

Rethinking and Updating Demographic Questions: Guidance to Improve Descriptions of Research Samples

Jennifer L. Hughes,* Abigail A. Camden, and Tenzin Yangchen
Agnes Scott College

ABSTRACT. In this editorial, we encourage authors to rethink and update the demographic questions they use in their research surveys. We argue that this is important for ethical and professional reasons (i.e., inclusion and advancing diversity) and also for research integrity reasons (i.e., accurately describing samples for the purposes of clarity, which impacts generalization of findings and possible replication of findings). We give information about the 5 most commonly used demographic questions in survey research (i.e., gender identity, age, ethnicity and race, education, and location) and other additional demographic questions often found in research (i.e., questions about children, disability, employment, relationship status, religion, sexual orientation, and social class). We list questions and answer choices that we selected after reviewing the research literature, and we include our additional, more inclusive answer choices and coding categories. These modified questions better reflect the complexity of respondents' identities and provide clarity as to how to assess those identities.

In this editorial, we will encourage authors to rethink and update the demographic questions they use in their research surveys. We argue that this is important for ethical and professional reasons (i.e., inclusion and advancing diversity) and also for research integrity reasons (i.e., accurately describing samples for the purposes of clarity, which impacts generalization of findings and possible replication of findings).

Researchers often collect demographic information in research surveys for two reasons. The first reason concerns collecting information to answer their research questions, which can involve analyzing demographic information to determine whether identity is causing an individual to do a specific thing (i.e., independent variable) or if something is causing an individual to adopt a certain identity (i.e., dependent variable; Abdelal, Herrera, Johnston, & McDermott, 2009). It should be noted that identity can explain why people behave in certain ways, but just because someone has a certain identity does not mean that the person will act in a certain way (Abdelal et al., 2009).

The second reason researchers collect demographic

information is to accurately describe their sample. It is important to accurately describe a sample for the following reasons. First, by doing this, authors can determine if the participants they wanted to recruit responded to the survey and if those who responded comprehensively represent the population the researchers wanted to study. Second, it is important for researchers to describe their samples so readers are better able to account for similarities and differences across studies. Third, by describing their sample, other researchers will have a better chance of replicating the original findings. Finally, if readers know more about the sample, they will know whether the findings are specific to that one sample or if they can be generalized to a larger group of people.

Many of the demographic questions used in survey research can be considered to be sensitive questions because the way they are written often ignores the complexity of identity (BrckaLorenz, Zilvinskis, & Haeger, 2014). Identity is not simple and asking participants to classify themselves into categories that do not fit them can lead to frustration and uncertainty about how to respond.

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Researchers have found that sensitive questions can affect survey outcomes by decreasing (a) the number of participants who are willing to take the survey, (b) response rates to particular items, and (c) the accuracy of responses (Tourangeau & Yan, 2007). Accounting for the variety of individual identities can be difficult in survey research (BrcaLorenz et al., 2014). Rethinking the wording of questions and updating historical categories is needed to better represent participants' identities (Moody, Obear, Gasser, Cheah, & Fechter, 2013).

This editorial will review information collected from many sources about the five most commonly used demographic questions (i.e., gender identity, age, ethnicity and race, education, and location) used in research surveys. We could not find a single source that offered information about how to write accurate and inclusive demographic questions or one source with example questions; consequently, we gathered information from many recent sources. In conducting our research, we found that only recently have researchers and governmental agencies begun to question the simplistic categories that have been historically used (Pew Research Center, 2016). An example includes that the U.S. Census did not allow respondents to select more than one racial category until 2000 (BrcaLorenz et al., 2014). In this editorial, we will list questions and answer choices (i.e., if closed-ended) that we selected from the many of the available options used in the research literature. Further, we will include our additional, more inclusive answer choices. For the open-ended questions, we will list coding categories. We feel these altered questions better reflect the complexity of respondents' identities and provide clarity as to how to assess those identities.

After we review the standard demographic questions, we will give information about additional demographic questions that are found in research. These include questions about children, disability, employment, relationship status, religion, sexual orientation, and social class. According to the *Publication Manual of the American Psychological Association* (American Psychological Association [APA], 2013) researchers should "describe the groups as specifically as possible, with particular emphasis on characteristics that may have bearing on the interpretation of results" (p. 29). Following this recommendation, we must depart from apparently straightforward ways to assess these and move toward more precise and useful approaches. Again, we recommend using the updated questions we provide in this editorial if the information collected applies to the project

being conducted. For example, for a study on work behaviors, it may not be necessary for researchers to ask about sexual orientation, but for a research study about couples, researchers would want to evaluate participants' sexual orientation.

Before we cover the specific demographic questions, we will discuss where these questions should be placed in a survey. Many researchers have suggested placing demographic questions at the end of the survey in order to keep the interest of the participant, to avoid possible discomfort from sensitive questions, and because demographic questions are easier to answer when a participant has survey fatigue at the end of a survey (Albert, Tullis, & Tedesco, 2009; Bourque & Fielder, 2002; Colton & Covert, 2007; Dillman, 2007; Jackson, 2012; Pew Research Center, 2016). Gilovich, Keltner, and Nisbett (2006) also advocated for placing the demographic questions at the end of the survey to avoid the possibility of stereotype threat (i.e., being at risk of confirming, as a self-characteristic, a negative stereotype about one's own social group; Steele & Aronson, 1995), which could prime respondents with their demographic characteristics and lead them to respond differently than they otherwise would have.

