

## Guidance for Researchers When Using Inclusive Demographic Questions for Surveys: Improved and Updated Questions

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**ABSTRACT.** This article is an updated version of Hughes et al.'s (2016) article, which encouraged authors to think about and update the demographic questions they use in their research surveys. Hughes et al. (2016) wrote the original article because they could not find a comprehensive resource that gave researchers examples of well-written and representative demographic questions based on the research literature. Since that original article, new and revised terminology related to demographics has emerged and scholarship on equity, diversity, and inclusion has flourished, so the need to present a set of updated demographic questions arose. Based on the recommendation from the APA Journal Article Reporting Standards, Appelbaum et al. (2018) recommended that researchers report the following major demographic characteristics for their samples, which are presented in this article (i.e., age, gender identity and sex assigned at birth, ethnicity and race, and socioeconomic status and social class). They also suggested that researchers assess other demographic characteristics that are important to their specific research, so the most common additional options from the psychological literature (i.e., children, citizenship and immigration status, disability, education, employment, income, language, location, relationship status, religion, and sexual orientation) are included as well. For each of these demographic domains, both questions and more inclusive answer choices are presented. This work is important because it can help researchers to gather and present more accurate information about survey participants' identities and demonstrates that researchers value inclusion and diversity when conducting their research (Hughes et al., 2016).

**Keywords:** demographics, demographic questions, survey, questionnaire, inclusion

In 2016, we published an article encouraging researchers to think about and update the demographic questions that they use in their research surveys (Hughes et al.). As we noted in the original article, we believe “. . . 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)” (Hughes et al., 2016, p. 138). Since then, new terminology has

been developed and other terminology has been revised, so we felt the need to update the original article with revised demographic questions. We wrote our original article because we could not find a comprehensive resource, based on best practices, for writing strong and representative demographic questions for surveys (Hughes et al., 2016). Besides our original article, this is still the case.

In this article, we present a list of questions and response options that we believe represent current best practices in inclusivity. To develop our questions,

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we relied on our own expertise for the different demographic categories, and we also extensively reviewed the research literature and typical practices for each of the categories. In addition, we pilot tested earlier versions of the questions listed in this article and received valuable feedback from researchers who study these areas, as well as those who are not involved in academia. That feedback led to revising the questions and response options.

As mentioned in the original article, we have only recently started to see a shift in how some governmental agencies and researchers are presenting demographic questions (Hughes et al., 2016). Historically, they asked questions with what now seems to be simplistic categories that only represented majority groups of individuals (Hughes et al., 2016; Pew Research Center, 2022b). However, there is much improvement that still needs to happen. By using consistent and inclusive options for demographic questions, both research participants and those reading about research will be able to see themselves represented (Betz, 2020). Asking participants to select options that do not represent them can lead to frustration, marginalization, and also not knowing how to respond (Hughes et al., 2016). This frustration can decrease the number of participants willing to answer certain questions or even take surveys (Hughes et al., 2016; Tourangeau & Yan, 2007).

The American Psychological Association Journal Article Reporting Standards (JARS; APA, 2021b; Applebaum et al., 2018) are designed to increase transparency and the scientific rigor of journal articles. These standards suggested that researchers should report the major demographic characteristics (i.e., age, sex, ethnicity, and socioeconomic status, SES) of their samples (Applebaum et al., 2018). In addition, they suggested that researchers should include additional characteristics that are important to their specific research.

We believe at a minimum that all research articles should include information about age, gender identity and sex assigned at birth, ethnicity and race, and SES and social class. Depending on what the researchers are examining, while taking into consideration the length of their survey and respondent burden, we suggest using some of these other common categories when applicable: children, citizenship and immigration status, disability, education, employment, income, language, location, relationship status, religion, and sexual orientation. We also acknowledge that there are other additional demographic characteristics (e.g., political party affiliation, military veterans or active service) that researchers may choose to ask depending on the research topic, but in this article, we have focused on those most widely utilized in psychological research.

Researchers should be intentional when selecting

demographic questions (Alchemer, 2021) to ensure that each question is mapped to their larger survey goals and that there is a plan for how to analyze the data. This means being thoughtful about the selection of the demographic questions and only using ones that are relevant to the research being conducted.

In addition, researchers will want to be mindful of the following issues when using demographic questions in surveys. First, in our original article, we discussed the reasons why researchers collect demographic information (Hughes et al., 2016). One reason is to answer research questions about identity, and another reason is to accurately describe the sample of participants. By describing the sample in detail, researchers can determine if the sample they recruited represented the population they wanted to study. In addition, describing the sample's demographic characteristics helps readers to understand the sample better, to tell if the findings are generalizable, and to compare the sample to other studies. This also can help when it comes to replicating the research.

Second, we discussed in our original article the factors that can influence where demographic questions are placed in surveys (cf. Hughes et al., 2016). Our conclusion was that one set rule at the beginning or end of the survey should not be used and researchers should consider the types of questions they will be using and how their participants might respond to those questions.

Third, question wording is another important issue in that the choice of words and phrases indicates the meaning and intent of the question to the survey participants and wording choices can affect how participants answer the questions (Pew Research Center, 2022b). If researchers do not use established questions like the ones we present in this article, we suggest they pilot test their questions with a diverse group of individuals to receive feedback on the wording and phrases used.

Fourth, researchers should decide when they will use open-ended (i.e., participants provide a response in their own words) vs. closed-ended questions (i.e., participants are asked to choose from a list of possible answers; Pew Research Center, 2022b) for each demographic question. Open-ended questions can be useful as far as keeping the survey length shorter without compromising accuracy or inclusivity (Hughes et al., 2016). In addition, open-ended questions can be better suited for questions where all the possible response options might not be known, or participants might be more comfortable describing their answers in their own language (Cooks-Campbell, 2020). However, closed-ended questions often help with ease of scoring and coding responses. It is important to consider that, for closed-ended questions, participant responding

may be influenced by the response options given, the order in which those response options are presented, and the number of response options (Pew Research Center, 2022b).

Finally, researchers should be sensitive about whether and how they ask for personal data (Sharma & Cowley, 2019). If possible, researchers should consider making their surveys anonymous or at least confidential if they are asking about sensitive demographic information.

### Standard Demographic Questions

In the following section, we describe the demographic categories of age, gender identity and sex assigned at birth, ethnicity and race, and SES and social class. Based on the JARS guidelines (APA, 2021b), we believe these are essential demographics to report.

#### Age

As noted in the original article by Hughes et al. (2016), age is fairly straightforward to assess, and this is true for most countries except for some East Asian countries where people believe that life begins outside of the womb at one year old (Meinlschmidt & Tegethoff, 2015). If researchers are collecting data using participants from East Asian countries, they should be aware of this.

In the original article, we suggested that researchers use an open-ended question to evaluate age, which allows the researchers to know specific ages of participants and it is easy to calculate a mean age (Hughes et al., 2016; see Figure 1). However, we received feedback from researchers who used this question that more respondents were leaving the question blank as

compared to when they used a closed-ended question with response categories. We think this is the case because some respondents thought they could be identified by their exact age, especially if they were older or younger than the typical participant. Researchers should take this into account, and because of this we offer a second option for assessing age. Toor (2020) echoed this and noted that, due to the sensitive nature of age, forcing participants to give a specific number for age is generally discouraged.

A second option includes using a closed-response question (see Figure 2). Researchers who have used closed-response questions have typically divided age into only a few categories (i.e., often five categories), which have ended up with large developmental ranges (cf. U.S. Department of Education, 2009). Large categories such as 60 and older do not feel inclusive in that survey respondents could be in their 70s, 80s, 90s, or even over 100 and might not feel they are developmentally the same as those in their 60s. Instead, we offer nine response categories that represent smaller developmental ranges and also an option for those who prefer not to answer.

It should also be noted that APA (2021a) suggested that authors use inclusive age-related language to replace dated terminology. They suggested avoiding the terms: “the elderly,” “elderly people,” “the aged,” “aging dependents,” “seniors,” and “senior citizens.” The terms they suggested using include: “older adults,” “older people,” and “the older population.”

#### Gender Identity and Sex Assigned at Birth

Despite significant strides in recognition of gender and sex as distinct and separate constructs, questions regarding these terms are still often conflated in research (Hughes et al., 2016; Westbrook & Saperstein, 2015). We offer two different demographic questions for asking participants about gender and sex. In contrast to an individual’s sex assigned at birth (APA, 2021; Schusterman Family Philanthropies, 2021), gender refers to an individual’s deeply felt sense of being a woman, man, and/or nonbinary individual, which may or may not align with biological sex or secondary sex characteristics (APA, Divisions 16 and 44, 2015; Hughes et al., 2016). Additionally, gender identity is fluid and can change over time (Hughes et al., 2016; Westbrook & Saperstein, 2015). The question on sex assigned at birth should only be asked if it is essential to address the research questions (e.g., research on ovarian cancer), as asking this question without reason may be offensive to individuals who do not identify with their assigned sex.

**FIGURE 1**

**What is your age in years?**

Please specify: \_\_\_\_\_

I prefer not to answer

**FIGURE 2**

**What is your age in years?**

11 or younger

12–17

18–24

25–34

35–44

45–54

55–64

65–74

75 or older

I prefer not to answer

### Gender Identity

Our question about gender identity was initially proposed by Moody et al. (2013) and endorsed by Hughes et al. (2016). Open-ended demographic questions are inclusive because they convey that the researcher is receptive to using the labels and identities that the participant uses to describe themselves (APA, 2020, 2021) without the researcher biasing the response through set options or the order of options, which have the potential to convey cisgenderism bias. This open-ended question is in line with APA's (2020) bias-free language guidelines, which note that language related to gender has evolved rapidly and could continue to do so. Having an open-ended response allows for future changes in language.

Conveying the fluidity in gender is important to addressing and understanding inclusivity. When writing our question in 2016 we added “currently” to convey that gender can change over time (Hughes et al., 2016; Westbrook & Saperstein, 2015). Some have commented that this qualifier may confuse those who have not questioned their gender. However, because it does not change the integrity of the question, we opted to retain this qualifier, as it conveys that gender is fluid and can change over time. Additionally, we offered additional structure to the original question proposed by Moody et al. (2013) by creating a “please specify” option where participants write their responses. Moreover, the “I prefer not to answer” option is in line with best practices that honor participants’ autonomy over whether they wish to disclose aspects of their identity to the researcher. Similarly, researchers should not force a response (e.g., if using an online survey software such as Qualtrics, researchers should not require a response to move on to the next page of the survey; ORARC, 2020).

