

REB Guidance and Information Document

Guide File # REB.INFO.410

Title Demographic Questions in Research

Effective Date July 2024

Next Review 2029

Next Administrative Review 2027

1) Purpose

This guiding document will illustrate best practices when asking demographic questions in research, including sex, gender, sexual orientation, ethnicity, race, and Indigenous populations.

2) Definitions

See the MSVU [REB Glossary of Terms](#) (REB.INFO.001)

3) Notice to Researchers

The information in this document is for information and guidance purposes only. Each research study poses unique properties and/or situations that may require additional or different guidance than what is presented in this document. The information in this document is meant to provide general situational advice and does not constitute research ethics compliance in absolute form. If you have any questions, please contact ethics@msvu.ca.

4) Guidance/Information/Procedures

Although demographic questions can be helpful in gathering information about the population being researched, they should only be utilized when the research study and

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research question(s) require it. The wording of demographic questions given to participants when asking about personal information such as sex, gender, sexual orientation, ethnicity, race, or Indigenous populations can create barriers between the participants and the researcher, particularly if the participant does not feel adequately represented.

According to the TCPS 2 (2018), “researchers shall not exclude individuals from the opportunity to participate in research on the basis of attributes such as culture, language, religion, race, disability, sexual orientation, ethnicity, linguistic proficiency, gender or age, unless there is a valid reason for the exclusion” ([Article 4.1, para 6](#)). If there is a valid reason to exclude based on any attribute listed above, it must be explained in the ethics application.

*For additional resources and optional training modules, please review section five (5).

4.1) Collecting Data on Sex, Gender, and Sexual Orientation

- **Sex**

“Sex refers to biological characteristics, such as male, female or intersex” ([Government of Canada, 2019, para 7](#)). The term “sex: is often used as the designation an individual is assigned at birth and is typically based on the biological factors of genitalia. [CIHR](#) (2019) recommends that “applicants consider accounting for sex as a biological variable in basic science, clinical, health system and population health studies where appropriate” (para 6). It is recommended to give participants the option to not disclose their sex.

Response options, deriving from the [Government of Canada](#) (2021):

- Female
- Male
- Intersex
- Prefer not to answer

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- **Gender**

“Gender refers to a social identity, such as a man, woman, non-binary or two-spirit” ([Government of Canada, 2019, para 7](#)). Furthermore, “gender identity” refers to a person’s internal sense of being a woman, man, both, neither or somewhere along the gender spectrum” ([Government of Canada, 2021, para 14](#)). When asking about gender, providing an adequate number of options is encouraged, which can reaffirm the individual’s sense of self. Avoid grouping genders into ‘other’ category, as this can diminish the unique experiences of participants. It is also encouraged to give additional options such as “I do not identify with any of the above”, “I prefer not to answer”, or give space for participants to fill in their own term. If using a preexisting survey or research tool it is best to examine the questions and options being asked, to ensure the information listed best represents the community and/or populations one is working with.

Response options, deriving from the [Government of Canada](#) (2021), with general definitions:

Gender Fluid	A person who may change their gender identity or expression and/or both over time (Harvard Health Publishing , accessed August 22, 2022).
Nonbinary	<p>A person who does not identify as female or male, who may have multiple genders, or does not have/identify with any gender (Liszewski et al., 2019, accessed August 22, 2019)</p> <p>Other terms:</p> <ul style="list-style-type: none"> - Gender-nonconforming - Genderqueer - Agender - Third gender or third sex - Gender-fluid

Transgender Man*	An individual assigned female at birth, who now identifies as male.
Transgender Woman*	An individual assigned male at birth, who now identifies as female.
Two-Spirit	<p>Depending on the individual, Two-Spirit can be used to describe a sexual orientation that questions Western influence of binary notions or used to describe someone's gender.</p> <p>"Historically, many First Nations People had more than two genders. Currently, there are around 130 Nation-specific terms within many First Nations languages that name, account and identify these other genders" (Pruden & Salway, 2019, para 4).</p> <p>*It is important to note that this term originated in the Indigenous community, and it is intended for use by Indigenous people only. Researchers must safeguard against cultural appropriation.</p>
Woman	An individual who identifies as female and whose sex assigned at birth was female (Liszewski et al., 2019).
Man	An individual who identifies as male and whose sex assigned at birth was male (Liszewski et al., 2019).

*Transgender individuals typically have a gender expression that does not match their sex assigned at birth ([Liszewski et al., 2019](#)). Furthermore, a transgender individual may identify with only one gender expression, multiple genders, or do not identify with any gender, such as identifying as both transgender and nonbinary.

- **Sexual Orientation**

Sexual orientation "refers to a person's emotional, physical, and sexual attraction to other people" ([University of British Columbia, 2022, para 7](#)). Sexual orientation, and the associated terms below, are distinct from one's gender identity or expression.

It is strongly recommended to not group sexual orientation into ‘other’, and instead give multiple options to best support and empower participants, as grouping sexual orientations can create barriers between the researcher and the participant. It is further advised to give options such as “I do not identify with any of the above”, “I prefer not to answer”, and/or give space for participants to write out their own preferred sexual orientation. If using a preexisting survey or research tool it is best to examine the questions and options being asked, to ensure the information listed best represents the community and/or populations one is working with. If asking about sexual orientation it is recommended to either disclose why this is being used in the study in the consent form or in the survey when the question is being asked.

