dscout

Bad Form

Our Research Platform Excluded People Based on Gender Identity. Here's How We're Fixing It, and What We've Learned.

We wish we could tell you this research started with a customer request; that we began our search for a more inclusive way to ask about gender identity because someone else needed to do a better job.

But it didn't.

It started with us, dscout, and with our employees raising concerns that our platform was poorly designed when it came to inclusion.

Every day, individuals (we call them scouts) use our mobile app to answer quantitative and qualitative questions. We use those answers to guide research for our customers, many of them large national and international companies.

To participate, scouts had to complete a profile. To complete their profile, they had to select their gender. And when they selected their gender, they were given two options: male or female.

As our employees reminded us, gender identity isn't binary. Research proves that it falls along a spectrum, and the public increasingly agrees: the majority of adults aged 18–34 in the United States don't believe that gender defines people as much as it once did[1],[2],[3]. Twelve percent of millennials identify as transgender or gender non-conforming.[4] More and more people are using gender-neutral pronouns.[5]

We built a platform to champion the voices of users, but it wasn't reflecting their real lives.

And we knew we weren't the only company getting this wrong.

We owed it to our employees, our customers, and the research community to put inclusive design at the center of our platform. And we owed it to our users to build a platform that allows them to reflect their true identity.

So we decided to use what we do best—research—to design a better way. Here's how we did it and what we learned.

How We Did It

Starting in May 2019, we recruited 69 individuals (scouts) who felt unable to accurately express how they identify in typical forms for gender. We asked them to tell us more about their experiences, broadly.

Using the dscout app, scouts completed a four-part study by providing written responses and recorded videos. Each section prompted them with a task, outlined below.

How You Identify

- **Part 1** Share two moments from your everyday experience. One where you felt seen or validated in your gender identity and one where you felt silenced, overlooked, or misunderstood.

- **Part 2** Share two examples from the digital world. One for the best digital experience you've had with a brand, organization, or company around your gender identity and one for the worst.

- **Part 3** Redesign the gender section of the dscout scout profile. Sketch out the details of your ideal design and walk us through your thought process.

- **Part 4** Review the prototype of our revised scout profile based on your feedback. Tell us what you like and what still needs work.

In Part 1, we heard about their general, day-to-day interactions and experiences where they felt included and excluded based on their gender identity. These were not easy moments for scouts to share.

In Part 2 we narrowed the focus to the digital world, again prompting them to provide examples of the best and worst experiences they had while indicating their gender identity.

What we saw is that there are many companies that offer very poor, and even harmful, experiences. Many of the experiences reported by our scouts centered on forms with only binary options for gender. For most people, encountering a question about gender on a form is, at best, an annoyance. For people who regularly lack the options to accurately express how they identify, it can be a vulnerable and sensitive experience—reminding them again of the space they need to carve out in the world to be who they are.

Top ten words scouts used to describe their emotions during the negative experiences.

> **Truly, the lack of options for us is part of the larger system of oppression with all the discrimination and dismissal we face. Options for us helps [sic] to normalize our existence, equalizes us, and actively challenges the narrative that we don't exist. Providing these options is life-saving, because, as [Marian Wright Edelman said], 'you can't be what you can't see.'**
>
> **— Fig T** · They/Them

After seeing that dscout's own research platform was an offender of non-inclusive design, and knowing that many other digital spaces need to rethink how, when, and why they ask questions about gender, we wanted our 69 individuals to help us design a better digital experience.

For the next part of the project, we prompted scouts to redesign the form for dscout's participant profile, specifically the section that captures gender.

Design Principles

Using the scout designs and the positive and negative digital experience examples, we were able to identify four design principles that helped guide our design changes. For each principle we included direct scout quotes that informed it and the specific actions we took based on that principle.

1. Question the question

Ask yourself, "Do you need gender data at all?" Identity is personal. We shouldn't assume this is an easy selection for individuals to make.

If you do decide gender data is essential, know why and be transparent about it.

> **You should explain why you asked for gender and *if you can't explain it, maybe you shouldn't ask for it.***
>
> **— Mary S. 32 ·** They/Them

Perhaps the biggest thing we learned was that many times gender is asked "just because." It's not necessarily because the information is needed; it's just done out of habit.

