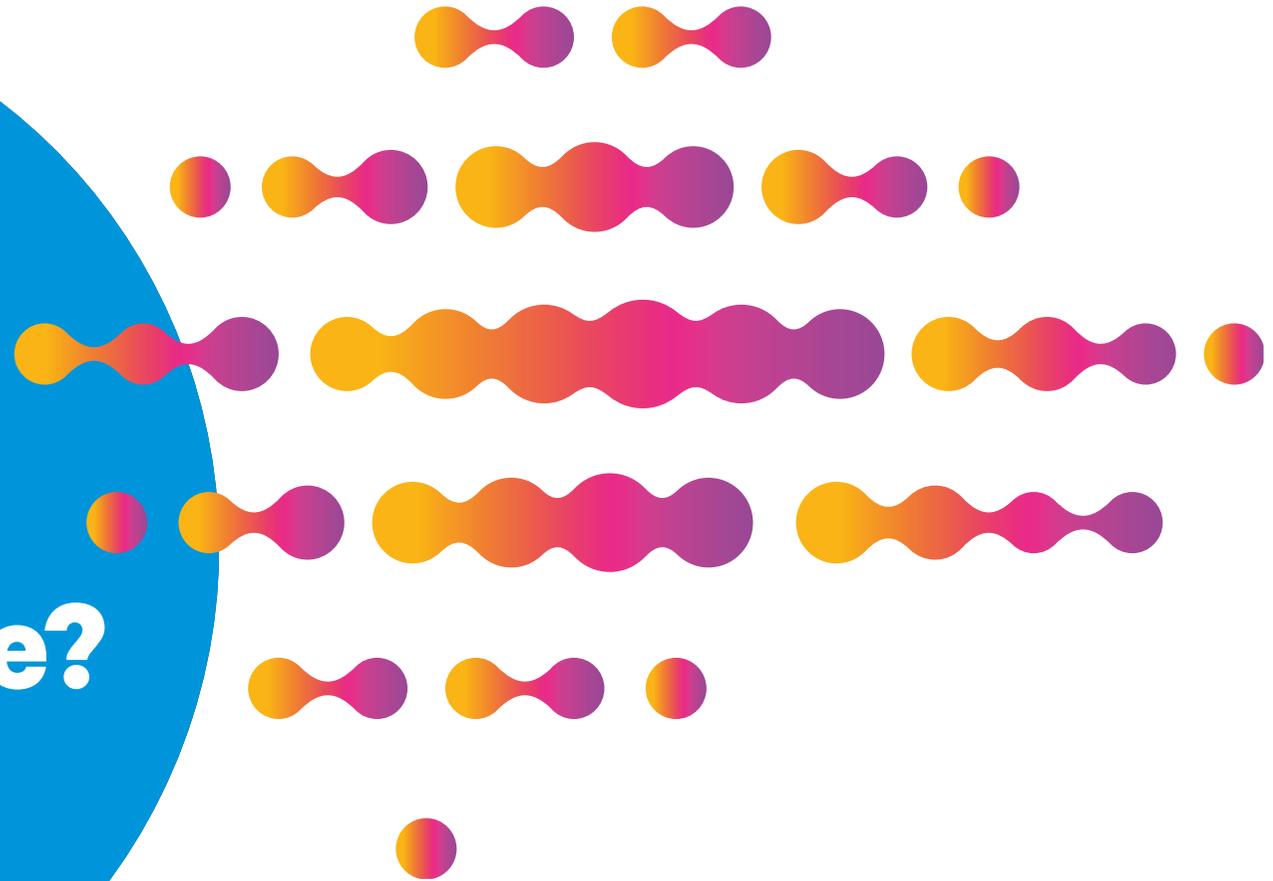# What does inclusive research look like, and why should we care?

A PRACTICAL GUIDE

Sandy Downs, Head of DE&I and Senior Account Director

Teamspirit

The role of surveys & research in PR

Research – especially quantitative surveys – is a huge part of our work in PR and communications. We know we don't know everything. Research is a critical tool in finding out what's going on in the world around us, and then building a dialogue with our audience about their views, behaviours, and realities. Whether that's asking 2,000 consumers about their views on cars, 500 accountants about their experiences with debt financing, or 50 DB pension trustees about the impact of new TPR regulations, we spend a lot of time and effort gathering public opinion and using it to tell stories that matter to our clients and their audiences.

