

THE EVOLUTION OF DEMOGRAPHIC QUESTIONS

Position Paper on How to Ask Demographic Questions on Gender, Sexual Orientation,
and Race and Ethnicity and Needed Research-on-Research in the Industry

Prepared by the IDEA Council | September 2021



Introduction

Insights professionals are critical to understanding changing demographic shifts in the United States and applying an understanding of those shifts to research design and interpretation. The Insights Association IDEA Council is conducting research-on-research to help inform:

- How to ask demographic questions
- How evolving demographic questions impact sample design
- How the way we ask these questions affect the research respondent experience

Included in the IDEA Council research-on-research initiative will be a review and testing of questions on gender, sexual orientation, and race and ethnicity. The focus of this current paper is:

- A review of current practices and how they are applied
- Initial recommendations on how to ask demographic questions today
- What questions and elements need to be tested

We recognize that there are many efforts underway across the industry to have insight into more inclusive demographic questions and how to apply them. The Insights Association IDEA Council is collaborating with research organizations within and outside the United States who also are working to bring greater diversity, equity, inclusion and belonging (DEIB) to the industry.* The current point-of-view reflected in this paper is informed by the input from many people in the marketing research industry, as well as academic and government research.

The Insights Association IDEA Council is currently developing a testing program that will be implemented next. The focus of this paper and the testing plan is on the United States. Our hope is to expand to other countries in the future and to continue to evolve the knowledge base on this topic. The planned testing approach will allow us to understand both implicit and explicit responses to the questions, so that we can understand the rationale, stated reaction, as well as the emotional reaction to different ways of asking demographic questions. Our ultimate goal is to provide more inclusive best practices in research design.

Please note that this summary is oriented to creating more sensitive and inclusive questions and is to be used in conjunction with considerations for individual's privacy and governing privacy laws.

Big thanks is given to Michaela Mora of Relevant Insights for her presentations and review of the research, along with Insights in Color who have distributed a great position paper, and with many others cited in the sources [here](#).*

Demographic Questions for Gender

How we ask gender is one of the key demographic questions that researchers are focused on because the way people in the United States define their gender identity is shifting and changing, and gender is often a key demographic question used in sample design. The definition of gender has become more fluid, especially among younger generations who do not necessarily find that they fall into the traditional binary gender categories. As this field is still evolving, there are many difficulties in crafting updated questions around gender—everyone does not fit neatly into one category, nor is everyone familiar with the newer terminology that is being used. Although gender questions are asked in many ways, some of them have been tested and others have not.

Below we outline many of the issues to be addressed. We have included recommended questions, along with some alternative questions being explored but not tested yet. Our goal is to test these questions and make recommendations to help inform when to use them and how they will impact sample design and quotas. This current piece for the IDEA Council is intended as a brief overview and set of recommendations to help answer questions now, as research on this topic continues.

As we look at how to ask questions around gender and sex, it is important to look at the key definitions of key terms. In the Oxford English Dictionary, sex, gender, gender identity and sexual orientation are defined as follows:

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.

GENDER: Either of the two sexes (male and female), especially when considered with reference to social and cultural differences rather than biological ones. The term is also used more broadly to denote a range of identities that do not correspond to established ideas of male and female.

GENDER IDENTITY: A person's internal sense of being male, female, some combination of male and female, or neither male nor female.

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.

Because these terms cover different things, it is very important not to mix sex, gender or gender identity and sexual orientation when asking demographic questions in a survey. We have seen a lot of new questions that are mixing these elements. Many of the terms used are not well understood by research participants leading to many using the wrong category or not responding at all. The result is often biased responses as respondents are confused with the questions and how best to answer them.

Following are a series of questions and responses around sex, gender and gender identity, how they are currently applied, our recommendation on how to most inclusively ask gender identity today, and what questions, and responses, need to be tested.

IDEA Council Recommendation for How to Ask Gender

We recommend a three-question approach to asking gender.

G1.1. Rotate Male and Female

What sex were you assigned at birth, on your birth certificate?
(Please select one.)

1. Male
2. Female

G1.2. Rotate Male and Female

How do you describe yourself?
(Please select one.)

