FEDERAL INTERAGENCY TECHNICAL WORKING GROUP ON
RACE AND ETHNICITY STANDARDS

Annex 1. Content Team Final Report

Contents

1. Executive Summary

To develop comprehensive recommendations, the Content Team reviewed the work conducted by previous Federal working groups,[1,2,3] existing Federal Government research, and experiences from the 2020 Decennial Census. Additionally, the Content Team considered input from the public to identify needs and uses for data, and feedback on the initial proposals for revising SPD 15 presented in the January 2023 Federal Register Notice (FRN).[4]

The Content Team's recommendations presented in this annex build upon the four initial proposals shared with the public in the January 2023 FRN and additional issues that arose during the FRN's public comment period. Recommendations are presented in brief below. The full annex describes each of the content recommendations in detail, providing background, a summary of research evidence, overview of public feedback, and a discussion of the rationale for the recommendation.

Recommendation 1: Collect race and ethnicity using a single combined race and ethnicity question, allowing multiple responses.
- Require a combined race and ethnicity question for both self-response and proxy response.
- Within the combined race and ethnicity question design, respondents may select one or multiple categories, and each of the categories should be understood to be co-equal.
- A single response will be considered a complete response (e.g., Hispanic or Latino respondents are not required to select an additional category).

Recommendation 2: Add "Middle Eastern or North African" (MENA) as a minimum reporting category, separate and distinct from the "White" category.
- Add "Middle Eastern or North African" to SPD 15 as a new minimum reporting category distinct from all other reporting categories.
- Revise the "White" category definition to remove references to "Middle Eastern or North African," as "MENA" responses will be tabulated as part of the new "MENA" category.

Recommendation 3: Require the collection of more detail beyond the minimum race and ethnicity reporting categories by default, unless an agency determines that the potential benefit of the detailed data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality.
- Require data collection on race and ethnicity with greater detail beyond the minimum reporting categories by default unless an agency determines that the potential benefit of the detailed data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality. In those cases, agencies must use the SPD 15's minimum reporting categories.

- In any circumstance, agencies are encouraged to collect and provide more granular data than the minimum reporting categories.
- Allow agencies to determine what additional data to collect to best meet program and stakeholder needs. Allow Federal agencies flexibility to adapt their race and ethnicity questions to changes in the social and demographic environment while still providing consistent and comparable data at the level of the minimum categories.

Recommendation 4: Update terminology in SPD 15.
The Content Team recommends that the terminology in SPD 15 be updated with the following changes:

Names of Minimum Race and Ethnicity Reporting Categories
- Retain the current names for five minimum reporting categories: "American Indian or Alaska Native," "Asian," "Black or African American," "Hispanic or Latino," and "White."
- Create a new minimum reporting category for "Middle Eastern or North African."
- Remove the word "Other" from "Native Hawaiian or Other Pacific Islander," thereby revising the category name to "Native Hawaiian or Pacific Islander."

Definitions of Minimum Race and Ethnicity Reporting Categories
American Indian or Alaska Native Definition
  - **Remove** the phrase "who maintains tribal affiliation or community attachment," making this minimum reporting category's definition consistent with all minimum reporting categories.
  - **Change** "(including Central America)" to having "Central America" listed co-equally with North and South America.

Asian Definition
  - **Replace** "Far East" with "Central or East Asia."
  - **Replace** "Indian Subcontinent" with "South Asia."

Black or African American Definition
  - **Remove** "Negro."

Hispanic or Latino Definition
  - **Correct** "Cuban" being listed twice.
  - **Delete** text "regardless of race. The term, 'Spanish origin,' can be used in addition to 'Hispanic or Latino.'"

Middle Eastern or North African Definition
  - **Add** "Middle Eastern or North African" as a new minimum reporting category, distinct from and co-equal to all minimum reporting categories.

Native Hawaiian or Pacific Islander Definition
  - **Remove** "Other" from "Native Hawaiian and Other Pacific Islander."

White Definition
  - **Remove** reference to "the Middle East, or North Africa" and create a new minimum reporting category for "Middle Eastern or North African."

The terms "Majority" and "Minority"

- Discontinue use of the terms "majority" and "minority," except when statistically accurate and used for statistical descriptions or when legal requirements call for use of the terms.

Question Stem and Instructions

- Use "race and/or ethnicity" in the question stem. For example, ask respondents, "*What is your race and/or ethnicity?*"
- Use instructions that emphasize that reporting multiple categories is allowed (and encouraged), regardless of whether minimum or detailed categories are collected. Explicit instructions that the respondent can select all that apply AND provide detailed reporting is helpful. For example:
  - In a self-administered instrument collecting the <u>minimum</u> reporting categories: "Select all that apply. Note, you may report more than one group."
  - In a self-administered instrument collecting the <u>detailed</u> categories: "Select all that apply and enter additional details in the spaces below. Note, you may report more than one group."

"Multiracial and Multiethnic" Tabulation Category

- The terms used in tabulations to represent people who identify with more than one of the minimum race and ethnicity reporting categories should be "Multiracial and Multiethnic" rather than "Two or More Races."
- Note, the Content Team is not recommending that a "Multiracial and Multiethnic" *checkbox* be used for data collection. This recommendation applies to the use of data tabulations, where ensuring respectful and commonly understood terminology is used to describe the population which identifies with multiple racial and/or ethnicity groups.

Additional issues for future research

While the initial proposals published in the January 2023 FRN were based on a thorough review of existing research, there were several topics from the FRN, and identified from public comments, which the Content Team concluded there was not enough existing research to make a definitive recommendation at this time. Suggested topics for future research and testing are presented in brief below. The full report describes the context and rationale for each suggestion.

- Identifying best practices for collecting race and ethnicity data from Afro-descendent populations.
- Exploring options to support greater disaggregation of data for Black or African American population groups. Federal agency research and stakeholder engagement are needed on the collection of data on American descendants of enslaved people from Africa.
- Understanding how respondents interpret language used within SPD 15 category definitions (e.g., "origins in any of the original peoples of…"), if that language should be revised, and how any potential revisions would impact the ability of agencies to monitor and enforce civil rights laws.
- Understanding how respondents interpret the "Hispanic or Latino" category name and definition. This includes exploring ways to collect data for individuals of Spanish origin or descent as required under Public Law 94-311 (1976) and ensuring that those data are a valid representation of what is intended to be measured.

- Exploring potential modifications to minimum category names to clarify which (if any) criteria all people should consider when reporting their race and ethnicity on Federal data collections (e.g., surveys, forms, etc.).
- Understanding U.S. race and ethnicity constructs in various languages and immigrant communities.

The Content Team's recommendations represent the culmination of months of deliberation, assessment of evidence, and consideration of comments received from the public over the past year. Recognizing the critical need for revisions to SPD 15, it is expected that the recommended revisions will improve the ways in which we measure and present data on the complexity and diversity of the U.S. population.

2. Background

Race and Ethnicity Concepts

Race. Ethnicity. Color. Origin. Nationality. For most of our nation's history, various terms and concepts have been employed in the United States Decennial Census to measure, classify, and tabulate statistics on our country's diverse demographic population groups. Across the past 230 plus years of our nation's history, the usage of these terms and concepts has changed, reflecting the common thinking, understanding, and biases of the times in which they were utilized. Today in the 21st century, these ideas continue to be contested and challenged as our nation becomes more racially and ethnically diverse in its demographic composition and there is broader inclusion of members of different racial and ethnic groups in national policy discussions.

Since the first census in 1790, Federal race and ethnicity data collection has attempted to measure a mixture of race, ethnicity, color, origin, and nationality. Race and ethnicity are complex concepts that have different meanings and interpretations across cultures and languages. This lack of standardization and consistency in conceptualization has led to confusion and difficulty in comparing data across different populations.[5] In 1977, SPD 15 established two questions for Federal collections of race and ethnicity data. It was determined that one question would ask about race, and another question would ask about ethnicity. The responses to these questions were collected for the entire U.S. population beginning with the 1980 Census. These data were to be collected using the minimum reporting categories for: a) Civil rights compliance reporting, b) General program administrative and grant reporting, and c) Statistical reporting.[6]

In developing the race and ethnicity standards in 1977, SPD 15 noted that, "These classifications should not be interpreted as being scientific or anthropological in nature, nor should they be viewed as determinants of eligibility for participation in any Federal program." In 1997, the idea that race and ethnicity are not scientific constructs was taken further and SPD 15 noted that, "The categories developed represent a socio-political construct designed to be used in the self-reported or observed collection of data on the race and ethnicity of major broad population groups in this country and are not biologically or genetically based."

The Content Team acknowledges and recognizes there are many different perspectives on the concepts of "race" and "ethnicity," as well as strong feelings by some as to whether they are similar or distinct

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[5] Williams, David R. The Concept of Race in Health Services Research: 1966 to 1990. Health Services Research. 1994; 29(3): 261-74. www.ncbi.nlm.nih.gov/pmc/articles/PMC1070005/.

[6] wonder.cdc.gov/wonder/help/populations/bridged-race/directive15.html.

concepts. Additionally, the Content Team understands that empirical scientific research has shown how people understand, or do not understand, the concepts to be the same, similar, or different. The Content Team has considered feedback from the public, as well as recommendations from scholars and researchers on this topic. This feedback has helped to inform the Content Team's deliberations and development of recommendations for revising and improving SPD 15 so that the collection, classification, and tabulation of demographic statistics for our nation better align with the ways in which race and ethnicity are understood and operationalized in the 21st century. Finally, the Content Team also stresses the importance of recognizing that the concepts of race and ethnicity are social constructions which change over time as peoples' experiences and perceptions of the world and society change. As a result, there has never been, nor likely will there ever be a "perfect" or "final" question or questions about race and ethnicity that all people agree upon. Rather, the question or questions should reflect the current ideas and understanding of race and ethnicity at the time of their use with continual research efforts focused on documenting changes in societal views of race and ethnicity.

In the 25 years since the 1997 revision, there have been large societal, political, economic, and demographic shifts in the United States. During this time, Federal agencies have also conducted methodological research to better understand how use of SPD 15 informs the quality of Federal statistics on race and ethnicity. Recognizing the critical need for revisions to SPD 15, it is expected that the recommended revisions will improve the ways in which we measure and present data on the complexity and diversity of the U.S. population.

3. Methodology

OMB charged the Federal Interagency Technical Working Group on Race and Ethnicity Standards (Working Group) with providing recommendations on topics including, but not limited to: a) Whether the minimum reporting categories should be changed and how to best address detailed race and ethnicity groups in SPD 15; b) Whether updates should be made to the question format, terminology, and wording of the questions, as well as the instructions for respondents and associated guidance; and c) Whether guidance for the collection and reporting of race and ethnicity data can be improved, including in instances when self-identification is not possible.

The Working Group's Content Team was tasked with examining these topics and providing content-related recommendations. These recommendations build upon the four initial proposals that were shared with the public in the January 2023 Federal Register Notice (FRN)[7] as well as additional recommendations on issues that arose during the FRN's public comment period. The four initial proposals were to: 1) Collect race and ethnicity information using one combined question; 2) Add "Middle Eastern or North African" (MENA) as a new minimum reporting category; 3) Require the collection of detailed race and ethnicity categories by default; and 4) Update terminology in SPD 15.

In the deliberations leading to the original 1977 and the revised 1997 SPD 15, principles were established to guide interagency consideration. The governing principles of the Working Group, which are explained in the Final Recommendations Report, were foundational for the framing, discussions, and deliberations of the Content Team as recommendations on question design, categories, definitions, and other aspects of improving SPD 15 were developed and considered. These governing principles were critical guideposts for this work.

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[7] January 2023 Federal Register Notice. www.federalregister.gov/documents/2023/01/27/2023-01635/initial-proposals-for-updating-ombs-race-and-ethnicity-statistical-standards.

To develop comprehensive recommendations, the Content Team assessed the work conducted by the previous 2014-2018 Federal Interagency Working Group for Research on Race and Ethnicity (IWG),[8, 9] and examined existing Federal Government research and experiences with the most recent 2020 Decennial Census. The Content Team also reviewed the work of the Interagency Working Group on Equitable Data pursuant to Executive Order 13985.[10] Additionally, the Content Team considered input from the public to help with identifying needs and uses for data, and feedback on the initial proposals for revising SPD 15. A significant source of public feedback on the four initial proposals was received through comments submitted to the January 2023 FRN. In addition, through a year-long series of virtual, bi-monthly listening sessions, as well as public town halls and a tribal consultation, Working Group members heard directly from the public.[11] In conjunction with all of this, the Working Group also coordinated additional research by Federal agencies in the Spring and Summer of 2023 on various aspects of the proposed revisions.

The recommendations from the Content Team represent the culmination of months of deliberation, assessment of evidence, and consideration of comments received from the public over the past year. The next sections describe each of the content recommendations in detail, providing background, a summary of research evidence, an overview of public feedback, and a discussion of the rationale for the recommendation.

