THE DEVELOPMENT OF INDICATORS IN NEW ZEALAND: INDICATORISATION

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Due in considerable part to a confluence of influence between government ideology, contemporary public administrative practise and with some support from the social science community, New Zealand (NZ) has in a very short period of time successfully institutionalised a partly-coordinated system of social indicators (SI), after a fairly sparse and jagged pre-history of social indicator developments. In order for successful long-term institutionalisation to be cemented-in a set of conditions must be met: these include technical adequacy, and host, 'user community' and political acceptance. There is also a 'value-added' sequence in scientific terms in which the descriptive value of SI is enhanced by a systematic time-series which is linked to established causative factors. The development of NZ SI will be assessed in relation to these frameworks.

(1) Pre-History of SI in NZ

"Work on the development of social indicators in NZ was initiated in 1974 by the Social Development Council when it formulated a set of social goals for NZ and urged government to establish a social indicators programme. In January 1976 a social indicators unit was formed within the Department of Statistics" (DOS). In 1978 (Cant et. al., 1979), after the unit had established an interim list of indicators, "The NZ Workshop on Social Indicators for development was convened by the National Commission for Unesco on behalf of the Social Development Council, the Department of Statistics, the NZ Planning Council, the National Research Advisory Council and other government departments and organisations interested in the development of social indicators and their application to planning in New Zealand". The 2-day workshop was to further explore the issues and possibilities: particularly in the fields of health, education, social welfare and labour.

The indicators proposed by the DOS unit were organised into the 8 areas of concern that the SDC had developed. The range of 'official statistics' then available was scanned for potential indicators. However, the main innovation proposed by the unit was to collect fresh data on subjectivities. This was a significant break in SNZ history as (along with most government agencies) it remains unconfident/shy in dealing with more open-ended data.

Alongside these official developments had been a small burst of activity under the banner of 'territorial indicators' from geographers who were then interested in

urban and also rural indicators of social well-being using census data to provide indices and maps. In turn, this effort was a strand (almost a 'last stand') within a surge of geographical interest in 'social area analysis' (See Cant, 1979; Crothers, 1986). At much the same time, "Social Trends in NZ" was issued in 1977 (DOS). (A volume cost $4.50!! – a tenth what would be charged today) This was a highly ambitious 'stand-alone' exercise in which a highly developed collection and analysis of data across a wide set of information was garnered.

The main outcome of this period of development of social indicators was a pilot test and then full run of a social indicators survey in 1980/81. This was based on the HLFS and included respondents. After a further gap a lengthy report was prepared.

A partial extension was the interest of the NZ Planning Council (NZPC) in 'social monitoring which led to the development of a series of monitoring reports based on life cycle stages (NZPC, 1985, 1989; Davey, 1993, 1998, 2003). This was a social monitoring approach "..concerned with detecting change and tracing the effects of change throughout society" (1985: 11). The chapters are organised in terms of a 'life event' approach – successively dealing with the experiences of different age-cohorts in dealing with birth, starting school, becoming a teenager, starting paid work, setting up as a couple, becoming a parent, breaking up, major job change, loss of spouse, loss of autonomy and death. Census and government survey and administrative data are drawn on, and short time series are presented.

However, at this point the SI thrust in NZ 'went into recession' and the temporary coalition that had been formed dissipated.

To understand why, it is necessary to place the SI interest within the broader context of NZ developments of the time. The SI interest had come towards the end of a period in NZ dominated by 'Keynesian' attempts at state coordination of capitalism, especially as NZ's post-WW2 economic development 'golden period' faded with UK's joining of the EU. A National Development Conference had been set up in the late 1960s and in turn this had become the institutional matrix from which an array of 'planning' organisations (including those which had actively sponsored SI) had spun-out. Although this 'planning apparatus' had always had a thread of interest in social (i.e. non-economic) issues this seemed to increase over time. However, perhaps because of technical difficulties in tackling wider social areas this interest tended to become rather too rapidly confined to demographic issues and also confined to a 'monitoring' framework. 'Social' became defined as either demographic or ethnic.

