



Understanding the 2024 OMB Updates to Race and Ethnicity Standards: Implications for AAPOR Members

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Introduction

The purpose of this document is to help AAPOR members quickly understand key elements of the OMB revisions to the Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity¹ (SPD 15) and how it may affect their work. In so doing, we provide background on SPD 15, describe the changes, and outline how data users may maintain consistency across time. We also provide suggestions for data weighting and bridging that will be of direct use to AAPOR members who work with federal data sets. This summary is informational only and does not replace OMB guidance. Readers are encouraged to review SPD 15 and the resources referenced at the end of the document and to stay abreast of any future changes to the directive.

On March 28, 2024, the US Office of Management and Budget (OMB) finalized revisions to Statistical Policy Directive No. 15: Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity (SPD 15). Fundamentally, SPD 15 governs how race and ethnicity are collected and defined for statistical purposes. The 2024 revisions to SPD 15 were effective as of its publication date and federal agencies were instructed to comply with these updates as soon as possible and no later than March 28, 2029².

Rewrites to SPD 15 encourage respondents to select as many options for race and ethnicity that correspond to how they self-identify. Hispanic origin has also been eliminated as a stand-alone question and has instead been added as an option in the combined race/ethnicity question. Race and ethnicity options now include Middle Eastern or North African (MENA) as a required minimum category. The revised SPD 15 also requires the collection of additional detail for each minimum required race and ethnicity category, unless an exemption is requested. Such changes will thus necessitate adjustments to both collectors and users of federal data sets. For example, federal agencies may need to update databases or make necessary changes for bridging purposes in order to maintain continuity across time.

¹ <https://spd15revision.gov/>

² <https://spd15revision.gov/content/spd15revision/en/news/2024-10-16-omb-blog.html>

Background

Background on Race/Ethnic Categories

Race and ethnicity categories have evolved over time since they were first collected in the 1790 Census. Changes on the U.S. Decennial Census of Population (U.S. Census) reflect developing language to describe groups (e.g., changing from “colored” to “Negro” to “Black” and “African American”), where immigrants originate, and other changes in how Americans conceptualize race. Starting in 1960, the U.S. Census switched to mostly self-administered questionnaires so people began self-identifying their race rather than being assigned by enumerator. Another important shift was that Americans could select multiple racial categories on the Census starting in 2000.

OMB dictates what categories the federal government must collect, then it is up to the individual agency to determine exactly which compliant version of the question to adopt. The U.S. Census Bureau conducts extensive research before implementing changes, e.g. [2015 National Content Test](#). Before this recent update, OMB had not updated their guidelines since 1997. In March 2024 OMB published an updated [Statistical Policy Directive No. 15](#) after a period of public comment which defined standards for collecting race/ethnicity data on a federal level. The main changes were:

- Treating the Hispanic category as part of the combined race/ethnicity question rather than having Hispanic origin as its own question
- Collecting data on the Middle Eastern and North African (or MENA) category

These changes to the racial and ethnic categories represent decades of debates between scholars, government employees, survey researchers, and activists. As such, the removal of the two-part Hispanic identifier question and the inclusion of a MENA category along with instructions to “Select all that apply,” have attempted to resolve these issues and bring about greater representation and equity in the collection and dissemination of racial and ethnic data in the United States.

Figure 1 below illustrates the 1997 version, with figures 2-4 the proposed revisions. OMB encourages agencies to conduct research to further understand best methods and practices for collecting the new standard. Agencies must submit action plans for how they will be in compliance by September 2025.

Figure 1 1997 SPD 15's Two-Questions Format for Self-Response³

Are you Hispanic or Latino?

No, not Hispanic or Latino
 Yes, Hispanic or Latino

What is your race? Select one or more.

American Indian or Alaska Native
 Asian
 Black or African American
 Native Hawaiian or Other Pacific Islander
 White

Figure 2 Race and Ethnicity Question with Minimum Categories, Multiple Detailed Checkboxes, and Write-In Response Areas with Example Groups⁴

What is your race and/or ethnicity?
Select all that apply and enter additional details in the spaces below.