4. Recommendations for Revising SPD 15

Recommendation 1: Collect race and ethnicity using a single combined race and ethnicity question, allowing multiple responses.

The Content Team recommends combining the current separate questions on Hispanic or Latino ethnicity and race into a single race and ethnicity question that allows respondents to select one or multiple categories, and requiring the use of this single-question format for both self-response and proxy response. Within this combined race and ethnicity question design, each of the minimum reporting categories should be understood to be co-equal. A single response will be considered a complete response (e.g., Hispanic or Latino respondents are not required to select an additional category).

Background

For data collected directly from respondents, the current SPD 15 requires two separate questions, with the question on Hispanic or Latino ethnicity presented first, followed by the question on race. SPD 15 allows for the collection of data using a combined race and ethnicity question, if necessary, for observer-

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[8] U.S. Office of Management and Budget, Executive Office of the President, Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity, 81 R 67398 (Sept. 30, 2016) https://www.federalregister.gov/ documents/ 2016/ 09/ 30/ 2016-23672/ standards-for-maintaining-collecting-andpresenting-federal-data-on-race-and-ethnicity.

[9] U.S. Office of Management and Budget, Executive Office of the President, Proposals From the Federal Interagency Working Group for Revision of the Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity, (Mar. 1, 2017) www.federalregister.gov/ documents/ 2017/ 03/ 01/ 2017-03973/ proposals-from-the-federal-interagencyworking-group-for-revision-of-the-standards-for-maintaining.

[10] Interagency Working Group on Equitable Data. (2022.) A Vision for Equitable Data: Recommendations from the Equitable Data Working Group. *The White House.* Retrieved from: https://www.whitehouse.gov/wp-content/uploads/2022/04/eo13985-vision-for-equitable-data.pdf.

[11] OMB Launches New Public Listening Sessions on Federal Race and Ethnicity Standards Revision, August 30, 2022, www.whitehouse.gov/omb/ briefing-room/ 2022/ 08/ 30/ omb-launches-new-public-listening-sessions-on-federal-race-and-ethnicity-standards-revision/.

collected data and advises that multiple responses are encouraged, but one response is acceptable. The Content Team acknowledges that while most race and ethnicity data are collected using the two separate questions format, many of these data collections tabulate and present results in a manner that combines the results into a single format, where race and ethnicity categories are presented together, not separately. Revising SPD 15 to require the use of a combined race and ethnicity question will bring uniformity to the format for collecting, tabulating, and reporting race and ethnicity statistics.

Research

The categories required in SPD 15 represent socio-political constructs designed for collecting data on the race and ethnicity of broad population groups in the United States. The categories and constructs are not anthropologically, genetically, or scientifically based. Evidence from empirical research finds that the use of separate race and ethnicity questions confuses and concerns many respondents who instead understand race and ethnicity to be similar, or the same, concepts. Numerous qualitative and quantitative research studies, as well as public feedback, have found that many Hispanic or Latino respondents in the United States do not identify with any of the race options made available in the separate race question and often view their Hispanic or Latino identity as their "race." [12,13] Since 1980, responses to the census in each subsequent decade have shown increasing non-response to the race question, confusion, and concern from the public about separate questions on ethnicity and race. Collectively, this has required that many agencies increase the use of imputation (or systematic estimation) of "race" data for many respondents who identify as Hispanic or Latino.

Although not part of SPD 15, the U.S. Congress has required that the decennial census and the American Community Survey (ACS) use the "Some Other Race" (SOR) category so that respondents "are not forced to racially self-identify in a way they are uncomfortable with, and will produce census results that better reflect the realities of race today."[14] A large and increasing percentage of Hispanic or Latino respondents to the decennial census and the ACS over the past several decades are either not reporting a race or are selecting SOR; this is after responding to the ethnicity question, which SPD 15 requires to be collected first and separately. Multiple research studies for the decennial census and the ACS found that a combined race and ethnicity question, that presents "Hispanic or Latino" as a minimum reporting category co-equal with the other race and ethnicity minimum reporting categories, reduces confusion and reduces SOR reporting by Hispanic or Latino respondents.

The Content Team acknowledges that Federal data collections beyond the decennial census and the ACS also experience significant nonresponse to the race question by Hispanic or Latino respondents. Members of the Working Group consulted with agency colleagues on the experiences that their surveys were having with collecting and tabulating data from separate ethnicity and race questions in recent years. These consultations included staff responsible for surveys such as the Current Population Survey (Bureau of Labor Statistics and the U.S. Census Bureau) and the Residential Energy Consumption Survey (Energy Information Administration). These consultations found that the surveys were experiencing similar issues with the current two-question format. Mainly that many respondents who answer "Yes" to the separate question on Hispanic ethnicity continue to report "Other" for their race and/or report "Hispanic" or the

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[12] Porter, Sonya R. and C. Matthew Snipp. 2018. "Measuring Hispanic Origin: Reflections on Hispanic Race Reporting." *The Annals of the American Academy of Political and Social Science*, vol. 677: 140-52. www.jstor.org/stable/26582324.

[13] Hitlin, Steven, J. Scott Brown, and Glen H. Elder. 2007. Measuring Latinos: Racial vs. Ethnic Classification and Self-Understandings. *Social Forces* 86 (2): 587–611. www.jstor.org/stable/pdf/20430755.pdf.

[14] November 22, 2004, Press Release, U.S. Representative Jose Serrano (New York). web.archive.org/web/20080430214126/http:/serrano.house.gov/pressrelease.aspx?newsid=1122web.archive.org/web/20080430214126/http:/serrano.house.gov/pressrelease.aspx?newsid=1122.

name of a specific Hispanic or Latino group. These respondents are often imputed a race value using statistical methods.

The foundational research for examining combined race and ethnicity question designs began with the 2010 Census Alternative Questionnaire Experiment Research on Race and Ethnicity (AQE).[15] The 2010 AQE was part of the 2010 Census, and experimental forms were mailed to a national sample of nearly half-a-million housing units. For the first time in decennial census tests, a complex four strata sampling design was used to oversample various groups of interest – including one stratum for the Asian population and the Native Hawaiian and Pacific Islander population, one for the Black or African American population, one for the Hispanic or Latino population, and another stratum for the remainder of the population. The AQE methodology also included a reinterview operation to help assess the accuracy of the different question alternatives that were tested. Additionally, a series of 67 focus groups was commissioned across the country to talk with people about how they understood concepts of race and ethnicity, how they answered these questions, and why, and to help inform ways that the questions could be improved.

The main findings from the 2010 AQE research concluded that when comparing data collected from a combined race and ethnicity question with data collected from two separate race and ethnicity questions: a) There were no significant differences in the proportion of respondents selecting the "Hispanic or Latino," "Black or African American," "American Indian or Alaska Native," "Asian," or "Native Hawaiian or Pacific Islander" categories; b) While SOR reporting was as high as 7 percent in the separate questions approach, it was less than half of a percent with the combined question designs; c) The reporting of "White" in the combined question approach reflected the proportion categorized as Non-Hispanic White from other sources; and d) The combined question designs yielded lower item nonresponse rates, increased reporting of detailed responses for most groups, and also provided a better reflection of how people self-identify.

Across the AQE focus groups, participants commented that all racial and ethnic groups were not treated equally in the 2010 Census and felt that all groups should be treated fairly and equitably. Across communities, respondents liked the combined question approach, and felt it presented equity to the different categories, as each major group received a checkbox with examples and a write-in response area, where detailed responses could be provided.

The 2010 AQE research was foundational as it became the basis for ongoing research conducted by the U.S. Census Bureau in preparation for the 2020 Census. The AQE identified several promising ways to improve race and ethnicity questions so that they better measure the nation's diversity and complex population. Qualitative research and engagement with communities and stakeholders across the country about the research designs and findings concluded that many Americans view "race" and "ethnicity" differently than in decades past.

The Census Bureau continued to conduct scientific research to further evaluate the separate questions approach and the combined question approach, leading to a 2015 National Content Test (NCT).[16] The 2015 NCT was the largest research test ever undertaken by the Census Bureau, employing a large, nationally representative sample of approximately 1.2 million households, across the country. The study purposefully oversampled key population groups such as the Asian population and the Native Hawaiian

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[15] www2.census.gov/programs-surveys/decennial/2010/program-management/5-review/cpex/2010-cpex-211.pdf.
[16] www2.census.gov/programs-surveys/decennial/2020/program-management/final-analysis-reports/2015nct-race-ethnicity-analysis.pdf

and Pacific Islander population, the Middle Eastern and North African population, the Black or African American population, the Hispanic or Latino population, and the American Indian and Alaska Native population in tracts across the country. Like the 2010 AQE, the sample design for the NCT included a reinterview operation to further assess the accuracy of the question alternatives. The goal of the research was to inform the potential question design format for the 2020 Census and to discuss findings with OMB and Federal interagency colleagues during the review of SPD 15.

The 2015 NCT findings showed that a combined question with detailed checkboxes design elicited higher quality data on race and ethnicity. These findings are in line with the results from the 2010 AQE and other Census Bureau studies over the decade. Specifically, the research found that for the optimal combined question with detailed checkboxes design: a) The proportion who identified as White reflected the Non-Hispanic White population seen in traditional separate question approaches; b) SOR reporting decreased to near zero; c) There were no significant differences in the reporting of other major race groups; d) Hispanic or Latino reporting was higher and more consistent in the combined question; e) The combined question designs resulted in lower item nonresponse rates than the separate questions approach; and f) Produced the same or higher levels of detailed reporting.

Another key finding from the research was that there were no significant differences among the question formats for Hispanics who identified as Black or African American alone. There was a concern after the 2010 AQE results were released that Afro-Latinos would not report both Black or African American **and** Hispanic or Latino at the same rate with a combined question format. The 2015 NCT results found no significant differences in Hispanics identifying as Black or African American alone when comparing separate questions with all combined question formats.

These results were used to refine the combined question design for further testing after the 2015 NCT. This was done in the 2017 Census Test. This was particularly important as design tweaks were implemented to improve the collection of detailed responses for the American Indian and Alaska Native population and provide broader representation with checkboxes and examples for the "Middle Eastern or North African" category.

This research informed the discussions of the Working Group and were reflected in the initial proposals that were distributed for public feedback in January 2023. This body of research over the past decade and a half demonstrates that for data collections with "Other" or "Some Other Race" options, changing to a combined question significantly reduces the number of Hispanic or Latino respondents selecting these options, and improves the accuracy of responses within the required SPD 15 categories. This change in question format is expected to reduce the use of imputation in data collections with high race nonresponse rates among Hispanics. This increases the accuracy of data, which illuminates how respondents answer and identify, while also reducing data management burden for affected agencies.

Federal agencies conducted additional qualitative and quantitative testing during the Spring and Summer of 2023 with individuals, households, and establishments to explore how the combined question format without a "Some Other Race" category would perform, as most Federal surveys do not include an option for "Other" or "Some Other Race." The research showed that with a combined race and ethnicity question that did not include SOR as a category, respondents were easily able to identify themselves with the format and category options provided. In general, across the board, the combined race and ethnicity question tested well, with little concern for respondent confusion. In most cases, respondents were able to accurately find and record race and/or ethnicity for themselves as well as proxies in a household setting. For establishments (e.g., law enforcement agencies, colleges, and businesses), generally, there were no

issues with a combined race and ethnicity question. There were some establishment participants who suggested that a single combined question would likely result in changes to the demographic distribution in the future (e.g., more people selecting "Hispanic or Latino" alone). Based on the evidence from research, the Content Team recommends proceeding with a combined race and ethnicity question.

Summary of Public Feedback[17]

In the January 2023 FRN, the Working Group made an initial proposal to OMB that SPD 15 move from the two separate questions format to a single combined question as the required design for self-reported race and ethnicity information collections. Comments from the FRN, listening sessions, and engagements with stakeholders demonstrate strong public support. Most comments submitted to the FRN that addressed the combined question format supported this change. A common theme was that the proposed change will improve the collection of data for the Hispanic or Latino population by reducing the number of respondents who leave the race question blank or select "Some Other Race" when that option is available. This change is also anticipated to reduce the need to impute race data for Hispanic or Latino respondents. Among some respondents, while generally in support of this change, there were suggestions to remove the words "race" and "ethnicity" from the question stem if a combined question is to be used and to emphasize that respondents should mark or select all categories that apply to them.

Some comments submitted to the FRN were opposed to the use of a combined question and expressed concerns about potential loss of data about Afro-Latino respondents. It was argued that a combined race and ethnicity question conflates two distinct concepts and implies that Hispanic or Latino is now a "race." Commenters believed that a combined race and ethnicity question would result in a large proportion of Afro-Latinos only identifying as Hispanic or Latino and contribute to an undercount of the Afro-Latino population. Some commenters felt that the 2015 National Content Test did not include a sufficiently representative sample of Afro-Latinos to draw conclusions about Afro-Latino reporting when a combined race and ethnicity question was utilized.