However, in the early 1980s a major paradigm shift took place and all semblances of a Keynesian state were swept away by a thorough-going neo-liberalism which pulled back state activity and opened the NZ economy to global competition. The round of 'interest group' activity which had previously dominated the NZ scene was severely crimped. (More accurately, influence on government became centered on the interests of local big business and those in the international business community with NZ interests.) The growing 'social' concern was severely relocated into a defensive mode: trying to protect vulnerable social groups who were at a high risk of unemployment. Social monitoring was pressed

into service, but these efforts were not systematic or highly visible. Research tended to be local and consultative rather than national and statistical. The government, hell-bent on rapid economic reform actively endeavoured to suppress any systematic information about the social consequences of its economic policies. Social indicator work was in effect driven underground.

(2) Recent Institutionalisation of SI

In (and around) 2000 three quite independent developments of indicator programmes launched the current system of social indicators in New Zealand, and on the foundation this somewhat accidental convergence a more systematic system of indicators has subsequently been built.

The least important of these efforts was my own paper (Crothers, 2000) – published in NZ's major policy journal – to open up the possibilities for reviving more systematic SIs by drawing on a range of 65 NZ time series for up to 20 years organised across 8 domains. Correlation analysis is used to examine inter-relationships amongst the variables and across time.

In 2000 after a trip to the UK about a year after taking office the (then) Minster of Social Policy, Steve Maharey (who had previously been a sociology lecturer) instructed his Ministry (now the Ministry of Social Development: MSD) to prepare, within a period of a few months, a set of social indicators for public release. He had been impressed by the targeted indicators of the UK "Opportunity for All" poverty-reduction scheme and wished to mobilise his ministry (then an agency) to focus on achievements aimed at targets relevant to the NZ context. In order to achieve this target a loose task-force was assembled (under the control of the Strategic Social Policy branch) but supported by several staff from the Knowledge Management branch. The ministry was able to recast their Minister's more focused purpose in order to project a wider framework. A framework of domains was mapped out and a deliberately restricted set of about 40 indicators (5-6 each measuring 10 domains) were developed. The highest quality of the more available alternative measures was pressed into service. Attention was given to clarity and user-friendliness of the layout of the material. However, quality was not sacrificed, and a feature of the report has been careful footnoting of sources and drawing attention to errors, limitations and difficulties with the data. As well as providing the indicators, a limited time-series was sometimes made available and where possible dis-aggregations to gender, ethnicity and age were carried out. (The conclusion summarised these patterns.) A small reference-group drawn from academic and other social researchers provided alternative sources of expert advice. Although this development was largely innocent of appropriate international models (Cf. Smith, 2006), the appendix to the first report (Crothers, 2001) lists some of the parallel overseas exercises known to the developers.

One major breakthrough was to rope in a range of other government ministries to assist with the development of those indicators of interest to them. Further, data used went outside that more traditionally collected by the central state statistical agency. The SI report was launched on the back of a myriad of data-sources: see appendix. It was also well-grounded in several significant NZ goal development exercises: in particular those established by the Royal Commission on Social

Policy (1987) which had undertaken extensive public consultation and provided some useful frameworks concerning what NZ's wanted in terms of their well-being.

The well-presented report was greeted with wide acclaim, receiving extensive and favourable press and media coverage. Copies of the report were made widely available and the Minister was assiduous in personally helping with the distribution process. The report was also made widely available by being placed on the Ministry web-site. The report made it clear that this was to be the first of a series (although at that stage no commitment was made to the periodicity of the report). Since then the series has been issued annually and this periodicity is important in ensuring the long-term continuation of the SI framework.

The third conjoint development was through a coalition of local government officials representing the largest of NZ municipalities. This initiative came from staff involved on the social development side of local government work. These commissioned a comparable exercise in which a wide range of statistics were drawn on for each of the areas covered, supported by social survey data. The result is less systematically packaged, and less technically well-developed but nevertheless received with considerable acclaim. This SI effort, too, has been successfully updated on several occasions.

The two major exercises have since gradually converged.

