

Measuring Sexual Orientation & Gender Identity (SOGI) in Surveys

Justine Bulgar-Medina

OVERVIEW

- A brief background
- Key terms
- Current measures & approaches
 - Sexual orientation measures
 - Gender identity measures
 - Context & disclosure
- Key takeaways

BACKGROUND & SOGI TERMS

- Sexual orientation questions have been fielded on national surveys, such as the GSS, since the 1980s, but most incorporation didn't happen until the 2000s
- Inclusion of SOGI measures on surveys is still inconsistent (unlike other demographics such as religion, political party affiliation, or race/ethnicity)
- Sexual Orientation (SO)
 - Identity
 - Attraction
 - Behavior
 - Disclosure/Concealment
- Gender/Gender Identity (GI)
- Sex
 - Sex assigned at birth

CURRENT LITERATURE

- Sexual Orientation/Gender Identity (SOGI) can include self-identity, behavior and/or attraction (Berg & Lein 2006; Brooks & Quina 2009; Gates 2014)
 - Experiences vary by Race/Ethnicity (RE) (Kim & Fredricksen-Goldsen 2013)
- A fourth measure of sexual identification may be necessary (i.e. contextualized disclosure Sell 1997)
 - Cognitive testing suggests individuals do not disclose in all social contexts (see Bulgar-Medina, AAPOR 2017)
- Role-flexing, or code-switching, has been identified as a common experience for sexual minorities, with larger effects for dual (racial/sexual) minorities (Sarno et al. 2015; Balaji et al. 2012)
- Experiences with ‘outness’, or disclosure, can vary greatly by context, age, race and other key factors (Morgan 2012; Herek 2010)
- MATA formats, with constructs in separate questions, might be the best approach to asking these questions (Brenner & Bulgar-Medina 2018)

KEY CONSIDERATIONS

- Culturally responsive measurement
 - Age
 - Race/ethnicity
 - Individual v. household measures
- ‘Fit for purpose’

FINDING SOGI MEASURES IN SURVEYS

- NHIS
- CHIS (CA)
- BRFSS (Select states)
- NCVS
- GSS
- NHANES
- NSFG
- NATS
- NSDUH

SEXUAL IDENTITY EXAMPLES

Which of the following best represents how you think of yourself?

[Lesbian or] Gay

Straight, that is, not [lesbian or] gay

Bisexual

Something else

I don't know the answer

(Refused)

How do you identify yourself, sexually?

Lesbian

Gay

Queer

Bisexual

Heterosexual

Celibate

Other _____

Decline

What is your sexual orientation?

Heterosexual (straight)

Homosexual (gay, lesbian)

Transsexual

The next question is about how do you think of yourself?

Please answer all that apply to you.

Lesbian, gay or homosexual

Straight or heterosexual

Bisexual

Transgendered

Not sure

You think of yourself in different terms (please describe)

(SOME MORE) SEXUAL IDENTITY EXAMPLES

Do you think of yourself as:

Heterosexual or straight (that is, sexually attracted only to women/men)

Homosexual or gay/lesbian (that is, sexually attracted only to men/women)

Bisexual (that is, sexually attracted to men and women)

Something else

Or you're not sure?

Whether you are currently sexually active or not, what is your sexual identity or orientation?

Please choose one answer:

Heterosexual

Bisexual

Lesbian, gay, or homosexual

None of the above

Prefer not to answer

Sexual identity: Which of the following best describes you?

Heterosexual (straight)

Gay or lesbian

Bisexual

Not sure

Do you think of yourself as:

Lesbian, gay or homosexual

Straight or heterosexual

Bisexual

Something else, please describe _____

Don't know

BEST PRACTICES FOR SO IDENTITY QUESTIONS

- Ask about self-labeling (e.g. how do you think of/describe yourself)
 - Consider a reference period, as identities may change over one's life
- 'Term confusion' only happens with straight respondents, likely due to the higher topic salience for SOGI minority respondents
- When using MATA formats, SO and GI need to be asked separately to ensure endorsement selections for both identities
- MATA formats and FC formats likely perform similarly, but MATA can offer a more inclusive option without decreasing data quality

SEXUAL ATTRACTION EXAMPLES

NSFG (and SMART suggestion):

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

Only attracted to [females/males]?

Mostly attracted to [females/males]?

Equally attracted to females and males?

Mostly attracted to [females/males]?

Only attracted to [females/males]?

Not sure?

SEXUAL BEHAVIOR EXAMPLES

Female (NSFG):

Question 1: Counting all of your male partners, even those you had intercourse with only once, how many men have you had sexual intercourse with?

Question 2: Thinking about your entire life, how many female sex partners have you had?

Response: $\text{Number of male partners} / \text{Number of female partners}$

Male (NSFG):

Question 1: How many different females have you ever had intercourse with? This includes any female you had intercourse with, even if it was only once or if you did not know her well.

Question 2: Thinking about your entire life, how many male sex partners have you had?