Overall, there was strong support for a combined race and ethnicity question as the required design for self-reported race and ethnicity information collections to enable respondents to identify in ways that are meaningful to them. The majority of comments received were in favor of using a combined question to collect race and ethnicity data. Many comments stated that the current two question structure is confusing to respondents, especially those respondents who identify as Hispanic or Latino and do not identify with one of the current OMB race groups. Some commenters expressed a perception that the current two separate questions format creates a serious impediment to the collection of accurate data on the Hispanic or Latino population. This is because many in this community cannot find a racial category that represents them and leave the question blank or answer "Some Other Race," resulting in a large percentage of Hispanic or Latino racial responses being imputed. Many commenters also provided feedback that the combined format will result in much better data on racial variation among the Hispanic or Latino population, with a number recommending that there be a strong emphasis on the ability of respondents to select or mark all categories that apply to them. But others expressed concern that a combined question would contribute to undercounts in the Afro-Latino community.

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[17] More detail on public feedback can be found in *Annex 4: Communications and Outreach Team Report.*

Recommendation 2: Add "Middle Eastern or North African" (MENA) as a minimum reporting category, separate and distinct from the "White" category.

The Content Team recommends that "Middle Eastern or North African" (MENA) be added to SPD 15 as a new minimum reporting category distinct from all other reporting categories. Thus, the SPD 15 definition for the "White" category would be revised to remove references to "Middle Eastern or North African," and MENA responses would be classified and tabulated as part of the new "MENA" category.

Background

Since SPD 15 was issued in 1977, the Federal government has defined "White" as people having origins in any of the original peoples of Europe, the Middle East, or North Africa. As part of a comprehensive review of SPD 15 during the mid-1990s, OMB considered several suggestions from the public to improve the accuracy and reliability of Federal race and ethnicity statistics, including the addition of a minimum category for respondents identifying as "Arab or Middle Easterner." At the conclusion of that review, agreement could not be reached among public stakeholders on the definition of this category (e.g., whether a new "Arab or Middle Easterner" category should be defined based on shared language, geography, etc.) nor which groups would be included in this category. As a result, an additional, minimum reporting category was not created. Instead, the 1997 revisions to SPD 15 advised that further research be done to determine the best way to improve data collection and reporting for "Arabs/Middle Easterners."

Research

In response to the 1997 revisions to SPD 15 that advised that further research be conducted, the Census Bureau initiated several research studies examining the development of a "Middle Eastern or North African" response category in the decade leading up to the 2010 Census. The 2010 Alternative Questionnaire Experiment (AQE), which tested multiple questionnaire design strategies, found that focus group participants disagreed with several SPD 15 categories. Specifically, most of the MENA focus group participants stated that they did not view themselves as White and often selected SOR on questionnaires. There was also strong agreement across all racial and ethnic groups included in the focus group study that there should be a separate "MENA" category, as including these groups in the "White" category was "wrong" and "inaccurate." Comments like these were often connected to recommendations by focus group participants for a separate "Middle Eastern, North African, or Arab" category.[18]

Another source of relevant research is the 2015 Forum on Ethnic Groups from the Middle East and North Africa (Forum), also conducted by the Census Bureau. The Census Bureau invited MENA community members, experts, and organization leaders to provide feedback on its data collection plan for MENA respondents in the 2015 National Content Test. Specifically, Census Bureau organizers asked for feedback on the term "Middle Eastern or North African" and the ethnicities and nationalities in the working classification of MENA, among other topics. Nearly all participants were supportive of a separate "MENA" category, citing reasons relating to health research, discrimination policy research, and community level data needs. Participants thought the term "Middle Eastern or North African" was the clearest and most inclusive term used to identify this group. Most of the participants felt that MENA responses should not be classified as White, although some individuals expressed that some MENA respondents do consider themselves to be White or Black or African American. Many of the other key themes in the Forum involved

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[18]Compton, E., Bentley, M., Ennis, S., & Rastogi, S. (2013, February). 2010 Census Race and Hispanic Origin Alternative Questionnaire Experiment. *U.S. Census Bureau.* Retrieved from: https://www.census.gov/programs-surveys/decennial-census/decade/2010/program-management/cpex/2010-cpex-211.html.

discussions on which groups should be classified as MENA, as well as which groups were presented as examples or checkboxes on the survey.[19]

A key study used to evaluate the inclusion of a distinct "MENA" category is the Census Bureau's 2015 National Content Test (NCT). Research from the 2015 NCT found that the inclusion of a distinct "MENA" category led to more accurate data for MENA respondents. The 2015 NCT used a nationally representative sample of 1.2 million households, oversampling certain key groups such as MENA groups, to ascertain details about question formatting, response categories, instruction wording, and question terminology on the race and ethnicity questions. The 2015 NCT established a working definition of MENA that included 19 nationalities and 11 ethnicities. The study found that groups in the 2015 NCT's working classification of MENA identified as MENA when the category was available and predominantly identified as White or Some Other Race when the category was not available. Eighty six percent of MENA respondents identified as White and 12 percent identified as SOR when no MENA response was available. Those percentages decrease to 20 percent and 3 percent, respectively, when a "MENA" category was included. Additionally, the 2015 NCT found that including a distinct "MENA" category "significantly decreased the overall percentage of respondents reporting as White or SOR and significantly increased the percentage of respondents reporting as Black or African American or Hispanic or Latino." Lastly, with the addition of the "MENA" category, there was no significant difference in terms of the percentage of "no valid responses." The study concluded that the inclusion of a "MENA" category "helps MENA respondents more accurately report their MENA identities."[20]

Further research and engagement on the results of the 2015 NCT by the Census Bureau led to the successful fielding of a refined "MENA" category with modified detailed checkboxes and examples in the 2017 Census Test.[21] These modifications were made in an attempt to clarify that the "MENA" category included those with roots or heritage from diverse nationalities, ethnicities, and transnational groups in the MENA region and included individuals who were Arab and who were not Arab. In the 2017 Census Test's "MENA" category design, the checkbox categories included the two largest Arab nationalities in the United States from the Middle East (Lebanese and Syrian), the two largest Arab nationalities in the United States from North Africa (Egyptian and Moroccan), and the two largest Middle Eastern, non-Arab nationalities in the United States from the Middle East (Iranian and Israeli). The write-in response area examples included the next largest groups in the United States, which were a Middle Eastern group (Iraqi), a North African group (Algerian), and a transnational group (Kurdish).[22]

In 2017, the National Center for Health Statistics (NCHS) conducted cognitive interviews using a combined, mark-all-that-apply race and ethnicity question that included "MENA" as a separate category. Respondents with a MENA background were not accustomed to seeing the "MENA" category on questionnaires, but all were happy to have it as an option. Many MENA respondents chose only "MENA" when answering and discussed how they preferred it to the "White" category. For example, "White" was

[19] Buchanan, Angela, Rachel Marks, and Magdaliz Álvarez Figueroa. (2016). "2015 Forum on Ethnic Groups from the Middle East and North Africa: Meeting Summary and Main Findings." U.S. Census Bureau. www.census.gov/content/dam/Census/library/working-papers/2015/demo/MENA-Forum-Summary-and-Appendices.pdf.

[20] Mathews, Kelly, Jessica Phelan, Nicholas A. Jones, Sarah Konya, Rachel Marks, Beverly M. Pratt, Julia Coombs, and Michael Bentley. (2017). "2015 National Content Test Race and Ethnicity Analysis Report: A New Design for the 21st Century." U.S. Census Bureau. www2.census.gov/programs-surveys/decennial/2020/program-management/final-analysis-reports/2015nct-race-ethnicity-analysis.pdf.

[21] See 2017 Census Test, Appendix E. Facsimile of the Combined Ethnicity and Race Question. https://www.census.gov/programs-surveys/decennial-census/decade/2020/planning-management/plan/testing-activities/2017-census-tests/2017-census-test-report_tribal-enrollment.html.

[22] The largest groups were based on ancestry data from the 2013 American Community Survey 5-Year Estimates.

often seen as a forced or artificial category that was not an accurate representation of their race or ethnicity. Respondents said the "MENA" category was a better reflection of their identity, both culturally and ancestrally. Additionally, some respondents explained that having "MENA" as a separate category allowed the group to be recognized as a distinct and important part of society, on par with other racial and ethnic groups. Respondents stated that the practice of subsuming respondents of MENA backgrounds under the category of "White" renders them – and their contributions to society – invisible. Finally, some respondents chose to mark both "MENA" and "White," demonstrating that the mark-all-that-apply format is essential. Those who preferred to mark both "MENA" and "White" did so because of their experiences in the United States. They had come to embrace a White identity along with their MENA identity. Only two downsides were identified in the NCHS study. First, some respondents suggested that, given the political climate at the time of the study, they may continue to choose only "White" as a safety precaution. Second, a few respondents noted that "Middle Eastern" and "North African" are culturally distinct enough that they should not be combined into a single category.[23]

Recent cognitive interviews conducted by the Working Group in the Spring and Summer of 2023 examined the use of a combined race and ethnicity question with a separate "MENA" category. The findings from this research were similar to previous research, and respondents were pleased to see a "MENA" category. The research demonstrated that respondents were able to understand the term "Middle Eastern or North African." The inclusion of the "MENA" category enabled respondents who identified with multiple races and/or ethnicity groups to select multiple responses (e.g., "MENA" and "White").

A review of historical public comments[24] found that many believe that the MENA population is a racially diverse ethnicity. In this review, it was also found that many believe a "MENA" category that is separate from the "White" category should be added to the SPD 15. However, not all comments from the public were supportive of a "MENA" classification and category. Some comments did not support adding a minimum category for the MENA population, stating that there is no scientific basis for the category, or it may be seen as divisive.

Research conducted by those outside the Federal Government suggests that people from the Middle East and North Africa are not perceived to be White, often do not perceive themselves to be White, and when provided the option, often select "Middle East or North African" instead of "White."[25,26] Researchers from the University of Toronto, the University of British Columbia, Washington University in St. Louis, and the University of Chicago conducted online experiments with over 1,000 participants to examine the racial identification and perceptions of Middle Easterners and North Africans. The results of this study were similar to the Census Bureau's 2015 NCT findings, that, "when MENA respondents are not offered a "MENA" label, 80 percent choose to identify as White. However, when "MENA" is offered as a category,

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[23] Wilson, S., & Dunston, S. (2017, June). Cognitive Interview Evaluation of the Revised Race Question, with Special Emphasis on the Newly Proposed Middle Eastern/North African Response Option. *Centers for Disease Control and Prevention.* Retrieved from: https://wwwn.cdc.gov/qbank/report/Willson_2017_NCHS_MENA.pdf.

[24] This review included public comments received on the following Federal Register Notices: Proposed Information Collection; Comment Request; 2015 National Content Test (12/2/2014); Review and Possible Limited Revision of OMB's Statistical Policy Directive on Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity (9/30/16); and Proposals for the Federal Interagency Working Group for Revision of the Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity (3/1/17).

[25] Chaney, Kimberly E., Diana T. Sanchez, and Lina Saud, 2020. "White categorical ambiguity: Exclusion of Middle Eastern Americans from the White racial category." *Social Psychological and Personality Science*, 12(5): 593-602. https://doi.org/10.1177/1948550620930546.

[26] Maghbouleha, Neda, Ariela Schachter, and Rene D. Flores. (2022). "Middle Eastern and North African Americans may not be perceived, nor perceive themselves, to be White," *PNAS,* 119(7), https://doi.org/10.1073/pnas.2117940119.

only 10 percent continue to exclusively choose "White" and the majority choose the "MENA" category. Additionally, like the 2015 NCT research, the study found that the inclusion of the "MENA" category reduced reporting in the SOR category, dropping from 15 percent to zero percent.

The Content Team acknowledges that many stakeholders and community members have provided feedback on which groups should be classified as part of a "MENA" category. While the Content Team is not making a recommendation on an exhaustive list of groups that should be considered as MENA, it recognizes the need for continued research on how groups self-identify when a "MENA" category is available. In particular, more research is needed to understand which minimum reporting category is selected by those who identify as Armenian, Somali, and Sudanese when a "MENA" category is available. The Content Team believes that the proposed definition, along with Recommendation 3, allows sufficient flexibility for continued research and evolution of the collection and presentation of data on the MENA population under a revised SPD 15.

