



Inclusive UX Research: How to Workshop Your Participant Recruiting Processes

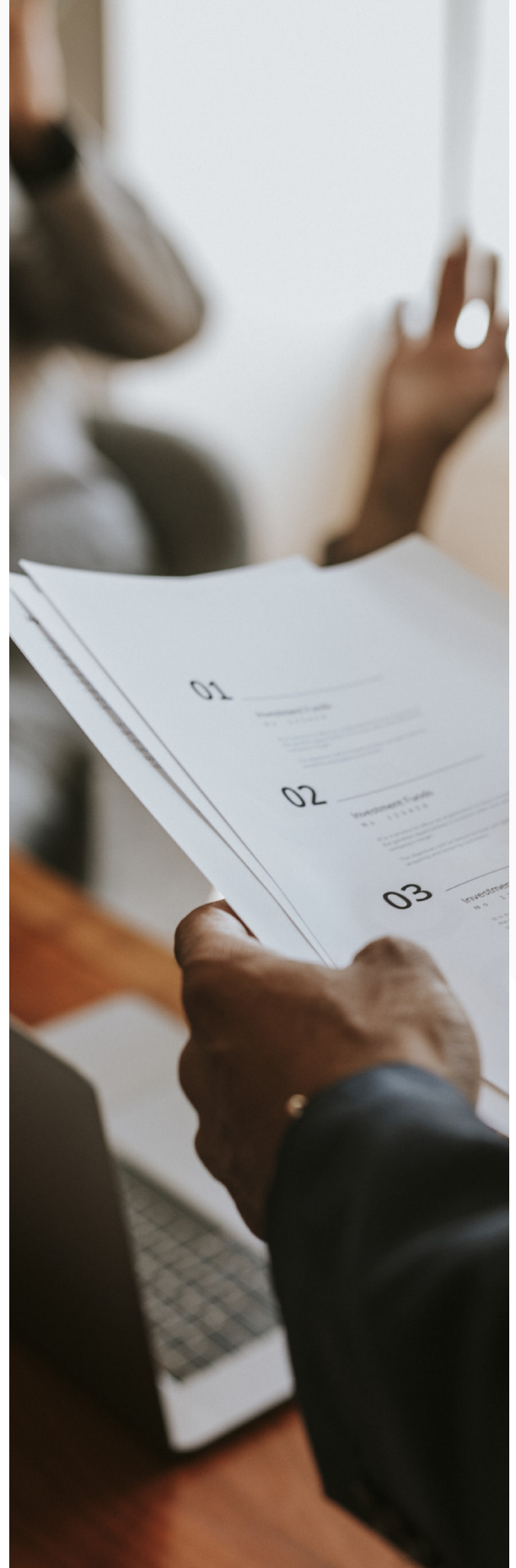
We all have different perspectives that change how we interact with the world around us. Ensuring you create products and experiences that take these perspectives into account starts with inclusive UX research experiences.

Inclusive research starts with an inclusive recruit.

Too often under-represented groups do not have great digital experiences. And why is that? Because they are often excluded from the design process due to outdated, embedded ways of thinking about the research process.

More inclusive design in the world means more experiences that all people love regardless of ability, age, gender, ethnicity, or socioeconomic status. But to design inclusive products, you have to ensure you're speaking to a diverse group of people and creating an inclusive research process. We all have different perspectives that change how we interact with the world around us. It's our job as researchers to understand how we can create better experiences that take these aspects into account. Start by refining your recruiting processes.

To update old practices and habits, start by looking at who's getting left out or ignored during typical research screening. Your screener asks questions about demographics, product usage, etc. to help you identify the participants who will help you answer your research questions. Creating an inclusive screener is the first step to getting an inclusive recruit.



Your Work Plan

Start by looking inward

- Educate yourself and team on [the definitions of inclusivity and accessibility](#) and align on what you'll use as a team moving forward.
- Encourage your team to think about who they are and how they identify. What are the aspects of their identity that change and shape how they interact with the world and the products they use? Starting these conversations can help everyone reconsider how they're approaching participant criteria.
- Review your ideas and plans with DEI experts. If your company has an internal DEI team or role, start there!