Response: $\text{Number of female partners} / \text{Number of male partners}$

SMART Suggestion:

In the past (time period e.g. year) who have you had sex with?

Men only

Women only

Both men and women

I have not had sex

CONSIDERING SEXUAL ATTRACTION & BEHAVIOR QUESTIONS

- Be cognizant of conflation of sex and gender constructs
- Binary measures, consider a different format (e.g. MATA)
- Attraction is very subjective
- Behavior is very culturally dependent
- Consider a reference period
- While both are components of 'complete' SO measurement, it shouldn't be asked in all surveys

SEX, GENDER, AND GENDER IDENTITY EXAMPLES

What sex were you assigned at birth, on your original birth certificate?

Male

Female

Refused

Don't know

Do you currently describe yourself as male, female or transgender?

Male

Female

Transgender

None of these

[If SEX ASSIGNED AT BIRTH does not equal CURRENT IDENTITY] Just to confirm, you were assigned {SEX ASSIGNED AT BIRTH} at birth and now describe yourself as {CURRENT IDENTITY}. Is that correct?

Yes

No

Refused

Don't know

ADDITIONAL DIMENSIONS OF GENDER IDENTITY

“In general, how do you see yourself? Please answer on both scales below.”

[Separate scales for feminine and masculine.]

Not at all

1

2

3

4

5

6

Very – 7

“In general, how do you think most people see you? Please answer on both scales below.”

[Separate scales for feminine and masculine.]

Not at all

1

2

3

4

5

6

Very – 7

GENDERED SELF-PRESENTATION

For this next set of questions, please think about how you might present yourself on an average day, [out to lunch WITH FRIENDS] [AT WORK], for each of the categories listed. Which term(s) best describe how you would present yourself on each item? For each item, mark all that apply.

- Feminine
- Masculine
- Gender Neutral
- Not Applicable
- I don't know.
- Clothing
- Jewelry
- Makeup
- Hairstyle
- Hand Gestures
- Eyeglasses or Sunglasses
- Your accessories (e.g. bag, umbrella, watch)?
- Your grooming (e.g. facial hair, body hair)?
- Your posture
- Your leg crossing

CONSIDERING GENDER IDENTITY

- Self-identity is the key component of measuring gender identity
- However, consider reports of gendered presentation of self for both creating a more robust set of measures
 - Additionally it affords an opportunity to measure how others may perceive (and ultimately treat) the respondent which may be key in certain situations (e.g. healthcare)

SEXUAL ORIENTATION & GENDER IDENTITY

➤ Three separate questions

*How do you currently identify yourself?
Mark all that apply.*

- Lesbian
- Gay
- Bisexual
- Questioning
- Queer
- Asexual
- Straight, that is not gay.
- I prefer not to label my sexual orientation/identity. I don't know.
- Something else (please specify)

What is your current gender identity? Mark all that apply.

- Male
- Female
- Transgender Male
- Transgender Female
- Genderqueer
- Non-binary
- Something else (please specify)

What sex were you assigned at birth on your original birth certificate?

- Male
- Female
- Something else (please specify)

ATTRACTION & BEHAVIOR

➤ Two separate questions

To whom were you attracted, one year ago?

- Other sex only
- Other sex mostly
- Other sex somewhat more
- Both sexes equally
- Same sex somewhat more
- Same sex mostly
- Same sex only
- I don't know.
- Have not been intimate/attracted