1. Male
2. Female
3. Transgender
4. None of these

G1.3. If none of these

What is your current gender identity? **[OPEN END]**

Application

We recommend this three-question approach because it is inclusive and better captures the gender identity of respondents, while also being able to be used to inform sample design. This line of questions has been tested on large scale government studies, and this is what we currently recommend using in General Population surveys until we have tested other questions. This is based on the recommendations from the SOGI Adult Measures Recommendations FAQs. This approach allows us to:

- Capture sex to help with matching quotas to Census results.
- Capture broad categories of gender identity as opposed to listing just a few categories.
- Offer respondents an option to self-identify. This provides the opportunity for respondents to describe their gender identity as opposed to selecting from a pre-coded list which could never be exhaustive. This also ensures that there is no misunderstanding based on language used. Lastly, this helps us learn how others describe themselves to help evolve the question.
- We also recommend rotating male and female on both G1.1 and G1.2.

Questions Recommended for Testing

The Census question below is being used today. It focuses on sex and not on gender.

G2. Census 2020 Gender Question

What is your sex? (Please select one.)

1. Male
2. Female

APPLICATION

This question is most useful when the goal is to match to Census quotas as closely as possible. We do not recommend this question alone to address inclusion because it does not reflect the changing demographic in the United States and the broader ways in which people identify.

Based on a review of many different surveys and input from multiple companies and consultants in the industry, the following questions are being used in various forms in studies in the United States and are intended to be more inclusive than the Census question on sex. We recommend testing these in future research and not using them yet in current studies until more research is conducted.

G3. Rotate Male and Female

How do you identify? (Please select one.)

1. Male
2. Female
3. Identify on my own terms
(Please specify) **[ANCHOR]**
4. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied as an alternative to the Census question. It allows for the ability to create quotas that come close to matching Census, while also allowing room for a more inclusive response. This question uses the question stem of “How do you identify?”, that many recommend as a more inclusive and contemporary approach, particularly for younger generations. This question has not been tested. Elements that will need to be tested are the rotation or order of the response categories, how people understand the response terms, the phrasing of the open-ended option, along with how people identify with the response terms.

We recommend using a response option of “Identify on my own terms (Please specify)” or “I prefer to self-identify (Please specify)” with open ended write in options, rather than “Other (Please specify)” based on informal qualitative feedback from many in the industry that “Other” can feel impersonal and can alienate respondents. Testing these response options is also intended as part of the testing program.

G4. Rotate Male And Female, anchor at top. Rotate Non-binary and Transgender

How do you identify? (Please select one.)

1. Male
2. Female
3. Non-binary
4. Transgender
5. Identify on my own terms
(Please specify) **[ANCHOR]**
6. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied in research as a more inclusive gender question than the standard traditional question with two response categories and the inclusion of non-binary and transgender response categories. This question has not been tested, and there is limited research on how people interpret or identify with the terms “non-binary”. Elements that will need to be tested are the rotation or order of the response categories, how people understand the response terms, the phrasing of the open-ended option, along with how people identify with those response terms.

G5. Rotate Male and Female.

Anchor at top. Randomize 3–6.

How do you identify? (Please select one.)

1. Male
2. Female
3. Trans Man
4. Trans Woman
5. Gender Fluid
6. Intersex
7. Self-identify: (Please specify) **[ANCHOR]**
8. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied to have fully inclusive response options and for younger samples. Although this question is potentially more inclusive than others with fewer response options, we recommend further testing because there is not yet research that shows how people understand these response categories and how they self-identify. If using a question like this, we recommend rotating male and female and randomizing the other categories that we are testing. Elements that will need to be tested are the rotation or order of the response categories, how people understand the response terms, and how they identify with those response terms. We would like to test two variations of this question, the first using male and female terminology and the second using cis-male and cis-female terminology to see whether respondents understand the terminology and identify with these terms. The next question has the additional cis male and cis female response options.

G6. Rotate Cis Male and Cis Female.

Anchor at top. Randomize 3–6.

How do you identify? (Please select one.)

