

Radically inclusive marketing research

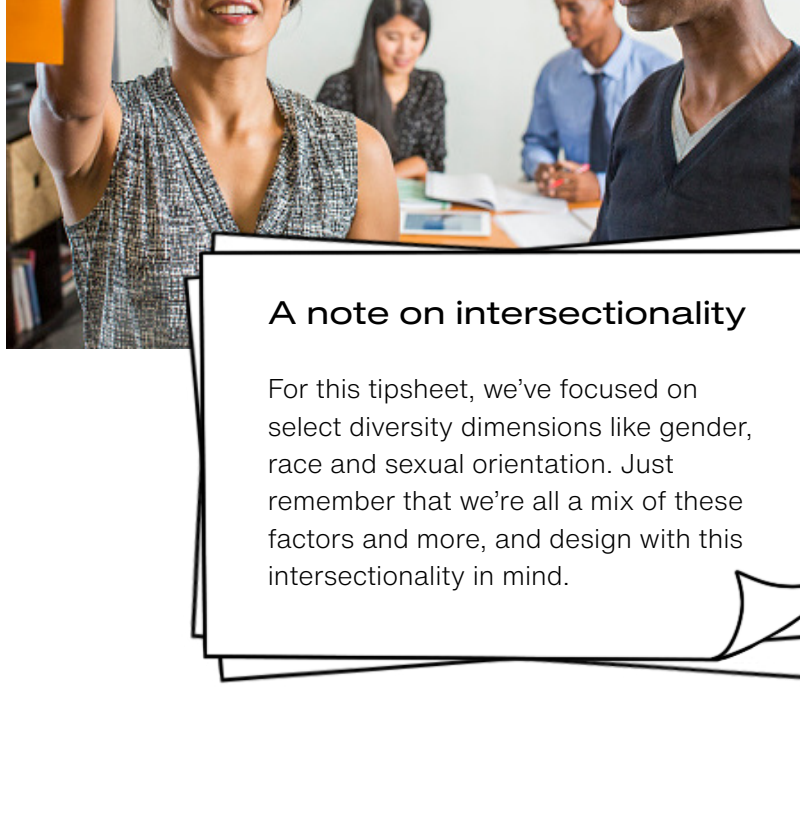
Looking for ways to make your marketing more diverse, equitable and inclusive? Start at the beginning with your research practices.

Representation in marketing research isn't just about inclusion for inclusion's sake—it's an approach that results in deeper, more accurate audience insights. We build our strategies and campaigns on these insights, so it's critical that we get them right.

The following guidance focuses on cultivating a DE&I mindset for customer research, whether conducted by internal teams or external partners. If you want to better understand your audience, strengthen your strategy, or improve campaign performance, this tipsheet is for you.

Learn about

- Designing for diversity
- Choosing inclusive collaborators
- Auditing your research methods