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, Maya, etc.
[Write-in space]

Asian – Provide details below.
 Chinese Asian Indian Filipino
 Vietnamese Korean Japanese
Enter, for example, Pakistani, Hmong, Afghan, etc.
[Write-in space]

Black or African American – Provide details below.
 African American Jamaican Haitian
 Nigerian Ethiopian Somali
Enter, for example, Trinidadian and Tobagonian, Ghanaian, Congolese, etc.
[Write-in space]

Hispanic or Latino – Provide details below.
 Mexican Puerto Rican Salvadoran
 Cuban Dominican Guatemalan
Enter, for example, Colombian, Honduran, Spaniard, etc.
[Write-in space]

Middle Eastern or North African – Provide details below.
 Lebanese Iranian Egyptian
 Syrian Iraqi Israeli
Enter, for example, Moroccan, Yemeni, Kurdish, etc.
[Write-in space]

Native Hawaiian or Pacific Islander – Provide details below.
 Native Hawaiian Samoan Chamorro
 Tongan Fijian Marshallese
Enter, for example, Chuukese, Palauan, Tahitian, etc.
[Write-in space]

White – Provide details below.
 English German Irish
 Italian Polish Scottish
Enter, for example, French, Swedish, Norwegian, etc.
[Write-in space]

³ <https://spd15revision.gov/content/spd15revision/en/history/1997-standards.html>

⁴ <https://spd15revision.gov/content/spd15revision/en/2024-spd15/question-format.html>

Figure 3 Race and Ethnicity Question with Minimum Categories Only and Examples

What is your race and/or ethnicity?
Select all that apply.

American Indian or Alaska Native
For example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Maya, etc.

Asian
For example, Chinese, Asian Indian, Filipino, Vietnamese, Korean, Japanese, etc.

Black or African American
For example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.

Hispanic or Latino
For example, Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, etc.

Middle Eastern or North African
For example, Lebanese, Iranian, Egyptian, Syrian, Iraqi, Israeli, etc.

Native Hawaiian or Pacific Islander
For example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.

White
For example, English, German, Irish, Italian, Polish, Scottish, etc.

Figure 4 Race and Ethnicity Question with Minimum Categories Only

What is your race and/or ethnicity?
Select all that apply.

American Indian or Alaska Native

Asian

Black or African American

Hispanic or Latino

Middle Eastern or North African

Native Hawaiian or Pacific Islander

White

Action by Federal Agencies

With the effective date of the standards of March 28, 2024, OMB has instructed agencies to move immediately to bring their collection and record keeping systems into compliance.

Work to plan for implementation, best practices, and the effects of the new standards on data has already begun in earnest. Additionally, agencies have already begun plans for implementation with Federal Register notices. Past work supporting the new standards and recent work continues and OMB encourages agencies to conduct their own research and share with their federal partners and stakeholders.

Survey Weighting and Using Bridging to Adjust for Measurement Changes

Estimates of race and ethnicity produced by federal statistical agencies are frequently referenced as a gold standard in data collection, allowing survey researchers to check their survey participation against larger demographic pools. Datasets are used for weighting comparisons.

A valuable survey weighting practice is to post stratify or rake weights to external population control totals to align weighted demographic distributions with population distributions. These adjustments account for over- or underrepresentation of different demographic groups in a survey's respondent set. Race and ethnicity are commonly used in poststratification and raking, with sources like the ACS often used to provide population control totals.

To support aligning survey estimates with population estimates used for poststratification and raking, surveys should ideally use the same race and ethnicity questions and categories as used from sources used for population control totals. Using the same questions will align the race/ethnicity responses with those from the source for the control totals. According to the Census Bureau's initial plans⁵, the updated race/ethnicity question may first be asked to the full sample in 2027, with 2027 1-year estimates released in fall of 2028. This timeline can be considered for planning when to update race and ethnicity questions for surveys.