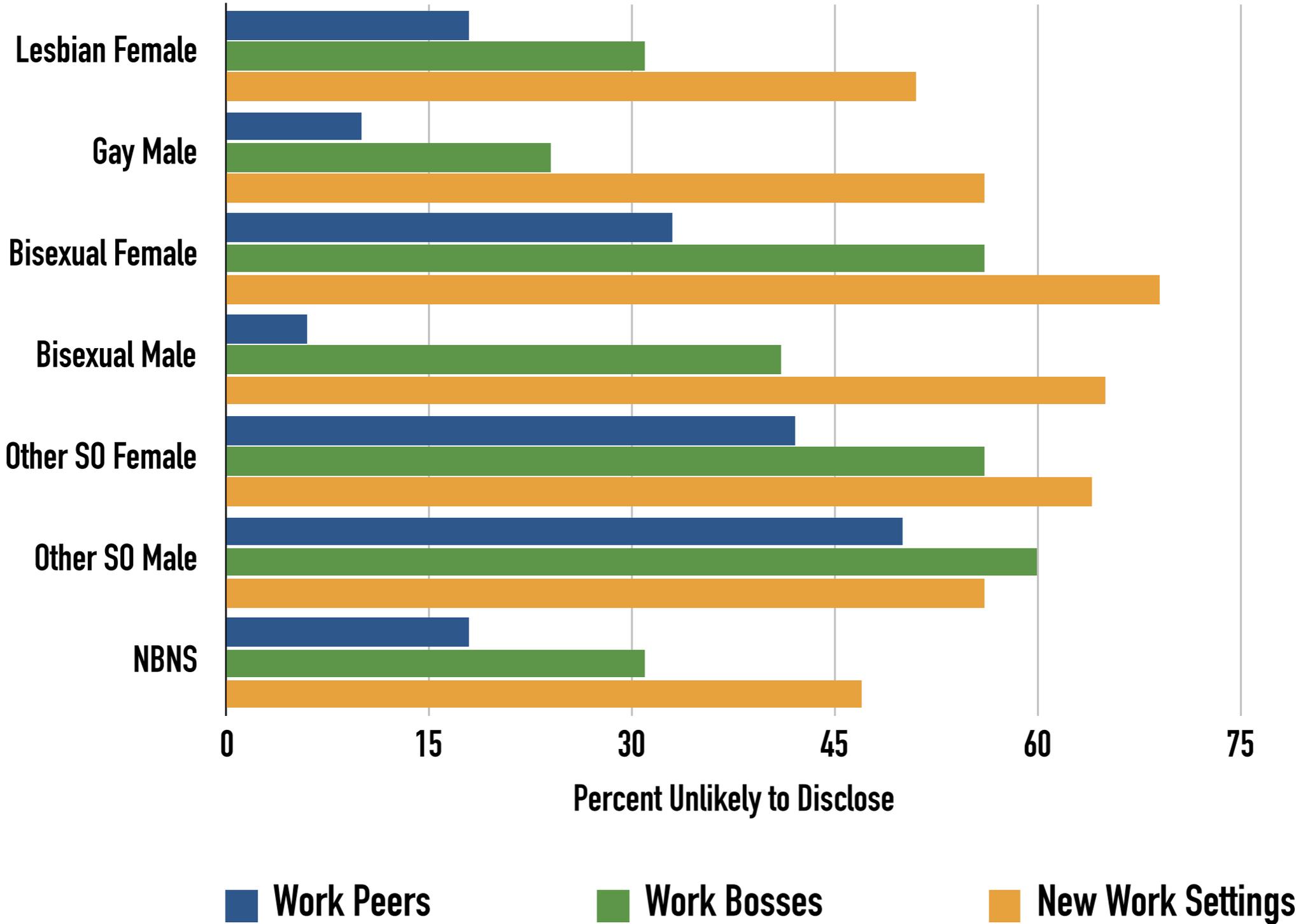
With whom have you had sex or been intimate in the last year?

- Other sex only
- Other sex mostly
- Other sex somewhat more
- Both sexes equally
- Same sex somewhat more
- Same sex mostly
- Same sex only
- I don't know.
- Have not been intimate/attracted

KEY CONSIDERATION – CONTEXT AND DISCLOSURE

	White	Non-White
Parents/Siblings	Know & Discuss	Might Know; No Discuss
Extended Family	Might Know; Might Discuss	Don't know; No Discuss
Straight Friends	Know & Discuss	Know & Discuss
Work Peers	Might Know; Might Discuss	Might Know; No Discuss
Work Supervisors	Might Know; No Discuss	Don't know; No Discuss
Social Settings	Know & Discuss	Know & Discuss
Strangers - Closed	Don't know; No Discuss	Don't know; No Discuss
Strangers - Open	Might Know; Might Discuss	Don't know; No Discuss

KEY CONSIDERATION – ONE CONTEXT (WORK)



KEY CONSIDERATION – STRATEGIC ENDORSEMENTS

- Endorsements (e.g. queer) may accompany another (qualifying) label (e.g. lesbian, gay)
- While willing to report/use terms in survey, limited use in daily interactions
- Reasons for endorsement
 - Political Statement
 - To avoid/require explanation
 - Expand borders of community
 - Desire to be ‘counted’, or supporting the LGBT community representation

KEY TAKE-AWAYS

- MATA formats, where constructs are asked separately, are likely the best approach to these questions
- Using a reference period helps ensure the respondent is able to answer the question in the way the researcher anticipated
- Context matters - ask the respondent to think about specific scenarios if they are relevant to the research question (e.g. healthcare)
- Use best practices, but be culturally responsive



..... **THANK YOU**

justine.bulgarmedina@gmail.com

CURRENT WORK IN THE FIELD

- Federal Interagency Working Group on Improving Measurement of Sexual Orientation and Gender Identity in Federal Surveys
- SMART Report from Williams Institute
- 5+ years of collaborative efforts for SOGI panels at AAPOR

RESOURCES

- <https://dpcpsi.nih.gov/sgmro/measurement/questions>
- <https://www.cms.gov/About-CMS/Agency-Information/OMH/resource-center/hcps-and-researchers/data-tools/sgm-clearinghouse/index.html>
- <https://williamsinstitute.law.ucla.edu/wp-content/uploads/SMART-FINAL-Nov-2009.pdf>
- <https://williamsinstitute.law.ucla.edu/wp-content/uploads/geniuss-report-sep-2014.pdf>
- *LGBTQ Stats* (Deschamps & Singer 2017)
- *Other, Please Specify* (Compton, Meadow and Schitlt 2018)