1. Cis Male
2. Cis Female
3. Trans Man
4. Trans Woman
5. Gender Fluid
6. Intersex
7. Self-identify: (Please specify) **[ANCHOR]**
8. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied to have fully inclusive response options and for younger samples. While this question is expanded from the G5 option to include cis male and cis female. If using a question like this, we recommend rotating male and female and randomizing the other categories that we are testing. Elements that will need to be tested are the rotation or order of the response categories, how people understand the response terms, and how they identify with those response terms. We are deliberately not providing any definition of the terms as we would like to test people’s understanding of the terms and whether a definition is necessary. The term “gender non-conforming” has also been used in response options but has not been tested yet and we do not recommend testing it and prefer using the “Self-identify” option.

G7. Rotate 1 and 2.

Which of the following sets of pronouns do you prefer people use to refer to you? (Please select one.)

1. She, her, hers
2. He, him, his
3. They, them, theirs **[ANCHOR]**
4. Identify with another pronoun
(Please specify) **[ANCHOR]**
5. Prefer not to use pronouns **[ANCHOR]**
6. Prefer not to answer **[ANCHOR]**

APPLICATION

We see the use of pronouns being used more frequently in the business world and in education as a form of self-identification in communications with others. Using pronouns as a way to ask gender in research has also increased. There is not yet research on the use of pronouns, and we recommend testing to measure the attitudes towards using pronouns and gauge if people understand the motivations of those using them and check if using them alienate certain respondents. When this approach is tested, we recommend testing the rotation or order of the response categories, how people understand the response terms, and how they identify with those response terms. It will also be important to understand if this question works as a replacement to a gender question for the general population and in setting up sample design and quotas or if it would need to be asked in addition to it.

G8. Rotate 1 and 2.

Which of the following sets of pronouns do you prefer people use to refer to you? (Please select one.)

1. She, her, hers
2. He, him, his
3. They, them, theirs **[ANCHOR]**
4. E/ey, em, eir/eirs **[ANCHOR]**
5. Per, per, pers **[ANCHOR]**
6. Sie, sie, hir/hirs **[ANCHOR]**
7. Tey, ter, tem/ters **[ANCHOR]**
8. Ve, ver, vis/vers **[ANCHOR]**
9. Xe, xem, xyr/xyrs **[ANCHOR]**
10. Zie, zim, zir/zis **[ANCHOR]**
11. Identify with another pronoun
(Please specify) **[ANCHOR]**
12. Prefer not to use pronouns **[ANCHOR]**
13. Prefer not to answer **[ANCHOR]**

APPLICATION

This question (G8) is an expanded list of pronouns. This expanded list is not seen in application that frequently, but we are seeing more reference to it. For example, Lucid with Insights in Color and ThinkNow recommend using Xe/Ze when using pronouns in their presentation *Redefining Identity in Research*. This longer list is to be inclusive to provide inclusive options other than the feminine, masculine, or neutral pronoun forms of she, he, and they. Like with other questions, we recommend considering who your research sample is and if the question is relevant for your sample and the objectives of the research. This approach has not been fully tested. When it is tested, we recommend testing the rotation or order of the response categories, how people understand the response terms, and how they identify with those response terms. It will also be important to understand if this question works as a replacement to a gender question for the general population or if it would need to be asked in addition to it. We recommend testing both G7 and G8.

How To Ask Sexual Orientation

How to ask sexual orientation is important to test because it can sometimes be confused with sex and gender questions, and there is not a 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).

It is a sensitive question and many versions have been tested without a conclusive solution, so we recommend further testing among General Population respondents. This question should be asked when appropriate for the research objectives.

IDEA Council Recommendation for How to Ask Sexual Orientation

The Insights Association does not have a definitive recommendation about how to ask about sexual orientation yet and will conduct more testing to provide such recommendations. We recommend these guiding principles.

- Allow for write-in responses for greatest flexibility
- Have an equitable and inclusive coding structure for open-ended questions
- Place this question, and other sensitive questions, at the end of the survey questionnaire
- Allow people to skip or not answer and ask the question only if need to meet the research objectives

Questions Recommended for Testing

The following questions have been designed based on our analysis of the current literature and will be used for testing to help the IDEA Council make a recommendation.

SO1. Randomize

Which of the following best describes your sexual orientation? (Please select one.)