Refine your screener

- Evaluate the demographic questions in your surveys, screeners and even forms in your digital interactions.
 - Do they reflect the diversity of your customers?
 - Are the questions necessary? Do they exclude people or have the potential to make customers uncomfortable?
 - Are you allowing for a range of identities in your answer choices?
 - Are the questions relevant to your research goals?
- Re-examine your questions and response options for the following demographics (see page 8 for details on how we ask about some of these).

<input type="checkbox"/> Gender	<input type="checkbox"/> Education level
<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Marital status
<input type="checkbox"/> Age	<input type="checkbox"/> Employment status
<input type="checkbox"/> Household income	<input type="checkbox"/> Ability
- Is the way you're asking these questions inclusive? Are you able to articulate the reason you're asking these questions to build trust with both participants and stakeholders?

Build in steps for accountability

- Roll out your new screener to your team and build in ways to hold everyone accountable for executing on these goals.

Workshopping your participant criteria

● Rethink your established templates

Typically, research organizations will have a screener template they start with for every study. Start by rethinking your template. Are you excluding participants because of older standards or out of date practices? For example, many recruiters screen out based on age, marital status, or education levels automatically. Are these practices critical to the goals of the study, or are they there simply because of outdated standards and opinions?

● Get a range of perspectives and ideas to develop better screener practices

Form a team to help rethink your practices and develop better screeners. At AnswerLab, we created a set of internal employee taskforces to lead inclusivity initiatives with one focused on creating a new, more inclusive screener. By including various employee perspectives in the process, you'll discover insights and opinions you might not have come to on your own.

● Think holistically

Instead of thinking about what the "perfect" participant looks like, think about the unique perspectives you might be missing. Consider who you're recruiting (or not recruiting) and why to help build a holistic case for why certain participants should be included. Perhaps there's someone who doesn't fit every piece of criteria exactly but can offer an opinion no one else would be able to. Recruit them.

● Hold yourself accountable

Here's the big one: accountability. Once you've made these decisions, swapped out questions, or changed your criteria for screening out respondents, you need to build a system to hold you and your team accountable for executing on these changes. As a part of our inclusivity journey, our team built a participant demographic tracker that allows us to see just how diverse our study populations are. It helps us identify if we're over or under recruiting from certain groups and, subsequently, pivot to course-correct.

Workshopping your research screener

At AnswerLab, we began by looking at our screener and discovered we had a lot of room to grow in how we were asking certain demographics questions.

Screening for gender

Before:

GENDER: **Note the gender of the participant, DO NOT ASK:**

Male, AIM FOR 50% N=4 MAIL

Female, AIM FOR 50% N=4 MAIL

After:

[FOR PHONE SCREENING]: What is your gender?
[DO NOT READ OPTIONS]

Woman

Man

Non-Binary

Prefer to Self-Identify (please state): _____

Prefer not to say

[FOR SURVEYS]: Which of the following **best describes you?**

Woman

Man

Non-Binary

Prefer to Self-Identify (please state): _____

Prefer not to say

Pushing our participants into two binary choices was not inclusive of the wide range of gender identities. Allow participants to self-identify with an open-ended question, rather than guessing based on their voice. When you can't ask an open-ended question, always offer a variety of options in survey responses, including non-binary and prefer not to say.

Screening for ethnicity

When asking about ethnicity, always explain why you're asking the question, provide a broader mix of ethnicity options, give folks the option to opt out, and make sure your options and the representation reflects the geography and demographics where the research will be taking place.