Alongside and supporting the Social Report (SR) has been a 'programme' underwritten by the MSD. This has assisted in retaining the quality of the SR.

In order to develop the 'social report' format two exercises were commissioned later that year. One was a review of the indicators framework in relation to its (potential) users (Gray, 2002). A private researcher and the project director went to several centres and discussed the usefulness of the report and explored a set of issues about its development. This latter particularly was concerned with the set of domains used and the way in which indicators fitted into them. The result of the study was that the framework and indicators were slightly redesigned.

A second commissioned study was to look at the 'drivers' of changes in social indicators (NZIER, 2003). The literature (and if possible the local literature) pertaining to some one dozen of the indicators was reviewed and comments made about what might be seen as causes or drivers of these trends. This worked particularly well in areas where there was an established research tradition.

Interest has been taken in Australian and Canadian methodologies for developing measures of 'progress' (eg Colman, 2004) which do not have the drawbacks of standard economic indicators: such as 'genuine progress indicators. A parallel, but much earlier local example of this viewpoint has been Prof. Marilyn Waring's international espousals of similar concerns (see Waring, 1988).

More recently, attention has swung on the extent to which domain indicators hook up with overall life satisfaction and happiness measures – resorting to survey evidence for this purpose. Studies (Smith, 2004) found that "Six outcome domains

are unambiguously supported by the empirical evidence and one more (Economic Standard of Living) shows a more nuanced picture that is not inconsistent with the *Social Report*. For two more domains (Physical environment and Cultural identity) there is no good evidence while for only one domain (Knowledge and skills) does the international literature suggest a poor fit with the SR" (Smith, 2006: 9-10). These general points were largely reinforced empirically. "Of the six SR domains which could be tested to some degree, three received strong support from the NZ data –paid work, economic standard of living and social connectedness. Two domains – Leisure and recreation and cultural identity - showed somewhat more qualified support. Only one domain – Knowledge and skills – showed no correlation with selling after controlling for the impact of other factors" (Smith, 2006: 10).

Successive years have seen much the same format repeated with limited change but some useful developments. There is more reliance on the web-based version. Improved aspects include a more thoroughly developed analysis of over-time changes, captured in part through 'Rae diagrams': see appendix. The major change has been the gradual introduction of a survey data-base support for the indicators and in particular the inclusion of subjective indicators. Also, a regional/local authority extension has been developed. In addition, efforts have been made to actively bring the QOL and SR formats together.

There have been occasional tensions. 2002 was an election in the required 3-year NZ electoral cycle, and worse the election was brought forward. Moreover, few new data-series were readily available. Nevertheless a limited version report was produced. In 2005 the election period intersected with the pre-campaign period and opposition parties were (understandably) annoyed at the Government drawing support from the SR for improvements over the period it had been in power. For its part, the government's commitment to the SR was no doubt increased by "its'" successful social record which was more readily built on the back of a period of economic growth (cf Smith, 2006). The center right-wing Auckland newspaper wrote a condemnatory editorial, although the Herald had been happy enough on previous occasions to use the material provided by the SR as the basis for articles (cf. Crothers, 2005).

Ideally, there should be a cut-out between such governmental reporting and its exposure to the public: preferably by constituting an independent advisory board or perhaps by drawing on the statutory independence guaranteed to the Government Statistician. Such a cut-out would also clip the temptation of the issuing government ministers to gloat over 'successes'. However, at best a fairly ad hoc advisory group has been drawn on.

There are other institutional developments in train which might lock-in the institutional structure of indicators. One development lurking in the wings is the possibility of establishing in law a social responsibility act that would require mandatory government report on the social condition of New Zealanders. (In the heyday of neo-liberalism in NZ a 'fiscal responsibility' act was passed which (inter alia) requires Treasury to publish immediately before any election a full account of the government's finances. Building on this the NZ government wishes to also sheet home a long-term government responsibility for social matters and a

'Social responsibility' bill awaits legislative introduction.) Although this possible development has not widely publicised there seemed to be some concern that this was a form of overwrought 'political correctness' by right wing interests.