However, other researchers have argued that, if researchers want to route participants through particular sections of the survey, if the questions are needed to determine eligibility for the survey (Pew Research Center, 2016), if researchers want to use screener questions to determine if participants are eligible to continue with the survey (Dillman, Smyth, & Christian, 2014), or if demographics are an important part of the analyses (Gilovich et al., 2006), demographic questions should be placed at the beginning of the survey. We would add that placing demographic questions at the beginning of the survey allows the researcher to know the demographic information from those who choose to not complete the entire survey to best understand systematic differences in participation.

Recently, researchers have begun to conduct empirical research on this topic and have found some support for placing the demographic questions at the beginning of the survey. For example Teclaw, Price, and Osatuke (2012) and Drummond, Sharp, Carsin, Kelleher, and Comber (2008) found that placing the demographic questions at the beginning of their surveys increased the response rate for the demographic questions and did not affect the response rate for the nondemographic questions. We argue against using generic methodological practices for placement of demographic

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questions and instead to carefully consider the questions and sample being used (Green, Murphy, & Synder, 2000).

Standard Demographic Questions

Gender Identity

Historically, researchers have assessed *sex* or *gender* in their surveys. Unfortunately, they have often used the terms interchangeably or used the terms that imply biological sex, *male* and *female*, to measure gender, rather than using the gender terms *man*, *woman*, *cisgender*,¹ or *transgender*² (Westbrook & Saperstein, 2015).

Gender is culturally driven and has been defined as attitudes, feelings, and behaviors associated with a person’s biological sex (APA, Divisions 16 and 44, 2015). Westbrook and Saperstein (2015) suggested that researchers assess gender identity as compared to gender and acknowledge that gender identity can change over time. Gender identity is defined “as a person’s deeply-felt, inherent sense of being a boy, a man, or male; a girl, a woman, or female; or an alternative gender (e.g., genderqueer,³ gender nonconforming,⁴ boygirl, ladyboy). These gender identities may or may not correspond to a person’s sex assigned at birth or to a person’s primary or secondary sex characteristics” (APA, Divisions 16 and 44, 2015, p. 20). Gender identity is internal and not necessarily visible to others (APA, Divisions 16 and 44, 2015).

Moody et al. (2013) proposed a simple open-ended question, which we endorse and it is given in Figure 1. Some researchers have suggested using two questions to assess sex and gender identity (Balarajan, Gray, & Mitchell, 2011; Tate, Ledbetter, & Youssef, 2013; Westbrook & Saperstein, 2015), but unless researchers need to know information about sex and gender identity, we think Moody et al.’s (2013) question works well.

FIGURE 1	
How do you currently describe your gender identity?	
<input type="checkbox"/>	Please specify: _____
<input type="checkbox"/>	I prefer not to answer.

We added the word *currently* to their question because of gender fluidity (Westbrook & Saperstein, 2015) and used the response option *please specify* instead of *free response* because we prefer a more directive approach. Moody et al. (2013) also suggested coding options if researchers did not

want to use the open-ended question. We would add the terms *gender questioning*,⁵ *disorders of sex development*,⁶ and *two-spirit*⁷ to their coding list. The updated coding list would include: (a) man, male, or masculine; (b) transgender man, male, or masculine; (c) transgender woman, female, or feminine; (d) woman, female, or feminine; (e) gender nonconforming, genderqueer, or gender questioning, (f) intersex, disorders of sex development, two-spirit, or other related terms; (g) no response; and (h) prefer not to answer.

Moody et al. (2013) stated that open responses allow for possible changes in terminology over time, and therefore responses collected may be used to form future response options. We also believe an open-ended question is useful if the researcher is surveying people from other countries because it allows participants to use terms they feel are appropriate for them. Although using an open-response item creates more work for the researcher because of coding and trying to understand what participants’ responses mean, we feel that an open-ended question allows for participants to feel included, no matter how they identify.

Rainbow Health Ontario and Hart (2012) noted several possible problems when collecting information about gender identity. Namely, some

¹ *Cisgender* describes “a person whose gender identity and gender expression align with sex assigned at birth” (APA, 2015, p. 862).

² *Transgender* “is an umbrella term used to describe the full range of people whose gender identity and/or gender role do not conform to what is typically associated with their sex assigned at birth” (APA, 2015, p. 863).

³ *Genderqueer* is “a term to describe a person whose gender identity does not align with a binary understanding of gender (i.e., a person who does not identify fully as either a man or a woman)” (APA, 2015, p. 862). The APA (2015) adds: “people who identify as genderqueer may think of themselves as both man and woman (bigender, pangender, androgyne); neither man nor woman (genderless, gender neutral, neutrois, agender); moving between genders (genderfluid); or embodying a third gender (p. 862).

⁴ *Gender nonconforming* is an umbrella term used to describe “people whose gender expression or gender identity differs from gender norms associated with their assigned birth sex” (APA, 2015, p. 862).

⁵ *Gender questioning* describes those who may be exploring their gender identity and who feel it does not match their assigned sex at birth” (APA, 2015).