During the Spring and Summer of 2023, Federal agencies conducted additional research on the use of a separate "MENA" category. For research conducted with individuals and households, the findings were similar to previous studies. The research demonstrated that respondents were able to understand the phrase "Middle Eastern or North African." The inclusion of the "MENA" category enabled respondents who identified with multiple races and/or ethnicity groups to select multiple responses (e.g., "MENA" and "White"). Reactions to the inclusion of a "MENA" category were generally positive among establishment survey respondents as well. However, currently, there are very few establishments that include this category as an option for individuals to select. As a result, adding this option will take significant investments of time, effort, and resources to implement. "Middle Eastern or North African" as a category generally tested well and was understood by research participants. Based on the evidence from this research, the Content Team recommends proceeding with establishing a new minimum category for "Middle Eastern or North African."

Summary of Public Feedback
In the January 2023 FRN, the Working Group recommended that OMB seek public comment on a proposal that "Middle Eastern or North African" be added to SPD 15 as a new minimum reporting category distinct from all other reporting categories and in doing so, the definition of the current "White" category be edited to remove MENA from its definition.

Comments from the FRN, listening sessions, and engagements with stakeholders demonstrate overwhelming public support from members and leaders of the MENA community for adding a minimum reporting category that is distinct from the "White" category. Nearly all comments submitted in response to the FRN that addressed the "MENA" category supported adding it as a minimum reporting category. Commenters expressed that the current classification of MENA respondents as White does not reflect the reality of many who are MENA, and they provided both personal and societal reasons for their support. Many commenters also provided feedback on which groups should be considered MENA, commenting that it was important for groups such as Armenian, Somali, and Sudanese to be part of any "MENA" category.

A few commenters were opposed to the addition of a minimum reporting category for MENA respondents, stating that some individuals from that region do consider themselves to be White or that race and/or ethnicity data should not be collected by the Federal Government. Despite this, the vast majority of feedback suggests that the addition of a "MENA" minimum reporting category that is separate and distinct from "White" is strongly and broadly supported by the public.

Recommendation 3: Require the collection of more detail beyond the minimum race and ethnicity reporting categories by default, unless an agency determines that the potential benefit of the detailed data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality.

The Content Team recommends requiring the collection of data on race and ethnicity with greater detail beyond the minimum reporting categories by default, unless an agency determines that the potential benefit of the detailed data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality. In those cases, Federal agencies must use SPD 15's minimum reporting categories. In any circumstance, agencies are encouraged to collect and provide more granular data than the minimum reporting categories. Federal agencies are allowed flexibility to determine what additional data to collect in order to best meet program and stakeholder needs, provided that the detailed data can be aggregated into the minimum race and ethnicity reporting categories.

Background

Currently, SPD 15 states that "[t]he collection of greater detail is encouraged" when "any additional categories can be aggregated into the minimum standards." While the collection of more detailed groups beyond the minimum categories is encouraged, it is not required. SPD 15 states that as much detailed data should be tabulated as possible but that Federal agencies "...*shall not present data on detailed categories if doing so would compromise data quality or confidentiality standards.*" SPD 15 does not provide specific guidance on which additional disaggregated data categories should be collected.

The Content Team initially reviewed the language in the current SPD 15 regarding the minimum reporting categories to attempt to reach a common understanding of the current recommendations and requirements. There are numerous examples of Federal agencies collecting detailed race and ethnicity data in their statistical reporting; these examples are not limited to decennial censuses or extremely large surveys, such as the American Community Survey. Nonetheless, Content Team members were aware that the minimum reporting categories as described in the current SPD 15 are often misinterpreted as the only permissible reporting categories.

The minimum reporting categories in SPD 15 contain heterogeneity, as evidenced by differences in a wide variety of outcomes for distinct groups within their definitions. The increasing demand for analysis that represents the diversity of the American public increases the need for race and ethnicity information disaggregated beyond, or more granular than, SPD 15's minimum reporting categories. The collection of disaggregated information already occurs in many circumstances; for example, some current information collections use detailed checkboxes and/or write-in fields to collect detailed race and ethnicity data. However, it is noted that collecting data using only the minimum reporting categories may be necessary when, for example, low response rates among population groups of interest lead to non-representative data, small sample sizes make estimates about disaggregated groups statistically unreliable, data are collected by proxy, or small cell sizes in data analyses and publications create privacy and confidentiality risks.

The Content Team recognizes that the United States population today is comprised of people with heritages from all over the world, and over the past half-century, immigration from nations around the globe has led to myriad detailed population groups growing in size, and increasing intermarriage has resulted in numerous combinations of multiracial and multiethnic identities within our nation. The increasing demand for Federal statistical data and analyses that fully represent the diversity and

complexity of the American public increases the need for Federal race and ethnicity information disaggregated beyond, or more granular than, SPD 15's minimum reporting categories.

Research

Prior to the current proposal, Federal data collections that elicit detailed responses typically did so only for groups within the Hispanic or Latino, American Indian or Alaska Native, Asian, and Native Hawaiian or Pacific Islander minimum reporting categories. In recent years there have been increasing requests from members of White and Black or African American communities for all racial and ethnic communities to have the same ability to self-identify their detailed racial and/or ethnic identities and receive tabulations. Research and testing from the Census Bureau showed that when detailed responses are elicited, respondents readily provide this information.[27] Further, a 2020 Pew Research Center survey[28] found most U.S. adults are willing and able to report more detailed race and ethnicity data beyond the minimum reporting categories.

The most recent 2020 Census results[29] illuminate the robust reporting of detailed identities within all the minimum SPD 15 categories and how much diversity and complexity our nation of 330 million people has interwoven within its demographic composition. The myriad ways in which individuals report their race and ethnicity were illuminated when the 2020 Census – for the very first time in a decennial census – afforded all individuals the opportunity to self-identify by providing dedicated response areas and examples for each of the OMB minimum reporting categories. With this opportunity, the number of detailed response write-ins increased from 55 million in 2010 to 355 million in 2020, and thousands of unique and specific ethnicities, nationalities, races, tribes, and additional identities were successfully reported, coded, and tabulated. This increase in detailed reporting is attributed to improvements the Census Bureau made to its questionnaire design, processing, and coding, which allowed respondents in all race and ethnicity groups to report their detailed identities.[30]

Summary of Public Feedback

In the January 2023 FRN, the Working Group made an initial proposal to OMB that SPD 15 require data collection of race and ethnicity at the detailed category level unless an agency determines that the potential benefit of the detailed data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality. In those cases, agencies would be required to use the SPD 15's minimum reporting categories.

The majority of comments regarding this proposal advocated for the collection of detailed race and ethnicity data. Comments from the FRN, listening sessions, and engagements with stakeholders demonstrate strong public support for the collection of detailed race and ethnicity categories by default,

[27] Mathews, K., Phelan, J., Jones, N.A., Konya, S., Marks, R., Pratt, B.M., Coombs, J., & Bentley, M. (2017, February). 2015 National Content Test Race and Ethnicity Analysis Report: A New Design for the 21st Century. *U.S. Census Bureau.* Retrieved from: https://www.census.gov/programs-surveys/decennial-census/decade/2020/planning-management/plan/final-analysis/2015nct-race-ethnicity-analysis.html.

[28] Cohn, D., Brown, A., & Lopez, M. (2021, May). Black and Hispanic Americans See Their Origins as Central to Who They Are, Less So for White Adults. *Pew Research Center.* Retrieved from: https://www.pewresearch.org/social-trends/2021/05/14/black-and-hispanic-americans-see-their-origins-as-central-to-who-they-are-less-so-for-white-adults/.

[29] 2020 Census Detailed Demographic and Housing Characteristics File-A www.census.gov/newsroom/press-releases/2023/2020-census-detailed-dhc-a.html.

[30] Marks, Rachel and Merarys Ríos-Vargas. August 3, 2021. "Improvements to the 2020 Census Race and Hispanic Origin Question Designs, Data Processing, and Coding Procedures." www.census.gov/newsroom/blogs/random-samplings/2021/08/improvements-to-2020-census-race-hispanic-origin-question-designs.html.

citing the diverse experiences of members of each current minimum reporting category. In particular, a number of health organizations expressed the importance of having detailed race and ethnicity groups to measure disparate healthcare outcomes amongst members of these groups. There were also many comments that advocated for flexibility in SPD 15 to allow for changes in the specific detailed categories used as new data about the demographic make-up of the United States become available and to allow Federal agencies to adapt the detailed categories based on their specific data collection needs and contexts. There was a mix of comments regarding whether the detailed data should be collected using a closed-ended or open-ended approach.

A few commenters were opposed to the requirement for the data collection of race and ethnicity at the detailed category level expressing concerns with the burden of implementing expanded detailed race and ethnicity categories in their systems, the risks to data privacy and disclosure for small population groups, and respondent burden.

Recommendation 4: Update Terminology in SPD 15

The Content Team recognizes the importance of accurate and inclusive terminology because words have practical and emotional connections to an individual's sense of belonging. To that end, the Content Team recommends the removal or updating of terms from SPD 15 that are not well understood, offensive, or no longer in common use. The language in SPD 15 should be updated throughout to ensure clarity, consistency, and relevance.

Background

In the current SPD 15, a number of terms are not well understood or have fallen out of favor, and in some cases are even considered offensive by the public and/or members of the described groups. Although many respondents report according to the race and ethnicity categories presented in Federal data collections, SPD 15 itself may not be well understood by the public. For example, current definitions of race and ethnicity categories may be incomplete, unclear, inconsistent, or confusing. Respondents may not realize that they can report more than one race and/or ethnicity. Also, respondents may find certain terms to be outdated. These issues point to the importance of a review of terminology used in SPD 15 to ensure continued relevance and clarity.

Research

"Majority" & "Minority"
Based on public input and prior testing, the Content Team recommends the removal of the term "principal minority race" from SPD 15. Recent research and consultations about how to appropriately describe racial and ethnic groups and measures of diversity revealed inconsistent understandings of "minority" and "majority," including which respondent groups comprise these groups and that the terms are antiquated, pejorative, and not inclusive.

Where possible any use of "minority" or "majority" as describing a racial or ethnic group, including in data tables and data products, should be replaced with a more purposeful and specific descriptor. As much as possible, name groups for who they are and reference that group individually. The Content Team recommends only using "majority/minority" terminology when statistically accurate and used for statistical descriptions or when legal requirements call for the use of the terms.

Question Stem and Instructions

Decennial census and ACS research suggests that some respondents are confused by the distinction between the terms "race," "ethnicity," and "origin" used in question stems. The research also suggests that some respondents stop reading the instructions "mark one or more" after the word "one."[31] The Census Bureau's 2015 NCT, in conjunction with cognitive testing leading up to the 2015 NCT, showed that it is optimal to use the "race and ethnicity" terminology when using a combined question. Additionally, this research showed that the instructions to "Mark all that apply" (for paper data collections) and "Select all that apply" (for electronic data collections) performed as well as, or better than, alternative instructions.

Recent testing of the terminology "race and/or ethnicity" in the question stem conducted by the Working Group was viewed relatively positively by respondents, and there was some evidence that it promoted understanding that selecting multiple categories was acceptable. Most findings involve how the question was implemented for self- or interviewer-administration. For example, some agencies tested the question "What is your race or ethnicity?" while others tested "What is your race and/or ethnicity?" A small, quantitative, nonprobability study suggested no significant difference between the two versions of the question, but qualitative testing suggested that the "and/or" application may lead to more reporting of both race and ethnicity or multiple races or ethnicities. In general, respondents commented that they felt freer to report as many identities as they felt with the "and/or" instruction than when "or" was used alone. When collecting race and ethnicity data using English language forms, via self-administered mode, the Content Team recommends using "race and/or ethnicity" rather than "race or ethnicity."[32]

The Working Group also tested different versions of the instructions that appeared after the question. These varied from what was recommended in the FRN ("Select all that apply AND enter additional details in the spaces below. Note, you may report more than one group.") to a simplified version ("Select all that apply."). Again, the small, quantitative, nonprobability study showed no significant difference, but qualitative testing showed that the longer instruction did not hurt understanding in any way and may help clarify the intention that multiple ethnicity and race reporting is acceptable. Sometimes respondents did not seem to see the instructions, whether the long or the short version was used, a finding that is consistent with past research. The Content Team recommends using the longer instruction ("Select all that apply AND enter additional details in the spaces below. Note, you may report more than one group.") rather than the shorter "Select all that apply." when collecting detailed race and ethnicity responses.

Multiracial and Multiethnic

The Content Team recommends that with the concept of a combined race and ethnicity question, in data tabulations, the terms used to represent people who identify with more than one of the minimum race and ethnicity categories should be "Multiracial and Multiethnic" rather than "Two or More Races." The Working Group's analysis of public comments found that for those comments which support aggregating individuals who select more than one category into a group, the preferred term is "Multiracial." The recommendation to use the terms "Multiracial and Multiethnic" follows the premise that all of the

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[31] Mathews, Kelly, Jessica Phelan, Nicholas A. Jones, Sarah Konya, Rachel Marks, Beverly M. Pratt, Julia Coombs, and Michael Bentley. (2017). "2015 National Content Test Race and Ethnicity Analysis Report: A New Design for the 21st Century." U.S. Census Bureau. https://www2.census.gov/programs-surveys/decennial/2020/program-management/final-analysis-reports/2015nct-race-ethnicity-analysis.pdf.