In the years since we recommended this question, we have received feedback that the term “gender identity” versus “gender” is confusing to some participants, which may in turn lead to responses that do not reflect the spirit of this question. Some researchers have found more success with this open-ended question when they add examples in parentheses (e.g., woman, man, nonbinary). However, we have also found that some respondents may confuse “e.g.,” with “i.e.,” and in turn do not perceive these parentheticals as examples, but rather as forced options, which could make the question much less inclusive than intended. Additionally, by listing only a few options, the researcher may seem to convey a lack of understanding of the gender spectrum. For example, when we piloted this question for the revised edition of this article with a couple examples of gender (e.g., woman, agender), we received feedback that more examples should be added to acknowledge the full spectrum of gender, or conversely that examples should

**FIGURE 3**

**How do you currently describe your gender?**

- Please specify: \_\_\_\_\_
- I prefer not to answer

**FIGURE 4**

**In research, we often must present demographic information in categories. We understand these labels are limiting. If you had to select one of the options below, which one best describes your gender identity?**

- Agender
  - Gender fluid
  - Gender queer
  - Gender questioning
  - Māhū, or muxe, or two spirit
  - Man
  - Nonbinary
  - Woman
  - I prefer not to answer
- Do you identify as transgender?
- Yes
  - No
  - I prefer not to answer

be removed. To create a true open-ended question, we opted to remove examples to avoid bias responding or force set responses and to avoid conveying noninclusivity by listing only a few options. See Figure 3.

Some may be concerned that an open-ended question may create more work for the researcher to code participants’ responses. In our use of this demographic question, we have found that running frequencies on the variable allows for a relatively streamlined process, with some outliers if a participant has misunderstood the question or misspelled their response. Please refer to Hughes et al. (2016) for a coding schema.

Should researchers wish to ask respondents to select a categorical response, they may opt to use a question with response options consistent with Schusterman Family Philanthropies’ (2021) recommendations, with the addition of “gender questioning” and some terms used by Indigenous, Native American, and Native Hawaiian cultures to describe nonbinary genders, including “māhū” (Vanderbilt, 2022), “muxe” (Vanderbilt, 2022), and “two spirit” (Hughes et al., 2016). If it is relevant to the research questions, researchers may also wish to ask participants if they are transgender as an additional question, particularly if choosing not to qualify men and women with cisgender (Schusterman Family Philanthropies, 2021). See Figure 4.

If researchers list response options such as these, they should make several considerations in wording

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and ordering. For example, transgender should not be listed as a gender label by itself, as this conveys that transgender is an adjective and ignores the potential that transgender individuals may also identify as agender, a man, a woman, gender-fluid, etc. (APA, 2020). Rather, researchers may ask a follow-up question regarding identification as transgender (Schusterman, 2021). Additionally, although some may wish to use “cisgender man” or “cisgender woman” as response options, some respondents are not familiar with these terms, and we would therefore recommend against it to avoid confusion in responding.

### **Sex Assigned at Birth**

For sex assigned at birth, we endorse the demographic question provided by Badgett et al. (2014), to which we have added an intersex response option. Although intersex has only recently been utilized on corrected birth certificates (Segal, 2017), we believe that adding this response option is important to be inclusive of those with a disorder of sexual development. Additionally, as previously noted, researchers should not ask about biological sex in addition to gender unless necessary for their research question. Asking about biological sex, particularly after asking about gender identity, may be offensive to those who do not identify with their biological sex. Moreover, it should be noted the American Medical Association (2021) recently recommended that sex be removed from the public portion of birth certificates. If sex assigned at birth is necessary to the research question (e.g., research on menstruation), researchers may wish to clarify why they are asking about sex assigned at birth in addition to gender identity. The explanation about the necessity of the question regarding sex assigned at birth should be as thorough given the predetermined research parameters. See Figure 5.

### **Ethnicity and Race**

Collecting race and ethnic information continues to be of critical importance for tracking health (Flanagin et al., 2021), academic (Fox et al., 2021), and other systematic disparities in outcomes across groups. Although race is a social construct, the impacts of racism are real and devastating, making the continued measurement of these constructs a necessity. In addition

to measures of ethnicity and race possibly being essential to understanding results, post-hoc subgroup analyses in any dataset may also provide valuable insights into questions of interest. In addition to representing good scientific practice, the measurement of ethnicity and race is required in many instances. For example, in clinical trials, the National Institutes of Health requires tracking gender and ethnicity/race to ensure representation in federally funded research (National Institutes of Health, 2017).

Over the years, definitions and measurements of ethnicity and race have varied. Perhaps most notably, this is easily and strikingly captured in a historical review of the U.S. Census racial/ethnic categories (Pew Research Center, 2020). A common critical decision is whether to measure ethnicity and race separately or in combination. In the earlier article, Hughes et al. (2016) measured ethnicity and race by listing ethnic and racial categories in the same item. In this updated article, we recommend separating the categories for increased precision. Another factor that varies in measurement over time is the use of specific ethnic labels. These are in constant evolution, and there is significant variability within groups on their preference for self-identification. Researchers might choose to (a) use federally determined labels, (b) group selected labels (e.g., the national ethnic psychological associations use the panethnic terms: Black, Indian, Latinx, Asian American, and American Arab, Middle Eastern, and North African, in their association names) or (c) labels otherwise known to be preferred in the communities within which they work (U.S. Census Bureau, 2022a).

### **Disaggregation of Ethnicity and Race**

Disaggregating questions on ethnicity and race provide a richer description of samples and can be optimally inclusive. Researchers should be as specific as appropriate while being sensitive to the needs of the target population and acquiring the necessary data for their research (APA, 2021a). If feasible, researchers should consider using open-ended questions to allow for self-identification instead of forcing a response in a predetermined category that may not address the identities of participants (Woolverton & Marks, 2021). For example, there are 574 federally recognized Native American tribes (Indian Affairs, 2022). That number increases when considering state-recognized tribes. Native Americans may or may not have tribal affiliations, and tribal affiliations and self-reports vary (U.S. Census Bureau, 2019). It would be overwhelming to attempt to collect disaggregated data. However, predetermined categories may be necessary for some research. It is vital to balance the preferences of participants (e.g., most

**FIGURE 5**

**What sex were you assigned at birth?**

Female

Intersex

Male

I prefer not to answer

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Latinos prefer to identify with national origins rather than the panethnic “Hispanic or Latino” label; Taylor et al., 2012) with research needs (e.g., panethnic labels can help simplify some complexities). In most cases, we provide alternatives (e.g., Black or African American), but in others, the options could be overwhelming (e.g., Hispanic or Latino/Latina/Latinx/Latine) and we selected the more used terms (Noe-Bustamante et al., 2020; Taylor et al., 2012). We also attempted to address this issue by providing the larger group categories and allowing space for respondents to provide more detail if they wish to do so.

We also want to acknowledge that panethnic labels can and will vary based on the population of interest, research question, and many other factors (Noe-Bustamante et al., 2020; U.S. Census Bureau, 2021). Further, although we often use panethnic labels, the individuals within these groups are not monolith groups and thus have different experiences and label preferences. Therefore, when engaging in this work, we strongly suggest being cognizant of the potential implications of panethnic labels while considering the research’s context, purpose, target audience, and intended population. Also, although we use panethnic labels here, and there will be occasions that it is necessary for research, we want to reiterate that many individuals tend to prefer labels that are specific to their tribe, nationality, or ethnic group and those should be used when feasible (Lê Espiritu, 2019). See Figure 6.

### Race

In addition, disaggregating ethnicity and race can help provide more clarity in data. For example, the U.S. Census does not provide an ethnic category for Middle Eastern and North African (MENA) people and instead categorizes them as White (Wang, 2022). Yet, for many, this categorization is inaccurate as their physical appearance and lived experiences may be in sharp contrast with the label White. Indeed, many MENA do not perceive themselves, nor are perceived by others, to be White (Maghbouleh et al., 2022). Also, the conflation of race and ethnicity do not allow researchers to capture the layers of identity participants may have, and “all that apply” options do not provide additional context regarding race and ethnic identification. To address these complexities, we created an ethnicity question and a race question, providing some guidance to respondents regarding the definitions of each construct. We have also added information to point to how participants see themselves and how they are perceived by others. This is part of the complexity of felt, as compared to observed, identity. Research has documented that self-report is more accurate than observer report (Moscou

**FIGURE 6**

**Ethnicity reflects the cultural traditions, values, and practices that are shared by people across generations. When you consider your personal and familial cultural values, traditions, and practices, what labels best describe your ethnicity? (mark ALL that apply)**

- Arab, Middle Eastern, or North African—For example, Algerian, Egyptian, Iraqi, Jordanian, Sudanese, Syrian, Yemeni  
Please specify: \_\_\_\_\_
- Asian or Asian American—For example, Asian Indian, Chinese, Filipino, Japanese, Korean, Nepalese, Vietnamese  
Please specify: \_\_\_\_\_
- Black or African American—For example, Ethiopian, Haitian, Jamaican, Nigerian, Somali  
Please specify: \_\_\_\_\_
- Hispanic or Latino—For example, Colombian, Cuban, Dominican, Mexican or Mexican American, Puerto Rican, Salvadoran  
Please specify: \_\_\_\_\_
- Native American or Alaska Native—For example, Arapaho, Blackfoot Tribe, Mayan, Native Village of Barrow Inupiat Traditional Government, Navajo Nation, Nome Eskimo Community  
Please specify: \_\_\_\_\_
- Native Hawaiian or Other Pacific Islander—For example, Chamorro, Fijian, Marshallese, Native Hawaiian, Samoan, Tongan  
Please specify: \_\_\_\_\_
- White or European American—For example, English, French, German, Irish, Italian, Polish  
Please specify: \_\_\_\_\_
- Some other race, ethnicity, or origin  
Please specify: \_\_\_\_\_
- I prefer not to answer

et al., 2003; Polubriaginof et al., 2019) and also that perceived phenotype can impact a person’s experiences in a variety of contexts (see colorism section below). To that end, questions about self-report and how the person is perceived by others could give some rich contextual information.