⁶ *Disorders of sex development* (some prefer the term intersex) can be defined as “a variety of medical conditions associated with atypical development of an individual’s physical sex characteristics” (Hughes, Houk, Ahmed, & Lee, 2006, as cited in the APA, 2015, p. 861).

⁷ *Two-spirit* is a Native American term and is used to identify “people with both male and female gender roles, which can be because of gender identity or sexual orientation, or both” (APA, 2015, p. 863).

participants have more than one gender identity, some lists do not have options that fit the participant, and the order in which options appear can be interpreted as an order of researcher preference and thereby influence how participants respond. Moody et al.'s (2013) open-ended response item helps with these problems because participants with multiple gender identities can write multiple answers, the respondents do not have to select off a list, and the researchers do not show a preference for gender identity by listing the response options in a certain order. If a researcher wanted to list choices for the participants, they could manage some of the above issues by alphabetizing the options or randomizing the response option. They also could allow for multiple responses to be selected and offer an *other* option for participants' who are not represented on the available list.

Age

Age is one of the easiest demographics to assess and can be assessed the same way in most countries with the exception of some Asian countries. In most countries, when children are born, they start their age at zero. However,

in the traditional East Asian age reckoning system, originating in China and still widely used in some East Asian countries such as Korea, newborns start life outside the womb at one year old (becoming two years old on the first day of the subsequent lunar New Year's day; Meinlschmidt & Tegethoff, 2015, p. 85).

We suggest that, when asking about age, researchers use an open-ended response format (see Figure 2). This allows researchers to know specific ages of their participants. Historically, researchers used categories such as the ones written by the U.S. Department of Education (2009) including (a) 16–18 years, (b) 19–24 years, (c) 25–44 years, (d) 45–59 years, and (e) 60 and older. However, we think these categories are arbitrary, and some of the categories span what could be considered to be a large developmental range (i.e., 25 to 44 years). In addition, they group those in their 60s, 70s, 80s, 90s, and 100s into one category.

FIGURE 2	
What is your age in years?	
<input type="checkbox"/>	Please specify: _____
<input type="checkbox"/>	I prefer not to answer.

Ethnicity and Race

It is important to collect information about ethnicity and race because it can help researchers to assess disparities in health and environmental risks (U.S. Census Bureau, 2013) and the United States is becoming more diverse in terms of ethnicity and race with the 2010 Census reporting just over one-third of the U.S. population identifying as something other than non-Hispanic White (U.S. Census Bureau, 2011). However, ethnicity and race have been difficult to assess because of confusion with the terminology (Roller & Research Design Review, 2016). Using focus groups, the U.S. Census (2013) found that many Americans did not know the difference between *ethnicity* and *race* and thought they meant the same thing. The U.S. Census (2013) report noted that racial and ethnic identity are “a complex mix of one’s family and social environment, historical or socio-political constructs, personal experience, context, and many other immeasurable factors” and this makes them hard to quantify (p. xi).

Recently, most governmental agencies in the United States have used the guidelines put forth by the U.S. Office of Management and Budget (1997), which included asking about *ethnicity* and *race*. However, the Census Bureau is considering using a new approach in 2020, which includes eliminating the terms *ethnicity* and *race* (Cohn, 2015). We suggest this new approach, given in Figure 3, for researchers collecting data in the United States. This approach decreases the typical confusion created with the old categories and includes an updated list of categories with a new *Middle Eastern and North African* response category (Cohn, 2015;

FIGURE 3	
Which categories describe you? Select all that apply to you:	
<input type="checkbox"/>	American Indian or Alaska Native—For example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community
<input type="checkbox"/>	Asian—For example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese
<input type="checkbox"/>	Black or African American—For example, Jamaican, Haitian, Nigerian, Ethiopian, Somali
<input type="checkbox"/>	Hispanic, Latino or Spanish Origin—For example, Mexican or Mexican American, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian
<input type="checkbox"/>	Middle Eastern or North African—For example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian
<input type="checkbox"/>	Native Hawaiian or Other Pacific Islander—For example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese
<input type="checkbox"/>	White—For example, German, Irish, English, Italian, Polish, French
<input type="checkbox"/>	Some other race, ethnicity, or origin, please specify: _____
<input type="checkbox"/>	I prefer not to answer.

Krogstad, 2014). We suggest for the option *some other race, ethnicity, or origin*, the wording *please specify* be added. In addition, Moody et al. (2013) suggested using a category *prefer not to answer*, which we suggest using (see Figure 3).

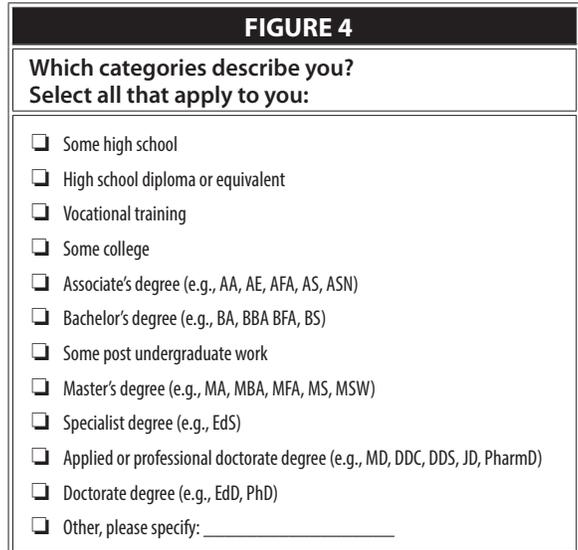
Moody et al. (2013) suggested using different wording if recruiting participants outside of the United States. They suggested that researchers should consider *national identity*, as well as ethnic and racial identity. National identity is a person's sense of belonging to a state or nation and involves "many often co-existing and overlapping social identities, including territorial, racial, religious, linguistic, and gender identities" (Ashmore, Jussim, & Wilder, 2001, p. 71). We encourage researchers collecting data outside of the United States to consider altering the wording of this question by adding *national identity* in the question and to make sure the categories represent people in those countries. In addition, we suggest that researchers look into typical survey practices in the countries they are recruiting from because, in some countries, ethnic or racial questions can be seen as offensive or even illegal to ask (White, 2015).