[32] The Working Group suggests that more research is needed to explore alternatives to the use of "y/o" in the administration of data collections that are conduct in Spanish language. The organization responsible for Spanish language rules – the Real Academia Española – discourages the use of "y/o," and considers it to be an anglicism. Federal agencies that conduct surveys in languages other than English are encouraged to undertake qualitative research to explore alternatives.

minimum categories are co-equal, and that SPD 15 is not defining certain groups as "races" or "ethnicities." Therefore, the reporting of multiple minimum reporting categories represents "Multiracial and Multiethnic" responses. Note, the Working Group is not recommending that a "Multiracial and Multiethnic" *checkbox* be used for data collection; this recommendation applies to the use of the terms for data tabulations and presentations as a way of ensuring respectful and commonly understood terminology to describe the population which identifies with multiple race and ethnicity groups.

Definitions for the Race and Ethnicity Minimum Reporting Categories
The Content Team acknowledges that every nationality, ethnicity, or transnational group from across the world should not be codified into the definitions for the minimum race and ethnicity reporting categories, in accordance with our guiding principle to facilitate self-identification to the greatest extent possible. Instead, the use of representative examples helps to provide guidance, but not exhaustive prescription for the categories. This allows for future research to examine reporting patterns of groups who may not be clearly defined in the SPD 15 definitions, to understand where and how they self-identify and determine how best to code and classify the responses within the standards. The goal is to help inform future research on how individuals from some groups, who could potentially be listed in multiple categories, self-identify given the minimum reporting categories and their definitions. The language is also designed to help distinguish between individuals expected to share a common ancestry and those only sharing a common geography. For example, it is expected that individuals whose families have origins in India but who live in East Africa, would select the "Asian" category rather than the "Black or African American" category, while individuals whose families have origins in England but live in Australia would select the "White" category rather than the "Native Hawaiian or Pacific Islander" category.

Summary of Public Feedback
In the January 2023 FRN, the Working Group made an initial proposal to OMB that SPD 15 be revised with accurate and inclusive terminology and remove terms that are offensive and no longer in common use.

There was general support for many of the proposed terminology changes including removing "Other" from the "Native Hawaiian or Other Pacific Islander" category, removing the term "Negro" from the "Black or African American" category, and replacing "Far East" with "East Asia." There was also support for the change from "Select/Mark one or more" to "Select/Mark all that apply."

There were also suggestions for additional terminology changes that are reflected in the current recommendations including, for example, removing "Spaniard" from the examples provided in the initial proposal for the "Hispanic or Latino" category.

But there were also commenters that suggested additional terminology changes such as:
- Adding language for the "Black or African American" category to distinguish between "Black Americans," people from the Caribbean, and people from Sub-Saharan Africa; and
- Including the term "indigenous" in the title of the "American Indian or Alaska Native" category.

The Content Team recommends that the terminology in SPD 15 be updated with the following specific changes:

"Majority" and "Minority"
- The Content Team recommends SPD 15 discontinue use of the terms "majority" and "minority."

Question Stem and Instructions
- Use "race and/or ethnicity" in the question stem.
- Use instructions that emphasize that reporting multiple categories is allowed (and encouraged), regardless of whether minimum or detailed reporting categories are collected. Explicit instructions that the respondent can select all that apply AND provide detailed reporting is helpful. For example:
  - In a self-administered instrument collecting the <u>minimum</u> reporting categories: "Select all that apply. Note, you may report more than one group."
  - In a self-administered instrument collecting <u>detailed</u> categories: "Select all that apply and enter additional details in the spaces below. Note, you may report more than one group."

"Multiracial/Multiethnic"
- The Content Team recommends that with the concept of a combined race and ethnicity question, in data tabulations, the terms used to represent people who identify with more than one of the minimum race and ethnicity categories should be "Multiracial and Multiethnic" rather than "Two or More Races."
- Note, the Content Team is not recommending that a "Multiracial and Multiethnic" *checkbox* be used for data collection; this recommendation applies to the use of data tabulations, where ensuring respectful and commonly understood terminology is used to describe the population which identifies with multiple races and/or ethnicity groups.

Names of Race and Ethnicity Minimum Reporting Categories
The Content Team recommends retaining the names for five of the race and ethnicity minimum reporting categories and making changes for two minimum reporting categories. One update is to create a new minimum category for "Middle Eastern or North African." The other update is to revise the name for the category "Native Hawaiian or Other Pacific Islander" to "Native Hawaiian or Pacific Islander," removing the word "Other." Therefore, the recommended names for the seven minimum reporting categories are:
- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander
- White

Changes to Definitions of Race and Ethnicity Minimum Reporting Categories
The Content Team recommends providing balance for definitions and using six example groups to illustrate the breadth and diversity of the category. Additional recommended updates to the race and ethnicity definitions include:

American Indian or Alaska Native Definition
- **Remove** the phrase "who maintains tribal affiliation or community attachment" in the American Indian or Alaska Native definition, making this minimum category's definition consistent with all minimum categories.
- **Change** "(including Central America)" to having "Central America" listed co-equally with North and South America.

Asian Definition
- **Replace** "Far East" with "Central or East Asia."
- **Replace** "Indian Subcontinent" with "South Asia."

Black or African American Definition
- **Remove** "Negro."

Hispanic or Latino Definition
- **Correct** "Cuban" being listed twice in the definition.
- **Delete** text "regardless of race. The term, 'Spanish origin,' can be used in addition to 'Hispanic or Latino.'"

Middle Eastern or North African Definition
- **Add** "Middle Eastern or North African" as a new minimum reporting category, distinct from and co-equal to all minimum reporting categories.

Native Hawaiian or Pacific Islander Definition
- **Remove** "Other" from "Native Hawaiian and Other Pacific Islander."

White Definition
- **Remove** reference to "the Middle East, or North Africa" and create a new minimum category for MENA.

Revised Definitions for Race and Ethnicity Minimum Reporting Categories

The Content Team deliberated and developed definitions which are purposefully written to provide a thoughtful balanced approach of examples that represent some of the largest population groups in the United States for the geographic regions that are referenced in each minimum reporting category's definition. The definitions are also purposefully written to not be exhaustive, but to provide examples that will help respondents understand the composition of the category. This purposeful approach allows for research and analysis to be conducted in the future, which will help inform and guide future data collections and tabulations.

The recommended definitions for each of the seven required minimum reporting categories are described below. The following series of tables provide a description of a) the minimum race and ethnicity category definitions from the 1997 SPD 15 and b) the recommendations for improving the definitions.

Definition for the American Indian or Alaska Native Category

Findings from Census Bureau qualitative research with cognitive testing and focus groups (2010 AQE, 2014 Census American Indian or Alaska Native identity research) found strong concerns about the language "who maintains tribal affiliation or community attachment" requiring an extra step for people to identify as American Indian or Alaska Native (AIAN), which treats this population differently from other groups. This research also found that Central and South American indigenous groups were unsure if the "AIAN" category was inclusive of them. Furthermore, there are no examples in the current SPD 15 definition for the "American Indian or Alaska Native" category, whereas other categories such as "Asian" provide a seemingly exhaustive list of detailed groups. The "AIAN" category is intended to be inclusive of American Indians, Alaska Natives, and Central and South American indigenous groups, but not having clear examples

of tribes and native villages from each of these conceptual areas of the definition does not make this clear to respondents.

To address these concerns, the Content Team recommends removing the phrase "who maintains tribal affiliation or community attachment" from the AIAN definition. This recommendation makes the "AIAN" category's description consistent with all other categories, and this was supported by the Census Bureau's research last decade and engagements with AIAN tribal leaders and organizations. In response to this proposal in the January 2023 FRN, several key AIAN organizations supported this recommendation.

The examples in the AIAN definition are used to encourage reporting across the broad spectrum and diversity of detailed AIAN groups in the United States. If only the six largest AIAN groups are used as examples, strictly by population size, only American Indian tribes would be represented. There would be no Alaska Native villages and no Central or South American indigenous groups.

Table 1. American Indian or Alaska Native Definition

1997 SPD 15 Definition	Recommendation
American Indian or Alaska Native – A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.	**American Indian or Alaska Native**. Individuals with origins in any of the original peoples of North, Central, and South America, including, for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, and Mayan.

Therefore, to provide balance and equity to represent the full scope of the SPD 15 definition for AIAN, two groups are chosen as examples for each conceptual component of the definition, with the two largest groups by population size. The examples represent the two largest Federally recognized tribes in the continental United States (Navajo Nation and Blackfeet Tribe of the Blackfeet Indian Reservation of Montana), the two largest Federally recognized Alaska Native tribes or villages in the United States (Native Village of Barrow Inupiat Traditional Government and Nome Eskimo Community), and the two largest Central or South American indigenous groups in the United States (Aztec and Mayan). The list of examples purposefully uses the name of Federally recognized tribes to fully represent these identities (e.g., "Blackfeet Tribe of the Blackfeet Indian Reservation of Montana" is used instead of the general "Blackfeet Tribe" and "Nome Eskimo Community" replaces the general response "Tlingit" as it was the largest Federally recognized Alaska Native response in the 2020 Census).

The recommended definition wording for the "American Indian or Alaska Native" category is: **"American Indian or Alaska Native.** Individuals with origins in any of the original peoples of North, Central, and South America, including, for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, and Mayan."

Definition for the Asian Category
Census Bureau cognitive testing and focus group research, as well as outreach and engagement with Asian organizations and scholars, found concerns that geographic references for the Asian definition do not include Central Asia. The list of Asian examples seems to be exhaustive (10 detailed groups are listed in SPD 15, and the Asian definition has a much lengthier list of examples than any other minimum reporting

category) and the offensive terminology of "Far East" and "Indian Subcontinent" are not appropriate geographic references.

By adding geographic references for Central or East Asia, Southeast Asia, and South Asia, the full geographic references of the Asian population are reflected in the definition. The addition of Central Asia resolves the concern shared by stakeholders that the definition only includes East Asian groups. The replacement of the terms "Far East" and "Indian Subcontinent" with "East Asia" and "South Asia" removes offensive terminology and uses commonly understood geographic references for these populations. The revisions ensure that the terminology used is respectful of how people refer to themselves.

Table 2. Asian Definition

1997 SPD 15 Definition	Recommendation
Asian – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.	**Asian.** Individuals with origins in any of the original peoples of Central or East Asia, Southeast Asia, or South Asia, including, for example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, and Japanese.

SPD 15 does not clearly specify which minimum category definition includes people who identify with groups such as Kazakh, Uyghur, Uzbek, and Kyrgyz with origins in Central Asia. However, in discussions about which examples to use for the Asian definition, the 2014-2018 Federal Interagency Working Group for Research on Race and Ethnicity acknowledged that persons from the countries of the former Soviet Union should report in the "Asian" category. Given that the countries of the former Soviet Union comprise "Central Asia," this reference and feedback from experts and stakeholders to include Central Asian nationalities within the "Asian" category for the 2020 Census, led the Census Bureau's Coding Research Team to classify Central Asian responses as part of the "Asian" category. Central Asian was previously not recognized in any of the OMB minimum reporting categories, so this addition will provide clarification. Additionally, the Census Bureau ran special tabulations of 2020 Census responses and found that about 60 percent of respondents who provided a detailed Central Asian response to the race question provided their response in the Asian write-in area. Of those who reported a detailed Central Asian response, half also selected the "Other Asian" checkbox, 25 percent selected only the White checkbox, and about 5 percent selected the "White" *and* "Other Asian" checkboxes, while about 6 percent did not select any checkboxes.[33] Including Central Asia ensures that every region within the Asian continent is included in the minimum reporting category for "Asian."

Furthermore, in public comments submitted to the January 2023 FRN, greater clarity was requested regarding which Asian sub-regions would be included in the "Asian" minimum reporting category. Comments from organizations that work with Central Asian populations in the United States explicitly requested that "Central Asia" be included in the definition. Organizations shared that when some members of South Asian, Southeast Asian, and Central Asian groups fill out demographic forms, they may assume that the group with which they self-identify is not "Asian" given popular misconceptions of "Asian" as solely "East Asian" in American society, and they may then mark "Some Other Race" erroneously.

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[33] U.S. Census Bureau, Unpublished special tabulation. 2020 Census. The U.S. Census Bureau reviewed this data product for unauthorized disclosure of confidential information and approved the disclosure avoidance practices applied to this release. CBDRB-FY23-0485.

Recent research conducted by Pew Research supports this. Pew Research found that "the vast majority of Asian adults say they consider East Asians (89 percent) and Southeast Asians (88 percent) to be Asian, while a smaller majority (67 percent) say the same for South Asians and only 43 percent of Asians in the United States consider Central Asians to be Asian."[34] In order to help respondents better understand how the minimum reporting categories relate to themselves, commenters recommended that SPD 15 be revised to include all of the regional groupings ("East Asian," "South Asian," "Southeast Asian," "Central Asian") in the definition. This will help respondents better understand how to self-identify within the context of the "Asian" category.