With the current (2006) minority government perhaps more fragile than the previous, it seems unlikely that this final consummation of the indicators movement will actually take place. Perhaps this is a pity, as it would have provided a model for other countries in the world to emulate. It is possible that in a drive towards government economies had the right wing parties prevailed the social indictor work might have been sacrificed.

Some of the success of the SR framework lay in the conceptualisation of 'life domains' it put forward. This framework was seen as a useful classificatory frame (especially given the potential for measurement which is also promised in using it) and so has been included in significant documents such as 'Opportunity for All' .

Besides the MSD and BCQOL official statistical developments other ministries have also deployed 'indicators'. Other departments have pursued indicator programmes – usually in a more ad hoc fashion. These include work on economic, environmental, housing, ethnic-specific, gender-specific, health and cultural indicators. Some attempts have been made to 'tidy up' the broad front of indicator development with Stats NZ taking a lead in this (and in so doing attempting to reassert its customary pre-eminence in this form of government activity). This consolidation would align the overall indicator framework within the government's structure of goals:
- underlying 'sustainability' indicators
- social ("Social Report'), economic (GIF) and environmental indicators
- more specific indicators.

Stats NZ has also developed a skeletal overall set of standards for indicators.

Beyond the central government realm indicators abound. Many local authorities have set up indicator frameworks (e.g. Lower Hutt, Hamilton and Environment Waikato). A (Australia-based) right-wing think-tank has propounded an indicator set for NZ and the Council of Christian Social services ran a poverty indicator programme for a period. A wider sweep would undoubtedly reveal an even wider range of uses.

The NZ Social Indicator 'System'

Indicator-set	Sponsor	Subject	Periodicity	Associated Goal-Framework	Web-site
Methodology of Indicators	SNZ	methodological rules and advice	ns	SNZ responsibilities in relation to 'Whole of Government'	
Sustainability Indicators	SNZ	mainly a combination of key indicators	ns	Sustainability ?	

		from other indicator efforts			
GIF indicators	Min. Economic Development & Research, science and technology	Measures of longer-term economic development	?	GIF	
Economic Indicators	Treasury, Reserve Bank, SNZ	different time periods			
Environmental Indicators	Min for the Environment	mainly an indicative framework	5 yearly?		
Social Report	Min Social Development	well-developed set of objective and (some) subjective indicators across 10 life domains	annual	Opportunities for All	
Regional Indicators	MSD	break-out of Social Report indicators (where possible) for 18 Regional Council areas	annual		
Ethnic-specific indicators	Breakout from Social Report				
Life-stage indicators	MSD	indicator-sets (partly related to Social Report) for children, youth, elderly…			
Life-Stage indicators	Judith Davey	statistics arranged relevant to different life-stages	5 yearly		
Big Cities Quality of Life	wide-ranging set of objective and subjective indicators for 12 major	annual	Local Authority ?		

	cities				
Housing Indicators	SNZ	set of complex measures of housing standards			
Poverty indicators	CCNZSS	measures of uptake of poverty services			
Health Indicators	Ministry of Health	????			
Cultural Indicators	Min Culture & Heritage				
Maori	Ministry Maori Development				
Womens	Ministry Women's Affairs				

(3) Explanations
Why the apparent success in institutionalising social indicators in NZ?

The main reason why there has been a receptive environment for si in NZ has been because of a change in ideology (towards a broad 'third way' approach in which economic and social issues receive more even-handed attention) and the consequent and also parallell-y-evolving doctrines of public administration (which in part are the legacy of some aspects of neo-liberalism but contain separate ingredients as well). The 'new public administration' emphasises the setting of explicit goals, emphasising 'outcomes' (rather than merely outputs), measuring success, using evidence (and the scanning of appropriate other jurisdictions) to develop the most effective methods of dealing with issues, cooperation with the voluntary/community sector (and also capitalist sector), ensuring that there is effective co-ordination across 'whole of government', 'strategic policy' etc. One motto of this approach is for policy to be 'evidence-based' (clearly epistemologically an impossibility) or at least 'evidence-based'. These developments are all conducive towards the systematic deployment of monitoring, evaluation and also indicators. Where at all possible these methodologies should be 'linked up' so that similar indicators are used in different parts of the 'indicator/monitoring system'.