Education

Education is another standard demographic question used to describe samples. The typical categories are listed in Figure 4 (U.S. Census Bureau, 2010a). We changed the wording of *less than high school* to *some high school* because the wording was more positive and concordant with other response options. We also suggest adding *vocational training*, *some postgraduate work*, and *specialist degree*. The *other, please specify* category that we added can be used for those respondents who did not attend high school or have another type of education not listed. White (2015) noted that it is important to remember that the education level for degrees does not always correspond from country to country, so those collecting data outside of the United States should plan for this (see Figure 4).

Location

Some researchers collect data in person and therefore know the location of the participants, but many researchers collect data online. If this is the case, they should ask where the participants currently live. The U.S. Census Bureau (2010b) suggested using the following question, listed in Figure 5, when collecting data in the United States. We added a response for *Puerto Rico or other U.S. territories* and *other, please specify*. Using the other



option and asking respondents to specify where they live allows researchers to see if respondents outside of the United States took the survey. When using samples including participants from outside of the United States, the researcher might instead want to use an open-ended question and ask for the respondent's country of residence and not list the regions of the United States.



Additional Demographic Questions

Next we will cover additional demographic categories that can be used if applicable to the research being conducted. They include: children, disability, employment, income, relationship status, religion, sexual orientation, and social class. We will again give recommendations about how to assess these variables.

Children

Hughes (2013) found that researchers asked questions about children in many different ways.

She suggested that researchers should ask questions about the number of children, their ages, and whether or not they live in the household. She based her suggestions on Lee and Duxbury's (1998) recommendation for assessing children. They suggested asking participants about their children, if they have children, by using the youngest child at home because younger children often involve more work.

Hughes (2013) suggested asking about number of children first, and she added *adopted*, *foster*, and *step children* to the wording of the question (see Figure 6) to try to decrease confusion for those responding who may be representing different types of parenting roles. We also suggest adding an option for those who are (or their partner is) pregnant or in the process of adopting a child.

FIGURE 6

Do you have biological, adopted, foster, or step children?

No

No, but I am (or my partner is) pregnant or in the process of adopting

Yes, one child

Yes, two children

Yes, three children

Yes, four or more children

The second question, listed in Figure 7, about the ages of the participants' children can be combined with the third question about whether or not children live with the parents. Hughes (2013) suggested using Lee and Duxbury's (1998) response options and that, because of the growing number of adult children living at home, an option for *adult children (19+)* should also be added.

FIGURE 7

If you have children, what are the ages of your children and do they live with you? (Mark all that apply)

	They do not live with me	They live with me part-time	They live with me full-time
Preschool (birth to 5 years old)			
Elementary (6 to 13 years old)			
Adolescent (14 to 18 years old)			
Adult Children (19+ years old)			

Disability

There is disagreement about how to define disability, and the federal government uses several different definitions (Bureau of Labor Statistics, 2014). We also found that disability is assessed in other countries using different terminology, so researchers using samples from outside of the United States need to be aware of this.

Moody et al. (2013) and BrckaLorenz et al. (2014) developed two questions assessing different aspects of disability that we view as inclusive. The question Moody et al. (2013) suggested asks about long-lasting or chronic conditions that substantially limit life activities and is listed in Figure 8. Participants who mark *yes* are asked to write a response to explain. We again added the response option *please specify* instead of *free response*.

FIGURE 8

Do you have a long-lasting or chronic condition (physical, visual, auditory, cognitive or mental, emotional, or other) that substantially limits one or more of your major life activities (your ability to see, hear, or speak; to learn, remember, or concentrate)?

Yes

No

I prefer not to answer.

If yes, please indicate the terms that best describe the condition(s) you experience:

Please specify: _____

I prefer not to answer.

BrckaLorenz et al. (2014) reported about how disability can be assessed using diagnoses. If a researcher wants to know about specific diagnoses but does not need to know about the impact, this question, listed in Figure 9, might work for their research.

FIGURE 9

Have you been diagnosed with any disability or impairment?

Yes

No

I prefer not to answer.