Providing examples of detailed Asian groups from each component of the Asian definition shows that Central or East Asia, Southeast Asia, and South Asia are all part of the larger "Asian" category, and research demonstrated robust reporting in all three groups. The examples for each minimum reporting category allow people to discover the response (or responses) that best fits how they self-identify. The examples provided in the recommended Asian definition provide a broad representation of the geographic definition for Asia that is consistent with the United Nations geographic descriptions of the world.[35] The "Asian" category includes responses of dozens of different Asian nationalities, ethnic groups, and transnational groups. However, data from the recent censuses and the American Community Survey show that the majority of the Asian population in the United States reports one of several detailed responses, with Chinese, Filipino, Asian Indian, Vietnamese, Korean, and Japanese being the largest. Results from the 2020 Census illustrate that about 8 in 10 Asians identify as one or more of the six largest detailed Asian groups. The six examples in the "Asian" category definition represent the largest Central or East Asian (Chinese, Filipino, Japanese, Korean), Southeast Asian (Vietnamese), and South Asian (Asian Indian) groups in the United States and illustrate the diversity within the Asian definition.

The recommended definition wording for the "Asian" category is: "**Asian.** Individuals with origins in any of the original peoples of Central or East Asia, Southeast Asia, or South Asia, including, for example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, and Japanese."

Definition for the Black or African American Category

Many Black or African American participants in qualitative research, including cognitive testing and focus groups, expressed that the term "Negro" is outdated and offensive language.[36] Additionally, there has been engagement with Black organizations, scholars, and Federal advisory committees regarding similar concerns about this term. For example, the U.S. Census Bureau received strong public backlash for the term "Negro" being included in the "Black, African American, or Negro" category label used in the 2010 Census race question. There were numerous media articles and public concerns shared prior to the 2010 Census about this issue. This led to the U.S. Census Bureau Director issuing a statement acknowledging public concerns about including the term "Negro" in the race question and sharing plans for removing the term.[37,38] The 2010 Alternative Questionnaire Experiment found no significant difference in the reporting

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[34] Ruiz, Neil, Luis Noe-Bustamante, and Sono Shah. 2023. "Diverse Cultures and Shared Experiences Shape Asian American Identities." Pew Research. https://www.pewresearch.org/race-ethnicity/2023/05/08/diverse-cultures-and-shared-experiences-shape-asian-american-identities/.

[35] United Nations geographic regions of the world - https://unstats.un.org/unsd/methodology/m49/.

[36] Compton, E., Bentley, M., Ennis, S., & Rastogi, S. (2013, February). 2010 Census Race and Hispanic Origin Alternative Questionnaire Experiment. *U.S. Census Bureau.* Retrieved from: https://www.census.gov/programs-surveys/decennial-census/decade/2010/program-management/cpex/2010-cpex-211.html.

[37] Groves, R. (2010, January). The Word "Negro." *U.S. Census Bureau.* Retrieved from: https://www.census.gov/newsroom/blogs/director/2010/01/the-word-negro.html.

[38] Phillips, K. (2010, March). Census Chief Apologizes for 'Negro' Category. *The New York Times.* Retrieved from: https://archive.nytimes.com/thecaucus.blogs.nytimes.com/2010/03/26/census-chief-apologizes-for-negro-category/.

of "Black or African American" when the term "Negro" was removed. The U.S. Census Bureau removed "Negro" from the race question for its surveys and censuses beginning with the 2014 American Community Survey. However, for data collections that use write-in fields, respondents may still report the term "Negro" or other terms that best represent their racial or ethnic identity.

Unlike other SPD 15 minimum reporting category definitions, regional geographic references are not specifically included to describe the Black or African American definition. Unlike other SPD 15 minimum reporting category definitions, the listed examples are limited ("Haitian" and "Negro") and do not fully represent all references for the diversity and breadth of the Black or African American population. Census Bureau qualitative research such as 2010 AQE focus groups with African groups and Afro-Caribbean groups, as well as a 2010 Census White House Forum with Afro Caribbean Leaders, highlighted concerns about the "Black or African American" category not being inclusive of Black immigrant communities such as Jamaicans, Haitians, etc. Feedback strongly recommended that the category use examples that are fully representative of the Black diaspora. Many raised concerns that the "Black or African American" category (without examples) was intended only for native born Black Americans and not groups with African or Afro-Caribbean origins. The category should be inclusive of Sub-Saharan African, Afro-Caribbean, and North American Black groups.

Table 3. Black or African American Definition

1997 SPD 15 Definition	Recommendation
Black or African American – A person having origins in any of the black racial groups of Africa. Terms such as ''Haitian'' or ''Negro'' can be used in addition to ''Black or African American.''	**Black or African American.** Individuals with origins in any of the Black racial groups of Africa, including, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, and Somali.

The Content Team recommends removing the term "Negro" from the Black or African American definition, and to use relevant examples to clarify that the "Black or African American" category encompasses not just native born African American communities in the United States but also groups from across the Black diaspora of the Caribbean and Sub-Saharan Africa. Adding a geographic refence to the definition of Black or African American would both make this category more parallel to the definitions of the other categories and would reduce the use of color as a primary marker. The term "Sub-Saharan Africa" was offered as a geographic descriptor in public comments and is also the terminology used by the U.S. State Department for this geography. However, the Content Team recognizes that this would be a substantive change that has not been publicly vetted or for which comment and feedback has not been explicitly requested from stakeholders. Additionally, the term "Sub-Saharan African" has not been tested for comprehension among potential respondents.

The examples provided in the recommended Black or African definition provide a broad representation of the geographic definition for the Black diaspora that is consistent with the United Nations geographic descriptions of the world.[39] The "Black or African American" category includes African Americans, as well as responses of dozens of different Sub-Saharan African and Afro-Caribbean nationalities, ethnic groups, and transnational groups. However, data from the recent censuses and the American Community Survey show that the majority of the "Black or African American" population in the United States reports one of several detailed responses, with African American, Jamaican, Haitian, Nigerian, Ethiopian, and Somali

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[39] United Nations Geographic Regions of the World. https://unstats.un.org/unsd/methodology/m49/.

being the largest. The 2020 results illustrate that about 9 in 10 people who reported detailed Black responses identified as one or more of the six largest detailed Black or African American groups.

The six examples in the Black or African American definition represent the largest North American (African American), Sub-Saharan African (Nigerian, Ethiopian, Somali), and Afro-Caribbean (Jamaican, Haitian) groups in the United States and are used to encourage reporting across the broad spectrum and diversity within the Black or African American population.

The recommended definition wording for the "Black or African American" category is: "**Black or African American.** Individuals with origins in any of the Black racial groups of Africa, including, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, and Somali."

Definition for the Hispanic or Latino Category

The "Hispanic or Latino" category will continue to reference "Spanish culture or origin" in the definition due to legal requirements. There is not sufficient research evidence or stakeholder engagement to modify the construct of the "Hispanic or Latino" category's definition reference to "Spanish cultures." Additionally, this adheres to the original construct for the category that was developed in the 1970s, as discussed in the 1977 report, "Race and Ethnic Standards for Federal Statistics and Administrative Reporting." With respect to whether persons from all Central and South American countries should be reported in the category "Hispanic," the 1977 guidance advised, "No. Only those persons from Central and South American countries who are of Spanish origin, descent, or culture should be included in the category Hispanic. Persons from Brazil, Guiana, Surinam, Trinidad, and Belize would be classified according to their race, and would not necessarily be included in the Hispanic category."[40]

Table 4. Hispanic or Latino Definition

1997 SPD 15 Definition	Recommendation
Hispanic or Latino – A person of Cuban, Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race. The term, ''Spanish origin,'' can be used in addition to ''Hispanic or Latino."	**Hispanic or Latino.** Includes, for example, individuals of Mexican, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian, and other Spanish culture or origin.

The Content Team recommends correcting the error of "Cuban" being listed twice in the SPD 15 minimum reporting category definition for "Hispanic or Latino."

The Content Team recommends the removal of the phrase "regardless of race" from the Hispanic or Latino definition, as it is not meaningful in the context of a combined race and ethnicity question. The Content Team also recommends the removal of the phrase "The term 'Spanish origin' can be used in addition to 'Hispanic or Latino'" to ensure consistency across Federal data collections in the minimum reporting category label used ("Hispanic or Latino").

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[40] Wallman, Katherine and John Hodgdon. July 1977. Volume 77 Issue 10. "Race and Ethnic Standards for Federal Statistics and Administrative Reporting." Statistical Reporter. Statistical Policy Division, U.S. Office of Management and Budget. https://ia601907.us.archive.org/13/items/sim_statistical-reporter_1977-07_77_10/sim_statistical-reporter_1977-07_77_10.pdf.

In the 1997 SPD 15 revisions, the category name "Hispanic" was expanded to **"**Hispanic or Latino" based on research, which showed that regional usage of the terms differed – "Hispanic" was commonly used in the eastern portion of the United States, whereas "Latino" was commonly used in the western portion. This change was made to improve response rates.

But "Hispanic" and "Latino" are not interchangeable terms.[41] "Hispanic" has its roots in the colonization of the Americas by Spain and originally referred to individuals who came from or descended from Spanish-speaking countries. The term "Hispanic" is defined in the Merriam-Webster dictionary as "of, relating to, or being a person of Latin American descent and especially of Cuban, Mexican, or Puerto Rican origin living in the U.S. or relating to the people, speech, or culture of Spain." The term "Latino" emerged as a term during the 20th century civil rights movement to unite individuals from various cultures, ethnicities, and histories and primarily referred to individuals who come from or descended from Latin American countries, particularly those colonized by Spain, France, and Portugal including the Caribbean and majority of countries from Central and South America.[42] In the Merriam-Webster dictionary "Latino" is defined as "a native or inhabitant of Latin America; or a person of Latin American origin living in the U.S." According to the U.S. State Department, the U.S. Agency for International Development (USAID), the World Health Organization (WHO), the World Bank, and the United Nations, "Latin America" includes Central and South America. Additional research has been recommended by the Content Team to explore this in the future.

The examples provided in the recommended Hispanic or Latino definition provide a broad representation of the geographic definition of the countries with Spanish speaking origins, pursuant to current law. The "Hispanic or Latino" category includes responses of dozens of different Central American, South American, and Caribbean American nationalities, ethnic groups, and transnational groups of Spanish-speaking origin. However, data from the recent censuses and the American Community Survey show that the majority of the Hispanic or Latino population in the United States reports one of several detailed responses, with Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, Colombian, and Honduran being the largest groups from these regions. The 2020 results illustrated that about 9 in 10 people who reported detailed Hispanic or Latino responses identified as one or more of the six largest detailed Hispanic or Latino groups.

The six examples in the Hispanic or Latino definition represent the largest North American or Central American (Mexican, Salvadoran), Caribbean (Puerto Rican, Cuban, Dominican), and South American (Colombian) groups in the United States and illustrate diversity within the "Hispanic or Latino" category. They are used to encourage reporting across the broad spectrum and diversity of North, Central, and South American and other Spanish cultures within the Hispanic or Latino population. Together, these groups represent the vast majority of the Hispanic population in the United States.

The recommended definition wording for the "Hispanic or Latino" category is: "**Hispanic or Latino.** Includes, for example, individuals of Mexican, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian, and other Spanish culture or origin."

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[41] Alexander, William. (2022). *Ask the OEDI: Hispanic, Latino, Latina, Latinx – Which is Best. Downloaded on 08/01/2023 from https://medschool.duke.edu/blog/ask-oedi-hispanic-latino-latina-latinx-which-best. Hispanic* refers to a person with ancestry from a country whose primary language is Spanish. *Latino* and its variations refer to a person with origins from anywhere in Latin America (Mexico, South and Central America) and the Caribbean.
[42] Oklahoma Historical Society. What is the difference between Latino and Hispanic? Oklahoma: Oklahoma Historical Society; https://www.okhistory.org/learn/latino7.

Definition for the Middle Eastern or North African Category

For over 30 years, Middle Eastern and North African stakeholders and leaders have advocated for the removal of MENA from the "White" category, and to create a minimum reporting category for MENA respondents, citing that the current classification within the "White" category does not reflect reality and no data are currently available on this population. Feedback from Census Bureau qualitative research with cognitive testing and focus groups (2010 AQE), as well as outreach and engagement with Middle Eastern and North African organizations and scholars found concerns that many viewed the inclusion of Middle Eastern and North African groups within the "White" category as "wrong" or "inaccurate." There are currently no examples of MENA detailed groups in the SPD 15 definitions, whereas other categories such as "Asian" provide a seemingly exhaustive list of detailed groups. Further research and engagement with MENA communities, highlighted by the results of the 2015 NCT, revealed that modifications were needed to the examples used on the questionnaire to clarify that the "MENA" category included those with roots or heritage from diverse nationalities, ethnicities, and transnational groups in the MENA region and included individuals who were Arab and who were not Arab.