However, a conducive environment merely provides the opportunity. The MSD operation took masterful advantage of this opportunity, perhaps as part of a inter-departmental strategy to become the 'Social Treasury' (that is, as powerful in terms of social issues as Treasury is in terms of economic issues). Certainly, SI fitted as part of a drive to cement-in strategic social policy that identified across-government issues and ensured that there was coordination in delivering services. These 'political' objectives were further secured through good publicity and follow-up with user groupings.

Moreover, the technical work of MSD in their production was also masterful. A very useful presentational approach was developed which highlighted the key social facts, but this was backed up (mainly in appendices) with careful technical notes describing data-sources and noting limitations.

It is as well that there is a 'centre' for the SI movement in NZ as a much wider range of organisations and services also deploy indicators. After all, in perhaps a weaker guise the 'new public administration' pervades not only the community/voluntary sector but also capitalism in NZ (e.g. through 'corporate social responsibility') and thus indicators are being pressed into service across wider and wider reaches of NZ society. Indicatorisation is on the march!

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Appendix 1 **The Social Report 2005 outcome domains and indicators**

Health

Desired outcome statement	Indicators
All people have the opportunity to enjoy long and healthy lives. Avoidable deaths, disease, and injuries are prevented. All people have the ability to function, participate and live independently or appropriately supported in society.	1. Health expectancy 2. Life expectancy* 3. Suicide 4. Prevalence of cigarette smoking* 5. Obesity

Knowledge and Skills

Desired outcome statement	Indicators
All people have the knowledge and skills they need to participate fully in society. Lifelong learning and education are valued and supported. All people have the necessary skills to participate in a knowledge society.	6. Participation in early childhood education* 7. School leavers with higher qualifications* 8. Educational attainment of the adult population* **9.** Adult literacy skills in English 10. **Participation in tertiary education**

Paid Work

Desired outcome statement	Indicators
All people have access to meaningful, rewarding and safe employment. An appropriate balance is maintained between paid work and other aspects of life.	11. Unemployment* 12. Employment* 13. Median hourly earnings* 14. Workplace injury claims* 15. Satisfaction with work-life balance

Economic Standard of Living

Desired outcome statement	Indicators
New Zealand is a prosperous society, reflecting the value of both paid and unpaid work. All people have access to adequate incomes and decent, affordable housing that meets their needs. With an adequate standard of living, people are well-placed to participate fully in society and to exercise choice about how to live their lives.	16. Market income per person 17. Income inequality 18. Population with low incomes* 19. Population with low living standards 20. Housing affordability 21. Household crowding*

Civil and Political Rights

Desired outcome statement	Indicators
All people enjoy civil and political rights.	22. Voter turnout*

Mechanisms to regulate and arbitrate people's rights in respect of each other are trustworthy.	23. Representation of women in government* 24. Perceived discrimination 25. Perceived corruption

Cultural Identity

Desired outcome statement	Indicators
New Zealanders share a strong national identity, have a sense of belonging and value cultural diversity. All people are able to pass their cultural traditions on to future generations. Māori culture is valued and protected.	26. Local content programming on New Zealand television 27. Māori language speakers* 28. Language retention*

Leisure and Recreation

Desired outcome statement	Indicators
All people are satisfied with their participation in leisure and recreation activities. All people have adequate time in which they can do what they want to do, and can access an adequate range of different opportunities for leisure and recreation.	29. Satisfaction with leisure time 30. Participation in sport and active leisure* 31. Participation in cultural and arts activities

Physical Environment

Desired outcome statement	Indicators
The natural and built environment in which people live is clean, healthy and beautiful. All people are able to access natural areas and public spaces.	32. Air quality 33. Drinking water quality