Some racial groups have significant social ties to a collective racial identity (e.g., Black), that may not always mirror or capture nuances that exist in ethnic or national identities (e.g., Nigerian or African American). These identities also sometimes overlap and intersect with national identity, a person’s sense of belonging to a state or nation, which often include numerous overlapping social identities (Ashmore et al., 2001). Therefore, if researchers are interested in specific aspects of identity, collection of specific ethnic or national identity may be warranted. The collection of national or specific ethnic identities may be especially significant in research spanning multiple nations, or nations consisting of a population originally from a multitude of countries. Researchers engaging participants in countries outside of the United States should ensure that categories align with categories representative of their participants while accounting for cultural norms and the legality of questions regarding ethnicity and race (White, 2015, as cited by Hughes et

**FIGURE 7**

**Race is generally tied to physical characteristics such as skin tone, facial features, and height, among other characteristics, and the process of ascribing social meaning to those groups.**

How do **you** describe yourself racially? \_\_\_\_\_

How do **others** describe you racially? \_\_\_\_\_

**FIGURE 8**

**When thinking about physical attributes usually ascribed to race, which of the following general labels describe how **you** would describe yourself racially: (mark ALL that apply)**

- Asian
- Black
- Indigenous, Aboriginal, or First Nations
- Latino or Hispanic
- Middle Eastern
- White
- Other, please specify: \_\_\_\_\_
- I prefer not to answer

**When thinking about physical attributes usually ascribed to race, which of the following labels describe how **others** would describe you racially: (mark ALL that apply)**

- Asian
- Black
- Indigenous, Aboriginal, or First Nations
- Latino or Hispanic
- Middle Eastern
- White
- Other, please specify: \_\_\_\_\_
- I prefer not to answer

al., 2016). We provide additional questions about race and give more options for researchers to select from. See Figures 7 and 8.

**Colorism**

In addition to ethnicity and race, there has been increasing visibility and scholarship on issues related to colorism. Colorism is discrimination based on skin tone, and typically includes preferences for lighter skin (Dixon & Telles, 2017). Skin tone stratification, or undue privileges and opportunities granted due to lighter skin, is evident in numerous social inequities within society (Monk, 2021). Recent scholarship has revealed significant differences in health and social outcomes according to skin tone within ethnic groups (e.g., Capielo Rosario et al., 2021). Although colorism is evident within the experiences of many racial groups, experiences with colorism vary widely between groups and nations (Monk, 2021). Although we do not provide a measure of skin tone, we do encourage researchers for whom race and ethnicity demographics are central to consider also adding a skin tone measure in their demographics if relevant to the research (e.g., research on skin lightening). There are several measures of

colorism that researchers might explore including those reviewed by Dixon and Teels (2017), Capielo Rosario et al.’s (2021) revised version of the Felix vonLuschan Skin Color Chart, and Massey and Martin’s (2003) popular NIS Skin Color Scale.

**Socioeconomic Status and Social Class**

According to the APA (2021a), “socioeconomic status (SES) encompasses quality-of-life attributes and opportunities afforded to people within society and is a consistent predictor of a vast array of psychological outcomes” (p. 17). It has been assessed by evaluating income, levels of educational attainment, and occupational prestige (Deutsch, 2017; Diemer et al., 2013). APA (2021a) also includes perceptions of social class when measuring SES. All these components of SES are presented as demographic questions in this article, and we present ways to assess them. See APA (2015) and Diemer et al. (2013) for more information about how to use these variables to measure SES. Even though it is important for researchers to evaluate SES, it has often not been assessed in survey research because of the lack of conceptual clarity and measurement issues (Diemer et al., 2013; Fernandez et al., 2016; Hughes et al., 2016). Measurement issues involve the fact that SES consists of multiple factors, which often can be labor intensive to evaluate (National Committee on Vital and Health Statistics, 2012; Reeves et al., 2018). In addition, Diemer et al. (2013) advised to carefully select the components to assess, because even though they are related, they each measure separate parts of SES and should not be viewed as interchangeable (Hughes et al., 2016).

Researchers often assess social class instead of SES. Deutsch (2017) defined social class as an individual’s position within society that goes beyond SES and can be thought of as a culture that involves group membership, norms, and socialization patterns. Diemer et al. (2013) noted that “the scales generally include a person’s judgment—based on his or her personal/human capital (occupational prestige, income), social capital (access to socially desirable information), and cultural capital (what he or she knows)—of where they stand relative to others in society” (p. 104). In addition, the effects of social class intersect with other social categories, such as gender, race, and ethnicity (Diemer et al., 2013).

To assess social class, we again present a similar question from our original article, but we increased the number of response options using Stevens’ (2018) options and repeated the question for participants so they could evaluate social class from the perspective of their childhood and their current situation (Hughes et al., 2016). The question in our original article was based on the Social Class Worldwide Model developed by Liu et al. (2004). See Figures 9 and 10.

Reeves et al. (2018) cautioned that measuring social class can produce inconsistent results. Using the wording for three large national surveys (i.e., Pew, GSS/NORC, and Gallup) Reeves et al. (2018) demonstrated that the names and number of social class categories influenced responses and that most respondents put themselves in the middle class. We also believe that using labels (i.e., working class, lower middle class) can be harmful for some people. There are other ways to evaluate social class without labels (i.e., The MacArthur Scale of Subjective Social Status by Adler & Stewart, 2007), which we presented in the original article (Hughes et al., 2016). However, in pilot testing of our new possible demographic questions, we found that respondents asked for anchors to respond to when selecting their social class.

Furthermore, APA (2021a) identified terms regarding social class to avoid, including “the poor,” “low-class people,” and “poor people.” Alternative phrases were suggested, such as “people whose incomes are below the federal poverty threshold” and “people whose self-reported incomes were in the lowest income bracket” (p. 17). Additionally, the Diversity/Inclusivity Style Guide of The California State University (2020) recommended considering the term “underresourced” when referring to groups who have been underserved and underrepresented by the system at large to convey the responsibility of this system.

### Additional Demographic Questions

In the following section, we describe the additional demographic categories. Researchers will want to use these if they apply to the research they are conducting, while again considering participant response burden. These include children, citizenship and immigration status, disability, education, employment, income, language, location, relationship status, religion, and sexual orientation. Example questions and background information about those questions are given.

#### Children

Participants’ responses to surveys can be influenced by whether the participants have children (Toor, 2020). However, there has been little consistency with the way questions about children have been written (Hughes, 2013; Hughes et al., 2016), and many of the surveys do not have response options that fit all respondents.

In the original article, Hughes et al. (2016) based their recommendations for writing questions about children on the work of Hughes (2013) and Lee and Duxbury (1998) who recommended asking about the number of children, their ages, and if they live in the household. Two questions were written, and those questions have been revised. The first question recognizes

**FIGURE 9**

Thinking about *your childhood*, which social class did you identify with?

- Working class
- Lower middle class
- Upper middle class
- Upper class
- I prefer not to answer

**FIGURE 10**

Thinking about *your current situation*, which social class do you identify with?

- Working class
- Lower middle class
- Upper middle class
- Upper class
- I prefer not to answer

**FIGURE 11**

When it comes to children, which of the following are true for you?

(mark ALL that apply)

- I prefer not to answer

**No Children**

- You do not have or ever have had children

**Unborn/Preplacement Adoptive Children**

- You are (or your partner is) pregnant, a surrogate is carrying your child, or you are in the process of adopting

**You currently, or in the past, have had:**

- Adopted children\*
- Biological children\*
- Foster children\*
- Stepchildren\*

**You currently, or in the past, have parented:**

- Children without a formal designation legally recognized by the government\*
- Other family members’ children\*
- Partners’ children\*
- Other, please specify: \_\_\_\_\_\*

\*Those who agreed to any of these options would then complete the grid listed in Figure 12.

more types of parenting roles and includes additional options for types of children. See Figure 11.

The second question about children uses a grid and should only be asked of those who select options other than “no children,” “unborn children,” or “I prefer not to answer” (Hughes et al., 2016). It asks about the ages of the children using age ranges, which were expanded for this revision and include newborn, infant, and toddler. We also kept the option for adult children based on the recommendation of Lee and Duxbury (1998; Hughes, 2013; Hughes et al., 2016). We continue to think that this response option is important to include because 52% of young adult children (i.e., ages 19–29) currently live with one or both of their parents (Fry et

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al., 2020). In addition, the question asks if the children live at home full-time or part-time, not at all, or are no longer living (U.S. Census Bureau, 2021). The addition of “they are no longer living” allows those who have lost a child or children to also be represented in the response options. See Figure 12.

If researchers wanted to know more specific information about the respondents’ children, they could have the participants write the gender identity of the children in the boxes instead of numbers. This was not included in our question.

**Citizenship and Immigration Status**

For U.S.-based surveys, researchers may want to gather information about participants’ citizenship status. According to the Pew Research Center (Budiman, 2020), 13.7% of the U.S. population is composed of immigrants. Immigrants may be authorized or unauthorized, temporarily or permanently. More permanent statuses (e.g., naturalized citizenship) provide immigrants with greater legal protections and civil rights.

This question could be sensitive and therefore it is not necessarily recommended as a standard demographic question. For example, research related to the citizenship question on the census found that those holding temporary or unauthorized statuses and Latinxs tend to underreport on this question (Baum et al., 2019; Brown et al., 2019). Hence, we recommend that this question is

asked in a trauma-informed way, reminding participants of confidentiality, anonymity, and the voluntary nature of the survey. For example: “Remember that your answers are not connected to you, survey responses will only be shared in aggregate form, and you may skip any questions you are uncomfortable answering.”

The wording of this question is critically important. We recommend using the terms “documented or undocumented” or “authorized or unauthorized.” The term “illegal” tends to describe an act, not a person (Colford, 2013) and its use is considered dehumanizing. Indeed, the use of humanizing language was implicated in the recent federal change to languages used in official documentation referring to undocumented or unauthorized immigrants (Rose, 2021). In addition, immigration status is fluid, and the term illegal might inaccurately capture an infraction that is relative to policy changes. An immigrant who entered a country lawfully might have overstayed their visa and have documentation but be currently unauthorized to reside there. Some recommend the use of the term “unauthorized” as more precise. For example, a refugee or asylum seeker may not have documentation, but may have authorization to be in a country. An immigrant may be unable to obtain documentation because it is prohibited by law in which case the label undocumented is somewhat incomplete (Toobin, 2015).

In recent years, researchers have worked to make visible the differential impacts to health and well-being related to immigration status (Cadenas et al., 2022; Garcini et al., 2022; How et al., 2021; Moreno et al., 2021; Venta et al., 2022), especially as public policies change (e.g., the Supreme Court DACA rescission case in 2020; *Department of Homeland Security et al. v Regents of the University of California et al.*, 2020). Part of inclusion in demographics is to capture the diversity in participants that might be otherwise “invisible.” In a sample of U.S. participants, not reporting on citizenship status would invite an assumption that all participants are U.S. citizens. This simple question might help provide more nuance to the descriptive information provided about the sample. See Figure 13.

**Disability**

Disability is a broad category representing heterogeneous lived experiences, and inclusive demographic questions must recognize this. In asking about disability, person-first language is imperative (APA, 2021a). Our recommended question and response options are based on those from the Schusterman Foundation (2021) and Fernandez et al. (2016), the latter based on the National Survey of Student Engagement. We have altered these questions to include important categories (e.g., mobility impairment or physical disability) and disaggregate some categories. We recommend these

**FIGURE 12**

**Put a number in the box(es) to represent each child.** For example, if you have 2 toddlers who live with you full-time and 1 adolescent child who lives with you part-time, you will write 2 in the “they live with me full-time” box for your toddlers and 1 in the “they live with me part-time” box for your adolescent child.

