

General guidelines on asking for demographic information

This resource and its companion resources on how to ask about certain demographics are meant to start conversations among research teams and invite anyone involved in research to think through their decisions. They are not prescriptive and rarely provide exact wording. We hope these discussions can help strengthen teams and the research they produce.

1.0 Introduction

In surveys, we often ask respondents for demographic information out of habit, without having a specific reason for asking for this information or a specific plan to analyze it. How we ask questions impacts our participants, so it is important to take time to think about what we are asking and why. When designing a survey, keep in mind the following principles:

- **Relevance:** Do I need this information?
- **Specificity:** What specific information do I need and how will I analyze it?
- **Inclusion:** Am I asking for this information in an inclusive way?

These principles are key to good research because they ask that researchers consider the responsibility they have to research participants. The resource also focuses on why these principles matter for equity and inclusion.

Although this series of resources focuses on demographic information, these principles are also worth considering for other forms of diversity, such as learning styles, personality types, etc.

2.0 Relevance: Do I really need this information?

Researchers sometimes collect demographic information even though this data is not needed or not used during analysis. Collecting personal information about people without a plan for analysis raises practical concerns, such as reducing your response rate due to survey length, and ethical concerns, such as collecting private information without a strong rationale. To alleviate these concerns, consider why you are collecting demographic data during the design phase of your research.

QUESTIONS YOU MIGHT CONSIDER:

- What is my analysis plan? Am I trying to get a sense of who the research participants are, or do I want to analyze the relationship between different variables to understand how experiences vary across groups?
- Does the existing literature suggest that some demographic groups might have specific experiences that are important to capture? Is this an exploratory study that might help identify group differences?
- What is my plan to translate the findings into practice?
- Who is my audience? Are they interested in specific demographic groups?
- Am I checking for representativeness to avoid response rate bias?

Whatever questions you decide to include or not include, make sure you have a rationale for your decision. You may choose to communicate that rationale within the survey itself, as being transparent with research participants can help demonstrate respect for their humanity and their contribution to your research.

Asking without analyzing

By including demographic questions, you are suggesting that you are being attentive to these dimensions of identity. This could be encouraging for groups that have been historically underrepresented in research. However, if you do not actually attend to these dimensions in your analysis, your research may continue this history of underrepresentation and have a negative impact of respondents' perceptions of research and researchers.

Stereotype threat

Not collecting demographic data can unintentionally imply that a group does not matter, but collecting that information can activate stereotype threat and impact your results, especially if you are doing applied research or looking at cognitive items in lab settings (Steele, 2011).

Stereotype threat is the risk of confirming negative stereotypes about an individual's racial, ethnic, gender or cultural group, which puts psychological strain on an individual. Research has consistently suggested that people under stereotype threat may respond to items differently than they would if they were not under that threat. Take the time to consider how you might lessen these impacts. For example, it might work to ask about demographics at the end of a survey or to include a blurb contextualizing why you are collecting this data.



THE TAKE-AWAY

Consider the wording of your question to ensure that it does not (intentionally or unintentionally) exclude some groups of people. Use resources available to you (at UBC, online or in your networks) to check that the language you are using is up-to-date.

3.0 Specificity: What specific information do I need and how will I analyze it?

Social and cultural categories are shortcuts that help us make sense of the world by categorizing each other and ourselves. Most of the time, these categories work well enough and they allow us to navigate the world and relationships a bit more easily. However, these categories are shortcuts and they may not always give us the information we are looking for.

FOR EXAMPLE:

- Asking for sex (male/female) may not tell you if the respondent experiences your classroom as a man, woman or non-binary person. For example, a trans man whose legal sex marker is still F might not know how to respond.
- Asking respondents if they are **new to Canada** may not tell you if they are fluent English speakers. For example, a student from a francophone community in Québec might still encounter language barriers.
- Asking respondents if they are an **international student** may not tell you if they are new to Canada. For example, a non-Canadian student who attended grade 11 and 12 in Canada might be enrolled as a domestic student.



THE TAKE-AWAY

Take some time to think about the specific information that you need to answer your research questions, and design your question so you can obtain that information directly rather than infer it.

4.0 Inclusion: Am I asking for this information in an inclusive way?

If you have decided it is important and relevant to your research to collect data about demographic categories, make sure your wording of the question is not outdated or leaving out some people.

To ensure you are using inclusive language, you can talk to colleagues who have expertise in that area or look into how language has evolved to talk about a certain group. In some cases, you might organize focus groups or pilot your questions with relevant stakeholder communities, especially if you have consulted with communities early on and your research will have a direct benefit on the population with whom you are consulting.

To help in this effort, the Equity and Inclusion Office has created some guidelines on how to ask about some demographic categories in a [series of resources](#) available online.

RESOURCES ON SPECIFIC DEMOGRAPHICS INCLUDE:

- Disability
- Gender
- Indigenous identity
- International student status
- Language
- Race and ethnicity
- Socioeconomic status
- Sexual orientation

These resources provide some information and context for talking about categories that often raise questions about usage and language. Other demographic categories might not raise as many questions about how they should be formulated (for example, age, educational background or marital status) but their relevance should still be carefully considered.

These resources provide a starting point but language can quickly evolve. If possible, it is best to get feedback from content experts or directly from the communities that you are asking about. They will be best positioned to identify inclusive language.



THE TAKE-AWAY

Consider the wording of your question to ensure that it does not (intentionally or unintentionally) exclude some groups of people. Use resources available to you (at UBC, online or in your networks) to check that the language you are using is up-to-date.

5.0 The case for collecting demographic data

Asking these questions does not mean you should never collect demographic data. In fact, robust research should strive to be inclusive by taking into account the diversity of learners.

Even though your initial research questions may seem unrelated to student diversity, consider how students belonging to certain social groups may be impacted by the element of teaching that you are interested in studying. Literature reviews can help identify what elements are relevant for your research.



FOR EXAMPLE:

- If you are interested in the impact of clicker quizzes—the use of clickers might be difficult for students who struggle to afford clickers, or for students who struggle to read the screen from far away.
- If you are interested in learning about oral participation—some students may have great input but feel unwelcome in the space to contribute ideas.
- If you are interested in the impact of videos—videos without subtitles might be difficult for students with hearing impairments or students who are less fluent in English.



THE TAKE-AWAY

When you are thinking about your research questions, consider how social identities and unequal access to power might shape students' experiences with teaching and learning. Refine your research questions to consider inclusion and diversity.

REFERENCES

Steele, C. M. (2011). *Whistling Vivaldi: How stereotypes affect us and what we can do (reprint edition)*. New York, NY: W. W. Norton & Company.