If yes, which of the following have been diagnosed? (Mark all that apply)

A sensory impairment (vision or hearing)

A mobility impairment

A learning disability (e.g., ADHD, dyslexia)

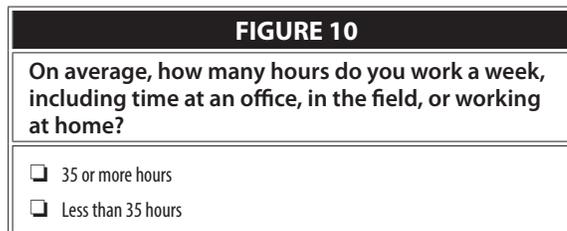
A mental health disorder

A disability or impairment not listed above

Employment

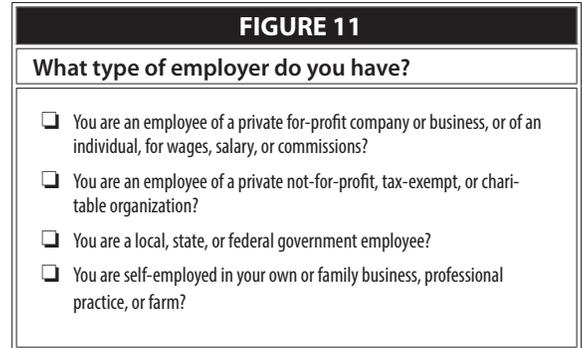
If researchers target employed participants, they may want to report several types of information. That information could include: full-time vs. part-time employment, type of employer, and type of industry. The response items may need to change if researchers are recruiting participants outside of the United States because of different employment practices. We also suggest that researchers instruct participants to answer the questions about employment using their primary job (i.e., typically the job where they work the most hours), if they have multiple jobs (U.S. Census Bureau, 2016a). If researchers suspect that some of their participants will have multiple jobs, they may want to ask an additional question about the number of jobs each participant has.

Full-time vs. part-time employment. Historically, many researchers have enrolled participants, regardless of whether or not they are full-time or part-time workers, and the researchers who have differentiated full-time and part-time employment have done so in many different ways (Hughes, 2013). The Bureau of Labor Statistics (U.S. Department of Labor, 2016) defined full-time labor as 35 or more hours. Because of this, Hughes (2013) suggested that researchers should ask the following question, listed in Figure 10, with 35 or more hours as *full-time work* and less than 35 hours as *part-time work*. Hughes (2013) added that work hours should include hours worked at an office, in the field, or at home. This allows for those who work in the field or telecommute to be included.



Type of employer. The U.S. Census Bureau (2016a) used the following categories to assess type of employer, which we endorse (see Figure 11). However, we combined the governmental employee categories and the self-employed categories from three categories each to one category each.

Type of industry. Some researchers report type of industry in their research papers. Researchers who recruit participants from the same industry will find reporting about the types of industry



in the method section to be simple. However, many researchers recruit participants representing numerous industries, which is harder to summarize.

The U.S. Census Bureau (2016b) used the following question to assess industry, which we endorse if a researcher wants to specify industry. We suggest using the phrase *not employed* instead of *unemployed* because unemployed can have negative connotations, and some people are not employed and not seeking work. We should note that, by using this question listed in Figure 12, some respondents might feel like they will be identified by their occupation, so researchers will want to consider that before using the question.

Researchers who do not want to include a list as long as the one suggested could use a shorter open-response question and categorize the responses using the categories below. However, categorizing the responses could take the researcher quite a bit of time, depending the size of the sample (see Figure 12).

Relationship Status

Historically, researchers have only asked about marital status, but this was confusing and sometimes offensive to those who were in partnerships and could not marry, were not married, or did not want to marry (Makadon & Tillery, 2013). To be more inclusive and to obtain more accurate answers, we suggest that researchers ask about relationship status using two questions, listed in Figure 13. This will allow researchers to describe and understand their samples in more meaningful ways. We included a response option for those practicing polyamory.⁸ We also included *civil unions* because, in some countries outside of the United States, that is a common practice (White, 2015) and because same-sex marriage was not legal nationwide in the United States until 2015 (de Vogue & Diamond,

⁸*Polyamory* is defined as a person who wants or has multiple loving relationships (Manley, Diamond, & van Anders, 2015).

FIGURE 12

Which of the following categories best describes the industry you primarily work in (regardless of your actual position)?

- | | |
|---|---|
| <input type="checkbox"/> Not employed | <input type="checkbox"/> Processing |
| <input type="checkbox"/> Retired | <input type="checkbox"/> Legal services |
| <input type="checkbox"/> Agriculture, forestry, fishing, or hunting | <input type="checkbox"/> Manufacturing—Computer and electronics |
| <input type="checkbox"/> Arts, entertainment, or recreation | <input type="checkbox"/> Manufacturing—Other |
| <input type="checkbox"/> Broadcasting | <input type="checkbox"/> Military |
| <input type="checkbox"/> Education—College, university, or adult | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Education—Primary/secondary (K-12) | <input type="checkbox"/> Publishing |
| <input type="checkbox"/> Education—Other | <input type="checkbox"/> Real estate, rental, or leasing |
| <input type="checkbox"/> Construction | <input type="checkbox"/> Religious |
| <input type="checkbox"/> Finance and insurance | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Government and public administration | <input type="checkbox"/> Scientific or technical services |
| <input type="checkbox"/> Health care and social assistance | <input type="checkbox"/> Software |
| <input type="checkbox"/> Hotel and food services | <input type="checkbox"/> Telecommunications |
| <input type="checkbox"/> Information—Services and data | <input type="checkbox"/> Transportation and warehousing |
| <input type="checkbox"/> Information—Other | <input type="checkbox"/> Utilities |
| | <input type="checkbox"/> Wholesale |
| | <input type="checkbox"/> Other industry, please specify: _____ |

FIGURE 13

Are you currently in a romantic relationship with a partner or partners?