Before:

ETHNICITY: Which of the following **best describes your ethnicity?**

- Caucasian or White
- Hispanic / Latino / Central or South American Decent
- African American or Black
- Native American
- Asian
- Other: _____

After:

ETHNICITY: **We are always trying to hear from many kinds of people with different backgrounds and points of view.** Which of the following ethnicities **do you identify with?**

(Select all that apply)

- Caucasian or White** (for example, German, Irish, Italian, Polish, French, etc.)
- Hispanic / Latinx / Central or Spanish origin** (for example, Mexican, or Mexican American, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian, etc.)
- African American, African, or Black** (for example, African American, Jamaican Haitian, Nigerian, Ethiopian, Somalian, etc.)
- American Indian or Alaska Native** (for example Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village or Barrow Inupiat Traditional Government, Nome Eskimo Community. etc.)
- Asian** (for example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese, etc.)
- Middle Eastern or North African** (for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)
- Native Hawaiian or Other Pacific Islander** (for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)
- Some other race, ethnicity, or origin:** _____
- Prefer not to say**

How to ask about demographics and qualities of identity in your screeners

Gender

When possible, we keep our questions about gender open-ended so participants can answer in their own words. When open-ended isn't possible, include expanded choices for gender in your screeners, for example, non-binary and prefer not to state. These options not only give you a more accurate understanding of your participants, but also prevent them from feeling excluded by the question choices.

Ethnicity

In every study, we strive to recruit a group of participants whose ethnic makeup matches the U.S. Census data. Our new standards are to recruit no more than 1/3 from any one ethnicity and no more than 1/6 from any one geography, as opposed to leaning on the more general, but ambiguous instruction to "recruit a mix." Regardless of the study's size, our percentages of participants will always match the country's demographics unless the study objectives ask otherwise. When working internationally, we adjust our practices to match the local market.

Age

Participants over 55+ are often excluded from research due to outdated notions of tech-savviness, but we believe reaching this age group is critical to creating experiences that work for everyone. People of all ages are using technology more than they used to, and the percentage of the population who are 55 or older has grown in recent years. Prioritize getting a mix of participants across ages 18+ unless your study objectives focus on a specific age group.

Household Income

Include a mix of household income levels to make sure you're reaching a diverse group of participants with different socioeconomic circumstances. Screening out based on household income comes from outdated industry standards of who your "target customer" is. In some cases, a focus on specific income brackets, including low-income populations and high net worth individuals, is necessary to uncover specific customer needs.

Employment Status during COVID-19

This is a tricky one. During the COVID-19 pandemic, many people have been laid off, furloughed temporarily, or have left their jobs due to shifting economic circumstances and priorities. We now often include those laid off or looking for work in studies where we previously may have only recruited employed participants. This serves as a good reminder to always re-think the “standards” of recruiting that might not make sense given the current landscape. It’s important to acknowledge the difficult, changing circumstances many find themselves in today.

Necessary accommodations or assistive technology

It’s very important to ask if participants need any accommodations to participate in a study, whether conducted in-person or remotely. These accommodations might include assistive technology such as screen readers, in-person accessibility needs, or remote walk-ins to ensure a seamless and timely session experience. Make sure your researcher is prepared to adjust the session questions or prototypes if necessary to accommodate these participants’ needs.

Marital Status

Marital status is an age-old recruiting question we believe doesn’t tell you very much anymore. Whether someone is married or not doesn’t indicate how they’re going to interact with a product or experience in the same way it used to, and collecting this information comes from out-dated social norms. By asking this question in our screener, it seemed like a way to “exclude” rather than “include” participants. Try asking about the participant’s household size as an alternative to be more inclusive and get even more accurate information. However, when it’s not relevant to the study’s objectives, for example, in B2B studies, you can omit this question altogether.

Location

Now that we’ve moved to remote research, we have an opportunity to reach rural populations that were previously very difficult to access from our in-person research labs. To aid this, we’ve started asking participants whether they live in urban, suburban, or rural areas in our screener to recruit a better range of participant lifestyles. You might also consider asking about the region they live in (e.g. Northeast, Midwest, Southeast, etc.) to make sure you’re getting better representation from across the U.S. in your studies.

What steps will you take to promote inclusivity?

AnswerLab helps brands bring a human-centered design process to every product they launch. To answer your toughest questions, we use a range of techniques, methodologies, and best practices to support every stage of the product development lifecycle. Our research studies are tailored to your unique needs to provide clear, actionable recommendations that generate strategic business results.

For more resources on designing inclusive research experiences and products, visit answerlab.com/inclusivity.

Contact us at info@answerlab.com.