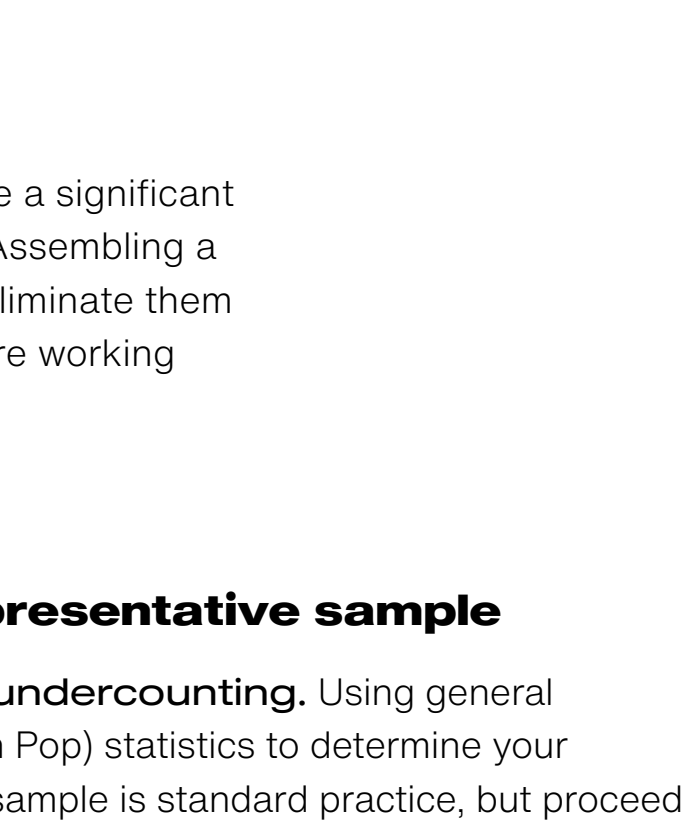


A note on intersectionality

For this tipsheet, we've focused on select diversity dimensions like gender, race and sexual orientation. Just remember that we're all a mix of these factors and more, and design with this intersectionality in mind.

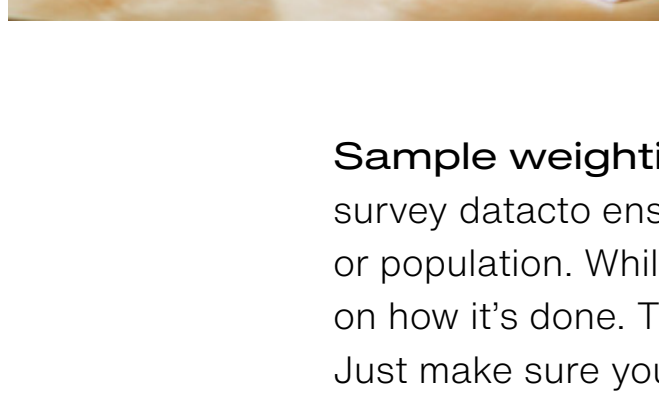
Designing for diversity

Inclusive research brings the right perspectives into the room and ensures that all participants are heard.



1 Know your team's biases

Biases among your internal team and your partners can have a significant impact on research objectives, design and implementation. Assembling a diverse team is a great way to minimize biases, but it won't eliminate them completely. So make an effort to understand the biases you're working under and identify the gaps that your research can fill.



2 Build a representative sample

Account for undercounting. Using general population (Gen Pop) statistics to determine your representative sample is standard practice, but proceed with caution. If you're using US Census Data or other accepted resources, make note of [common population undercounts](#) of certain groups such as lower socioeconomic households, immigrant populations and younger people.

Pro tip: If these perspectives are important to your research, [oversample](#) commonly undercounted groups, as well as any group that's typically underrepresented or hard to reach.

Sample weighting matters. Weighting is a method of adjusting survey data to ensure your study accurately reflects the sampled group or population. While it's meant to minimize bias, the results will depend on how it's done. There are [many valid ways](#) to use sample weighting. Just make sure you understand why you're doing it and how your approach will lead to more inclusive insights.

Watch out: Many industry databases use a binary male/female gender breakdown, which means if you weight your data to these distributions (e.g., 50/50) you may unintentionally exclude respondents who don't identify this way. Consider comparing both weighted and unweighted data to see if there are differences. Until the industry catches up to include non-binary gender sample distributions, it may be worth using unweighted data in some scenarios.