- No
- Yes, one partner
- Yes, I have multiple partners
- If you answered yes, are you? (Mark all that apply):
- Not applicable
- Married or in a civil union, and living together
- Married or in a civil union, and living apart
- Not married or in a civil union, and living together
- Not married or in a civil union, and living apart

2015). These questions do not ask about past relationships or whether a participant is divorced, widowed, or separated. If researchers want to know this information, they could add a third question.

Religion

Because of the many different types of religions, Moody et al. (2013) suggested using the open-ended question listed in Figure 14. We used the response option *please specify* instead of *free response*. They list the coding responses as: (a) Agnostic; (b) Animist; (c) Atheist; (d) Baha’i; (e)

FIGURE 14

How do you describe your religion, spiritual practice, or existential worldview?

- Please specify: _____
- I prefer not to answer.

Buddhist; (f) Christian (including other descriptions, which might include related faith or practice communities; further analysis may subdivide this response category into Protestant, Catholic, Lutheran, Methodist, Mormon, Presbyterian, or other frequently cited denominations); (g) Deist; (h) Hindu; (i) Humanist; (j) Jewish (including other descriptions, which might include related faith or practice communities); (k) Muslim; (l) Pagan; (m) Pantheist; (n) Polytheist; (o) Secular; (p) Sikh; (q) spiritual but not religious; (r) Taoist; (s) Unitarian Universalist; (t) Wiccan; (u) no response; and (v) prefer not to answer.

Sexual Orientation

Sexual orientation has been defined as a person’s lasting attraction (i.e., including romantic, emotional, and/or physical attraction) to another person (GLADD, 2016b). It has historically been assessed using sexual attraction and sexual behavior (APA, Divisions 16 and 44, 2015). However, more recently it has included sexual identity, romantic attractions and behaviors, membership in sexual communities (e.g., lesbian, bisexual, gay), and sexual fantasies (Grollman, 2010). Researchers thought that sexual orientation was lasting and enduring, but more recently, they are beginning to acknowledge sexual fluidity throughout people’s lives (Grollman, 2010).

For most people, sexual identity matches sexual orientation, but this is not always the case (Grollman, 2010). Grollman (2010) wrote “we can define sexual identity as the label that people adopt to signify to others who they are as a sexual being, particularly regarding sexual orientation” (para. 4). Typical labels have included: gay/lesbian, heterosexual, bisexual, and pansexual/queer (APA, Divisions 16 and 44, 2015). Grollman (2010) also noted that there is a political element to sexual identity. He explained that “rather than identifying as bisexual (*bi* = two), some people identify as pansexual (*pan* = multiple); this moves away from the implication that there are only two sexes (i.e., female and male) and two genders (i.e., women and men) in light of the growing visibility of intersexed and transgender people” (para. 5).

He further stated that “others identify as queer to highlight the fluidity and diversity of gender and sexual orientation and, further, to reclaim the term *queer*, which has historically been used as a derogatory term for lesbian, gay, and bisexual people” (Grollman, 2010, para. 5).

Researchers once believed that asking questions about sexual orientation decreased respondents’ willingness to participate in surveys, but this has not held true (Case et al., 2006). When writing questions, it is important to make questions comfortable enough to ask of everyone who takes the survey (Makadon & Tillery, 2013). Questions that assume heterosexuality or questions that do not acknowledge, devalue, stigmatize, or make assumptions about individuals of any sexual orientation should be avoided (Herek, Kimmel, Amaro, & Melton, 1991).

Assessing sexual orientation is complex. Sexual orientation has been used as a catchall term describing sexual behavior, sexual attraction, and sexual identity (Keatley, Miller, Grant, Callahan, & Rasmussen, 2013). A single question cannot adequately account for the diversity of people’s behavior, attractions, and identities (Rainbow Health Ontario & Hart, 2012). Sexual orientation can be measured by questions about behavior, attraction, or identity. However, attraction tends to garner the most responses and sexual identity the fewest (Rainbow Health Ontario & Hart, 2012), and attraction includes those who are not sexually active (Williams Institute & Sexual Minority Assessment Research Team, 2009). Despite this, the Williams Institute and the Sexual Minority Assessment Research Team (2009) noted that assessing the three major dimensions of sexual orientation may be too much to ask of participants and that the choice of questions selected should be tailored to the study’s goals.

Sexual attraction. To assess sexual attraction (i.e., the sex or gender of individuals who someone feels attracted to), the Williams Institute and Sexual Minority Assessment Research Team (2009) suggested the question in Figure 15. We suggest adding three more options: *I am still figuring out who I am attracted to* (instead of *not sure*), *I am not attracted to women or men*, and *prefer not to answer* and changing their *female* and *male* terminology to *women* and *men* in order to be more in line with gender identity than biological sex. These options include a questioning and asexual⁹ response, as well as allow a respondent not to answer for those who prefer not to label themselves (Keatley et al., 2013).

FIGURE 15

People are different in their sexual attraction to other people. Which best describes your feelings? Are you:

- Only attracted to women?
- Mostly attracted to women?
- Equally attracted to women and men?
- Mostly attracted to men?
- Only attracted to men?
- I am still figuring out who I am attracted to.
- I am not attracted to women or men.
- I prefer not to answer.