	They do not live with me	They live with me part-time	They live with me full-time	They are no longer living
Newborn and infant (birth to 1 year old)				
Toddler (1 to 3 years old)				
Preschool child or children (3 to 5 years old)				
Elementary child or children (5 to 12 years old)				
Adolescent child or children (12 to 18 years old)				
Adult children (18+ years old)				

updated disability questions over the ones presented in our previous article (BrckaLorenz et al., 2014; Hughes et al., 2017; Moody et al., 2013), as they better recognize the scope of disability identity and aim to address under-reporting. See Figure 14.

Historically, disability has been underreported (Fernandez et al., 2016). Several factors can be seen as contributing to this, including the phrasing of demographic questions. Namely, some respondents may be unsure

**FIGURE 13**

**What is your citizenship and immigration status?** [*Trauma-informed prompt example: Remember that your answers are not connected to you, survey responses will only be shared in aggregate form, and you may skip any questions you are uncomfortable answering*] (mark **ALL** that apply)

- I am a citizen of the United States by birth
- I am a citizen of the United States by naturalization
- I am a Deferred Action for Childhood Arrivals (DACA) recipient
- I am a permanent resident of the United States
- I am a refugee or asylum seeker
- I have an immigrant visa (please select one of the following):
  - Work visa
  - Immigrant visa
  - Visitor visa
  - Fiancé visa
  - Other visa, please specify: \_\_\_\_\_
- I have Temporary Protected Status (TPS)
- Other, please specify: \_\_\_\_\_
- I prefer not to answer

**FIGURE 14**

**How would you describe your disability/ability status?** We are interested in understanding your experience with conditions that substantially limit one or more major life activities, regardless of whether you seek formal accommodations or have a formal diagnosis (mark **ALL** that apply).

- A cognitive disability\*
- A learning disability\*
- A long-term medical illness\*
- A long-term mental health condition\*
- A mobility impairment or physical disability\*
- A sensory impairment (e.g., vision, hearing)\*
- A sensory processing or integration disorder\*
- A temporary impairment resulting from illness or injury\*
- A disability or impairment not listed here. Please specify: \_\_\_\_\_\*
- Prefer to self-describe: \_\_\_\_\_\*
- I do not identify with a disability or impairment.
- I prefer not to answer

\*Those who agreed to any of these options would then respond to the additional question listed in Figure 15 for each option.

**FIGURE 15**

**Has this been formally diagnosed (e.g., by a medical doctor or psychologist)?**

- Yes
- No
- I prefer not to answer

what the researcher is asking if it is not clearly defined, given that disability is broad, and some individuals may not consider themselves to have a disability despite falling into a relevant category. Additionally, disability can be a sensitive topic (Schusterman Foundation, 2021). Phrasing should recognize this and clarify why the researcher is requesting this information. Given this, we recommend explaining what is meant by disability and why the researcher is asking, by using the definition from the American with Disabilities Act (i.e., conditions that substantially limit one or more life activities; ADA, 1990). This language is preferable over demographics questions that ask about specific areas of life that are affected by the disability (e.g., those presented on the census; U.S. Census Bureau, 2018), as it allows the respondent to dictate what important areas of life are impacted for them. Moreover, our recommended questions clarify that the researcher is interested in understanding disability status regardless of accommodations or diagnosis, in an aim to combat underreporting of disability. As a follow-up question, if it is important to the research questions, researchers may wish to ask whether the disabilities have been formally diagnosed or require accommodations. See Figure 15.

**Education**

Education is often assessed in surveys, but researchers are not consistent in the ways they ask their questions (Hughes et al., 2016). The original educational attainment question from Hughes et al. (2016) was retained and updated. New questions about college enrollment and online and in-person education were added. Those additional questions could be useful for researchers wanting to know more about their student samples.

**Educational Attainment**

In the original article by Hughes et al. (2016), one question was used to assess education attainment, and it was based on the U.S. Census’ (2010) education question with some additions. For this revision, the new question was based on the American Community Survey (U.S. Census, 2022b), but again some revisions were made. Those include the following.

First, the American Community Survey’s educational attainment question (U.S. Census, 2022b) included specific grades. We did not include those, but instead, we asked if participants had completed elementary school, or middle or junior high. We knew that we would be adding other response options, and this helped to keep the length more manageable.

Second, Mahmutovic (2021) encouraged those writing demographic questions about education to also include options for apprenticeships in order to include those who continue their education but not at colleges

or universities. Some technical, trade, and vocational schools give students certificates when students complete the programs, so “certificate” was added to that option as well. The response option for “vocational training” was expanded to include the wording “technical, trade, or vocational school certificate or apprenticeship.” For a review of these types of programs see the Center for Employment Training (2022).

Third, when people think of postsecondary education, they often default to bachelor’s degrees, but many people are earning subbaccalaureate credentials (i.e., associate degrees or completing certificates; Hudson, 2018). Those respondents should also feel represented with survey options. The current U.S. Census (2021b) uses a new distinction for associate degrees, including occupational associate degrees (i.e., a degree given for a specific occupation) and academic associate degrees (i.e., a degree typically in the arts and sciences with the work being able to be transferred to a bachelor’s degree). These options were added to the question.

Fourth, we added an option for those who just started college but had not obtained any college credit yet. The American Community Survey’s educational attainment question (U.S. Census, 2022b) did not represent this group.

Fifth, the specialist degree (EdS) was added to the list of possible degrees. Indeed (2021) noted that this degree is an alternative to a doctorate in education, and it typically is a more specialized degree in the areas of school psychology, education leadership and policy, and special education, which does not take as long to complete as a doctorate.

Two additional changes included, an “other, please specify” option and an option for “I prefer not to answer.” This way every possible participant is represented or if respondents did not feel comfortable responding to the question, they would not have to do so. See Figure 16.

**College Enrollment**

Two additional questions about college enrollment were added that ask respondents if they are part-time or full-time undergraduate or graduate students. Response options were added for those who used to attend college and those who never attended. Although, if researchers think they might have postbaccalaureate or certificate students, they might want to add additional questions for those students. These questions are useful for researchers and reviewers who want to know the percent of college students in samples. See Figures 17 and 18.

**Online and In-Person Education**

The final question about education asks about the mode of delivery for courses. This is a specialized question, and only some researchers might want to know this information. See Figure 19.

**FIGURE 16**

Which of the following is the *highest degree or level you earned or completed?*

I prefer not to answer

**Elementary and Middle School**

- No schooling completed
- Completed elementary school
- Completed middle or junior high school

**High School**

- Some high school, NO diploma
- High school diploma
- GED or alternative credential

**College, Some College, or Technical, Trade or Vocational School**

- Just started college, no college credit earned yet
- Some college credit, but less than one year of college credit
- One or more years of college credit, no degree
- Technical, trade, or vocational school certificate or apprenticeship
- Associate degree, academic (for example: AA, AS)
- Associate degree, occupational (for example: AAA, AAS)
- Bachelor’s degree (for example: BA, BS)

**After Bachelor’s Degree**

- Master’s degree (for example: MA, MBA, MEd, MEng, MS, MSW)
- Specialist degree (for example: EdS)
- Professional degree beyond the bachelor’s degree (for example: DDS, DVM, JD, MD, PharmD, PsyD)
- Doctoral degree (for example: EdD, PhD)
- Other, please specify: \_\_\_\_\_

**FIGURE 17**

Are you *currently* an undergraduate student?

- No, I have never been enrolled as an undergraduate student
- No, but I used to be an undergraduate student, but I did not complete a degree
- No, but I used to be an undergraduate student and I completed a degree
- Yes, I am currently an undergraduate student and attend full time\*
- Yes, I am currently an undergraduate student and attend part time\*
- Other, please specify: \_\_\_\_\_\*
- I prefer not to answer

\*Those who agreed to any of these options would then respond to the additional question listed in Figure 19.

**FIGURE 18**

Are you *currently* a graduate student?

- No, I have never been enrolled as a graduate student
- No, although I used to be a graduate student, I did not complete a degree.
- No, but I used to be a graduate student and I completed a degree
- Yes, I am currently a graduate student and attend full time\*
- Yes, I am currently a graduate student and attend part time\*
- Other, please specify: \_\_\_\_\_\*
- I prefer not to answer

\*Those who agreed to any of these options would then respond to the additional question listed in Figure 19.

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## Employment

Survey questions about employment vary considerably (Toor, 2020). For example, some researchers ask about employment status, number of work hours, type of employee, industry, size of organization, years of work experience, etc. (Toor, 2020). In our original article, three questions were given to assess different aspects of employment (Hughes et al., 2016). Those included a question about employment status, including hours worked, type of employer, and type of industry. Those questions were retained but revised. In addition, the option to answer those employment questions about more than one job was added. A more specific separate question about the number of hours worked overall was added and the number of hours worked per job was added as well. Finally, a question asking about occupational titles could be used for those evaluating SES.

### Employment Status

The first question asks respondents whether they are employed. As in the original article, the phrase “not employed” was used as an option instead of “unemployed” because the word unemployed has connotations of not being able to find work and in addition some people may not be looking for work (Hughes et al., 2016). In this revised question, “not employed” was broken into “not employed and not looking for work” and “not employed but looking for work.” An option of “retired” was also added, and a new option “I prefer not to answer” was added to every employment question. See Figure 20.

### Total Hours Worked Per Week

This question asks about the number of hours employees work per week including multiple jobs, if they have more than one job. The original question included a statement about hours worked at an office, in the field, or at home, and this was retained (Hughes, 2013; Hughes et al., 2016). This is especially important with 25% of all workers in the United States working from home (Robinson, 2022). In addition, the U.S. Census Bureau (2021) noted that those who were on a leave of absence (e.g., family leave, medical leave) might be employed but not have work hours to record. For this reason and to be more inclusive of those in different work situations, a response option representing this was added to the question.

The question asks respondents to use the past week when answering the question. Researchers should be aware that they might want to adjust the time of year for when they collect data (i.e., around holidays). By adding this question that asks about the number of work hours, researchers can differentiate between part-time and full-time employees (Hughes, 2013; Hughes et al.,

### FIGURE 19

#### How are your courses delivered?

- Most or all of my courses are hybrid (for example some of my courses are in person and some are online OR some of my courses use both in-person and online instruction)
- Most or all of my courses are in person
- Most or all of my courses are online
- Other, please specify: \_\_\_\_\_
- I prefer not to answer

### FIGURE 20

#### Are you currently employed?

- I am not employed, and I am NOT looking for work
- I am not employed but I am looking for work
- I am retired
- I have one job\*
- I have two jobs\*
- I have three or more jobs\*
- I prefer not to answer

\*For those who agree to these options, they would respond to the additional questions listed in Figures 22, 23, and 24, and the questions would be repeated for up to three jobs.