Many of our surveys, especially in the consumer space, are 'nationally representative' or 'natrep' – that is, the sample structure reflects the structure of the entire country. Our research house partners recruit panels of millions of people and record a host of socio-demographic information, so that each specific survey panel can be representative of UK adults in terms of age, gender, class, and education. Of course, this is only the case for surveys which can be nationally representative, like UK consumers – more niche B2B surveys are by their nature not natrep, but instead represent the societal make-up of the likes of c-suites, car dealers, and financial advisers.

> **Inclusive research means two things – asking the right questions, and telling the right stories**
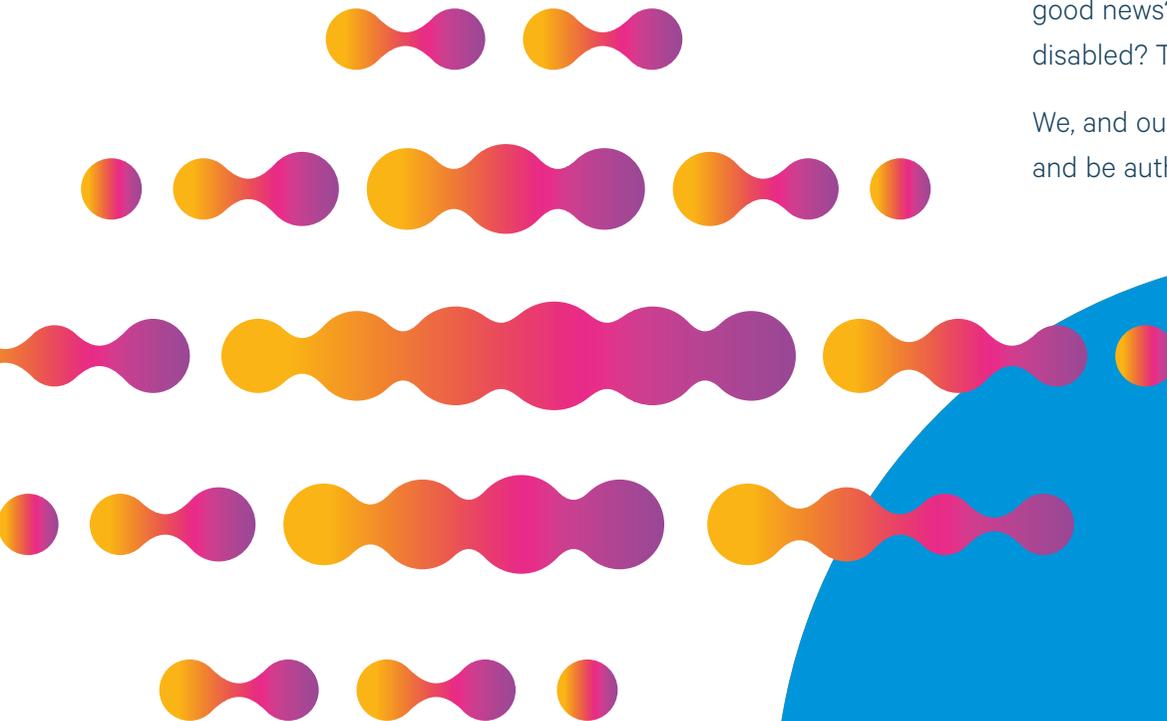
What we mean by inclusive research

You could say that this 'natrep' approach makes all of our research as diverse as it needs to be – that is, it reflects the community we're talking to, and about. But we can go further than this. For me, inclusive research means two things – asking the right questions, and telling the right stories.