1. Bisexual
2. Gay or Lesbian
3. Heterosexual/Straight
4. Identify as another sexual orientation
(Please specify) **[ANCHOR]**
5. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied to address the largest categories of sexual orientation. This is not an exhaustive list, but by allowing respondents to specify their sexual orientation, we are inclusive and are collecting information to help inform a longer list if necessary. We recommend testing this question and understand how respondents feel about the response categories. We also would recommend testing variations on the question stem with “How do you identify?”

SO2.1. Randomize r1, r2 and r3

Which of the following best represents how you think of yourself? (Please select one.)

1. Gay or lesbian
2. Straight, that is, not gay or lesbian
3. Bisexual
4. Something else
5. I am not sure yet
6. Prefer not to answer
7. I don't understand what this question means

APPLICATION

This version is from the Williams Institute at the UCLA School of Law and has been developed to provide a range of options and to allow people to write in an alternative. We recommend testing this question because it includes broad terms that have been used in the general population for a long time and allows for a different identification, for uncertainty and for refusal. It also has response options that need to be explored. For example, it defines what “straight” is but none of the other terms. It also has an option of “something else,” which people may create negative perceptions. It also focuses on self-identification and does not mention the term “sexual orientation” in the question stem, which can be misinterpreted by certain groups or may cause resistance to answer.

SO2.2. Ask if something else selected

What do you mean by something else?
[OPEN END]

SO3. Test in alphabetical order.

Which of the following best describes your sexual orientation? (Please select one.)

1. Asexual
2. Bisexual
3. Gay
4. Heterosexual
5. Lesbian
6. Pansexual
7. Queer
8. Questioning or unsure
9. Identify as another sexual orientation
(Please specify) **[ANCHOR]**
10. Prefer not to answer **[ANCHOR]**

APPLICATION

We see this question being applied to provide a broader list of response options for sexual orientation. This is far from being exhaustive, but we are allowing respondents to specify their sexual orientation to ensure that if they don't find a category they identify with, they can add that information. As the list is getting longer, we recommend testing response options in alphabetical order and randomizing the list.

SO4. Reverse answers (show 1, 2, 3, 4, and 5 for half of respondent and show 5, 4, 3, 2 and 1 to the other half)

People are different in their sexual attraction to other people. Who are you attracted to? (Please select one.)

1. Only attracted to females
2. Mostly attracted to females
3. Equally attracted to females and males
4. Mostly attracted to males
5. Only attracted to males
6. Not sure **[ANCHOR]**

APPLICATION

We see this question being applied to test sexual attraction instead of sexual orientation. This question is recommended by the Williams Institute at the UCLA School of Law to get at sexual attraction. This type of questioning limits the complexity of the language used and limits any confusion due to terminology. Since this question is a spectrum, we recommend asking the question starting with "Only attracted to females" for half of respondents and starting with the opposite, "Only attracted to males" for the other half. Following this test, we will be able to make a recommendation as to whether or not order of answer categories has an impact on responses.

How to Ask Race and Ethnicity

Having racially and ethnically diverse sample and diverse voices in research is critical. How we ask people to identify their race and ethnicity on surveys is key to having inclusive research. We currently are at an inflection point where asking single-select race/ethnicity does not apply to most people, and there is large variability in how different racial and ethnic groups self-identify. According to Census Bureau estimates, the number of Americans who identify with more than one race is growing faster than those who select a single race. According to the 2020 U.S. Census people of color represent 43% of the U.S. population, and over half (53%) of the population is under 18 years olds. Pew Research has found that more Black and Hispanic adults than White adults feel a strong connection with the origin of their family. As this field is still evolving, there are many difficulties in crafting updated questions around race and ethnicity to ensure that everyone feels represented and that questions resonate with how the diverse population identifies. While there are many ways race and ethnicity questions are being asked, some of them have been tested and others not have not.

Below we outline many of the issues to be addressed. We have included recommended questions, along with some alternative questions that are being explored but have not been tested yet. Our goal is to test these questions and make recommendations to help inform when to use them and how they will impact sample design and quotas.