2016). As noted in Hughes et al. (2016), the U.S. Bureau of Labor Statistics (2022) uses 35 or more hours to define full-time work, so for the question the hours were listed in 5-hour increments in case researchers wanted to divide employees into part-time and full-time employees. However, it should be noted that there is some variation in what is considered to be part-time and full-time (Indeed, 2022). For example, the Affordable Care Act uses 30 hours as the cutoff for full-time work, whereas some employers use 40 hours as the cutoff for full-time work (Indeed, 2022). Finally, the number of work hours given to select from range from under 20 to over 71 to allow for those who might work more than one job or work long hours. See Figure 21.

### Hours Worked Per Week

This question is like the question above about total hours worked per week, but respondents would give their hours individually for each job that they worked in the prior week. See Figure 22.

### Type of Employee

We based our original question on the American Community Survey’s type of employment question, and we used their recently revised question for our updated question (Hughes et al., 2016; U.S. Census Bureau, 2022b). However, an option for “other type of employee” was included with a place to specify the type. See Figure 23.

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**FIGURE 21**

If you are NOT on a leave of absence, how many TOTAL hours did you work last week including time at an office, in the field, or working at home? If you have multiple jobs, please add up the hours for all your jobs.

- 71 or more hours
- 66 to 70 hours
- 61 to 65 hours
- 56 to 60 hours
- 51 to 55 hours
- 46 to 50 hours
- 41 to 45 hours
- 36 to 40 hours
- 31 to 35 hours
- 26 to 30 hours
- 21 to 25 hours
- 20 or fewer hours
- On a leave of absence (for example: family leave, medical leave, etc.)
- I prefer not to answer

**FIGURE 22**

If you are NOT on a leave of absence, how many hours did you work last week at this job, including time at an office, in the field, or working at home?

- 71 or more hours
- 66 to 70 hours
- 61 to 65 hours
- 56 to 60 hours
- 51 to 55 hours
- 46 to 50 hours
- 41 to 45 hours
- 36 to 40 hours
- 31 to 35 hours
- 26 to 30 hours
- 21 to 25 hours
- 20 or fewer hours
- On a leave of absence (for example: family leave, medical leave, etc.)
- I prefer not to answer

**FIGURE 23**

What type of employee are you? (mark ALL that apply)

**Private Sector Employee**

- For-profit company or organization
- Non-profit organization including tax-exempt and charitable organizations

**Government Employee**

- Active-duty U.S. Armed Forces or Commissioned Corps
- Federal government civilian employee
- Local government (for example: city or county school district)
- State government (including state colleges/universities)

**Self-Employed or For-Profit Family Business Employee**

- Owner of incorporated business, professional practice, or farm
- Owner of non-incorporated business, professional practice, or farm
- Work without pay in a for-profit family business or farm for 15 hours or more per week

**Other**

- Other type of employee, please specify: \_\_\_\_\_
- I prefer not to answer

**Industry**

Some researchers recruit participants using people from a specific occupation or industry, which makes the occupational information easier to report but others use a wide variety of occupations (Hughes et al., 2016). When researchers recruit respondents from a wide variety of occupations, it is important for the researchers to consider that respondents may feel uncomfortable giving their specific occupation because they might question whether they will be able to be identified

by their response. Using industry instead of having participants list their occupation makes this less likely to happen (Hughes et al., 2016).

In the original article, the U.S. Census Bureau's (2016) list of industries was used, but some participants reported that their occupation fell into more than one of the industries listed. For this revision, the National Center for O\*NET Development's (2022) list of job industries was selected to use instead because they overlap less. Another advantage for using their list is that it has fewer options making the length of the question more manageable. Again, for this question, an option was added for writing in the industry if the participant did not see their industry represented (Hughes et al., 2016). See Figure 24.

**Occupation Title**

The National Committee on Vital and Health Statistics (2012) outlined possible steps to evaluate SES. One of those included using survey respondents' occupational titles to assess prestige. They noted that standard occupation codes can be used to code occupations using existing classification systems. If researchers want to use this to evaluate SES, they should include a free-response question asking participants to list their occupational titles. However, as noted before, some participants might be uncomfortable listing their specific occupational title or titles.

Finally, we did not include temporary or contract workers in our employment questions. If researchers want to know that type of information, they could add an additional question that asks about that.

**Income**

We did not include income questions in the original article (Hughes et al., 2016). In this revision, we added demographic questions about individual income and family income. We included income because the APA (2015) recommended that it was important to include in surveys to be able to evaluate SES. They also suggested that income should be measured using multiple sources, in addition to wages and salary. They gave examples such as dividends and interest, Social Security, unemployment insurance, and disability income. The American Community Survey's income questions use eight categories of income to come up with total income (U.S. Census, 2022b). For our questions, we used their eight sources of income, but instead of individually assessing each one of those as separate questions, we condensed their options into one question for both individual and family income.

Besides individual income, some researchers assess either family income or household income. However, the definitions for those differ. The U.S. Census (2021) defines a family as two or more individuals living together, and

**FIGURE 24**

**How would you describe the industry your job would be in?** (mark ALL that apply)

- Accommodation and food services
- Administrative and support services
- Agriculture, forestry, fishing, and hunting
- Arts, entertainment, and recreation
- Construction
- Educational services
- Finance and insurance
- Government
- Health care and social assistance
- Information
- Management of companies and enterprises
- Manufacturing
- Mining, quarrying, and oil and gas extraction
- Professional, scientific, and technical services
- Real estate and rental and leasing
- Retail trade
- Transportation and warehousing
- Utilities
- Wholesale trade
- Other industry, please specify: \_\_\_\_\_
- I prefer not to answer

**FIGURE 25**

**What is your total individual income in U.S. dollars for the past 12 months from all the following sources?** Please use all the examples below when thinking about your overall income. If you do not know your exact income, please estimate.

- Wages, salary, commissions, bonuses, or tips for all jobs (*Report amount before deductions for taxes, bonds, dues, or other items*)

**Other Sources**

- Any public assistance or welfare payments from the state or local welfare office
- Interest, dividends, net rental income, royalty income, or income from estates and trusts (*Include even small amounts credited to an account*)
- Retirement income, pensions, or survivor or disability income (*Include income from a previous employer or union, or any regular withdrawals or distributions from IRA, Roth IRA, 401(k), 403(b), or other accounts specifically designed for retirement. Do NOT include Social Security*)
- Self-employed income from own nonfarm businesses or farm businesses including proprietorships and partnerships (*Include NET income before business expenses*)
- Social security or railroad retirement
- Supplemental security income (SSI)
- Any other sources of income regularly received such as Veterans' (VA) payments, unemployment compensation, child support, or alimony (*Do NOT include lump sum payments such as money from an inheritance or the sale of a home*)

- No income
- Less than \$25,000
- \$25,000–\$50,000
- \$50,000–\$100,000
- \$100,000–\$200,000
- \$200,000–\$500,000
- More than \$500,000
- I prefer not to answer

who are related by birth, marriage, or adoption, whereas households include all individuals who are 15 years and older and who reside in a housing unit. This household definition can be confusing for students who often live with others in dorms or apartments and who do not influence them financially. Because many researchers include students in their samples, a question about family income will be presented instead of household income. We added “partnerships” to our definition of family income. It should be noted that many students who live away from their family most of the year will just report individual income. Family income would be more important for researchers using samples that include couples and families. See Figures 25 and 26.

Another important issue for researchers to consider is that the sources of income included in the individual and family income questions do not include income from noncash benefits (e.g., health benefits, rent-free housing, food stamps; U.S. Census, 2021). In addition, researchers should be aware that survey respondents often underestimate their income and that they more reliably report their wages or salaries as compared to the other types of possible income (U.S. Census, 2021). We suspect this issue is even worse for family income because survey respondents may not know details about family members' income. Even with these issues, we feel it is important to represent different sources of income in our questions.

Finally, we asked the income questions using U.S. dollars. This could be confusing for those who are living in the United States but have assets in other countries. In addition, if researchers are using participants from locations outside of the United States, they will need to revise these questions to reflect the currencies of the participants.

**Language**

As an element of understanding participants' culture, researchers may wish to gather information about their participants' language knowledge and use. This question can support unveiling the assumption that English is a primary or only language among study participants. U.S. Census (2015a) data shows that there are at least 350 languages spoken in homes, showing great language diversity in the United States. In addition to providing a richer understanding of the diversity of participant demographics, responses to this item may provide important contextual information for the researcher about the validity of survey responding. Indeed, even in proficient multilingual speakers, responses to surveys may vary by the language in which the questions are presented (Sha & Gabel, 2020).

We present two questions for gathering this demographic data, based on the U.S. Census (2018),

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with changes made to increase inclusivity through adherence to inclusive language guidelines and person-first language (e.g., APA, 2021a; OHSU, 2020). Namely, OHSU (2021) inclusive language guidelines suggest that “first language” is preferable to “English as a second language” to acknowledge that individuals may speak multiple languages. Our recommended question honors this through the plural “language(s)” to acknowledge that individuals may currently use multiple languages interchangeably or have grown up learning multiple languages simultaneously and therefore not be able to identify one first or primary language. Additionally, inclusive language guidelines dictate that language that paternalizes (e.g., “English language learner”) should be avoided (OHSU, 2021).

Therefore, questions about proficiency must be balanced with sensitivity to avoid paternalizing, appearing skeptical, or assuming nonproficiency. The U.S. Census English proficiency question has demonstrated good convergent validity with objective measures of proficiency (Vickstrom et al., 2015), and we rephrased this question to be more consistent with person-first language (APA, 2021a). See Figures 27 and 28.

We recommend presenting the proficiency question for all participants and presenting this prior to the language use question to avoid appearing reactive or skeptical of a possible language deficiency. As a follow-up to understanding which languages participants use, researchers may also wish to understand which, if any, of these the participant considers to be their

**FIGURE 26**

Family income is defined as the income of two or more individuals residing together most of the year and who are related to each other by birth, marriage, partnership, or adoption.

**What is your total combined family income in U.S. dollars for the past 12 months from all the following sources?** Income can come from many sources, please use the examples below when thinking about your overall household income. If you do not know your exact income, please estimate.