The first question we have to ask ourselves - and our clients - is why are we asking for demographics at all? How do we plan to use the information? A wealth of good stories lie in demographics – the fact that 50% of people have cats isn't a story. But if, hypothetically, 80% are women and 20% are men, you have not just a story, but a core insight to inform your marketing and sales strategies. Similarly, if only 10% of employees think they're discriminated against at work, is that good news? What if it's 85% of disabled employees, and 3% of non-disabled? That's a crisis.
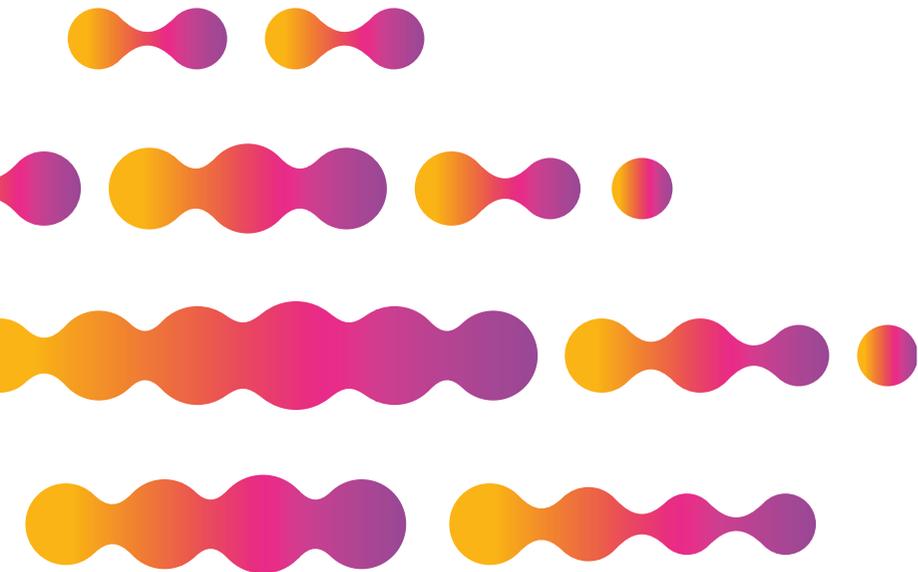
We, and our clients, need to be brave enough to tell these stories, and be authentic in our attempts to solve the problems we unearth.

What happens when we get it wrong

If we fail to ask the right questions, and put research into field which has exclusionary and alienating language or concepts, we risk excluding people from our research altogether. This means key individuals drop out of the survey, and end up unrepresented in our findings. In turn, we risk ending up with a biased sample, and telling stories which aren't representative of the whole truth.

And if we tell the wrong stories, we open ourselves – and our clients – to a world of reputational risk. Clients might make the wrong marketing or product decisions, or we end up in hot water with the media, or we just downright offend. None of these are good results, and they can be avoided by thinking proactively and fully about the demographic questions we ask, and the stories we tell.

Asking the right questions (about protected characteristics)

A lot of effort goes into crafting research questions, but it can be easy to jump over the demographic questions and take them as read. We mustn't.

We're asking about protected characteristics, so we need to be sensitive. There's no single standard for questions – the Government and UK census do have some templates, but not all are appropriate or useful for consumer research in a PR and communications context. We need to craft questions that work for our clients, our projects, and our sample – and that means what we ask, who we ask, and how we ask it.

A quick point – I talk about 'statistical significance' a lot in the next section. By this, I mean a section sample large enough to extrapolate from – usually this is 50 people. For example, 2,000 people will hopefully include at least 50 people from every UK region, but if there are only 25 in Northern Ireland we can't assume those 25 are representative of the entire nation.

Gender & sexuality

If I see a 'Sex: Man/Woman' question in a survey, I walk away. Firstly, it's incorrect, and secondly, it demonstrates to me that the survey owner doesn't care about diversity.

Man and woman are gender markers, while male and female are sex markers – the terms describing different but connected constructs, and shouldn't be switched.