Safety

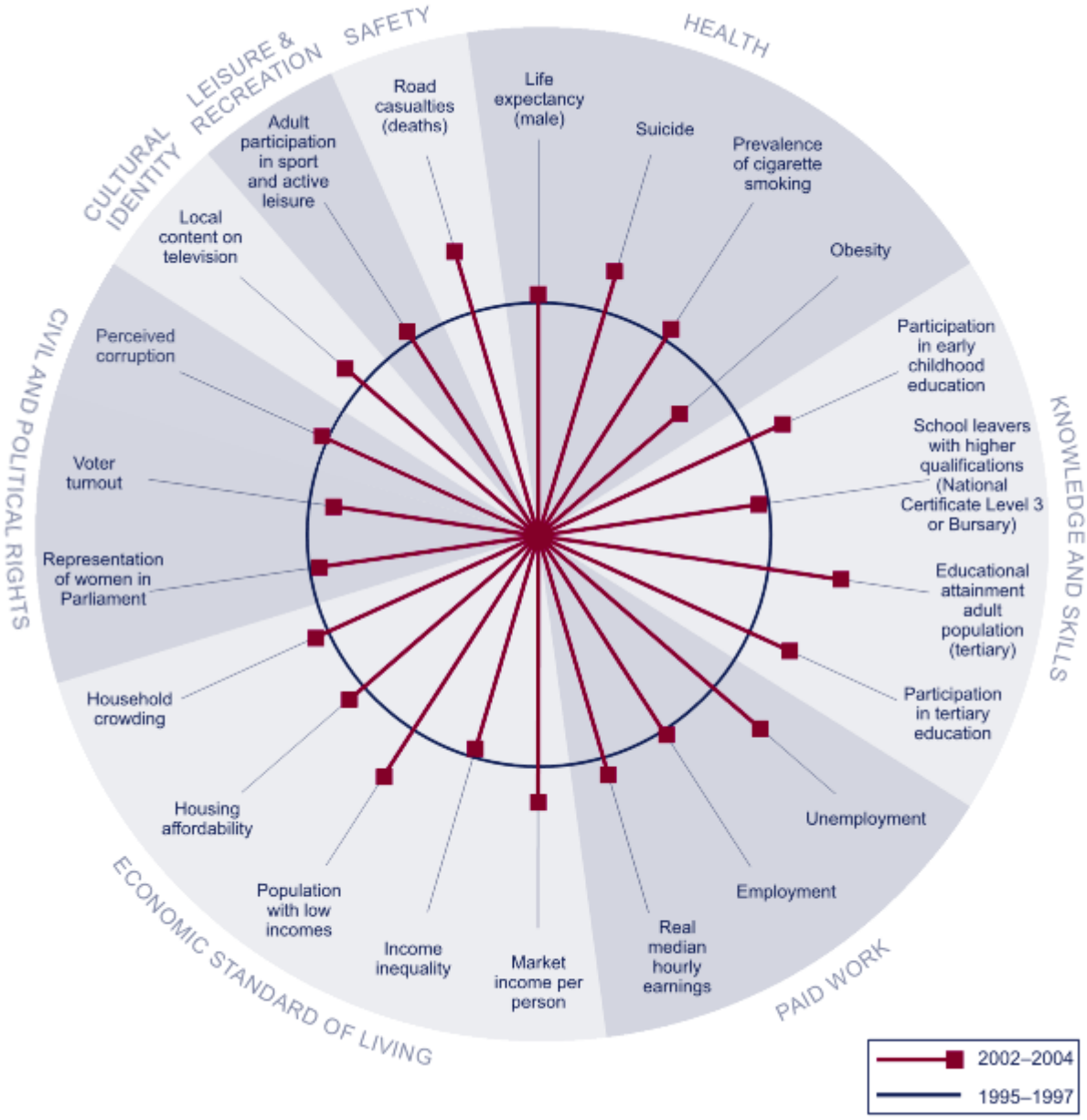
Desired outcome statement	Indicators
All people enjoy physical safety and feel secure. People are free from victimisation, abuse, violence and avoidable injury.	34. Intentional injury child mortality 35. Criminal victimisation 36. Perceptions of safety 37. Road casualties*