How we ask race and ethnicity has changed over time. The most common source that the industry uses for sample quotas has been the U.S. Census. The U.S. Census Bureau has been collecting data on race and ethnicity since 1790, and the way this information has been asked has evolved over the years as concepts of race and ethnicity evolved in the U.S. revisions or additions to the Census questions are made each decade, underscoring the complexity of collecting data on identity and classification. Along with the U.S. Census, the research industry has also made modifications to how questions have been asked. In the past year, the industry has moved toward a new understanding of how to ask race and ethnicity to be inclusive, address the many different cultures in our country, and be able to understand the impact of how we ask the question on the respondent experience as well as sample design.

To better understand all the issues, it is important to look at the key definitions of key terms. In the Oxford English Dictionary, race and ethnicity are defined as follows.

RACE: An ethnic group, regarded as showing a common origin and descent; a tribe, nation, or people, regarded as of common stock.

ETHNICITY: Status in respect of membership of a group regarded as ultimately of common descent, or having a common national or cultural tradition.

ORIGIN: The fact of being born from a particular ancestor or race; parentage, ancestry, extraction, pedigree.

ANCESTRY: Ancestral lineage or descent, now frequently in relation to ethnic or national origins.

HERITAGE: The history, traditions, and qualities that a country or society has had for many years and that are considered an important part of its character.

NATIONALITY: The legal right of belonging to a particular nation.

IDEA Council Recommendation for How to Ask Race/Ethnicity

The Idea Council does not yet have a definitive recommendation on how to ask race and ethnicity because research is needed to understand how people interpret questions and how to compare to Census. If you do not need to compare to Census or can work around Census-based quotas, general guidelines based on a review of the research and current applications are to:

- Allow for multiple selection
- Allow for write-in responses for greatest flexibility
- Have an equitable and inclusive coding structure for open-ended questions

Questions Recommended for Testing

Below is the 2020 U.S. Census question that contains two parts.

RE1.1. Census 2020 Question, part 1

Are you of Hispanic, Latino, or Spanish origin?
(Please select one.)

1. No, not of Hispanic, Latino, or Spanish origin
2. Yes, Mexican, Mexican Am., Chicano
3. Yes, Puerto Rican
4. Yes, Cuban
5. Yes, another Hispanic, Latino, or Spanish origin (Please specify) **[OPEN END BOX]**

RE1.2. Census 2020 Question, part 2*

What is your race? (Please select all that apply.)

1. White—Type, for example, German, Irish, English, Italian, Lebanese, Egyptian, etc. **[OPEN END BOX]**
2. Black or African Am.—Type, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc. **[OPEN END BOX]**
3. American Indian or Alaska Native—Type name of enrolled or principal tribe(s), for example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc. **[OPEN END BOX]**
4. Chinese
5. Filipino
6. Asian Indian
7. Vietnamese
8. Korean
9. Japanese
10. Native Hawaiian
11. Samoan
12. Chamorro
13. Other Asian—Type, for example, Pakistani, Cambodian, Hmong, etc. **[OPEN END BOX]**
14. Other Pacific Islander—Type, for example, Tongan, Fijian, Marshallese, etc. **[OPEN END BOX]**
15. Some other race—Type race or origin **[OPEN END BOX]**

APPLICATION

This question is most useful when the goal is to match to Census quotas as closely as possible. This question allows respondents to multi-select and add more information regarding their origin. We do not recommend this question for General Population surveys since it is fairly complex. In addition, according to Pew Research, only half of Americans find that this question identifies them very well.

*Note: Adopted for online surveys. Actual Census has print blocks. Other Asian is at the bottom of three columns and under Asian Indian but before Vietnamese; other Pacific Islander at the bottom of column three.

The following questions will be used for testing to help the IDEA Council make a recommendation.

RE2.1. Test randomized.

Which of these best describes your racial or ethnic background? (Please select all that apply.)

1. African American or Black
2. Asian or South Asian
3. Caucasian or White
4. Hispanic/Latino
5. Middle Eastern or North African
6. Native Hawaiian or other Pacific Islander
7. Native American or Alaska Native
8. Another race/ethnicity (Please specify)

[ANCHOR]

9. Prefer not to answer **[ANCHOR EXCLUSIVE]**

RE2.2. Test in alphabetical order.

Which of these best describes your racial or ethnic background? (Please select all that apply.)