Sexual behavior. To assess sexual behavior, the Williams Institute and Sexual Minority Assessment Research Team (2009) suggested using the following question listed in Figure 16 and instructed the researchers to select a specific time period based on the researcher’s goals. We suggest that researchers consider that participants may have different definitions about what constitutes as having had sex. This could affect the integrity of their findings.

FIGURE 16

In the past (time period) who have you had sex with?

- Men only
- Women only
- Both men and women
- I have not had sex

Sexual identity. To assess sexual identity (i.e., how one identifies one’s sexual orientation), the Williams Institute and Sexual Minority Assessment Research Team (2009) suggested using the following question listed in Figure 17. Based on Moody et al.’s (2013) coding guide for their sexual identity question, we would add the following categories: *fluid*, *pansexual*, *queer*, *demisexual*,¹⁰ *questioning*, *asexual*, and *prefer not to answer*. If researchers did not want to include all of these options, they could use an open-ended question like Moody et al. (2013) suggested and code the answers. However, Tourangeau and Smith (1996) wrote that surveys

⁹Asexual “refers to a person who does not experience sexual attraction or has little interest in sexual activity” (APA, Divisions 16 and 44, 2015, p. 20).

FIGURE 17

Do you consider yourself to be:	
<input type="checkbox"/> Heterosexual or straight	<input type="checkbox"/> Queer
<input type="checkbox"/> Gay or lesbian	<input type="checkbox"/> Demisexual
<input type="checkbox"/> Bisexual	<input type="checkbox"/> Questioning
<input type="checkbox"/> Fluid	<input type="checkbox"/> Asexual
<input type="checkbox"/> Pansexual	<input type="checkbox"/> I prefer not to answer.

that include closed questions with the full range of options produce the best responses to sensitive questions, specifically, sexual orientation. The Williams Institute and Sexual Minority Assessment Research Team (2009) suggested not using an *other* option because that can skew data if researchers remove those participants.

Researchers should note that sometimes *transgender* options are included in questions related to sexual orientation, even though being transgender is related to an individual's gender identity and not sexual orientation (Walkey, 2013). Transgender individuals can have any combination of sexual identities, just like nontransgendered individuals (Walkey, 2013). Also, researchers should not collapse data groups in ways that disrespect self-identity (Rainbow Health Ontario & Hart, 2012). An example would be to combine bisexual women and lesbians into one category. Finally, researchers should be aware that, in many countries outside of the United States and even in certain cities and states in the United States, it is a considered a crime to engage in certain sexual behaviors (Carroll, 2015), so researchers must be careful with the wording of their questions.

Social Class

It is important for psychologists to pay more attention to the role of social class and the impact inequality can have on people's lives and communities (Diemer, Mistry, Wadsworth, López, & Reimers, 2013). Social class is a key factor when studying development, well-being, and physical and mental health throughout the lifespan (APA, Task Force on Socioeconomic Status, 2007). However, lack of conceptual clarity for measurement of social class has led to the topic not being integrated fully into psychological research (Diemer et al., 2013).

Diemer et al. (2013) defined *social class* as a "higher order construct representing an individual or group's relative position in an economic-social-cultural hierarchy" (p. 79). Social class typically is assessed in two ways. The first is socioeconomic status (SES), which is an objective indicator of

one's position in a power hierarchy such as power, prestige, and control over resources (i.e., income, wealth, education level, and occupations prestige; Diemer et al., 2013). The second is subjective social status (SSS), which is often measured by an individual's perception of their social class (Diemer et al., 2013).

SES has been used in many research studies and has been studied using samples from many countries (Feng, Ji, & Xu, 2015). However, SES leaves out individual's perceptions of their relative social standing in relation to others (Diemer et al., 2013). Researchers have found that SSS can be more important for assessing psychological functioning and health-related factors than SES (Adler, Epel, Castellazzo, & Ickovics, 2000). It seems that SSS has a multidimensional quality and because of that, for individuals, it is a better synthesis of the components of SES at the individual level (Singh-Manoux, Marmot, & Adler, 2005). Therefore, we endorse using an assessment of SSS unless the researcher has a tangible reason to use SES instead. If researchers want to assess SES, Diemer et al. (2013) listed several possible measures that can be used to assess distinct components of SES such as income, wealth, education, and occupational prestige. They suggested that researchers carefully select indicators because, even though they are correlated, each one measures separate components of SES and should not be viewed as interchangeable (Diemer et al., 2013).

The MacArthur Scale of Subjective Social Status (Adler & Stewart, 2007) measures SSS and has been widely used (Diemer et al., 2013). The scale presents a "social ladder" to the participants in pictorial format, and the participants are asked to place an "X" on the rung that they feel represents them (Adler & Stewart, 2007). There are two versions of the scale including the SES version (i.e., SES ladder) and other version linked to a person's standing in their community and SSS (i.e., community ladder; Adler & Stewart, 2007). Adler and Stewart (2007) wrote:

The difference between these two ladders may be of particular interest in poorer communities in which individuals may not be high on the SES ladder in terms

¹⁰ *Demisexual* refers to people who feel sexual attraction only to people with whom they have an emotional bond (Demisexuality Resource Center, 2015). Most people who identify as demisexual rarely experience attraction and have little or no interest in sexual activity (Demisexuality Resource Center, 2015).

of income, occupation, or education, but may have high standing within their social groups such as a religious or local community (para. 2).

