

Strategies for Inclusive Collection of Sexual Orientation, Gender Identity / Expression and Sex (SOGIES) Demographic Questions

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QUEER PHYSIOTHERAPY COLLECTIVE

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Asking demographic questions can be valuable to better understand the people you work with or for. It can help drive transformative changes and identify areas for improvement. However, collecting, storing, analyzing, and reporting demographic data requires a thoughtful approach. In particular, how to be inclusive of communities that have historically experienced harm in the process, including individuals from Indigenous, Black, and LGBTQ+/2S communities.

This primer focuses is designed to support thinking around collecting sexual orientation, gender identity/expression, and sex (SOGIES) demographic data. However SOGIES is not the end of the demographic story. There are many exceptional resources that focus on considerations for demographic data collection from the lens of Indigenous and Black communities. In particular, the [First Nations Principles of Ownership, Control, Access and Possession \(OCAP\)](#) and the [Engagement, Governance, Access and Protection \(EGAP\) recommendations](#) from the Black Health Equity Working Group.

Guiding questions for SOGIES data:

Do you have to collect the data?

Proceed if

- It is required, e.g., by legislation
- Your plan for the data engages and centres the community you're collecting the data from
- You have the ability to take action based on what the data tells you

Pause if

- You don't have a predefined for how you will use the data, e.g., it is only report out, with no resources or ability to take action when it shows disparities

If you're still unsure, continue to think about why you want to collect this data and what actions you can take with the new information.

Do you know the difference between sexual orientation, gender identity/expression and sex?

Proceed if

- You clearly know the differences between the constructs
- Your plan centres and engages the community your collecting the data from

Pause if

- You are unsure what each term all means and/or how to differentiate between these constructs
- You're unsure how to design a question or the responses to measure each construct

Need a resource to understand these terms? The UN Refugee Agency has a [one pager](#) explaining the different data points. More details also on page 2.

Do you have a plan for storage, confidentiality, ownership and reporting?

Proceed if

- There is a plan for secure data storage, including restricted access to raw data
- You have a data removal process if someone requests their data be removed. If not possible, you disclose this to respondents before they share their data
- You have a clear communications plan to potential respondents that includes details on data storage, confidentiality, ownership and reporting to informed decision-making
- You've considered the power you/your organization holds over respondents and have actively taken steps to mitigate the power dynamic

Pause if

- There is no clear data storage or access plan
- You have not considered how to manage requests for data removal
- You haven't developed a communications plan that addresses data storage, confidentiality, ownership and reporting
- You haven't reflected on the power you/your organization holds and/or haven't taken any steps to mitigate the power dynamics

Still need more specifics on what questions to ask? Flip the page for definitions and sample questions!

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Now that you've considered if you should collect the data, and considered the best practices in demographic collection, you are ready to design your survey!

Let's make sure we know the differences between SOGIES data points and look at ways you can empower people to identify their survey choices, while still providing meaningful data.

Breaking down SOGIES:

Gender Identity

A person's deeply felt internal and individual experience of gender. It may not correspond with the sex they were assigned at birth or how they're perceived in society.

Gender Expression

The way people choose to express their gender. This can include names, pronouns, behaviour, clothing, voice, and mannerisms. Gender expression is not necessarily aligned with someone's gender identity.

Sex

Often refers to a person's sex assigned at birth and determined by observation of external genitalia. People's sex is labelled as female, intersex or male. There are wide variations in sex characteristics within all sex labels, some of which are identified at birth and which are identified in later life stages, e.g. during puberty.

Sexual Orientation

Romantic, emotional and/or physical feelings for, or attraction to, people of a particular gender, e.g., queer, heterosexual, lesbian, pansexual etc.

Guiding Principles for Survey Design

Autonomy

Find ways to for people to express their identities. This could mean using open text options and acknowledging your survey isn't perfect. If you're not planning a complicated data analysis, this is the ideal option.

Example: My sexual orientation is: _____

If you want to guide people a bit more, offer choices that go beyond the binary (i.e. including only response options for woman or man). Avoid using the term "other". It literally makes people whose gender is not defined by the binary feel othered.

Example: How would you describe your gender identity?

- Woman
- Man
- Non-binary
- Agender
- Prefer not to disclose
- I self-describe identify as: _____

Additional dimensions of SOGIES data

Please ensure you have a clear goal for collecting some SOGIES data. Ask questions if there is a specific reason—e.g., if the question explores experiences based on sexual orientation, or explores experiences of a specific population (e.g., among trans folks). Here are examples of ways to ask about intersex and trans experience:

Linked question: Do you identify as someone of intersex experience?

- Yes
- No

Linked question: Do you identify as someone with trans experience?

- Yes
- No

Two-Spirit is a term coined by Indigenous LGBTQ+ leaders in 1990 to serve as a community organizing strategy/tool and a way to describe oneself. It helps Indigenous Peoples reconnect with Nation-specific expressions of gender and sexual diversity, as well as traditional languages, cultures, and pre-Colonial ways. Thus, Two-Spirit should be an option open to Indigenous participants only (using 2-step method).

Example: Do you identify as Indigenous?

- Yes
- No
- Prefer not to disclose

If the response is yes... Are you Two-Spirit?

- Yes
- No
- Prefer not to disclose

*These learnings were shared by **Harlan Pruden** (nēhiyo/First Nations Cree), where best practices are described with [recommendations published on CIHR's website](#).*

Collecting demographic data can be incredibly important and meaningful. It also requires constant un/re/learning as language and the ways people identify change. We welcome feedback and new ways of knowing and thinking about sexual orientation, gender identity/expression and sex constructs!

Still need more? Contact the Queer Physiotherapy Collective queerphysiotherapycollective@gmail.com for a consultation.

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