- Wages, salary, commissions, bonuses, or tips for all jobs (*Report amount before deductions for taxes, bonds, dues, or other items*)

**Other Sources**

- Any public assistance or welfare payments from the state or local welfare office
- Interest, dividends, net rental income, royalty income, or income from estates and trusts (*Include even small amounts credited to an account*)
- Retirement income, pensions, or survivor or disability income (*Include income from a previous employer or union, or any regular withdrawals or distributions from IRA, Roth IRA, 401(k), 403(b), or other accounts specifically designed for retirement. Do NOT include Social Security*)
- Self-employed income from own nonfarm businesses or farm businesses including proprietorships and partnerships (*Include NET income before business expenses*)
- Social security or railroad retirement
- Supplemental security income (SSI)
- Any other sources of income regularly received such as Veterans' (VA) payments, unemployment compensation, child support, or alimony (*Do NOT include lump sum payments such as money from an inheritance or the sale of a home*)

- My individual income is the same as my family income
- No income
- Less than \$25,000
- \$25,000–\$50,000
- \$50,000–\$100,000
- \$100,000–\$200,000
- \$200,000–\$500,000
- More than \$500,000
- I prefer not to answer

**FIGURE 27**

**How well do you use English?**

- Very well
- Well
- Fair
- Poorly
- Very poorly
- I prefer not to answer

**FIGURE 28**

**What language(s) do you use fluently or with near fluency? (mark ALL that apply)**

- |   |   |
|---|---|
| <input type="checkbox"/> Arabic           | <input type="checkbox"/> Mandarin                     |
| <input type="checkbox"/> Bengali          | <input type="checkbox"/> Polish                       |
| <input type="checkbox"/> Cantonese        | <input type="checkbox"/> Portuguese                   |
| <input type="checkbox"/> English          | <input type="checkbox"/> Punjabi                      |
| <input type="checkbox"/> French           | <input type="checkbox"/> Russian                      |
| <input type="checkbox"/> German           | <input type="checkbox"/> Signed Language              |
| <input type="checkbox"/> Haitian Creole   | <input type="checkbox"/> Spanish                      |
| <input type="checkbox"/> Hindi/Hindustani | <input type="checkbox"/> Tagalog                      |
| <input type="checkbox"/> Japanese         | <input type="checkbox"/> Telugu                       |
| <input type="checkbox"/> Javanese         | <input type="checkbox"/> Vietnamese                   |
| <input type="checkbox"/> Korean           | <input type="checkbox"/> Other, please specify: _____ |
| <input type="checkbox"/> Malay/Indonesian | <input type="checkbox"/> I prefer not to answer       |

**FIGURE 29**

**Which of these would you consider to be your primary language(s)? (mark ALL that apply)**

- |   |   |
|---|---|
| <input type="checkbox"/> Arabic           | <input type="checkbox"/> Mandarin                     |
| <input type="checkbox"/> Bengali          | <input type="checkbox"/> Polish                       |
| <input type="checkbox"/> Cantonese        | <input type="checkbox"/> Portuguese                   |
| <input type="checkbox"/> English          | <input type="checkbox"/> Punjabi                      |
| <input type="checkbox"/> French           | <input type="checkbox"/> Russian                      |
| <input type="checkbox"/> German           | <input type="checkbox"/> Signed Language              |
| <input type="checkbox"/> Haitian Creole   | <input type="checkbox"/> Spanish                      |
| <input type="checkbox"/> Hindi/Hindustani | <input type="checkbox"/> Tagalog                      |
| <input type="checkbox"/> Japanese         | <input type="checkbox"/> Telugu                       |
| <input type="checkbox"/> Javanese         | <input type="checkbox"/> Vietnamese                   |
| <input type="checkbox"/> Korean           | <input type="checkbox"/> Other, please specify: _____ |
| <input type="checkbox"/> Malay/Indonesian | <input type="checkbox"/> I prefer not to answer       |

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**FIGURE 30**

**Where do you live?**

- In the United States or a United States Territory (mark ALL that apply):
  - Midwest**—Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, North Dakota, South Dakota, Wisconsin
  - Northeast**—Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont
  - South**—Arkansas, Alabama, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia
  - West**—Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming
  - United States territory**—American Samoa, Baker Island, Guam, Howland Island, Jarvis Island, Johnston Atoll, Kingman Reef, Midway Islands, Navassa Island, Northern Mariana Islands, Palmyra Atoll, Puerto Rico, Virgin Islands, Wake Island
  - None of the above, please specify \_\_\_\_\_
- Outside of the United States or United States Territories, please specify: \_\_\_\_\_
- I prefer not to answer

**FIGURE 31**

**I primarily reside:**

- In the United States or a United States Territory (mark ALL that apply)
 

<input type="checkbox"/> Alabama	<input type="checkbox"/> Nebraska
<input type="checkbox"/> Alaska	<input type="checkbox"/> Nevada
<input type="checkbox"/> American Samoa	<input type="checkbox"/> New Hampshire
<input type="checkbox"/> Arizona	<input type="checkbox"/> New Jersey
<input type="checkbox"/> Arkansas	<input type="checkbox"/> New Mexico
<input type="checkbox"/> Baker Island	<input type="checkbox"/> New York
<input type="checkbox"/> California	<input type="checkbox"/> North Carolina
<input type="checkbox"/> Colorado	<input type="checkbox"/> North Dakota
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Northern Mariana Islands
<input type="checkbox"/> Delaware	<input type="checkbox"/> Ohio
<input type="checkbox"/> Florida	<input type="checkbox"/> Oklahoma
<input type="checkbox"/> Georgia	<input type="checkbox"/> Oregon
<input type="checkbox"/> Guam	<input type="checkbox"/> Palmyra Atoll
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> Howard Island	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> Idaho	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Illinois	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Indiana	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Iowa	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Jarvis Island	<input type="checkbox"/> Texas
<input type="checkbox"/> Johnston Atoll	<input type="checkbox"/> Utah
<input type="checkbox"/> Kansas	<input type="checkbox"/> US Virgin Islands
<input type="checkbox"/> Kentucky	<input type="checkbox"/> Vermont
<input type="checkbox"/> Kingman Reef	<input type="checkbox"/> Virginia
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Wake Island
<input type="checkbox"/> Maine	<input type="checkbox"/> Washington
<input type="checkbox"/> Maryland	<input type="checkbox"/> Washington DC
<input type="checkbox"/> Massachusetts	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Michigan	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Midway Islands	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Minnesota	<input type="checkbox"/> None of the above, please specify: _____
<input type="checkbox"/> Mississippi	
<input type="checkbox"/> Missouri	<input type="checkbox"/> Outside of the United States or United States Territories
<input type="checkbox"/> Montana	<input type="checkbox"/> I prefer not to answer
<input type="checkbox"/> Navassa Island	

primary language. The language options we provide in these demographic questions are those that the U.S. Census Bureau (2015a) reported to be spoken most frequently in the United States and those languages the 2020 Census was offered in (i.e., based on most frequently reported languages from 2012–2016), in addition to those recommended by the ACPA Standards for Demographics Questions (Moody et al., 2013). However, researchers should adjust these language options according to the populations they are sampling. See Figure 29.

**Location**

Geography is an important context for understanding a person. Indeed, a whole field of behavioral geography (Montello, 2013) examines human behavior in geographical locations. For researchers whose need for examining demographics is less central, a briefer question (see Figure 30) that groups states and territories may make more sense. The groupings are based on the U.S. Census determination of geographic regions. In addition to those, we added an option for territories. We named all territories. When considering inclusion, details such as this make a big difference for the people living in these territories. In addition to possibly feeling invisible, participants may think they are not eligible to participate in a study, or they may leave a geographical location question blank because it is unclear where they belong. In addition to better inclusion, this list provides clarity that would, hopefully, increase probability of responding.

For people seeking a more detailed examination of geography in their variables, we recommend a more disaggregated approach (see Figure 31). Although, we acknowledge that some participants may worry that giving a specific location could help to identify them, especially if the location is different from many of the other participants.

The emergence of COVID-19 caused many to move to remote work, and for some individuals, this may mean that they are residing in a state different from their primary employment. Given this, researchers might want to ask another question about the location of employment. However, this level of detail may be unnecessary, cumbersome, or even increase the probability of making participants more identifiable. Researchers should take these issues into account when choosing location questions. For this additional question, the question stem could be: “I work in the same state or territory that I primarily reside;” with the first response option being “yes,” and the second option being “no, please select the state or territory where you work: (mark all that apply)” with the same states and territories listed in Figure 31. Options for “Outside of the United States or United States Territories” and “I prefer



not to answer” would be retained as well.

Depending on the needs of research, geographic designation rather than location may be more relevant. A specific state may be less meaningful than a distinction of rural or urban context. Unfortunately, the definitions of rural and urban have varied over the years (Ratcliffe, n.d.), and the 2020 Census saw more changes (U.S. Department of Commerce, 2022), making precise measures difficult and messy. Rather than concentrate on minute distinctions, a simple item that asks about the general description of the area as urban, suburban, or rural can provide rich context (Parker et al., 2018; see Figure 32).

Finally, researchers will want to be mindful of the risks inherent in survey research that might be distributed well beyond the boundaries under which it was approved. From a regulatory standpoint, Institutional Review Boards’ (IRB) approval resides within the boundaries of the United States. For researchers wanting to collect data on international samples, it is important to know that international research requires local review (Domenech Rodríguez et al., in press). A researcher hoping to collect data in Argentina would have to find a local review board to review and approve the research prior to data collection there. Research approval procedures vary tremendously across countries. A notable example was the passing of the General Data Protection Regulation (GDPR) in 2018. The GDPR has strict standards for data protections for all countries in the European Union (gdpr-info.eu) that easily surpass IRB standards in the United States. We would recommend that, as a minimum, researchers ask whether participants currently live in the United States or one of its territories (see options in Figure 30 and 31). This question would likely be included in a screening questionnaire to ensure compliance with protection standards for human participants in research.

### Relationship Status

As relationships and living arrangements have changed considerably over the last few decades, the heterosexual intimate/sexual dyad should no longer be assumed for Americans’ relationship structure and composition of families (Seltzer, 2019). Hughes et al. (2016) stated that, up until recently, researchers have only asked about marital status, which was often treated in earlier research as a dichotomous variable between married

and not married, the latter being an aggregate category for divorced, separated, widowed, and single. According to Pew Research Center, 38% of U.S. adults ages 25 to 54 were unpartnered in 2019, a steep increase from 29% in 1990 (Fry & Parker, 2022). The substantial rise in the proportion of unmarried people should not be construed as an increase in singlehood, as traditionally perceived. This perspective may be offensive to people who are in partnerships but cannot or do not want to marry (Makadon & Tillery, 2013), and may also lead to inconclusive results and inaccurate views of relationship formations and trajectories. More people in the United States are delaying or eschewing marriage, which may partially explain the general upward trend in cohabitation and divorce rates, shifting traditional meanings of intimate relationships, which are now more individualized (Horowitz et al., 2020).