Response options, deriving from the [Government of Canada](#) (2021), with general definitions. Definitions have been derived from the [Humans Right Campaign](#).

Asexual	Existing on a spectrum, individuals experience a complete or partial lack of sexual attraction or interest with others.
Bisexual	Individuals who experience sexual, romantic, and/or emotional attraction with a multitude of genders, gender identities, or sexes.
Gay	Individuals who experience sexual, romantic, and/or emotional attraction to the same sex and/or gender. Often used in reference to gay men and/or male-identified individuals.
Heterosexual	Individuals who experience sexual, romantic, and/or emotional attraction to the opposite sex and/or gender.
Lesbian	A female-identified individual who experiences sexual, romantic, and/or emotional attraction to the same sex and/or gender.

Pansexual	Individuals who experience sexual, romantic, and/or emotional attraction to another individual independent of sex, gender, or gender identity.
Queer	A catch-all term that can be used to express a multitude or spectrum of identities and orientations; typically used by those who feel they do not fit into any one category.
Two-Spirit	Depending on the individual, Two-Spirit can be used to describe a sexual orientation that questions Western influence of binary notions or used to describe someone's gender. "Historically, many First Nations People had more than two genders. Currently, there are around 130 Nation-specific terms within many First Nations languages that name, account and identify these other genders" (Pruden & Salway, 2019, para 4).

4.1.1) Using Bias-Free Language

It is strongly recommended that researchers take careful consideration when constructing research tools to use age-appropriate nouns such as "women", "men", and "girls" instead of "females" and "males", and to avoid gendered language (e.g., mailman, mankind).

If unsure of the pronouns of participants, it is strongly encouraged to use their preferred name or gender-neutral pronouns ("they", "them", "theirs"). Asking for their pronouns is good practice, however, researchers should consider whether this would create any barriers between them and the participant. Furthermore, prefixes such as "Mr." and "Ms./Mrs." should be avoided, unless appropriate in certain geographical, cultural, or linguistic contexts.

Researchers should be informed of these practices before conducting their data collection.

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4.2) Collecting Data on Ethnicity and Race

- **Ethnicity**

Ethnicity, or ethnic origin, refers “to a person’s ‘roots’ and should not be confused with citizenship, nationality, language or place of birth” ([Government of Canada, 2019, para 3](#)). Ethnicity is constantly evolving due to immigration and the new identities that form, and can include “race, origin or ancestry, identity, language, and religion...culture, the arts, customs and beliefs and even practices such as dress and food preparation” ([Government of Canada, 2017, para 1](#)).

Researchers must be aware of the most appropriate and up-to-date terms, while allowing participants the flexibility to identify their ethnicity in their own words. Research questions should not limit nor segregate or ignore the multitude of ethnicities that are within Canada and should give additional options such as “I prefer to not answer”. It is also important to not group together complex and often ignored identities, such as grouping “First Nations” for all Indigenous, Metis, and Inuit populations.

- **Race and Racialize**

Race is the “idea that the human species is divided into distinct groups on the basis of inherited physical and behavioral differences” (<https://www.britannica.com/topic/race-human, para 1>). In other words, race “refers to a group that is “socially” defined but on the basis of “physical” criteria” ([York University, para 3](#)). Racialization is the “social process by which certain groups of people are signaled out for unique treatment on the basis of real or perceived physical characteristics” ([York University, para 25](#)).

Researchers need to be aware of the most appropriate and up-to-date terms, specifically that are in use today, when studying or asking questions about race, racialization, racism, etc. It is strongly recommended to give additional options, such as “I do not identify with the above categories” or “I prefer to not answer”. Refrain from creating ‘other’ categories that do not allow for written response, as

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questions of race have historically been used to separate non-white individuals from populations of western European origin. It is important to ask all participants these questions, and not just to those who are Non-white.

It is recommended to include a disclaimer in the consent form to prepare the participants on why these questions are being asked. Furthermore, it is highly suggested to not only work with other scholars in a similar field but to include the voices of the community when designing the tools for the study. When using pre-designed tools, such as surveys, it is important to assess whether these questions and the terminology used are appropriate for the population being researched.

Response options, deriving from Canadian Institute for Health Information (CIHI): [Guidance on the Use of Standards for Race-Based and Indigenous Identity Data Collection and Health Reporting in Canada](#) (2022) and [Public Health Ontario](#) (2021), with disclaimer before question:

“Health researchers examine race and ethnic origin together to enable a more complex analysis of community needs and experiences” ([Public Health Ontario, 2021, para 13](#)).

