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**How to record demographic information in your data collection tools (e.g. CRM)**

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# About this guide

This guide will:

* Help you understand how we can improve the quality of our data through collecting complete and inclusive demographic data.
* Outline the changes that we have made to our data collection systems, such as the CRM, to collect data in line with best practice.
* Explain how this will affect local Healthwatch and the way in which you collect and record your data.

# What is demographic data?

Demographic data refers to information about the characteristics of the population. It allows you to work out who you are talking to.

Protected characteristics are specific aspects of a person’s identity defined by the Equality Act (2010) which protect someone from discrimination.[[1]](#footnote-2)

The Equality Act defines the following as protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, gender, and sexual orientation.

For more information about protected characteristics and discrimination, please refer to the [Equality and Human Rights Commission guidance](https://www.equalityhumanrights.com/en/equality-act/protected-characteristics).

### Why it’s vital to collect this information

Collecting quality demographic data helps us to better understand how people's personal characteristics affect their experiences of health and social care, both within local areas and at a national level. It also allows us to identify health inequalities and where there are gaps in support for particular groups of people. This is particularly important when conducting research during the COVID-19 pandemic due to the impact it has had on different groups of people.

Collecting and analysing demographic data can also be used to identify people or groups that are underrepresented during engagement, which helps to inform engagement plans and target future work. Healthwatch has a duty to represent everyone’s views of health and social care, which means we must make every effort to reach all communities.

**Changes to demographic data collection**

We have revised the demographic categories in the CRM and the National Reports Library about people’s personal characteristics to be more comprehensive and respectful.

These changes will need to be used by all local Healthwatch, so that we all have a consistent way of reporting and brings our data collection in line with best practice.

We have incorporated free-text options so that people can self-define if they wish/where needed. While the new fields will be mandatory, there is a “don’t know” option.

### Why have the demographic questions and answers been changed?

The Healthwatch England Research and Insight Team undertook an assessment of the data collected by local Healthwatch about protected groups. We found that much of the feedback shared with us via the CRM lacked any demographic details. One of the reasons for this was that the options available to record this information was incomplete.

Our focus on equalities forms a large part of our current work and plans for the future. This means that we need to have the data to support such work.

Healthwatch is subject to the Public Sector Equality Duty as part of the legal requirement set out in the Equality Act (2010).[[2]](#footnote-3) This requires public bodies to have due regard to the need to eliminate discrimination, advance equality of opportunity and foster good relations between different people when carrying out their activities. Therefore, we need to improve the data that we collect on equality issues.

These changes will improve the way you collect your demographic information about the people you engage with. And by collecting this data consistently, you will be able to analyse the experiences of different groups and identify whether there are any key differences in the way people receive health and social care. It will also make data recording about demographics consistent across the whole Healthwatch network. People are often more willing to share demographic details with you than you’d think.

# What demographic information should I collect?

We have put together the core demographic questions and inclusive response options for use in your data collection tools, including the CRM.

Key

SS = Single selection – can only choose one option

MS = Multiple selection – can choose more than one option

### Age

Is the person’s age category

* 0 to 12 years [SS]
* 13 to 15 years [SS]
* 16 to 17 years [SS]
* 18 to 24 years [SS]
* 25 to 49 years [SS]
* 50 to 64 years [SS]
* 65 to 79 years [SS]
* 80+ years [SS]
* Prefer not to say [SS]
* Not known [SS]

Please note that young people over the age of 13 are able to give informed consent without a parent or guardian. For more information about obtaining consent, refer to this [guidance](https://network.healthwatch.co.uk/guidance/2020-09-28/guide-to-gaining-consent).

### Gender identity

Is the person's gender identity

* Woman [SS]
* Man [SS]
* Non-binary [SS]
* Intersex [SS]
* Prefer to self-describe [SS]
* Free text option
* Not known [SS]

Is the person's gender identity the same as the sex they were assigned at birth?

* Yes [SS]
* No [SS]
* Prefer not to say [SS]
* Not known [SS]

### Sexual orientation

Is the person’s sexual orientation

* Asexual [SS]
* Bisexual [SS]
* Gay man [SS]
* Heterosexual / Straight [SS]
* Lesbian / Gay woman [SS]
* Pansexual [SS]
* Prefer to self-describe [SS]
* Free text option
* Prefer not to say [SS]
* Not known [SS]