The most common categories suggested and used for marital status classification are as follows: married, widowed, divorced, separated, and never married (Alchemer, 2021; SurveyMonkey, 2022; U.S. Census Bureau, 2022). DePaulo (2011) noted that it is offensive to list the option of “single” by just using the phrase “never married” because it implies marriage is the end goal for each person. The prompt provided by Alchemer (2021) used “single” because asking what a person’s marital status defaults to that as being the favored option. We included “single, not looking” and “single, looking or casually dating” based on the Pew Research Center’s (2022a) classifications. We also have expanded the options beyond those listed above to include “civil union/domestic partnership” and “cohabiting or in a relationship.” A total of 32 countries, including the United States, have accorded legal recognition to same-sex marriages, and an increasing number of Western democracies without marriage equality have recognized civil unions (World Population Review, 2022).

We also included response options for individuals practicing polyamory, a type of consensually nonmonogamous relationship in which people engage in intimate romantic relationships with multiple concurrent partners (Hauptert et al., 2017; Moors et al., 2021). The widely held assumption of romantic or sexual exclusivity with one partner as the natural, optimal model for healthy relating that appears in leading theoretical frameworks, such as attachment theory and the investment model of relationships (Conley et al., 2017; Moors et al., 2017), has historically been conventionalized. Although monogamy remains the most prevalent relational paradigm, there is a burgeoning public interest regarding polyamory in mainstream society and popular press (Moors et al., 2017), with one in nine people in the United States having been in a polyamorous relationship (Moors et al., 2021).

**FIGURE 32**

I live in an area that is best described as:

- Rural
- Suburban
- Urban
- I prefer not to answer

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For researchers specifically interested in studying intimate relationships, we recommend adding a text box question asking about how people in nonmonogamous relationships identify themselves. Although polyamorous relationships may also take the form of triads, quads, V-structures, etc., they all tend to adhere to the same core ideals of open communication and consent by all parties involved (Balzarini et al., 2019). As a further step toward acquiring a more nuanced understanding of intimate relationships, we added additional options that allow people to indicate whether they are currently in a monogamous relationship, polyamorous relationship, multiple relationships, or not in a relationship, in this updated version of the original article (Hughes et al., 2016). We recommend that researchers ask two sets of questions about current relationship status as a more inclusive approach for capturing the diversity of intimate relationships people engage in, as shown in Figures 33 and 34.

### Religion

Because the commonality of different religious affiliations varies across geographic regions, it is essential for researchers to be sensitive to the common religious faiths in the cultures from which data are collected. For that reason, the options provided in Figure 35 might not be relevant outside of North America; within North America, however, most respondents would find one or more of these options to be appropriately self-identifying based on recent population-wide religion surveys (Pew Research Center, 2015; Public Religion Research Institute, 2021).

This survey question was created to reflect a few important principles and best practices for inclusive religious self-identification. First, rather than directly asking participants to specify their religion, we suggest a broader question: “With which of the following do you identify?” This allows the question to be inclusive of those with theistic faiths, spiritual nontheistic beliefs, and nonspiritual worldviews within the same demographic question.

Second, instead of requiring respondents to only select one self-identification, we encourage allowing respondents to select as many descriptors as they would like. Although religious beliefs are often viewed as mutually exclusive categories, many people have fluid belief systems that incorporate multiple worldviews. Bidwell (2018) noted that spiritually fluid people reported feeling frustrated when asked to constrain their beliefs to a single tradition, and the requirement to select one single worldview was described by some as forcing them to exclude part of their identities. In pilot data collected for part of a recent unpublished study, 5.72% of a large sample of respondents selected multiple belief systems when given the opportunity to do so. By allowing participants to select as many descriptors as are self-identifying, it is

**FIGURE 33**

**Are you currently:**

- In a monogamous relationship
- In a polyamorous relationship (multiple relationships with the consent of participants)
- In multiple relationships (without those involved knowing about each other)
- Not in a relationship
- I prefer not to answer

**FIGURE 34**

**Are you currently:** (mark **ALL** that apply)

- Cohabiting or in a relationship (nonlegal)
- Divorced
- In a civil union/domestic partnership
- Married
- Separated
- Single, not looking
- Single, but looking or casually dating
- Widowed
- I prefer not to answer

**FIGURE 35**

**With which of the following do you currently identify?** (mark **ALL** that apply)

- Agnostic
- Animist
- Atheist
- Baha'i
- Buddhist
- Christian (Catholic, Orthodox, Protestant, or other)
- Daoist or Taoist
- Hindu
- Jain
- Jewish
- Muslim
- Polytheistic or Pantheistic
- Sikh
- Spiritual but not religious
- Unitarian or Universalist
- Wiccan or Pagan
- Nothing in particular
- Other religion, worldview, or belief system, please specify: \_\_\_\_\_
- I prefer not to answer

If you belong to a particular branch of a religion marked above (such as a specific denomination or subgroup), and you feel it would provide a more accurate understanding of your religious identity, please specify: \_\_\_\_\_

more likely that spiritually fluid participants will be able to fully communicate their identities.

Third, note that the options are included alphabetically. Alphabetic presentation prevents the perception of status, importance, or hierarchies among religions.

Fourth, we recommend the inclusion of “spiritual but not religious” (SBNR) as an identity option. As noted by Mercadante (2014), a substantial proportion of

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people—especially in the generations born in the 1990s and later—consider their spirituality to be a highly salient part of their identity, and yet many do not ascribe to any formal religious tradition or shared faith. Despite common stereotypes that these individuals simply lack commitment to a particular faith, Mercandate provided evidence that SBNR individuals hold strong convictions that arise from their spirituality, providing their lives with core value systems that are as central to their lives as formal religious doctrines are to the lives of many religiously affiliated people. By providing survey respondents with an SBNR option, researchers allow these participants to communicate the importance of spirituality in their lives without simply being grouped together in a general religiously unaffiliated group.

Fifth, the inclusion of “nothing in particular” is a recommendation that is aligned with the observation that one of the fastest growing religious groups in North America is the subset who do not feel a strong resonance with any religious descriptor: the “nones.” Between 2007 and 2014, the proportion of Americans selecting this option increased from 12% to 16%, making it the fourth largest religious subgroup (i.e., behind Evangelical Protestants, Catholics, and Mainline Protestants; Pew Research Center, 2015). Burge (2021) acknowledged that this increase may, in part, be due to changes in American society that make it more socially acceptable to acknowledge that one does not feel a strong commitment to any faith tradition, but his research suggests that this cannot fully account for the growth. Many nones, he argued, are in a process of moving away from the faith tradition of their childhood but are not driven to replace it with a new belief system. Rouse (2018) found distinct differences among religiously unaffiliated groups, with nones reporting attending church, praying, and reading sacred texts more often than atheists or agnostics. Rouse conducted a survey with “nothing in particular” as an option; two weeks later, he sent those who selected this descriptor a follow-up survey, but this time without providing that option. Although 44% of the nones selected “agnostic” and 19% selected “atheist” when “nothing in particular” was not provided, roughly a third of the nones selected a specific formal religious affiliation in its absence. This suggests that many nones may not identify with other religiously unaffiliated descriptors, so the provision of a “nothing in particular” option enhances the inclusion of this rapidly growing American subset.

Sixth, we encourage the opportunity to allow participants to self-describe their faith or worldview if not listed.

### Sexual Orientation

Research surveys have generally followed one of three different approaches when asking respondents to

self-identify their sexual orientation: (a) dimensional self-ratings, (b) categorical descriptors, and (c) open-ended free response. We recommend that respondents select either a categorical approach (see Figure 36) or free response (see Figure 37).

### Limitations of Dimensional Approaches

Within a historical context, dimensional approaches had an important place at one time for the promotion of inclusive data collection. The most well-known dimensional scale, the Kinsey Scale, represents a historical move toward greater inclusivity. At a time when sexual orientation was conceptualized by researchers as a simplistic dichotomy between “homosexual” and “heterosexual,” Kinsey et al. (1948) proposed a 7-point dimensional scale with options ranging from 0 (*heterosexual*) to 6 (*homosexual*); however, these anchors were often rephrased as “exclusively attracted to the opposite sex” and “exclusively attracted to the same sex”). Although this represented a positive first step in raising researchers’ awareness of the complexity of sexual orientations, it is insufficient for several reasons. Notably, it condenses sexual orientation into one single dimension, typically defined based on attraction.

The Klein Sexual Orientation Grid (KSOG; Klein et al., 1985) was developed specifically to rectify this limitation of the Kinsey Scale, and it is still widely used today. Using a 7-point scale, the KSOG and its variants ask respondents to rate themselves on several independent dimensions, such as rating one’s sexual attraction, sexual behaviors, sexual fantasies, self-identification, social preference, romantic preference, and “lifestyle.” Moreover, the KSOG asks respondents to evaluate each of those dimensions in three reference domains: past, present, and ideal.

FIGURE 36

What is your sexual orientation and/or sexual identity? (mark ALL that apply)

- Asexual or aromantic
- Bisexual
- Demisexual
- Gay
- Lesbian
- Pansexual
- Queer
- Questioning
- Sexually fluid
- Straight or heterosexual
- Other sexual identity or orientation, please specify: \_\_\_\_\_
- I prefer not to answer

FIGURE 37

How would you describe your sexual orientation? \_\_\_\_\_

- I prefer not to answer

There is much to admire about the KSOG's contributions toward greater inclusivity; for example, it reflects the lived experiences of many sexual minorities in allowing for representation of fluidity across time and complexity across aspects of identity.

However, dimensional approaches such as the Kinsey Scale, KSOG, and variants of these methods have two weaknesses that are detrimental to research inclusivity. First, these approaches tend to conflate the experiences of plurisexual people (e.g., bisexual, pansexual, and omnisexual) with those of asexual people. By conceptualizing sexual orientation as one or more dimensions anchored by (in Kinsey's original terminology) "heterosexual" and "homosexual," the middle range might include a very heterogeneous group of people. Galupo et al. (2018) asked a diverse sample of participants to rate whether the Kinsey Scale and KSOG accurately reflected their sexuality; plurisexual people rated the scales less positively than cisgender monosexual people (i.e., including gay men, lesbian women, and straight men and women). Second, these dimensional approaches tend to often reinforce gender binaries. If not anchored by terms such as "heterosexual" or "homosexual," they tend to be anchored by phrases such as "same sex" and "opposite sex," which reflects an incorrect conceptualization of sex or gender as a binary characteristic.