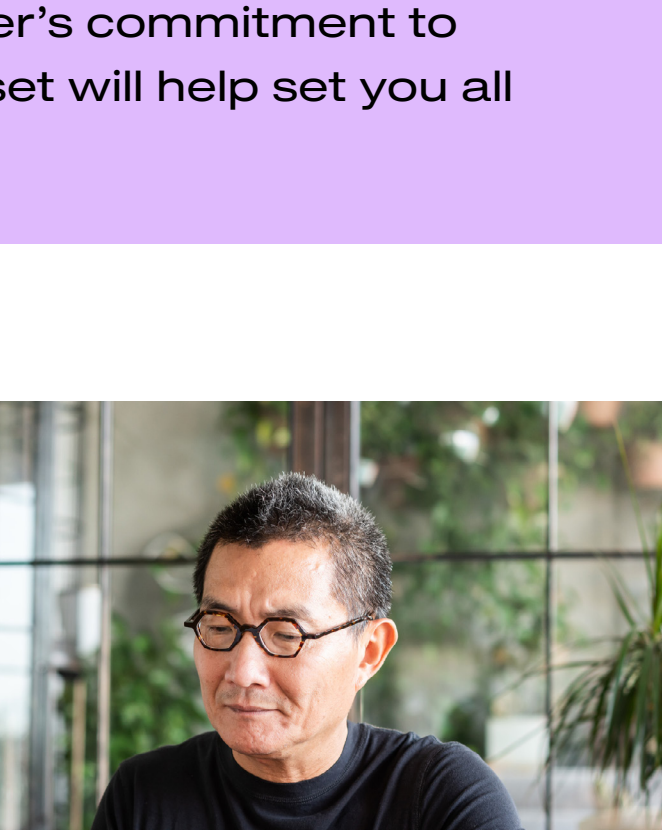
Target audiences are not homogenous. For target audience studies, make sure your team is clear on what's similar about a given group and what's different. Even well defined audiences will have notable diversity within the group.

Yes, you can be inclusive and targeted!

Being inclusive in our research and marketing doesn't mean we have to speak to all people, all the time. It's about thinking critically and proactively about the perspectives we seek and the methods we use.

3 Pay attention to research sources

Are all sources from the same region? Who funded the study you're citing? Are there any Latinx authors? All research is conducted by humans with some level of conscious and unconscious bias, so examine your secondary research rigorously. The more diverse your secondary sources are, the more inclusive and complete your insights will be.



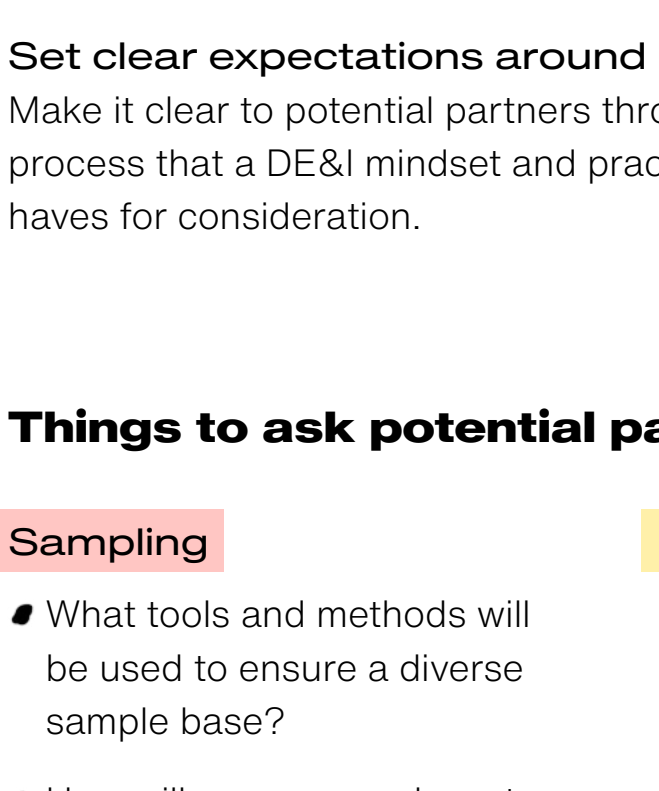
4 Make participation accessible

Requiring something as seemingly ubiquitous as a landline or an internet connection can preclude people from participating in your study. Worse, the effects could be disproportionately greater for the very groups you're trying to reach. Aim for accessibility in the broadest sense and remove as many potential obstacles as you can.

• **Landline or cell phone?** Using a landline makes sense if you're trying to reach homeowners or older populations, but if your target audience includes people under the age of 25, it might not be the best approach.

