



HOW TO CRAFT INCLUSIVE DEMOGRAPHIC QUESTIONS

Recommendations prepared
by Sago to advise on market
research best practices
for self-identification
opportunities around gender
identity, sexual orientation,
race, and ethnicity.

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INTRO

In 2021, we recommended a 38th question be added to **ESOMAR's 37 "Questions to Help Buyers of Online Samples."** This question — how is your company addressing diversity, equity, inclusion, and belonging in online sample? — helped us identify this as an area in which our practices as a company could better align with our values, namely the experience of people whom we value deeply. Here, we'll share changes we've made, which we hope help improve your participant experience as well.

As the world's most comprehensive sample and panel provider, we recognize we are uniquely positioned to examine and understand emerging language around demographics related to gender identity, sexual



orientation, race, and ethnicity. As we support an increasing amount of digital, self-serve research, we hope to support anyone who conducts research (not just research experts and insights providers) with best practices for how to ask demographic questions and how to understand sample design as it relates to the evolution of demographic questions.

The contents of the document include screener review recommendations for open-ended questions and self-identification options that, among other things, recategorize transgender and non-binary self-identifications from a sexual orientation or preference to a gender identity. We recommend this approach out of respect for respondents' need for updated language around demographic identification. Each section includes identity questions, recommended category text within the panelist profile demographic survey, definitions, and why we recommend the approach laid out therein.

Over half of the Fortune 500 uses Sago for our global

access to respondents around the world — it's important to keep in mind that gender and identity conversations vary by region. We're providing this resource because we believe it can have a tremendous impact, not just on respondents' experience in a survey, but on their relationship with brands, products, marketing, and customer experiences around the world. These recommendations should ideally be coupled with cultural sensitivity and an understanding of localized norms when conducting global research. This is an evolving discussion, and we believe it benefits everyone involved to continuously discuss learnings and best practices.



Dos

- Embrace differences in people and opinions.
- Recognize diversity, equity, inclusion, and belonging are essential to your success.
- Seek out a gut-check from members of your team, your HR department, your community, and/or representatives of the demographics here as you develop questions beyond the scope of our recommendations.
- Expect to need to update your language from time to time.



Don'ts

- Confuse sex assigned at birth with gender, gender identity, and sexual orientation.
- Use the word "preference" in reference to sexual orientation.
- Assume everyone agrees with your personal definitions of race, ethnicity, gender, etc.
- Assume everyone agrees with or uses common definitions or the definitions laid out in this document for sex, gender, gender identity, sexual orientation, race, or ethnicity.

PANEL PROFILE SURVEYS: DEMOGRAPHIC OPEN ENDS AND SELF IDENTIFICATION OPTIONS

Why Offering Open Ends Whenever Possible is a Best Practice in Demographic Identification

This option empowers panelists and respondents to describe their identity for themselves instead of selecting from a pre-coded list that could never be completely exhaustive. It reduces the chance that someone is unintentionally excluded from our panel or research due to lack of representation of their identity category. Lastly, this helps us learn how others describe themselves to help evolve our categories over time.

Why Offer “Prefer To Self-Describe” as an Option in Demographic Research Questions

Although “Other-specify” is a well-known standard in market research, we would like to avoid it when asking demographic questions. Asking someone who may be from a marginalized group to self-select “other” is in bad taste, and it is better to move to the more specific label to be more intentional with our screening language and reduce the chances of othering those who are volunteering to participate in our research.

What To Do When You Can't Ask Open-Ended Questions

Suppose the open ends listed in the recommendations are not possible for whatever reason. In that case, we recommend they remain as a category that someone could select if they feel it applies to them. This will allow the team to ask for more information open-endedly on another question or during other follow-ups over the course of the recruit.