Response Category	Examples
Black	Continental African, African Canadian, African Nova Scotian, African-Caribbean descent
Indigenous (First Nations, Inuk/Inuit, Innu Métis) *	First Nations, Inuk/Inuit, Innu Métis descent *Please see section 4.3 on collecting data with Indigenous populations
East Asian	Chinese, Japanese, Korean, Taiwanese descent
South Asian	South Asian descent (e.g., Bangladeshi, Indian, Indo-Caribbean, Pakistani, Sri Lankan)

Southeast Asian	Cambodian, Filipino, Indonesian, Thai, Vietnamese, or other Southeast Asian descent
Latinx*	Hispanic or Latin American descent *Gender neutral term for Latino (masculine) and Latina (feminine)
Middle Eastern	Arab, Persian, West Asian descent (e.g., Afghan, Egyptian, Iranian, Kurdish, Lebanese, Turkish)
White	European descent
Another Race Category <i>Optional</i> – please specify: [open text]	Includes values not described above
Do not know	Not applicable
Prefer not to answer	Not applicable

4.3) Collecting Data with Indigenous Populations

The terminology used to either describe Indigenous people and communities, or used by Indigenous people and communities, can vary greatly from governmental bodies (First Nations, Metis, Inuit, Aboriginal, status Indian), those within Indigenous groups (Indigenous, native, and names of specific nations), and social groups such as between younger and older generations. As terminology can greatly differ, it is important to work with, and consult, members from the specific community and build the study with the most appropriate terminology.

Per section 4.2 of the TCPS on collecting data on race and ethnicity, the Government of Canada uses Indigenous populations as an option when collecting race/ethnicity data. However, common practice typically dictates that questions pertaining to Indigenous populations be separated and categorized independently. This ensures that Indigenous populations are not categorized as ‘other’ and ensures that such specific questions are only utilized when the research study/question requires it.

For more information on collecting data with Indigenous populations, please review Chapter 9 of the TCPS: [Research Involving the First Nations, Inuit, and Metis Peoples of Canada](#).

Response options, deriving from Canadian Institute for Health Information (CIHI): [Guidance on the Use of Standards for Race-Based and Indigenous Identity Data Collection and Health Reporting in Canada](#) (2022):

Proposed response categories (select all that apply)
<input type="checkbox"/> Yes, First Nations
<input type="checkbox"/> Yes, Metis
<input type="checkbox"/> Yes, Inuk/Inuit
<input type="checkbox"/> Yes, Innu
<input type="checkbox"/> Yes, _____ [written option]
<input type="checkbox"/> No
<input type="checkbox"/> Prefer not to answer

When collecting data with a specific Indigenous population or community, additional ethics clearance must be granted from other Indigenous bodies, such as Mi'kmaw Ethics Watch, prior to data collection.

5) Additional Resources and Training

Additional Resources and Training for Sex, Gender, and Sexual Orientation	
Resources <ul style="list-style-type: none"> Chapter 5.5 in <i>Publication manual of the American Psychological Association: The official guide to APA style</i>. (Seventh edition.). (2020). American Psychological Association. https://apastyle.apa.org/style-grammar-guidelines/bias-free-language/gender Canadian Professional Association for Transgender Health (CPATH) Ethical Guidelines for Research Involving Transgender People & Communities 	

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- Statistics Canada (2021). [Age, Sex at Birth and Gender Reference Guide, Census of Population](#)
- [Inclusive Survey and Data Collecting Practices Concerning Gender, Sex, and Sexual Orientation](#), American University, The Centre for Diversity & Inclusion

Training

- CIHR Institute of Gender and Health (2015). [Sex and Gender Training Modules](#).

Additional Resources for Race and Ethnicity

Resources

- Statistics Canada (2016). [Ethnic Origin Reference Guide, Census of Population](#)
- Ross et al. (2020). Considerations for using race and ethnicity as quantitative variables in medical education research. Doi: doi.org/10.1007/s40037-020-00602-3
- Ford & Kelly (2005) Conceptualizing and categorizing race and ethnicity in health services research. Doi: [10.1111/j.1475-6773.2005.00449.x](https://doi.org/10.1111/j.1475-6773.2005.00449.x)

Training

- Ontario Human Rights Commission. Call it out: racism, racial discrimination and human rights: [Online Course](#)

Additional Resources for Indigenous Populations

Resources

- If intending to work with Indigenous communities, please review Module 9 of the TCPS 2 (2018): [Research Involving the First Nations, Inuit and Metis Peoples of Canada](#).
- Assembly of First Nations: [First Nations Ethics Guide on Research and Aboriginal Traditional Knowledge](#).
- Inuit Tapiriit Kanatami (2018): [National Inuit Strategy on Research](#).
- SAMHSA. (2009). "[Etiquette - Do's & Don'ts](#)". CultureCard.

Training

- First Nations Information Governance: [The First Nations Principles of OCAP](#) Training

6) Acknowledgements

The development of this document has benefited directly from similar documents made public by the Tri-Council, as well as several Canadian universities. In some instances, specific formulations drawn from these sources have been incorporated into this document, including:

- Carleton University, [Research Ethics Guidelines on the Use of Gender and Sex in Demographics](#), Accessed August 10, 2022
- University of British Columbia, [Participant Inclusivity in Research](#), Accessed August 10, 2022

7) Modification History

INFO Number & Version	Key Changes	Effective Date
REB.INFO.410	Formatted document for accessibility and readability; no changes to content	July 2024
REB.INFO.410	New	June 2023

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