1. African American or Black
2. Asian or South Asian
3. Caucasian or White
4. Hispanic/Latino
5. Middle Eastern or North African
6. Native Hawaiian or other Pacific Islander
7. Native American or Alaska Native
8. Another race/ethnicity (Please specify)

[ANCHOR]

9. Prefer not to answer **[ANCHOR EXCLUSIVE]**

APPLICATION

This question aims to simplify the race and ethnicity question by limiting it to just one question. It includes a Hispanic/Latino and a Middle Eastern or North African category as they were considered by the Census Bureau for the 2020 Census but then not implemented. To recognize the diversity, this question is a multi-select and offers the option to self-identify. We do have a concern that we want to verify, that is that respondents may not provide both racial and ethnic backgrounds, and we may miss some diversity in asking the question this way. Testing will allow us to check if our concern is something that needs to be addressed. We would like to test the question randomized and alphabetized.

We want to provide respondents an opportunity to self-identify but also want to test the wording for this answer category: “Another race” versus “I identify with another race”

RE3.1. Ask with next question.

Do you identify as of Hispanic or Latino origin?
(Please select one.)

1. Yes
2. No

RE3.2. Randomize. Ask with previous.

What is your racial background?
(Please select all that apply.)

1. White or Caucasian (origin may be German, Irish, English, Italian, Russian etc.)
2. Black or African American (origin may be Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.)
3. Indigenous American or Indigenous Alaskan (origin may be Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc.)
4. Asian or South Asian (origin may be Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese, etc.)
5. Middle Eastern or North African (origin may be Iranian, Egyptian, Lebanese, Syrian, Moroccan, Algerian, etc.)
6. Native Hawaiian or Other Pacific Islander (origin may be Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)
7. I identify as another race, ethnicity, or origin (Please specify) **[OPEN END BOX]**
8. Prefer not to answer **[ANCHOR EXCLUSIVE]**

RE3.3. Ask if Hispanic. Drop down list in alphabetical order.

Which of the following best describe you? (Please select all that apply.)

1. Argentinian
2. Belizean
3. Bolivian
4. Brazilian
5. Chilean
6. Colombian
7. Costa Rican
8. Cuban
9. Dominican
10. Ecuadorian
11. Guatemalan
12. Honduran
13. Mexican, Mexican American, Chicano
14. Nicaraguan
15. Panamanian
16. Paraguayan
17. Peruvian
18. Puerto Rican
19. Salvadorian
20. Uruguayan
21. Venezuelan
22. Another Hispanic or Latino origin
23. Prefer not to answer **[ANCHOR EXCLUSIVE]**

RE3.4. Ask if Asian. Drop down list in alphabetical order

Which of the following best describe you? (Please select all that apply.)

1. Bangladeshi
2. Bhutanese or Drukpas
3. Burmese
4. Cambodian
5. Chinese
6. Filipino
7. Indian
8. Japanese
9. Korean
10. Lao
11. Malaysian
12. Mongolian
13. Nepalese
14. Pakistani
15. Singaporean
16. Sri Lankan
17. Taiwanese
18. Vietnamese
19. Another Asian origin
20. Prefer not to answer **[ANCHOR EXCLUSIVE]**

APPLICATION

We also want to test having Hispanic or Latino origin as separate question. This set of questions aims to include race, ethnicity and country of origin as an increasing number of Americans associate with their country of origin more than their race or ethnicity. There has been debate about using the first question or not as is included in the Census question. We did not include it here as we felt this could be confusing. The second issue is whether people from Brazilian descent will identify as Hispanic or Latino in order to answer RE3.3. The third issue is to make sure people from Hispanic or Latino origin also select a race on the follow up question. We recommend testing adding the following additional text to see if this helps. “Please note that Hispanic is not a race. Those of Hispanic descent can be black, white or multiracial.” All the response options need to be tested for understanding and resonance with respondents. We recommend that apart from the first question, all other questions are multi-select. We also recommend that RE3.2 be randomized while RE3.3 and RE3.4 are alphabetized because these are long lists.

Conclusion

All of these key demographic questions are evolving. Research is needed to ensure that as an industry we are asking the right questions the right way—to be inclusive, to not alienate our respondents, and to not create any biases. We plan to test alternative questions to understand how respondents understand the response options and self-identify, what their experience is with the questions, and how the questions map to single-select traditional questions for sample design purposes.