The bare minimum we advise clients to ever use in a survey is:

Gender:

- Man
- Woman
- Other
- Prefer not to say

If a client is particularly keen to ask about sex, one could use:

Sex:

- Male
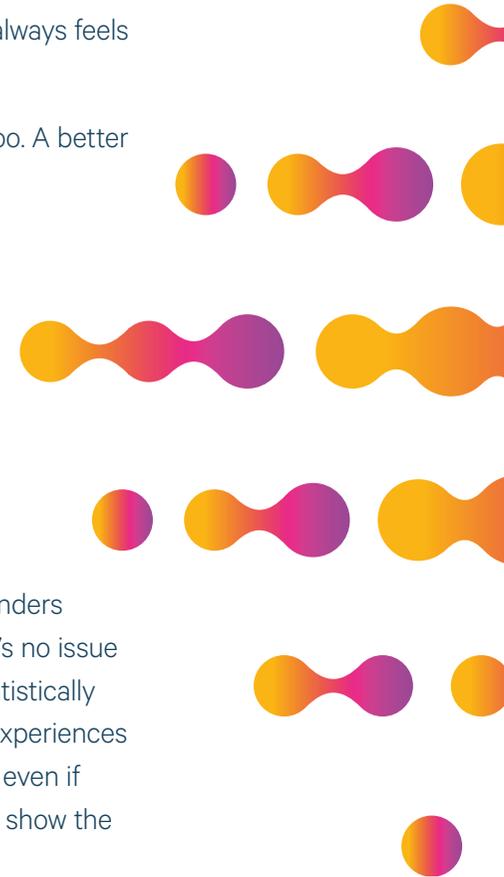- Female
- Intersex
- Prefer not to say

Working in financial services, there are very few circumstances in which we need to talk about sex – gender is a more comfortable and inclusive metric for almost everyone, and allows us to talk about the humanised 'women' in our headlines rather than 'females' (which to me always feels vaguely farmyard-y).

We can add more diverse options to our gender questions too. A better question would be:

Gender:

- Man
- Woman
- Agender
- Non-binary
- Other
- Prefer not to say

This demonstrates a basic understanding of the range of genders beyond the binary – and for reporting and storytelling, there's no issue with creating a NET of 'other'. Of course, you might find a statistically significant sample of say, non-binary people, have different experiences or views, which would give you a whole new story to tell. But even if you don't, or there's not a statistically significant sample, you show the respondents that they matter, and they count.

> **You show the respondents that they matter, and they count**

None of these questions capture whether people are trans or not. If you wanted to capture a trans sample in one question, you could do the following:

Gender:

- Cis Man
- Trans Man
- Cis Woman
- Trans Woman
- Agender
- Non-binary
- Other
- Prefer not to say

You could then NET Cis Men and Trans Men/ Cis Women and Trans Women, and also NET Cis Men and Cis Women/ Trans Men and Trans Women, to get both gender splits and trans/ cis splits. However, not everyone knows what cis means, so you might need a descriptor or explanation.

My preferred alternative is:

Q1 - Gender:

- Man
- Woman
- Agender
- Non-binary
- Other
- Prefer not to say

Q2 - Do you consider yourself to be trans?

(in this context, trans is used to refer to people whose gender identity does not match the sex they were assigned at birth):

- Yes
- No
- I don't know
- Prefer not to say

This gives you both answers, and you can still delineate into the categories above.

Age

Arguably the most straightforward of the protected characteristics, age is the simplest question to ask – people simply pick from a dropdown. Those ages can then be presented in a variety of ways – simple splits (18-25, 26-35 etc), or in generations.

When it comes to age, I'm more interested in thinking about inclusive language. Do the people you're talking to understand the questions you're asking? Do the words you use mean the same thing to the different audiences?

There was a YouGov poll in late 2022[1] looking at 'retro activities', which asked whether people did certain 'retro' things – for example, listen to a cassette, mail a postcard, and (concerningly for our industry if this is 'retro'), buy a physical newspaper. One of the options was 'send or receive a telegram' – and shockingly, 15% of 18-29 year olds said they 'currently do this'. People were baffled – until reminded, presumably by a resident Gen Z, that Telegram is the name of a slightly shady messaging app and those younger people had no idea that a 'retro' telegram existed.

If our questions rely on our audience having the same points of reference, we risk drastic misunderstandings – the solution to this is descriptions and caveats, to make sure everyone is on the same page.

Race

People are often reticent about asking about race, but anti-racist and inclusive research should do so. Again, we just need to be prepared to tell the stories we uncover.