• **Is internet access needed?** Keep in mind that people from rural communities and those with lower incomes may not have reliable internet access, which may prevent them from participating.

• **Are audio and visual stimuli included?** If so, provide closed captioning and audio for people with visual or hearing impairments. Make sure any online content follows the World Wide Web Consortium's (W3C's) [accessibility initiative guidelines](#).



5 Watch your word choices

Say yes to localization, no to idioms and slang. Unless you're message testing—and it's culturally appropriate and aligned with your brand—avoid idioms and slang, which aren't widely understood. Conversely, the practice of localizing (not just translating) surveys and discussion guides for local languages and cultural relevance is a great way to ensure that most or all participants can engage with your content.

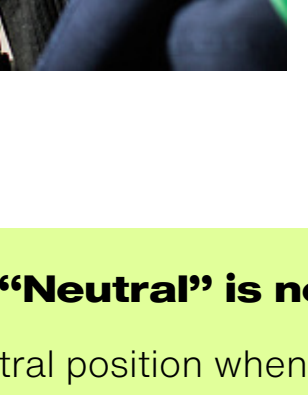
Pro tip: For qualitative research, your facilitators should speak in participants' native or fluent language.

Answer choices make a difference. When you ask a question about gender or race, do you give participants the choice to not identify at all? The way researchers phrase questions and the answer choices they provide have a huge impact on results, yet many of us are still unaware of the biases hidden in our own content. Examine your discussion content carefully and take a look at our [recommended demographic questions](#) for specific language you can use.

Pro tip: Demographic questions can be the most personal. So unless you need them for screening purposes, put these at the end of the survey when trust is typically higher and participants understand the full scope of the research. And be sure to let people know that all of their responses are anonymous and their privacy is always protected.

6 An inclusive approach to insights

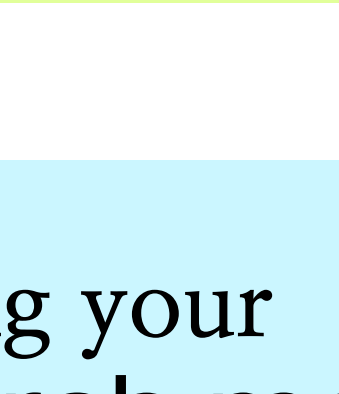
Demographics or psychographics? While demographic targeting is unquestionably useful, research designed to understand shared attitudes and perspectives is naturally more representative—not to mention more strategic. When you segment by psychographics, your marketing strategy is guided by a shared set of values, needs and aspirations, which can lead to more opportunities for both creative innovation and customer engagement.



Acknowledge differences within audiences.

While our job as marketers is to understand what characteristics define a given audience, differences will exist within any group. Including anecdotes in your report content can help demonstrate this diversity, especially for qualitative studies.

Craft your personas with intention. Personas are an effective tool for inspiring and guiding creative development, but they can also unintentionally reinforce our biases. So pay close attention to the details you provide and how they might be interpreted. Small changes can make a big difference here. If gender identity isn't critical information, for example, try giving your persona a name that isn't strongly associated with a particular gender. Use diverse photography and multiple visuals to bring a persona to life.



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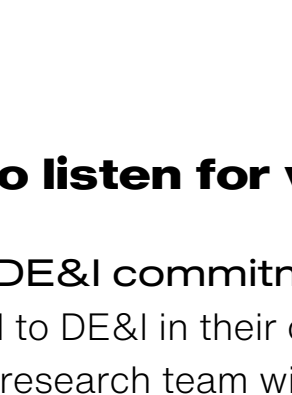
Choosing inclusive collaborators

Evaluating a partner's commitment to DE&I from the outset will help set you all up for success.

Before you evaluate

Request proposals from diverse vendors
Be sure to include companies that are owned or led by underrepresented groups in your RFP process.