Social Connectedness

Desired outcome statement	Indicators
People enjoy constructive relationships with others in their families, whānau, communities, iwi and workplaces. Families support and nurture those in need of care. New Zealand is an inclusive society where people are able to access information and support.	38. Telephone and internet access in the home* 39. Participation in family/whānau activities and regular contact with family/friends 40. Trust in others 41. Loneliness 42. Contact between young people and their parents

Appendix 2: Rae Diagram

Figure CO1 **Changes in social wellbeing, 1995–1997 to 2002–2004**

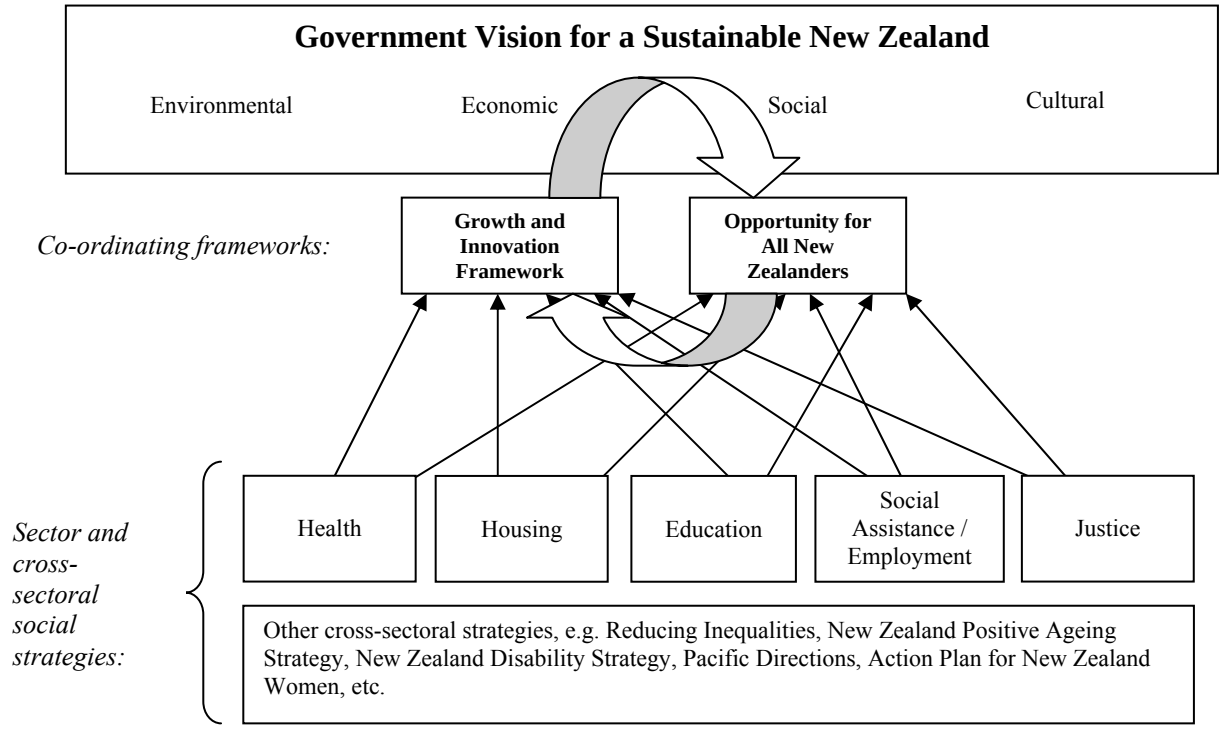


Interpreting "Changes in social wellbeing, 1995–1997 to 2002–2004"

The circle represents average performance against each indicator between 1995 and 1997, and the spokes represent the most recent performance, where possible averaged over the most recent three years. Where a spoke falls outside of the circle, this means outcomes have improved since the mid-1990s; the further from the circle it falls, the more significant the improvement. Where a spoke falls within the circle, outcomes in this area have deteriorated since the mid-1990s; the further the spoke is from the circle, the more pronounced the deterioration. There are, however, some important limitations on this style of presentation. In particular, we cannot directly compare the

size of changes for different indicators. The absence of trend data for some indicators also means we can only show 22 of the 42 indicators used in The Social Report 2005.