People want organizations to be transparent about why information on an individual's gender is being asked. They want to know the purpose up front. Not surprisingly, individuals want the information and data to be used properly. That means only allowing the people who need it to access the information and keeping the information secure.

I would challenge your team to be able to clearly identify if [gender data] is needed...or if it's just being selected as a go-to category that 'everybody' collects.

— Andrew S. 34 · They/Them & He/Him

If you think you may need the information in the future but aren't sure at the moment, provide an opt-out option. This communicates to users: "Your needs and comfort are more important than our need for data."

At dscout, gender is an important point to capture, but not so important that we want to exclude anyone because they are uncomfortable providing it.

We want to capture enough information to accurately represent our scouts' identities, but don't need — and won't press for — a high level of detail.
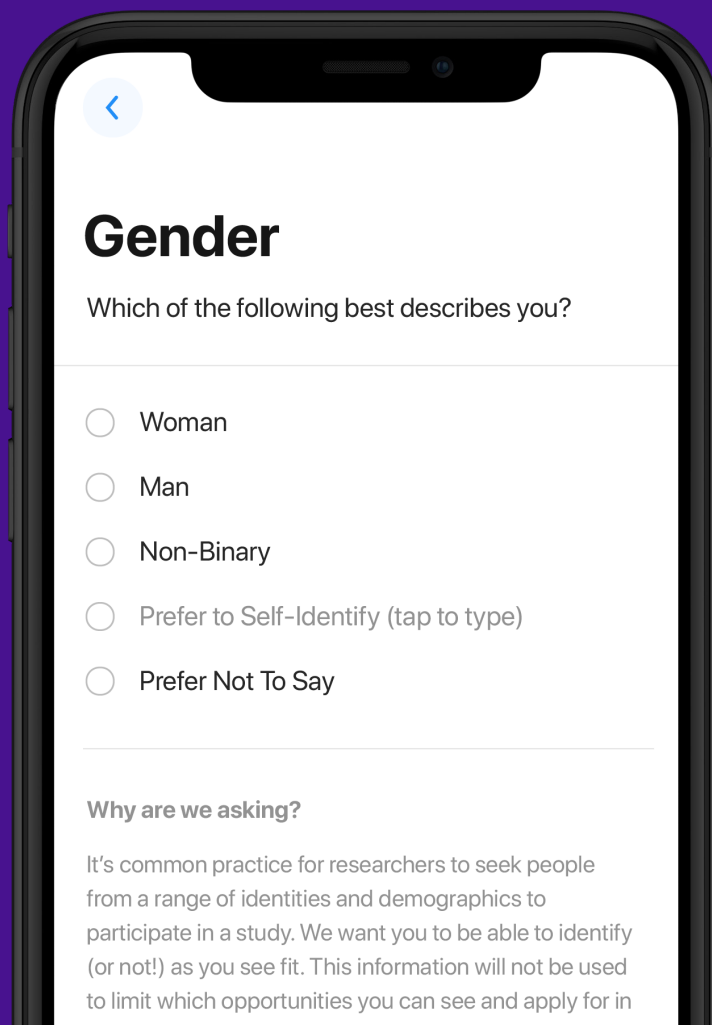
Action:

- Added a *Why are we Asking This?* icon and explanation for both the gender and (new) pronouns section of the profile.

- Added an opt-out (*Prefer Not to Say*) option.

2. Use language with care

The way you word something can make a world of difference. The best way to identify the correct and most appropriate language is to ask the people your design impacts. In other words, do your research.

Multiple scouts noted in their feedback that not only were our prior options exclusive, but they were also wrong. Our form was requesting gender but providing the options of *Female* and *Male*, which refers to sex. *Man* and *Woman* refer to gender.

> **Sex and gender are two different things. I don't know what actual info you want from people. If you want to know their sex, you should state that. But gender is different.**
>
> **— Anonymous**

The label for the write-in option was also discussed. Reactions to the different options of *Other*, *Custom*, and *Prefer to Self-Describe* were drastically different. *Other* and *Custom* implied that these options were outside of something or left out, whereas *Prefer to Self-Identify* or *Add Your Own* were read as empowering.