Set clear expectations around DE&I
Make it clear to potential partners throughout the process that a DE&I mindset and practices are must-haves for consideration.



Things to ask potential partners

Sampling

• What tools and methods will be used to ensure a diverse sample base?

• How will your research partners identify and mitigate barriers to true representation in their research practices?

Recruitment methods

• How do they recruit sample respondents for surveys?

• Do they use phone screens or in-person interviews?

• How do they frame the questions?

DE&I training

• How do they instill a DE&I mindset within their team?

• What training and development opportunities exist?

• What best practices do they teach?



What to listen for when evaluating

Internal DE&I commitment: Look for partners who are committed to DE&I in their own ranks. A range of perspectives within the research team will help ensure diversity during recruitment and implementation.

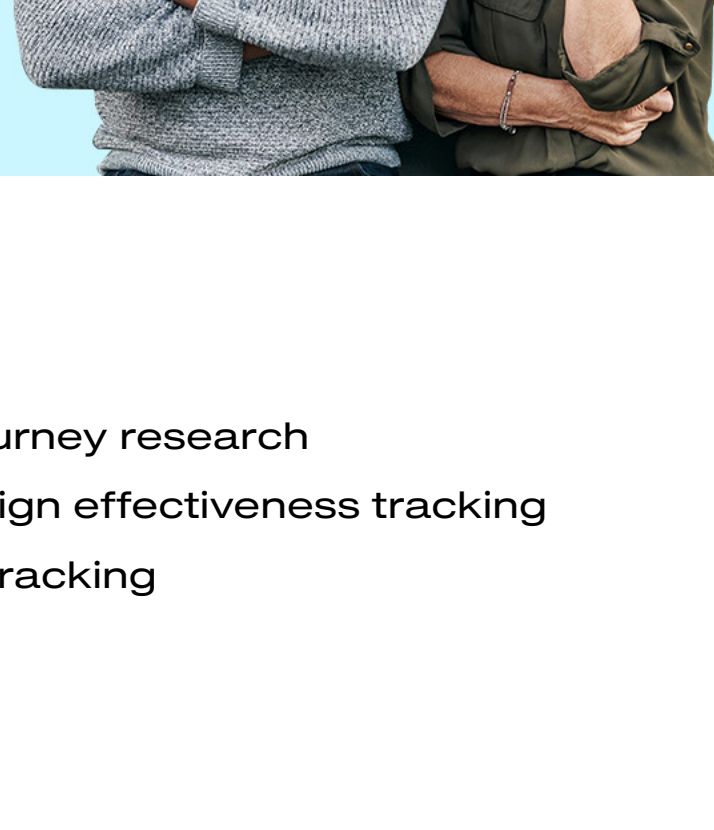
An intentional approach: Select the partner with an intentional approach to representing all consumer voices through recruitment, study design and reporting. Ask for case studies or past work examples that demonstrate this.

Remember: "Neutral" is not inclusive

There is no neutral position when it comes to diversity. When we fail to champion diversity in research, we perpetuate old biases and miss out on much needed perspectives.

Auditing your research methods

You don't have to wait for a new research project to start integrating these approaches. Use the practices outlined in this tipsheet to identify areas where you can improve today.



Assets to include

- Customer segmentations and personas
- Customer needs studies
- Brand positioning research
- User journey research
- Campaign effectiveness tracking
- Brand tracking

Questions to guide your audit

Participant demographics

- Are you including diverse populations?
- Are you asking demographic questions in an inclusive way?
- For target audience studies, what was the rationale for screening in only that set population?
- What perspectives might have been missed as a result?