If one were to try to be fully inclusive within the dimensional approach, a researcher would have to ask about multiple domains of identity (e.g., attraction, behavior, fantasies, and self-identity), multiple focuses (e.g., toward nonbinary people, toward gender-conforming men, and toward gender-conforming women), and multiple time frames (e.g., past and present). The resulting system would be very time consuming for respondents to complete, and although it might provide insights into a specific respondent's lived experiences, it would defy any type of summarization for descriptive statistics of a research sample. Therefore, we discourage the use of dimensional self-rating systems of sexual orientation.

### **Categorical Descriptors**

Suen et al. (2020) asked focus groups of gender and sexual minorities to reflect on the wording of categorical systems of self-identification, and their responses raise several important best practices in the use of this approach. First, they noted the importance of allowing respondents to select multiple identifiers, such as the phrase "mark all that apply" in Figure 36. Lunn et al. (2016) reported that 16.8% of the respondents in their large sample of sexual and gender minorities selected multiple identifiers when given the option to do so, so requiring respondents to only select one term is unlikely to allow all people to fully represent their identities.

Second, Suen et al. (2020) noted the importance of using terms that best resonate with individuals' identities. For example, many of their respondents found the use of the term "homosexual" to be offensive because of the tie between that term and a history of medicalization and stigmatization. Although the sexual and gender minority respondents in their sample also reported that the phrase "heterosexual" was offputting and problematic, we included the terms "straight/heterosexual" in Figure 36. After all, many straight people think of themselves as "heterosexual," and our goal was to create a fully inclusive survey in which all people felt as though they could express their own identity in a manner that resonated with their lived experiences. Third, Suen et al. (2020) emphasized the importance of allowing an "other" option. Although most respondents in Lunn et al.'s (2016) sample of 11,476 sexual minority respondents were able to self-identify with one or more of the descriptors listed in Figure 36, a subset of respondents may have a less common term (e.g., androsexual, gynesexual, or skoliosexual) that they consider to be a better representation of their identity. Although not identified by Suen et al. (2020), we recommend a fourth best practice for those using the categorical approach—listing the options in alphabetical order to avoid communicating a hierarchy or supremacy of some identities over others.

### **Free Response**

In the focus group conversations reported by Suen et al. (2020), many participants recommended a free response format such as the one in Figure 37. Because this approach allows each person to define their own identities for themselves instead of being constrained by previously selected terms, we recognize that this might be the most inclusive method of asking about sexual orientation. If a researcher opts for this approach, Suen et al. (2020) recommended using the term "sexual orientation" rather than "sexual identity" because (even among a sample of sexual and gender minorities) the term "sexual identity" was unclear to some focus group participants. In pilot data we collected for another project, many respondents misunderstood what we meant when using the phrase "sexual identity" in an open-ended question, providing their gender instead of their sexual orientation. "Sexual orientation" is more familiar to respondents and less likely to be misinterpreted.

Although an open-ended question has obvious benefits for the purpose of inclusive data collection, we offer a note of caution that points to a possible strength of categorical approaches like Figure 36. In pilot data collected for a different project (Hughes & Rouse, 2021), we noted that fewer MTurk respondents self-identified as sexual minorities when asked an open-ended question like Figure 37 than

when asked a categorical question like Figure 36. When we surveyed the same MTurk workers multiple times, several people who selected a nonstraight identity on a categorical question either skipped or wrote “straight” or “heterosexual” on an open-ended question. We can only speculate about the reason. However, given the level of stigma and self-stigma surrounding sexual orientation, it is possible that a person who is not fully comfortable with a nonstraight identity might find it less threatening to simply click a checkbox than to write out a phrase that they have not fully embraced. Because of the method of recruitment used by Suen et al. (2020), it is likely that most of their participants took pride in their sexual identities, and the opportunity to put their own descriptors in their own terms in an open-ended question was attractive; those who are not at the same level of confidence or comfort in their identities may find a categorical system to be an easier and safer way to self-identify.

### Conclusion

Our hope is that this article will help researchers think more critically about the types and formats of demographic questions they could use in their research surveys. As mentioned in the original article, it is important that researchers continuously evaluate the questions they use to make sure that they are using current and inclusive terminology that is representative of people's identities (Hughes et al., 2016). The questions are formulated, edited, expanded, and revised to reflect the current time. These questions provide the guidance needed to adequately phrase demographic inquiries in studies. Of course, in the future, these will need updating again to reflect societal level changes in how people perceive themselves and others in terms of demographic characteristics. But in the meantime, these questions are designed to assist researchers to collect data that are as accurate as possible. Accuracy here means that what researchers find in the sample of a study really does reflect the population (Hughes et al., 2016). So, these data in turn will impact the conclusions made from the studies and affect the generalizability of the findings (Hughes et al., 2016). More importantly, scientists investigating human behavior have an ethical obligation not only to avoid but also to correct themselves of inaccuracies so as not to harm others (Hughes et al., 2016).

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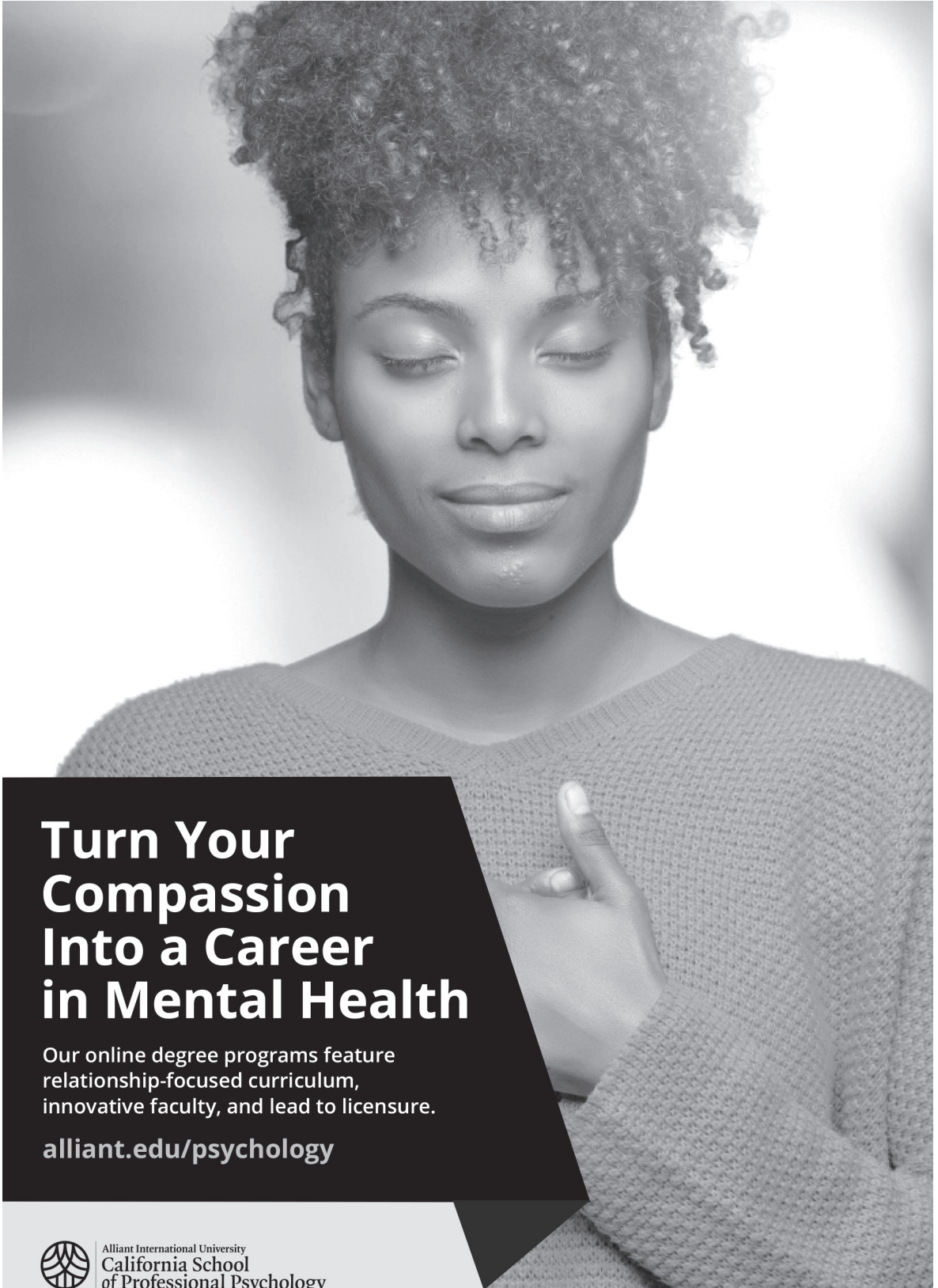
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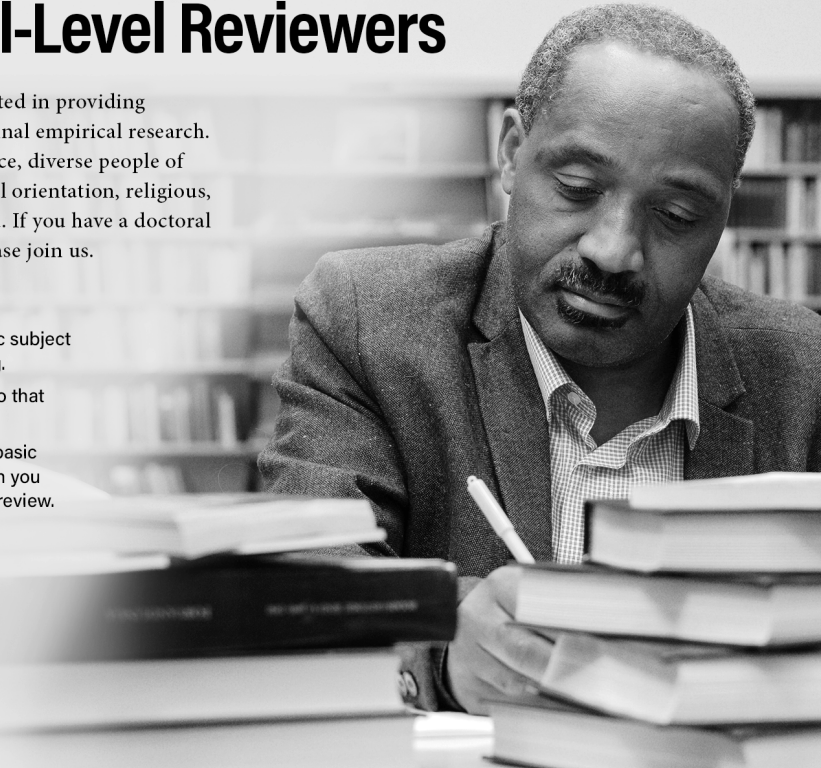
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