Table 5. Middle Eastern or North African Definition

1997 SPD 15 Definition	Recommendation
-- Not applicable.	**Middle Eastern or North African.** Individuals with origins in any of the original peoples of the Middle East or North Africa, including, for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, and Israeli.

The category of "Middle Eastern or North African" is a new minimum reporting category created by removing the reference to the Middle East or North Africa from the "White" category. While it is recognized that the use of the term "the original peoples of" for people who currently identify as MENA may be inaccurate as the original peoples of North Africa are largely not the people that make up the current population of North Africa, this wording has been tested and appears to be understandable by respondents.

The examples provided in the recommended definition provide a broad representation of the geographic definition for the Middle East and North Africa that is consistent with the Census Bureau's classification of "Middle Eastern or North African" that was tested in the 2015 NCT. The first set of examples used represent the two largest Arab nationalities in the United States from the Middle East (Lebanese and Syrian), the two largest Arab nationalities in the United States from North Africa (Egyptian and Moroccan), and the two largest Middle Eastern, non-Arab nationalities in the United States from the Middle East (Iranian and Israeli). These groups are included to clarify that this category includes those with roots or heritage from diverse nationalities and ethnicities in the Middle East and North Africa and that the category includes individuals who are Arab and who are not Arab. They are used to encourage reporting across the broad spectrum and diversity of Arab groups, non-Arab groups, and transnational groups within the Middle Eastern or North African population. Together, these groups represent the majority of the MENA population in the United States.

The recommended definition wording for the "Middle Eastern or North African" category is: "**Middle Eastern or North African.** Individuals with origins in any of the original peoples of the Middle East or North Africa, including, for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, and Israeli."

Definition for the Native Hawaiian or Pacific Islander Category

The Native Hawaiian or Pacific Islander (NHPI) category is intended to be inclusive of Melanesian, Micronesian, and Polynesian populations of the Pacific Islands, but there are limited examples of detailed groups in the NHPI definition, whereas other categories such as "Asian" provide a seemingly exhaustive list of detailed groups.

The Content Team recommends revising the name of the category in the 1997 SPD 15 from "Native Hawaiian or Other Pacific Islander" to "Native Hawaiian or Pacific Islander." The word "Other" in the NHPI category has been viewed as offensive and stakeholders recommend removing it from the category name. This update removes the word "Other" from the category name and is responsive to public feedback to make the name of this category reflective of the accepted terminology within the Native Hawaiian and Pacific Islander community. This change is supported by public comment as well as by best practices for inclusive language that specify that the nonspecific group label "other" is uninformative and may be considered pejorative as it suggests that members of the group are not part of society but rather a group apart.

Table 6. Native Hawaiian or Pacific Islander Definition

1997 SPD 15 Definition	Recommendation
Native Hawaiian or Other Pacific Islander – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.	**Native Hawaiian or Pacific Islander.** Individuals with origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands, including, for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, and Marshallese.

Providing examples of detailed Melanesian, Micronesian, and Polynesian groups from each component of the Native Hawaiian or Pacific Islander definition shows that each of these groups are part of the larger Native Hawaiian or Pacific Islander category, and research demonstrated robust reporting in all three groups. The six examples represent the largest Melanesian (Fijian), Micronesian (Chamorro, Marshallese), and Polynesian (Native Hawaiian, Samoan, Tongan) groups in the United States and represent the diversity within the Pacific Islander population. They are used to encourage reporting across the broad spectrum and diversity of Micronesian, Melanesian, and Polynesian Pacific Islander cultural groups within the Native Hawaiian and Pacific Islander population. Together, these groups represent the vast majority of the Pacific Islander population in the United States.

The recommended definition wording for the "Native Hawaiian or Pacific Islander" category is: "**Native Hawaiian or Pacific Islander.** Individuals with origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands, including, for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, and Marshallese."

Definition for the White Category

The Content Team recommends removal of the "Middle East, or North Africa" reference from the White definition, clarify the geographic references for the breadth of the White definition's composition, and follow the recommended approach for all the minimum reporting category definitions to list six examples for the largest White nationalities or ethnic groups in the United States.

Currently, there are no examples of European detailed groups in the White definition, whereas other categories such as "Asian" provide a seemingly exhaustive list of detailed groups. Providing examples of detailed European groups from Eastern, Western, Southern, and Northern Europe shows that each of these groups are part of the larger "White" category, and research demonstrated robust reporting in all these groups. To achieve consistency with the other definitions, the Content Team recommends adding European example groups.

Table 7. White Definition

1997 SPD 15 Definition	Recommendation
White – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.	**White.** Individuals with origins in any of the original peoples of Europe, including, for example, German, Irish, English, Italian, Polish, and French.

The six examples provided in the recommended definition provide a broad representation of the geographic definition for Europe that is consistent with the United Nations geographic descriptions of the world[43] and represent the vast majority of the White population within the United States. The "White" category includes responses of hundreds of different European national origins and ethnic groups. However, data from the ancestry question, which is collected through the American Community Survey, show that the majority of the "White" population in the United States reports one of several detailed responses, with German, Irish, English, Italian, Polish, and French being the largest. The six examples represent the largest Eastern (Polish), Northern (English, Irish), Southern (Italian), and Western (German, French) European groups, illustrating broad diversity of groups within the White population.

The recommended definition wording for the "White" category is: "**White.** Individuals with origins in any of the original peoples of Europe, including, for example, German, Irish, English, Italian, Polish, and French."

In summary, the key improvement for SPD 15 definitions of the minimum race and ethnicity categories is to use six examples in each definition to illustrate the breadth and diversity of each minimum category. Within the "White" category, identities of German, Irish, English, Italian, Polish, and French represent the largest detailed European groups reported in the United States. Detailed Hispanic or Latino groups such as Mexican, Puerto Rican, Cuban, Salvadoran, Dominican, and Colombian, are the largest groups of Spanish-speaking origin in the United States representing the regions of Central America, South America, and the Caribbean. Detailed Black or African American groups such as African American, Jamaican, Haitian, Nigerian, Ethiopian, and Somali are the largest groups representing the Black racial groups of Africa. Detailed Asian groups such as Chinese, Filipino, Asian Indian, Vietnamese, Korean, and Japanese are the largest groups in the United States representing the regions of Central or East Asia, Southeast Asia, and South Asia. American Indian or Alaska Native groups such as Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, and Mayan are the largest groups representing each conceptual component of the definition. Middle Eastern or North African groups are represented by the two largest Arab nationalities in the United States from the Middle East (Lebanese and Syrian), the two largest Arab nationalities in the United States from North Africa (Egyptian and Moroccan), and the two largest Middle Eastern, non-Arab nationalities in the United States from the Middle East (Iranian and Israeli). Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, and Marshallese represent the largest Melanesian,

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[43] United Nations geographic regions of the world - https://unstats.un.org/unsd/methodology/m49/.

Micronesian, and Polynesian groups in the United States. Figure 1 shows the definitions for the seven minimum race and ethnicity categories side-by-side.

Figure 1. Revised Definitions for Race and Ethnicity Minimum Reporting Categories

American Indian or Alaska Native	Asian	Black or African American	Hispanic or Latino	Middle Eastern or North African	Native Hawaiian or Pacific Islander	White
The category "American Indian or Alaska Native" includes individuals with origins in any of the original peoples of North, Central, and South America, including, for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, and Mayan.	The category "Asian" includes individuals with origins in any of the original peoples of Central or East Asia, Southeast Asia, or South Asia, including, for example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, and Japanese.	The category "Black or African American" includes individuals with origins in any of the Black racial groups of Africa, including, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, and Somali.	The category "Hispanic or Latino" includes, for example, individuals of Mexican, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian, and other Spanish culture or origin.	The category "Middle Eastern or North African" includes individuals with origins in any of the original peoples of the Middle East or North Africa, including, for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, and Israeli.	The category "Native Hawaiian or Pacific Islander" includes individuals with origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands, including, for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, and Marshallese.	The category "White" includes individuals with origins in any of the original peoples of Europe, including, for example, German, Irish, English, Italian, Polish, and French.

5. Operationalizing Content Team Recommendations in Federal Data Collection

This section provides examples of how Federal agencies may operationalize the recommendations discussed in the sections above.
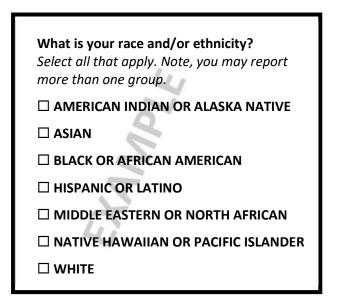
Examples of Self-Response Data Collections

While most data collection is now occurring though electronic modes, the examples in this section illustrate designs for paper data collection. The Content Team recognizes that there is not a one size fits all approach to collecting race and ethnicity data when the uses are numerous and that there are additional ways to operationalize these recommendations. While agencies will be required to use a combined race and ethnicity question that includes a "Middle Eastern or North African" category, agencies will have flexibility in how they collect detailed race and ethnicity responses (e.g., through checkboxes, through write-in response areas, or a combination of both checkboxes and write-in response areas.

In cases where the potential benefit of the detailed race and ethnicity data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality, agencies must use the SPD 15's minimum categories. The options below have been successfully tested.[44]

Figure 2 provides an example of a question design that collects race and ethnicity using the minimum reporting categories only. In this design, the required design elements of a combined race and ethnicity question, the "MENA" category, and the instruction to "Mark all that apply" are included.

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[44] SPD 15 does not dictate the order in which the minimum categories should be displayed on Federal information collections. Agencies generally order alphabetically or by population size.

Figure 2. Example of a Self-Response Question Design that Collects Race and Ethnicity Data Using the Minimum Reporting Categories.

What is your race and/or ethnicity?
Select all that apply. Note, you may report more than one group.

☐ **AMERICAN INDIAN OR ALASKA NATIVE**

☐ **ASIAN**

☐ **BLACK OR AFRICAN AMERICAN**

☐ **HISPANIC OR LATINO**

☐ **MIDDLE EASTERN OR NORTH AFRICAN**

☐ **NATIVE HAWAIIAN OR PACIFIC ISLANDER**

☐ **WHITE**

Unless an agency determines that the potential benefit of the detailed race and ethnicity data would not justify the additional burden to the agency and the public or the additional risk to privacy or confidentiality, agencies will be required to collect more detail beyond the minimum reporting categories by default. However, agencies will be able to determine what additional detail they collect to best meet their programmatic and stakeholder needs.

When collecting detailed race and ethnicity data, agencies should consider the following:
- If using detailed checkboxes, ensure that the groups used are representative of the minimum reporting category and represent diversity within that category.
- The mode of data collection may offer additional options for collecting detailed data. For example, in electronic modes of collection, agencies may use multiple screens to collect detailed data where the minimum reporting categories are collected on the first screen and the follow up screens collect detailed data for each minimum reporting category the respondent/proxy provided, whether through checkboxes, drop down menus, type-in response areas, a combination of these, or another method.

The design shown in Figure 3 provides an example of how an agency could collect detailed data using a combined race and ethnicity question, but it is not the only way in which the question could be designed. In this design, the required design elements of a combined race and ethnicity question, the "MENA" category, the instruction to "Mark all that apply AND enter additional details in the spaces below. Note, you may report more than one group" are included.

Methodologically, it is not feasible or recommended for censuses or surveys to provide question designs where detailed checkboxes are posed for the thousands of detailed identities with which respondents may identify. However, the combined race and ethnicity question design with multiple detailed checkboxes and write-in response areas approach has proven in a decennial census and ACS environment to foster the reporting of detailed identities and allows people to self-identify. The successful design

approach that was tested in the 2015 NCT provides an example of how a combined race and ethnicity question with multiple detailed checkboxes has proven to be an effective way for eliciting, collecting, and processing myriad detailed responses in a decennial environment for all communities. The key features of this design approach are to use a limited set of detailed checkboxes along with examples and dedicated write-in response areas so that the vast majority of all detailed groups reported by respondents are collected via one or more of the detailed checkbox categories rather than through write-in responses that require coding operations to process.