> **I also personally hate the category of 'Other' because you're essentially putting people into an 'other' box. ...which psychologically has some issues and as a researcher...for my job I also have issues with that.**
>
> **— Tray G. 32** · He/Him

> **As far as the section for adding in your own identity, I selected 'Add Your Own' because the words 'Other' are... Well, othering. Nobody wants to feel like there is male and female and 'Other.' It feels distanced, very far from normal, and invalidating. I like 'Add Your Own' because it leaves out any language that feels like I am very removed from the demographic.**
>
> **— Brennan W. 28** · They/Them & He/Him

The wording of the prompt, which previously read "Select Gender," was also an area for improvement. We heard that the rigid tone of this felt like we were trying to force participants into a box. By changing the prompt to "Which of the Following Best Describes You?" we wanted to acknowledge that this is complex and these options may not perfectly fit their identity.

Action:

- Changed the *Female* and *Male* options to *Woman* and *Man*

- Labeled the write-in option *Prefer to Self-Identify*

- Changed the prompt from "Select Gender" to "Which of the Following Best Describes you?"

3. Don't try to guess your users' identities. Give them space for expression

You'll never get it right the first time. The language around identity is constantly evolving. Attempting to include all possible options could not only overwhelm your audience but also border on invasive. Of the scouts' designs that included a list of predetermined options, 44 of 57 included a short list with three to four options.

> **The beauty of expanding language is that we keep getting more and more terms to help people express how they identify the way that they feel.**
>
> **— Fig T.** · They/Them

> **Overall it is beneficial to not have a gratuitous list of a bunch of names to identify as. I think that can be very overwhelming for everybody.**
>
> **— Anonymous**

Forty-one of the 57 list designs also included a write-in option. Instead of trying to guess what language they use, including a write-in option gives the participant the power.

> **I think it's just easier to give folks an option to self-describe instead of trying to list all of the possible gender identities and different permutations of those.**
>
> **— Anonymous**

> **The option to identify yourself as you see fit I think is crucial. It lets people know that they are free to identify themselves.**
>
> **— Anonymous**
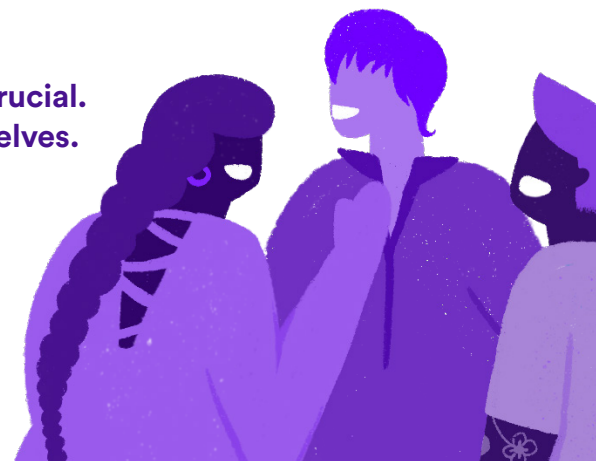
I don't think we should limit anyone to two choices, let an individual fill in the blank and you'll get a lot more accurate data.

— Aiden C. 25 · He/Him

Action:

- Kept the list of options short

- Added a write-in option

4. Follow through

We knew the form changes would be the easier part of this project because we were able to rely on the feedback from our participants as guidance. How the new data would be used required more consideration.

I do wonder, sometimes, if people who are trans are excluded from missions because they're considered a minority. If you're looking for women, and someone's a trans woman, and they indicate that, they might not be chosen even though they are validly a woman. That is who they are.

— Jenna H. 27 · They/Them & Ze/Hir

How can we ensure that the participants who identify themselves as outside of the gender binary won't be excluded from potential studies?

We removed a feature from our platform that allowed researchers to pre-filter (opportunities to participate in a project) based on gender. We are hoping this will urge our clients to use behavioral questions instead. One example is listed below:

If you are doing a study on make up and you're limiting it exclusively to female identified cisgender women, you would be missing a whole bunch of information from a huge target audience of drag queens. Typically these folks identify as male and often present themselves in a masculine way but also at times present themselves in a feminine way. Trust me, drag queens have a lot of opinions about makeup!