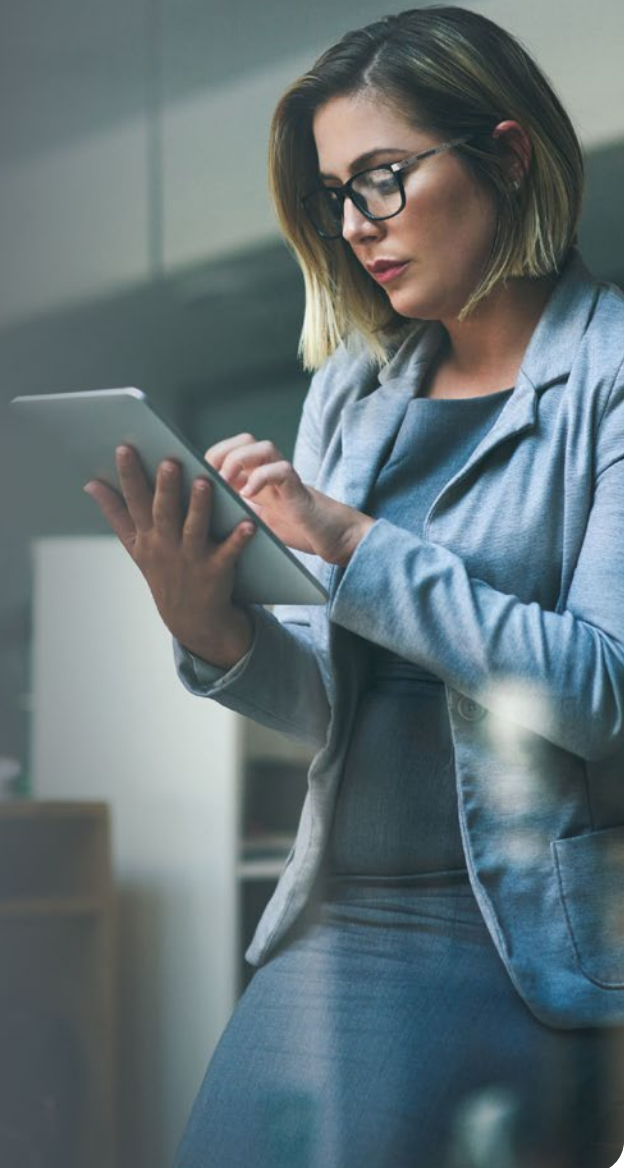


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1 SEX ASSIGNED AT BIRTH

Recommended Question Format

Please select the sex you were assigned at birth.

Options within the dropdown answer section:

- Male
- Female
- Intersex/ambiguous
- Prefer not to answer



Why do we recommend this approach?

This question combines current Census design and other potential medical research categories of interest, making it relevant to healthcare and consumer research. Asking explicitly about sex at birth also distinguishes sex from gender, which are separate and equally valuable demographic questions to understand your target audience.

Important Definitions

Sex:

Either of the two main categories (male and female) into which humans and most other living things are divided on the basis of their reproductive functions.

Intersex/ambiguous:

Either having both male and female gonadal tissue in one individual or having the internal genitalia of one sex and external genitalia of the other sex or is ambiguous, about 1 in 1,500 to 1 in 2,000 births.

“The Evolution of Demographic Questions” – Insights Association, IDEA Council

ISNA FAQ

“

Asking explicitly about sex at birth also distinguishes sex from gender, which are separate and equally valuable demographic questions to understand your target audience.

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2 GENDER YOU IDENTIFY WITH TODAY

Recommended Question Format

What gender do you identify with today?

Options within the dropdown answer section:

- Male/Man
- Female/Woman
- Gender-fluid/Non-binary
- Prefer to self-describe:

- Prefer not to answer

Do you identify as Transgender?

- Yes
- No



Why do we recommend this approach?

Expanding our list allows for more precise categorization. Separating “transgender” into its own question acknowledges that “transgender” is not a gender but rather an indicator that one’s sex assigned at birth differs from their gender identity. For example, someone who is transgender would not necessarily state they are a transgender man but simply that they are a man. This design allows for more precise assessment and understanding while also being inclusive of the complexity of people’s identities. A version of this line of questions has been tested on large scale government studies, based on the SOGI Adult Measures Recommendations FAQs and the Insights Association.

Important Definitions:

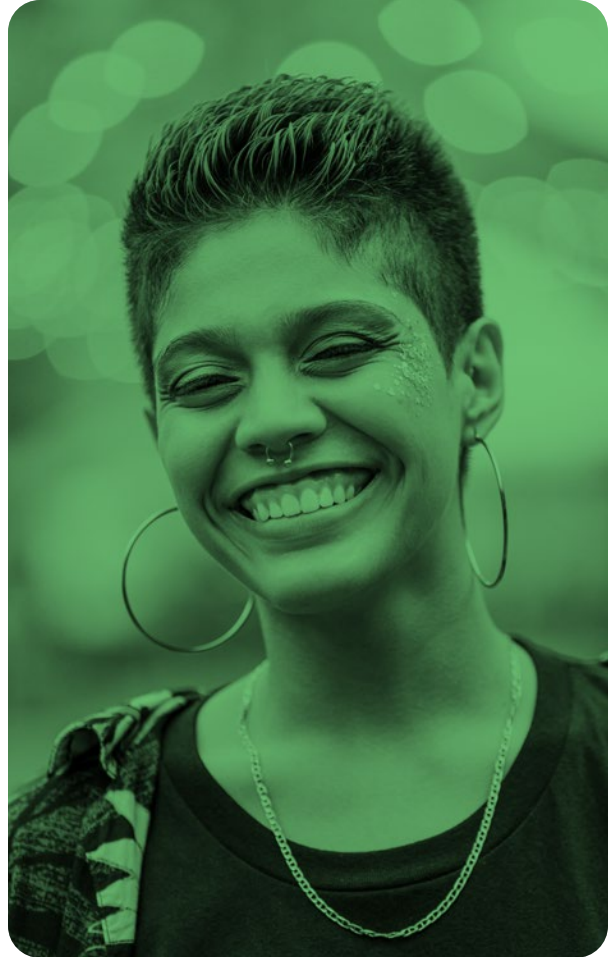
Gender Identity: A person’s internal sense of being male, female, some combination of male and female, or neither male nor female.