GENDER

We currently recommend using the three-question approach to gender (G2), which allows the ability to set up quotas while also being inclusive. We acknowledge that this question comes with trade-offs such as creating multiple questions on a questionnaire and having an open-ended response to be coded, as well as not currently having a longer list of potentially more inclusive response categories. At the same time, it is the most inclusive and flexible and has been tested with robust research.

SEXUAL ORIENTATION

We recommend including a sexual orientation question only when appropriate for the research objectives. We also recommend including it at the end of the questionnaire, unless it is being used for screening purposes and for quotas. All of the sexual orientation questions in this paper need to be tested.

RACE AND ETHNICITY

For race and ethnicity questions, we recommend considering whether this question is needed as a screening question or whether it can be placed with other demographic questions at the end of the questionnaire. When asking race and ethnicity, we recommend using a multi-select approach. For greatest inclusivity, we recommend having an open-ended question that is coded with an inclusive coding system. More testing is needed to understand what questions and response options are the most inclusive and understood and how to use these in sample design.

In general, consider the following when choosing how to ask demographic identity questions.

1. Look at the objectives of the research, the topics of the study as well as the target demographic. You do not necessarily need to ask these questions in every research project.
2. Think about the best placement of sensitive questions in the questionnaire. If a question is sensitive and not needed for a screener, consider putting it at the end of the questionnaire.
3. Think about your respondents and the experience you are creating for them. Choose questions and responses that are inclusive and appropriate.
4. Use language such as “Identify on my own terms (Please specify)” or “I prefer to self-identify (Please specify)” with open ended write in options, rather than “Other (Please specify)”
5. Allow people to skip or opt out of the question with a “Prefer not to answer” response option.
6. Ask open-ended questions if possible.
7. Have an inclusive and equitable coding system.

Next Steps

Our next step is to work with other industry organizations and companies to conduct research to test alternative ways of asking gender, sexual orientation, and race and ethnicity. The goal of this research is to understand how the responses are interpreted, understand the respondent experience, and how to use the responses to inform sample design and set up quotas. We will use both explicit and implicit techniques. The use of implicit research techniques will help us understand how demographic questions in surveys influence the respondent’s emotional state and willingness to participate in research.

The results of the research will help create best practices and enable the marketing research industry to make informed choices on how best to ask demographic questions and on sample design.

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Sources for Gender and Sexual Orientation Questions

- *Current Measures of Sexual Orientation and Gender Identity in Federal Surveys* paper from the Federal Interagency Working Group on Improving Measurement of Sexual Orientation and Gender Identity in Federal Surveys published in August 2016
- *Sexual Orientation and Gender Identity (SOGI) Adult Measures Recommendations* FAQ paper from the UCLA School of Law, the Williams Institute published in March 2020
- *Sexual Orientation in the 2013 National Health Interview Survey: A Quality Assessment* report by the Centers of Disease Control and Prevention
- *Updates on Terminology of Sexual Orientation and Gender Identity Survey Measures* paper from the Federal Committee on Statistical Methodology (FCSM)
- *Adapting how we ask about the gender of our survey respondents*

paper by the Pew Research Center

Sources for Race and Ethnicity Questions

- *The 2015 National Content Test: Race and Ethnicity Analysis Report* from the Census Bureau
- *Black and Hispanic Americans See Their Origins as Central to Who They Are, Less So For White Adults* paper by Pew Research Center
- *Measurement of Race and Ethnicity in a Changing, Multicultural America* paper published in 2009 by Humes and Hogan
- *Update on the U.S. Census Bureau's Race and Ethnicity Question Proposals for the 2020 Census* presentation from the Census Bureau in April 2018

Presentations for both Gender and Race and Ethnicity Questions

- *How To Improve Racial and Gender Inclusion in Survey Design* webinar by Michaela Mora on May 10, 2021
- *Redefining Identity in Research* presentation prepared by Insights in Color in collaboration with Lucid and ThinkNow

If you are involved in efforts to look at demographic questions and would like to collaborate to help consolidate work share your findings on testing these questions and help bring recommendations to the insight industry, please contact IDEA Council via the following email:

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