### Ethnicity

Is the person’s ethnicity

* Arab [SS]
* Asian / Asian British: Bangladeshi [SS]
* Asian / Asian British: Chinese [SS]
* Asian / Asian British: Indian [SS]
* Asian / Asian British: Pakistani [SS]
* Asian / Asian British: Any other Asian / Asian British background (please specify) [SS]
  + Free text option
* Black / Black British: African (please specify) [SS]
  + Free text option
* Black / Black British: Caribbean [SS]
* Black / Black British: Any other Black / Black British background (please specify) [SS]
  + Free text option
* Mixed / Multiple ethnic groups: Asian and White [SS]
* Mixed / Multiple ethnic groups: Black African and White [SS]
* Mixed / Multiple ethnic groups: Black Caribbean and White [SS]
* Mixed / Multiple ethnic groups: Any other Mixed / Multiple ethnic groups background (please specify) [SS]
  + Free text option
* White: British / English / Northern Irish / Scottish / Welsh [SS]
* White: Irish [SS]
* White: Gypsy, Traveller or Irish Traveller [SS]
* White: Roma [SS]
* White: Any other White background (please specify) [SS]
  + Free text option
* Any other ethnic group (please specify) [SS]
  + Free text option
* Prefer not to say [SS]
* Not known [SS]

For more information about changes to the ethnic group options for the Office of National Statistics 2021 census, see [here](https://www.ons.gov.uk/census/censustransformationprogramme/questiondevelopment/2021censustopicresearchupdatedecember2018#ethnic-group).

### Religion or belief

Is the person’s religion or belief

* Buddhist [SS]
* Christian [SS]
* Hindu [SS]
* Jewish [SS]
* Muslim [SS]
* No religion [SS]
* Sikh [SS]
* Other religion (please specify) [SS]
  + Free text option
* Prefer not to say [SS]
* Not known [SS]

### Martial and civil partnership status

Is the person’s marital and civil partnership status

* Single [SS]
* Cohabiting [SS]
* In a civil partnership [SS]
* Married [SS]
* Separated [SS]
* Divorced / Dissolved civil partnership [SS]
* Widowed [SS]
* Prefer not to say [SS]
* Not known [SS]

### Pregnancy and maternity

Is the person’s pregnancy and maternity status

* Currently pregnant [MS]
* Currently breastfeeding [MS]
* Given birth in the last 26 weeks [MS]
* Prefer not to say [SS]
* Not know [SS]
* Not applicable [SS]

### Disability

Does the person have a disability?

* Yes [SS]
  + Physical or mobility impairment [MS]
  + Sensory impairment [MS]
  + Learning disability or difficulties [MS]
  + Mental health condition [MS]
  + Long term condition [MS]
  + Other [MS]
    - Free text option
* No [SS]
* Prefer not to say [SS]
* Not known [SS]

### Long Term condition

Does the person have a long term condition?

* Yes [SS]
  + Asthma, COPD or respiratory condition [MS]
  + Blindness or severe visual impairment [MS]
  + Cancer [MS]
  + Cardiovascular condition (including stroke) [MS]
  + Chronic kidney disease [MS]
  + Deafness or severe hearing impairment [MS]
  + Dementia [MS]
  + Diabetes [MS]
  + Epilepsy [MS]
  + Hypertension [MS]
  + Learning disability [MS]
  + Mental health condition [MS]
  + Musculoskeletal condition [MS]
  + Other [MS]
    - Free text option
* No [SS]
* Prefer not to say [SS]
* Not known [SS]

### Carer

Is the person a carer?

* Yes [SS]
* No [SS]
* Prefer not to say [SS]
* Not known [SS]

# How to include this in your data collection tools (e.g. CRM)?

Local Healthwatch will need to adopt the new demographic categories and integrate them into current data collection tools (including engagement materials and CRM systems).

**For local Healthwatch who are using the CRM system provided by Healthwatch England**, you do not need to do anything as the changes will be applied to your CRM system. This will be a relatively simple change in which you will need to ensure that the relevant demographic fields are ticked (using the check boxes) in your CRM reports.

**For local Healthwatch who are using their own systems**, you will need to incorporate the changes outlined in the *What demographic information should I collect?* section of this guidance in order to replicate the national changes. If you use the Import Function, you will be expected to fill in these demographic fields.

For more information on the demographic fields and how to use them, please contact the Research and Insight Team at [research@healthwatch.co.uk](mailto:research@healthwatch.co.uk). To ensure your system is compliant contact the CRM lead at [HealthwatchCRM@healthwatch.co.uk](mailto:HealthwatchCRM@healthwatch.co.uk).

1. UK Public General Acts: [Equality Act (2010)](https://www.legislation.gov.uk/ukpga/2010/15/contents) [↑](#footnote-ref-2)
2. Equality and Human Rights Commission: [Public Sector Equality Duty guidance](https://www.equalityhumanrights.com/en/advice-and-guidance/public-sector-equality-duty-guidance) [↑](#footnote-ref-3)