Transgender: An umbrella term for people whose gender

identity is different from the sex assigned at birth. Being transgender does not imply any specific sexual orientation. Therefore, transgender people may identify as straight, gay, lesbian, bisexual, etc.

Gender- fluid/Non-binary: An identity embraced by some people who do not identify exclusively as a man or a woman. Non-binary people may identify as being both a man and a woman, somewhere in between or as falling completely outside of these categories. While many also identify as transgender, not all non-binary people do. Non-binary can also be used as an umbrella term encompassing identities such as agender, bigender, genderqueer or gender fluid.

HRC Transgender and Non-Binary FAQ



3 SEXUAL ORIENTATION

Recommended Question Format

Which of the following do you consider yourself to be?

Please select one.

- Asexual
- Bisexual
- Heterosexual or straight
- Homosexual or Gay
- Homosexual or Lesbian
- Pansexual
- Prefer not to identify
- Unsure
- None of these/
prefer to self-identify:

This is not an exhaustive list, but by expanding the options slightly and allowing respondents to specify, we are able to be more inclusive while collecting information to help inform a longer list if needed.



Why do we recommend this approach?

We see this question being applied to address the largest categories of sexual orientation. This is not an exhaustive list, but by expanding the options slightly and allowing respondents to specify, we are able to be more inclusive while collecting information to help inform a longer list if needed. It is essential to test how to ask sexual orientation because it can sometimes be confused with sex and gender questions, and there is no consistent approach. Sexual orientation is not asked on the U.S. Census, and there is no current question that has been tested broadly, though there is literature on how to ask from the Federal Interagency Working Group on Improving Measurement of Sexual Orientation and Gender Identity in Federal Surveys, as well as the Centers for Disease Control and Prevention (CDC).

Important Definitions:

Sexual Orientation: A person's sexual identity in relation to the gender to whom he or she is usually attracted; the fact of being heterosexual, bisexual, or homosexual.

Asexual: Complete or partial lack of sexual attraction or lack of interest in sexual activity with others. Asexuality exists on a spectrum, and asexual people may experience no, little or conditional sexual attraction.

Bisexual: A person emotionally, romantically or sexually attracted to more than one sex, gender or gender identity though not necessarily simultaneously, in the same way or to the same degree. Often used interchangeably with Pansexual, this identity implies attraction to two genders: male and female.

Pansexual: Describes someone who has the potential for emotional, romantic or sexual attraction to people of any gender though not necessarily simultaneously, in the same way or to the same degree. Often used interchangeably with Bisexual, this identity is chosen by people who want to indicate gender has no bearing on their attraction and is meant to be more inclusive to those who identify as nonbinary or transgender.

Heterosexual/Straight: (of a person) sexually attracted to people of the opposite gender.

Homosexual: Relating to, or characterized by sexual or romantic attraction to people of one's same gender.

Gay: A person who is emotionally, romantically or sexually attracted to members of the same gender. Men, women and non-binary people may use this term to describe themselves as a blanket term for homosexuality. Gay can also be used to specifically identify a man who is attracted to other men.

Lesbian: A woman who is emotionally, romantically or sexually attracted to other women. Women and non-binary people may use this term to describe themselves.

HRC Glossary

Bi vs. Pansexual

"The Evolution of Demographic Questions" – Insights Association, IDEA Council

4 RACE & ETHNICITY

Recommended Question Format

**Which of the following best describes you?
Select all that apply.**

Options within the dropdown answer section:

- Asian Indian/ East Indian
- Asian/Pacific Islander
- Black/African American
- Hispanic/Latino
- Middle Eastern/ Arabic/ Persian
- Multi-Racial
- Native American
- White/Caucasian
- Other
- Prefer not to answer



Why do we recommend this approach?

This question moves us closer to matching the Census options, while allowing more precise categorization by allowing multiple selections. Updating the category to include “race” and “ethnicity” also more accurately describes these options, encompassing both ethnicities and racial categories. This design also aims to simplify the race and ethnicity question by limiting it to just one question. It includes a Hispanic/Latino and a Middle Eastern category as they were considered by the Census Bureau for the 2020 Census but then not implemented. This question is a multi-select and offers the option to self-identify to recognize diversity further.

Important Definitions:

Race: Primarily a sociological designation that identifies a group sharing some outward physical characteristics and some commonalities of culture and history

Ethnicity: Identity acquired based on where your family is from and the group with whom you share cultural, traditional, and familial bonds and experiences with

“The Evolution of Demographic Questions” – Insights Association, IDEA Council

Escalent Demographic Recommendations – Presented at IDEA Council 2022

5 RESOURCES

“The Evolution of Demographic Questions” – Insights Association, IDEA Council

ISNA FAQ

HRC Transgender and Non-Binary FAQ

HRC Glossary

Bi vs. Pansexual

Escalent Demographic Recommendations – Presented at IDEA Council 2022



Adaptive solutions, confident decisions.

Let's Work Together

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Sago is a leading global research partner that puts the human voice at the center of everything we do by providing unparalleled access to audiences, comprehensive solutions, and market research expertise.