For the "American Indian or Alaska Native" category, detailed checkboxes are deliberately not used.[45] The 2015 NCT tested a question strategy that provided examples and a dedicated write-in response area for each of the three conceptual components referenced in the SPD 15 definition of "American Indian or Alaska Native" category ("American Indian," "Alaska Native," and "Central or South American Indian"). The examples were developed with input from American Indian and Alaska Native respondents, tribal leaders, and national AIAN organizations. The results of this strategy showed that about 10 percent of the detailed AIAN responses fell within the examples provided and the vast majority of respondents did not report an identity that was listed as an example group. The 2015 NCT also demonstrated that the use of a dedicated write-in response area only, rather than three conceptual checkboxes, elicited more detailed data from AIAN respondents. This design proved effective for collecting detailed responses for tribes, native villages, and indigenous identities such as Navajo Nation, Blackfeet Tribe of the Blackfeet Reservation of Montana, Native Village of Barrow Inupiat Tribal Government, Nome Eskimo Community, Aztec, Mayan, etc.

This question design was also successfully tested by Federal agencies during the Spring and Summer of 2023.[46] This research explored how to collect detailed responses within the combined question approach without a Some Other Race category, as most Federal surveys do not include an option for "Other" or "Some Other Race." The research showed that the combined question with detailed checkboxes performed well, especially when multiple collection screens were offered to collect the minimum response categories followed by detailed response categories.

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[45] Jones, N., Hixson, L, Pratt, B., Shin, H. and Ramirez, R. (2015). "Rationale for Race and Ethnic Question Design Refinements: Optimizing Detailed Reporting in the 2015 National Content Test." U.S. Census Bureau.
[46] U.S. Office of Management and Budget Interagency Technical Working Group on Race and Ethnicity Standards. (2024). Annex 2. Testing Team Report.

Figure 3. Example of a Self-Response Question Design that Collects Race and Ethnicity Data Using Minimum Reporting and Detailed Categories.

What is your race and/or ethnicity?
Select all that apply and enter additional details in the spaces below.
Note, you may report more than one group.

☐ **WHITE** – *Provide details below.*

| ☐ German | ☐ Irish | ☐ English |
| ☐ Italian | ☐ Polish | ☐ French |

Enter, for example, Scottish, Norwegian, Dutch, etc.

[   ]

☐ **HISPANIC OR LATINO** – *Provide details below.*

| ☐ Mexican | ☐ Puerto Rican | ☐ Cuban |
| ☐ Salvadoran | ☐ Dominican | ☐ Colombian |

Enter, for example, Guatemalan, Spaniard, Ecuadorian, etc.

[   ]

☐ **BLACK OR AFRICAN AMERICAN** – *Provide details below.*

| ☐ African American | ☐ Jamaican | ☐ Haitian |
| ☐ Nigerian | ☐ Ethiopian | ☐ Somali |

Enter, for example, Ghanaian, South African, Barbadian, etc.

[   ]

☐ **ASIAN** – *Provide details below.*

| ☐ Chinese | ☐ Filipino | ☐ Asian Indian |
| ☐ Vietnamese | ☐ Korean | ☐ Japanese |

Enter, for example, Pakistani, Cambodian, Hmong, etc.

[   ]

☐ **AMERICAN INDIAN OR ALASKA NATIVE** – *Enter, for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Mayan, etc.*

[   ]

☐ **MIDDLE EASTERN OR NORTH AFRICAN** – *Provide details below.*

| ☐ Lebanese | ☐ Iranian | ☐ Egyptian |
| ☐ Syrian | ☐ Moroccan | ☐ Israeli |

Enter, for example, Algerian, Iraqi, Kurdish, etc.

[   ]

☐ **NATIVE HAWAIIAN OR PACIFIC ISLANDER** – *Provide details below.*

| ☐ Native Hawaiian | ☐ Samoan | ☐ Chamorro |
| ☐ Tongan | ☐ Fijian | ☐ Marshallese |

Enter, for example, Palauan, Tahitian, Chuukese, etc.

[   ]

6. Additional Topics and Research Questions for Future Exploration

While the initial proposals published in January 2023 were based on a thorough review of existing research, there were several topics for which the Content Team concluded there was not enough existing research to make a definitive recommendation at this time.

Collecting Data for Afro-Descendent Populations

Recent testing conducted by the Census Bureau for the Working Group explored using the terms "Afro-descendent" (in English) and "Afro-descendiente" (in Spanish) to help clarify to Afro-Latino respondents that the definition of Black or African American is inclusive of people across the Black diaspora, whereas without this terminology some Afro-Latino respondents may interpret the category as being only for Black Americans. The terms "Afro-descendent" and "Afro-descendiente" are widely used on censuses throughout Latin America (e.g., Colombia, Panama, Peru, Mexico, Argentina, etc.). The Content Team suggests further research be conducted to examine how to clarify the Black or African American category is inclusive of Afro-descendent populations.

Disaggregation of Black or African American population groups

The Content Team acknowledges the public feedback in support of collecting data on American descendants of enslaved people from Africa by adding a new reporting category for "American Descendants of Slavery" or "American Freedmen." Advocates for the collection of data on this population argue these data are important for reparations and for disaggregating this population from other groups within the larger Black population. However, some have expressed concerns that the addition of a new reporting category for American descendants of enslaved people from Africa would lead to inaccurate data and undercounts of the Black population, particularly for Black immigrants. More research is needed on how best to collect data on this population and which term should be used to describe this population. Further stakeholder engagement is also needed on this topic with civil rights organizations, leaders, and advocates. At present, there is no consensus on which term to use. Further, no research has been conducted to evaluate if the inclusion of this term would result in accurate data for this population or how it would impact the data collected for other Black Americans who do not identify as part of this group.

Understanding How Respondents Interpret the SPD 15 Definitions

The definitions for the minimum reporting categories refer to people with "origins in any of the original peoples of…" However, there has been much discussion within the Content Team of how well understood this terminology is by respondents and Federal agencies tasked with implementing the definitions. In today's modern world where people migrate, sometimes multiple times, how is "origins in any of the original peoples of…" defined and conceptualized, and does this concept still accurately help agencies measure race and ethnicity? The Content Team suggests that research is conducted to understand how this language is understood by respondents and agencies, if it should be revised, and how any potential revisions would impact the ability of agencies to monitor and enforce civil rights laws.

Hispanic or Latino Category and Definition

The Content Team's recommended definition of Hispanic or Latino is consistent with Public Law 94-311 (1976) in which the U.S. Congress mandated the collection of data on Americans of Spanish origin or descent.[47] In the 1997 SPD 15 revisions, the category name "Hispanic" was expanded to **"**Hispanic or Latino" based on research that showed that regional usage of the terms differed. "Hispanic" was

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[47] https://uscode.house.gov/statutes/pl/94/311.pdf.

commonly used in the eastern portion of the United States, whereas "Latino" was commonly used in the western portion. This change was made to contribute to improved response rates. But, this change did not take into account that, with regard to Latin America, Hispanic is a subset of Latino and that "Hispanic" and "Latino" are not interchangeable terms.[48] "Hispanic" has its roots in the colonization of the Americas by Spain and originally referred to individuals who came from or descended from Spanish-speaking countries.[49] The definition of the term "Hispanic" in the Merriam-Webster dictionary is "of, relating to, or being a person of Latin American descent and especially of Cuban, Mexican, or Puerto Rican origin living in the U.S.; or relating to the people, speech, or culture of Spain." While the term "Latino" emerged as a term during the 20th century civil rights movement to unite individuals from various cultures, ethnicities, and histories and primarily referred to individuals who come from or descended from Latin American countries, particularly those colonized by Spain, France, and Portugal including the Caribbean and majority of countries from Central and South America. "Latino" is defined in the Merriam-Webster dictionary as "a native or inhabitant of Latin America; or a person of Latin American origin living in the U.S." According to the U.S. State Department, the U.S. Agency for International Development (USAID), the World Health Organization (WHO), the World Bank, and the United Nations, "Latin America" includes Central and South America. Further, there are Census reports that define Latin America as including *Central America,* which includes Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, and Panama, as well as *South America,* which includes Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Falkland Islands, French Guiana, Guyana, Paraguay, Peru, Suriname, Uruguay, and Venezuela. This geography includes five countries that do not reflect Spanish origin or cultures. Research indicates a disconnect in how the category "Hispanic or Latino" is defined and how people identify.[50]

While the Hispanic or Latino definition focuses on Spanish-speaking countries, some people from non-Spanish-speaking countries in Central America, South America, and elsewhere (e.g., Brazilians, Portuguese, Filipinos, and Belizeans) identify as Hispanic or Latino.[51] Similarly, SPD 15 is silent on how individuals who identify with groups originating in parts of Central and South America and the Caribbean should be classified racially. Additional research should be conducted to explore ways to collect data for individuals of Spanish origin or descent as required under a 1976 law and to ensure both that those data are a valid representation of what is intended to be measured and that the categories are inclusive such that all individuals are represented. The Content Team also suggests future research, including cognitive interviews and qualitative focus groups, with Brazilian Americans, Belizean Americans, and other groups to better understand how they self-identify within the new SPD 15 and whether additional options would need to be made available for them to self-identify more accurately.

Potential Modifications to Minimum Category Names
While the current recommendations for revising SPD 15 make significant strides towards more inclusive category definitions and accurate terminology, the recommendations do contain some problematic

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[48] Alexander, William. (2022). *Ask the OEDI: Hispanic, Latino, Latina, Latinx – Which is Best. Downloaded on 08/01/2023 from https://medschool.duke.edu/blog/ask-oedi-hispanic-latino-latina-latinx-which-best. Hispanic* refers to a person with ancestry from a country whose primary language is Spanish. *Latino* and its variations refer to a person with origins from anywhere in Latin America (Mexico, South and Central America) and the Caribbean.
[49] Oklahoma Historical Society. What is the difference between Latino and Hispanic? Oklahoma: Oklahoma Historical Society; https://www.okhistory.org/learn/latino7.
[50] Passel, Jeffrey S. and Jens Manuel Krogstad. April 19, 2023. "How a coding error provided a rare glimpse into Latino identity among Brazilians in the U.S." https://www.pewresearch.org/short-reads/2023/04/19/how-a-coding-error-provided-a-rare-glimpse-into-latino-identity-among-brazilians-in-the-u-s/.
[51] Passel, Jeffrey S. and Jens Manuel Krogstad. April 19, 2023. "How a coding error provided a rare glimpse into Latino identity among Brazilians in the U.S." https://www.pewresearch.org/short-reads/2023/04/19/how-a-coding-error-provided-a-rare-glimpse-into-latino-identity-among-brazilians-in-the-u-s/.

features. Chiefly, the minimum reporting category names are inconsistent. Two category names reference skin color ("White" and "Black or African American"), two reference geographic regions ("Asian" and "Middle Eastern or North African"), and the remaining two reference a mixture of geographic regions and ancestry ("Native Hawaiian or Pacific Islander" and "American Indian or Alaska Native"). This lack of consistency in the minimum reporting category names does not promote clarity in terms of which (if any) criteria should all people consider when reporting their race and ethnicity.

The Content Team recognizes that only two of the recommended category titles ("White" and "Black or African American") and one of the recommended category definitions ("the Black racial groups of Africa") include references to skin color. Under the current recommendation, the "White" category is now synonymous with the original peoples of Europe. Similarly, the "Black or African American" category is synonymous with individuals with origins in Sub-Saharan Africa, as North Africa is defined as part of the "Middle Eastern or North African" category, thus the remaining geography is Sub-Saharan Africa. Further, the term "Black racial groups of Africa" is not a commonly used term. Further research should be conducted to identify alternative terminology to replace the color-based terms currently used and explore whether the names of minimum categories should be revised, and if so, how?

Understanding Race and Ethnicity Constructs in Various Communities and Languages
Additional research is needed to better understand the specific challenges in understanding the race and ethnicity categories and definitions that some immigrants to the United States may face and which can have implications for data quality. These challenges include linguistic, cultural, and cognitive barriers.[52] Linguistic barriers can arise due to limited proficiency in English, making it difficult for immigrants to comprehend and respond accurately to questions regarding race and ethnicity. Cultural barriers, on the other hand, can stem from differences in how race and ethnicity are conceptualized and discussed in different cultures, leading to confusion and inconsistencies in responses. Cognitive barriers refer to difficulties in comprehending the abstract and complex concepts of race and ethnicity, particularly for immigrants who come from societies where these categories are not commonly used. Additionally, more research has been conducted over the years to understand how questions on race and ethnicity are understood when translated into different languages such as Spanish, Arabic, Korean, etc. SPD 15 does not address how questions and concepts should be translated from English into other languages. The Content Team suggests qualitative research studies be conducted to better understand and inform translation in different languages and consult with OMB on best practices.

7. Conclusion

In the 25 years since the 1997 revision, there have been large societal, political, economic, and demographic shifts in the United States. During this time, Federal agencies have also conducted methodological research to better understand how use of SPD 15 informs the quality of Federal statistics on race and ethnicity. Recognizing the critical need for revisions to SPD 15, it is expected that the recommended revisions will improve the ways in which we measure and present data on the complexity and diversity of the U.S. population.

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[52] Lee J, Bean FD. The diversity paradox: Immigration and the color line in twenty-first century America: Russell Sage Foundation; 2010.