For different reasons, surveys may not have time to implement the change in their race/ethnicity questions concurrent with the changes for the source providing their race/ethnicity population control totals. Even when timing can be aligned, it may be helpful for planning to analyze estimates of the proportion of the U.S. population that respond with different answers to the different race/ethnicity question. Many surveys also have the goal of providing estimates that are comparable over time to study trends in key measures. However, anticipated changes in race/ethnicity measurement due to updated SPD15 guidance can disrupt the comparability of question versions and trends if not handled with care. When race/ethnicity estimates in sources like the ACS change due to measurement changes, conducting weighting adjustments to new population distributions may disrupt the comparability of estimates.

⁵ <https://www.census.gov/newsroom/blogs/random-samplings/2024/11/implementation-spd-15-acss.html>

To support this, the OMB Interagency Technical Working Group for SPD15 released guidance to support comparison of race/ethnicity data with different race/ethnicity questions corresponding to either 1997 or 2024 SPD15 guidance. Specifically, the team released bridging factors that estimate the proportion of cases with different responses under 1997 guidance that respond in different ways under 2024 guidance. The reverse bridging factors (estimating the proportion of cases with different responses under 2024 guidance that respond in different ways under 1997 guidance) is also available. These proportional bridging factors are also available for estimates for population subgroups based upon age ranges. The Bridging Team Methods Report describes the methodology and how to use the bridging factors, with bridging factors, SAS and Python programs, and examples available from

<https://spd15revision.gov/content/spd15revision/en/data-tools.html>.

Relationship with AAPOR Equity and Inclusion

The Inclusion and Equity Committee (IEC) is responsible for the oversight of AAPOR's inclusion and equity strategies. This committee establishes, implements, and maintains programs that promote the inclusion of diverse AAPOR members and ensure that members of marginalized groups receive equitable opportunities, recognition, and support within the organization.

The updated race and ethnicity guidelines from OMB include questions that have been tested extensively, with the involvement of several AAPOR members. For example, AAPOR members have participated in the qualitative evaluation of the question wording with numerous language, race and ethnicity groups. The updated question wording has been the product of that extensive testing. The process of making changes in a way that reflects the voice of many affected people is in line with the aims of the IEC, as is our goal of keeping the AAPOR community informed of changes and their potential implications.

Summary and Conclusion

In summary, the changes in SPD 15 may create demographic shifts in race/ethnicity data due to how specific items are collected and coded. Researchers should be aware of these differences when comparing data collected using previous standards and take advantage of the resources for advice in bridging.

Resources:

- OMB SPD15 Website: <https://spd15revision.gov/>
- SPD15 Federal Register Notice:
<https://www.federalregister.gov/documents/2024/03/29/2024-06469/revisions-to-ombs-statistical-policy-directive-no-15-standards-for-maintaining-collecting-and>
- ACS Federal Register Notice:
<https://www.federalregister.gov/documents/2024/07/12/2024-15336/american->

[community-survey-timeline-for-implementing-updated-2024-race-and-ethnicity-data-standards](#)

Bridging research:

- Bridging Data Tools and Report:
<https://spd15revision.gov/content/spd15revision/en/data-tools.html>
- Census Scientific Advisory Committee Meeting Presentation:
<https://www2.census.gov/about/partners/cac/sac/meetings/2024-09/presentation-implementation-race-ethnicity-standards.pdf>

Effects of new standards on data:

- Measuring Potential Effects of Introducing the 2024 Race and Ethnicity Standards into the Current Population Survey Mark Loewenstein, David Piccone, and Anne Polivka NBER Working Paper No. 32812 August 2024 JEL No. J15. DOI 10.3386/w32812. Accessible at: <https://www.nber.org/papers/w32812>
- McKinney, Kevin L. and John M. Abowd, "Estimating the Potential Impact of Combined Race and Ethnicity Reporting on Long-Term Earnings Statistics," In Randall Akee, Lawrence Katz and Mark Loewenstein, eds., *Race, Ethnicity, and Economic Statistics for the 21st Century*, (Chicago, University of Chicago Press for the National Bureau of Economic Research, forthcoming).
<https://www.nber.org/system/files/chapters/c14957/c14957.pdf>

Additional Background

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