Appendix 3: Graphic Overview of Government's Vision (source: Opportunity for All)



Source: Minister of Social Development (2004)

Appendix 4: Data-base of Social report (2004 edition)

Type of Publication/agency		Frequency	Percent
Valid	Book	4	3.1
	Journal Art.	11	8.5
	Res. Org.	8	6.2
	Local Auth	1	.8
	Conf Paper	2	1.5
	International Gvt.	22	16.9
	Gvt Dept	82	63.1
	Total	130	100.0

year

		Frequency	Percent	Cumulative Percent
Valid		2	1.5	1.5
	1972	1	.8	2.3
	1980-	1	.8	3.1
	1985	1	.8	3.8
	1987	2	1.5	5.4
	1988	1	.8	6.2
	1989	1	.8	6.9
	1990	1	.8	7.7
	1993-	1	.8	8.5
	1993	5	3.8	12.3
	1994	1	.8	13.1
	1995	4	3.1	16.2
	1996	5	3.8	20.0
	1997	6	4.6	24.6
	1998	16	12.3	36.9
	1999	12	9.2	46.2
	2000	21	16.2	62.3
	2001	21	16.2	78.5
	2002	18	13.8	92.3
	2003	9	6.9	99.2
	2004	1	.8	100.0
	Total	130	100.0	

publisher

		Frequency	Percent
Valid		1	.8
	ACC...	1	.8
	Alpha Pubs.: PN	2	1.5
	AUP	1	.8
	Creative New Zealand/ Arts Council of New Zealand/ Toi Aotearoa	1	.8

Department of Family and Community, Canberra	1	.8
Department of Internal Affairs	1	.8
Department of Justice	1	.8
Department of Labour	3	2.3
Development and Psychopathology	1	.8
Electoral Commission	1	.8
Environment, November.	1	.8
HSRC	1	.8
Hui papers	1	.8
Human Resources Development Corporation	1	.8
Human Rights Commission	1	.8
IPS	3	2.3
Land Transport Safety Authority	7	5.4
Law Society Review	1	.8
Ministry for the Environment	1	.8
Ministry of Education	8	6.2
Ministry of Foreign Affairs and Trade	1	.8
Ministry of Health	18	13.8
Ministry of Health and Health Funding Authority	1	.8
Ministry of Justice: Wellington.	1	.8
Ministry of Maori Development: Wellington.	2	1.5
Ministry of Social Development: Wellington.	5	3.8
Ministry of Social Policy	1	.8
Ministry of Social Policy: Wellington.	2	1.5
Ministry of Transport	1	.8
National Research Council	1	.8
National Road Safety Committee	1	.8
New Zealand Employment Service	1	.8
New Zealand on Air	1	.8
NZCER	1	.8
NZIER	1	.8
NZPC	2	1.5
OECD	14	10.8
OECD Working Party on Social Policy	1	.8
Pediatric Infectious Disease Journal	1	.8

Pediatrics	1	.8
Population Health Metrics.	1	.8
Prime Ministerial Taskforce on Employment	1	.8
Report of Ministerial Committee of Inquiry into Violence	1	.8
Royal Commission on Social Policy	1	.8
Royal Commission on Social Security in New Zealand	1	.8
Social Policy Journal of New Zealand	2	1.5
Statistics New Zealand	14	10.8
Statistics New Zealand and Ministry of Health	1	.8
Strategic Unit, Cabinet Office, UK	1	.8
Te Puni Kokiri	4	3.1
The 2000 Papers. Public Service Senior Management Conference: Wellington.	1	.8
The Future of Children.	1	.8
United Nations High Commissioner for Human Rights	1	.8
United States State Department Bureau of Democracy, Human Rights and Labor.	1	.8
VUW	1	.8
WHO	1	.8
ZUMA	1	.8
Total	130	100.0