The UK census has a comprehensive answer list for race, which group up into five higher 'ethnic' groups. These are:

How would you best describe your ethnicity?

- Asian, Asian British: Bangladeshi
- Asian, Asian British: Chinese
- Asian, Asian British: Indian
- Asian, Asian British: Pakistani
- Asian, Asian British: Other Asian
- Black, Black British, Caribbean or African: African
- Black, Black British, Caribbean or African: Caribbean
- Black, Black British, Caribbean or African: Other Black
- Mixed or Multiple ethnic groups: White and Asian
- Mixed or Multiple ethnic groups: White and Black African
- Mixed or Multiple ethnic groups: White and Black Caribbean
- Mixed or Multiple ethnic groups: Other Mixed or Multiple ethnic groups
- White: English, Welsh, Scottish, Northern Irish or British
- White: Irish
- White: Gypsy or Irish Traveller
- White: Roma
- White: Other White
- Other ethnic group: Arab
- Other ethnic group: Any other ethnic group
- Prefer not to say

[1.] https://docs.cdn.yougov.com/27k8ncej1m/results_Retro%20Activities.pdf

> ❝
> **If our questions rely on our audience having the same points of reference, we risk drastic misunderstandings**

These are grouped into:

- Asian or Asian British
- Black, Black British, Caribbean or African
- Mixed or Multiple ethnic groups
- White
- Other ethnic group
- Prefer not to say

Unless you have an extremely strong sample or are conducting research specifically on race, the above groupings are likely adequate for any ethnicity questions in consumer research. So the ideal question is:

How would you best describe your ethnicity?

- Asian or Asian British
- Black, Black British, Caribbean or African
- Mixed or Multiple ethnic groups
- White
- Other
- Prefer not to say

It's important not to 'over NET' though. Grouping 'white' vs 'BAME' doesn't tell an inclusive story – black and Asian communities in Britain have different experiences and opinions, and grouping white vs 'other' just isn't good enough.

Disability & health

More people in the UK are disabled and/ or have chronic health issues than ever before[2], and their stories deserve to be told.

The UK govt uses this question, born of the Equality Act disability definition:[3]

Q1. Do you have any physical or mental health conditions or illnesses?

- Yes
- No

Q2. (Asked only if Q1 = yes) Has this lasted, or is it expected to last, for 12 months or more?
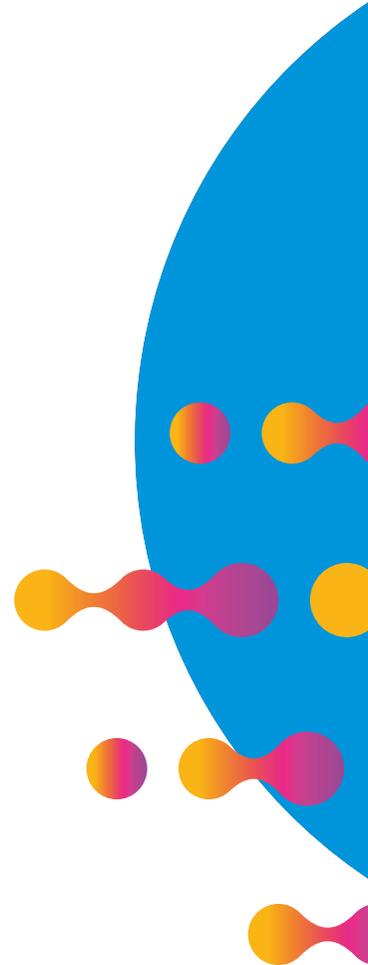
- Yes
- No

Q3. (Asked only if Q2 = yes) Do any of your illnesses or conditions reduce your ability to carry out day to day activities

- Yes a lot
- Yes a little
- Not at all

A person is counted as disabled if they answer "yes" to Q1, "yes" to Q2, and either "yes a lot" or "yes a little" to Q3.

[2]. https://commonslibrary.parliament.uk/research-briefings/cbp-9602/

[3]. https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/disability/articles/measuringdisabilitycomparingapproaches/2019-08-06

While the NHS uses:

Q1. Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months (include any problems related to old age)?