The MacArthur Scale of Subjective Social Status uses a drawing of a ladder with 10 rungs (MacArthur Research Network on SES and Health, 2008). The directions ask participants to:

Think of the ladder as representing where people stand in their communities. People define community in different ways, please define it in whatever way is most meaningful to you. At the top of the ladder are the people who have the highest standing in their community. At the bottom are the people who have the lowest standing in their community. Where would you place yourself on the ladder? Please place a large 'X' on the rung where you think you stand in this time in your life, relative to other people in your community (MacArthur Research Network on SES and Health, 2008, question 1).

Researchers typically score the ladder from 1 *very low status* to 10 *very high status* (Adler et al., 2000).

Diemer et al. (2013) gave a second measure for SSS listed in Figure 18, which involves asking participants about their class. This is based on the Social Class Worldwide Model developed by Liu, Soleck, Hopps, Dunston, and Pickett (2004), which provided a theoretical framework for how people individually understand and internalize social class as economically based cultures (Diemer et al., 2013). This model taps into subjective perceptions of an individual's standing within a social-economic-power hierarchy and how they feel they should behave according to their class (Diemer et al., 2013). Diemer and Ali (2009) cautioned that, in the United States, some researchers have found that participants may identify with the normative referent social class group instead of the class that truly represents them. This needs to be taken into consideration if using a question like this one.

Conclusion

Demographic questions are necessary to include in nearly every research enterprise involving human subjects for the purpose of providing an accurate description of the research sample. Demographic questions can also communicate the values of the discipline for inclusion and respect for people's dignity (APA, 2010). Yet, demographic questions

FIGURE 18

Which social class group do you identify with?

- Poor
- Working class
- Middle class
- Affluent

are not often afforded the same thoughtful selection process as more intriguing variables of study (e.g., personality characteristics) that require complex scales with multiple psychometric property checks. Unfortunately, a lack of attention to precision in demographic variables can result in inaccurate descriptions of sample, which can in turn lead to misguided notions of who the research applies to, who it might be generalizable to, or even result in communicating subtle but painful messages that perpetuate marginalization (also known as *microaggressions*; Nadal et al., 2011) resulting in unintended and collateral harms to research participants.

We hope this editorial is a starting point for discussion about how to improve demographic questions. We acknowledge that there is not one correct way to collect demographic information, and the questions used should fit with the researchers' goals. For some researchers, survey length will be an important consideration, and brief surveys will be prioritized. For them, we have included examples of open-ended questions that can support brevity without compromising accuracy or inclusivity. For other researchers, survey length may not be a barrier, but coding responses after data collection is not feasible given limited resources (e.g., research assistants) for accurate coding or they might worry that the answers given will not match the question being asked (Dillman et al., 2014). For them, we have included examples that maximize numerical coding from the outset. We realize that yet other researchers will have both a need for brevity and maximum numericity. For these researchers, a combination of open-ended and multiple response options may be ideal.

We urge researchers to consider the importance of being able to confidently answer the question: Do we know who we are we talking about in our research? For example, if we found a relationship indicating an association between condom use and self-efficacy, the finding would have very different implications in a sample of 16–18 year old boys as compared to 40–50 year old men in

romantic relationships.

We argue that demographic questions should be continuously evaluated to ensure that they fit with the identities of the research participants. Using more inclusive questions, written with clarity, will allow researchers to better understand the samples they are recruiting and, therefore, they will be better able to draw conclusions about those samples. Past research has been flawed in that groups of individuals have not been accurately represented in response options and therefore their data not analyzed properly. For example, historically researchers asked questions about gender with only two options, man or woman, which left out those who were in the process of transitioning (Tate et al., 2013). To achieve nondiscrimination, researchers should ask demographic questions, which allow them to understand a person's gender experience as transgender (Tate et al., 2013). To support the need for change, Westbrook and Saperstein (2015) wrote that, if changes are not made, survey research will continue to validate beliefs and produce findings that are disconnected not only from current social science theory but also from representing the diversity of identities. Generalizability of psychological theories rests on replication of theory-consistent findings across diverse samples.

We also encourage authors to check their demographic questions every time they conduct research for outdated or inappropriate terms. For example, the terms *homosexual* and *sexual preference* are no longer considered to be appropriate to use (GLADD, 2016a), but unfortunately still are used by researchers.

Finally, we suggest that researchers use the standard demographic questions listed in this editorial, so that there will be more consistency when comparing samples. However, because we are aware of possible respondent fatigue when additional demographic questions are asked, we suggest that researchers spend time thinking about whether they want to use the additional demographic questions and how they would use the supplemental information they provide.

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Author Note. Jennifer L. Hughes is the Charles Loidans Professor of Psychology, Psi Chi Advisor at Agnes Scott College, and Associate Editor of *Psi Chi Journal of Psychological Research*.

Abigail A. Camden and Tenzin Yangchen are psychology majors and Psi Chi members at Agnes Scott College.

Correspondence concerning this article should be addressed to Jennifer Hughes, Department of Psychology, Agnes Scott College, 141 E. College Ave., Decatur GA 30030. E-mail: jhughes@agnesscott.edu

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