Primary Research

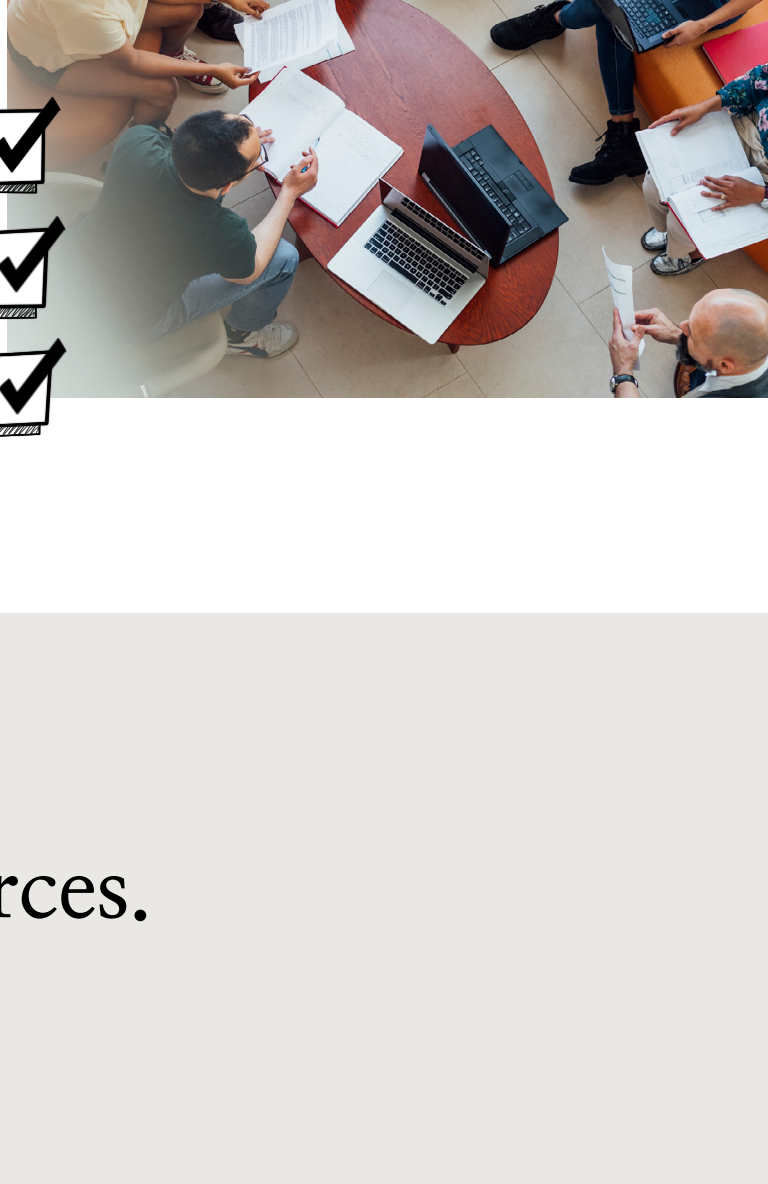
- Are surveys provided in multiple languages?
- Can individuals with disabilities easily participate in your qualitative interviews?
- What about people from different socioeconomic backgrounds?
- How are your quantitative studies weighted?

Secondary Research

- Do your sources represent different perspectives, regions, and cultures?
- What are the biases, perspectives, and lived experiences of the authors of these sources?
- What perspectives are missing?

Question framing

- Does the way you ask questions perpetuate stereotypes?
- Are the illustrative examples used inclusive and easily understood by a diverse audience?



Want to dig deeper? Check out these helpful resources.

[Recommended Demographic Questions \(a companion resource\)](#)

[AccessThat: Digital Accessibility Basics](#)

[Bias-free language](#)

[Best Practices for Asking Questions to Identify Transgender and Other Gender-Minority Respondents on Population-Based Surveys \(GenIUS\) - Williams Institute](#)

[Complexity of Audiences and Understanding Consumer Behavior - GWI](#)

[Conscious Style Guide: Home of Conscious Language](#)

[Disability Language Style Guide](#)

[LGBTQ-Inclusive Data Collection: A Lifesaving Imperative](#)

[Why \(and how!\) to ask survey questions on gender identity and sexual orientation](#)

For more info or help assessing your research practices, reach out to inclusivemarketing@mediamonks.com