- Yes, limited a little
- Yes, limited a lot
- No
- Prefer not to say

Q2. If you answered 'yes' to question 1, please indicate your disability:

- Vision (e.g. due to blindness or partial sight)
- Hearing (e.g. due to deafness or partial hearing)
- Mobility, such as difficulty walking short distances, climbing stairs, lifting and carrying objects
- Learning or concentrating or remembering
- Mental Health
- Stamina or breathing difficulty
- Social or behavioural issues (e.g. due to neuro diverse conditions such as Autism, Attention Deficit Disorder or Asperger's Syndrome)
- Other impairment
- Prefer not to say

Personally, my preferred question is as follows:

> **Do you have any of the following health conditions or disabilities? (Tick all that apply)**
> - I am neurodiverse (e.g. autistic) and/ or have a learning disability (e.g. dyslexia)
> - I have a long-term health condition (e.g. MS)
> - I have a long-term mental health condition (e.g. depression/ anxiety)
> - I have a physical disability (e.g. blind/ I use a wheelchair)
> - I don't have any long-term health conditions or disabilities
> - Prefer not to say

In my view, this gives us enough to take a NET disabled/ not disabled, and adequate detail to keep an eye out for interesting stories within statistically significant samples. It's critical that these are 'tick all that apply', as people have a huge range of intersecting conditions; none are mutually exclusive.

However, for a project we recently worked on about vulnerable customers, we needed much more in-depth information about disability and health. We asked questions which covered specific diagnoses within physical, mental, neuropsychological, and financial health, and cross referenced this with self-identified 'vulnerable' customers. The results were fascinating, and when the project lends itself to that level of detail, we mustn't shy away from asking such in-depth questions.

Sexual Orientation

A topic close to my own heart, there's plenty to talk about when it comes to queer communities in the UK, especially if you're surveying younger generations (who are more likely to identify as LGBTQ).

One option here is simply:

Do you consider yourself LGBTQ?

- Yes
- No
- I don't know
- Prefer not to say

But this doesn't account for variation within the community. To take things further, you could ask:

How would you describe your sexuality?

- Heterosexual/ straight
- Gay/ Lesbian
- Bisexual/ Pansexual
- Asexual
- Other
- Prefer not to say

With this route, you can track straight vs NET other to mark LGBTQ, while still having the nuance and inclusion in the question itself.
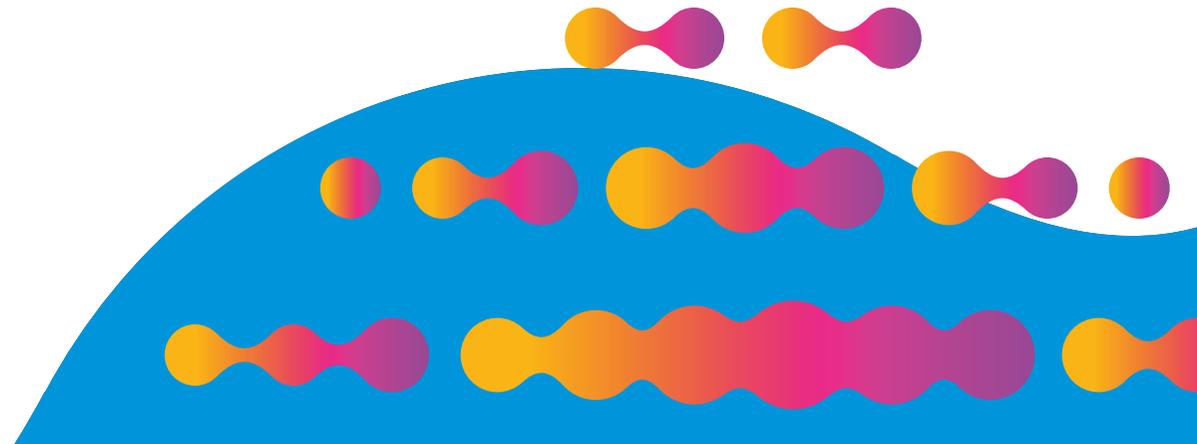
Marriage & civil partnerships

When asking about families, marriage plays a huge part in people's attitudes and behaviours – do they think of themselves as an individual, or a household? Are they divorced?

We tend to use the following question:

Which of the below best describes your familial status? (tick all that apply)

- Married
- In a civil partnership
- In a relationship
- Single
- Widowed
- Divorced

Again, it's important this is 'tick all' as people can be both divorced and in a relationship, or widowed and single for example. Often, tracking these against gender (so married men vs married women, single men vs married men) can reap fascinating stories.

Pregnancy & maternity

Pregnancy is a protected characteristic, though parenthood is not. It's rare (though not impossible!) that we need to track current pregnancy status, but if we did we would use:

Are you currently pregnant?

- Yes
- No
- I don't know
- Prefer not to say

We're more likely to ask about children, as parents are a key audience for many clients and products. In this case, asking about number and age of children is going to be more useful.

Religion & belief

People's religions and beliefs can materially impact their decisions. When it comes to religion, the best practice question is pretty straightforward:

What is your religion?

- Atheist/ no religion
- Buddhist
- Christian
- Hindu
- Jewish
- Muslim
- Sikh
- Not sure
- Prefer not to say

Of course, the list of religions is long, and this isn't exhaustive – but it covers the most likely results, and you can NET religious/ non-religious if appropriate.

'Beliefs' are a slightly different kettle of fish. Protected beliefs include a range of philosophical ideas, including atheism, humanism, agnosticism, veganism and pacifism. We tend not to track these in our research, but it's worth considering – for example, tracking vegans vs non-vegans on a survey about ethical investment could make for some interesting results!

And beyond protected beliefs, creative research can consider using beliefs and non-protected identity metrics to tell great stories. In summer 2023, YouGov ran a poll tracking whether people were more excited for Barbie or Oppenheimer against other questions on demographics, lifestyle, and behaviour[4]. It found that Barbie fans were more than twice as likely to be LGBTQ, Barbie fans were more interested in religion, and Oppenheimer fans were generally sceptical of brands expressing political views – an absolute masterclass in jumping on the zeitgeist to tell interesting stories!

The missing piece – class

Class, or socio-economic status, is not a protected characteristic in the UK – long story, it was going to be but this never got through Parliament. However, it can be a very important demographic factor to consider when conducting research.

Given how subjective people's perceptions of class are, it's a difficult one to survey. The current 'best practice', according to a government paper tied to the Social Mobility Employer Index[5], tracks four metrics:

- **Parental qualifications**
- **Parental occupations**
- **Type of school attended**
- **Eligibility for Free School Meals**

Metrics considered - but eventually not included - were time spent in care, refugee/ asylum status, home postcode aged 14, tenure of childhood accommodations, and a self-assessment of socio-economic background.

If you're looking to track social or cultural class, a combination of the above is necessary - with an allowance not to disclose, of course – but a simple 'best practice' is very hard to create.

But our clients are usually more interested in economic status – that is, current financial situation. It's interesting that current income (or assets/ wealth/ investable wealth) was not considered by the SMEI – and yet it tends to be what our clients care about. Whether that qualifies as 'class' or just 'wealth' is not my place to say.

4. https://business.yougov.com/content/46978-uk-barbie-vs-oppenheimer-movie-fans-survey

5. https://assets.publishing.service.gov.uk/media/5c2ca181ed915d7327b921a8/Measuring_Socio-economic_Background_in_your_Workforce__recommended_measures_for_use_by_employers.pdf

> **Creative research can use beliefs and non-protected identity metrics to tell great stories**

So what?

I hope this practical guide is helpful when thinking about inclusive research. If you have one single takeaway, as with so many DE&I things it is this: lean on the experts. As a communications agency we've worked hard to refine our research proposition, and we work closely with our research agency partners like Censuswide and Opinium to hold each other to account. There are also organisations – like the Diversity Standards Collective – who can help offer an expert perspective on specialist diversity questions, to ensure they're authentic and representative.

In reality, no single individual can get everything right – so throw draft questions around your team, brainstorm, sense-check, and collaborate to be as creative and inclusive as you possibly can.

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