— EG N. 37 · She/Her & They/Them

I know this is a radical idea in focus groups and marketing but I believe user bases are better screened by their existing or potential participation in a group, or as a consumer of a particular kind of thing, etc., than their gender.

— Jess D. 35 · They/Them

Part of validating and respecting someone's identity is also making sure they are referred to correctly. Pronouns are a big and important part of this. Many scouts included a pronoun section in their redesign, so we are adding one. If we are going to ask about our participants' gender identities, we want to make sure they are being referred to correctly.

> **In my opinion, talking to someone and using the correct pronouns is just as important, if not more important, than selecting a gender.**
>
> **— Aiden C. 25** · He/Him

When discussing the technical changes with our product team, we also had some decisions to make about historical data. Because our previous form was so restrictive, mapping old options (*Male* and *Female*) to the new options (*Man*, *Woman*, *Non-Binary*, *Prefer to Self-Identify*) wasn't an option. We wanted to steer clear of making any assumptions. At the same time, wiping the historical information would impact previous studies and result in lost data.

We decided to be transparent with our changes.

If a study occurred before the changes were made, the old options of gender will be surfaced in our research platform. Any participant that logs into the dscout app after the release date will be prompted to complete the gender (and new pronouns) section of their profile. This means we will have accurate data directly from any participants involved in studies after the changes are made. If a study is launched after the changes, the new options will be surfaced. From a technical standpoint, this was the most complex option, but after we examined it all, it was the only option we were comfortable with.

Actions:

- Removed the ability to filter who sees a screener based on gender identity

- Added a pronoun section

- Included scout pronouns in all researcher-facing views

- Surfaced old gender options to researchers in platform for studies launched before

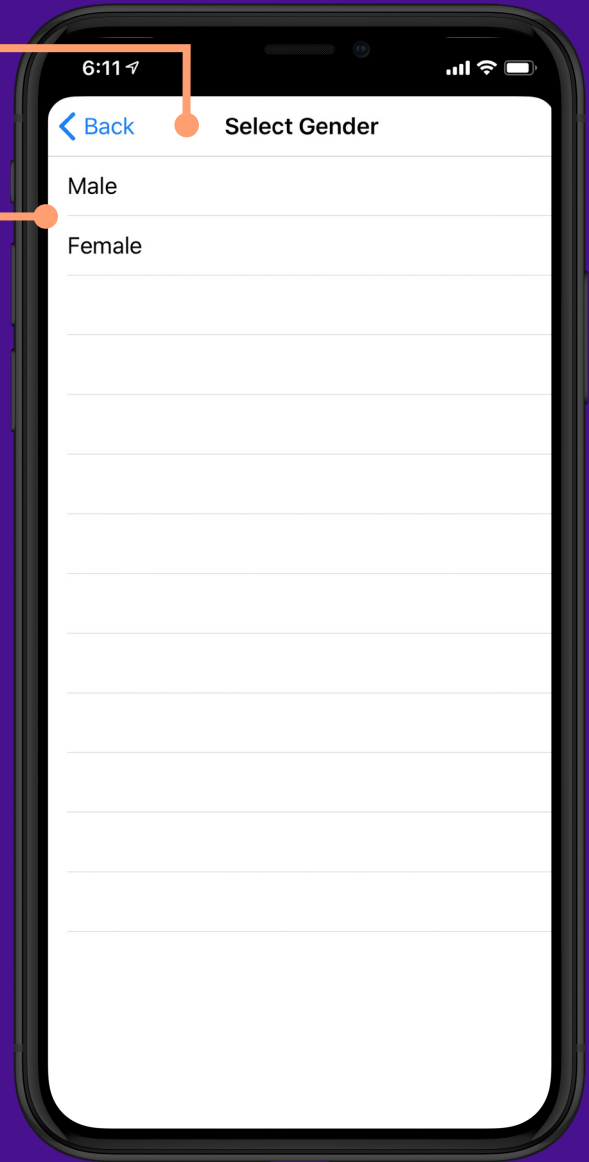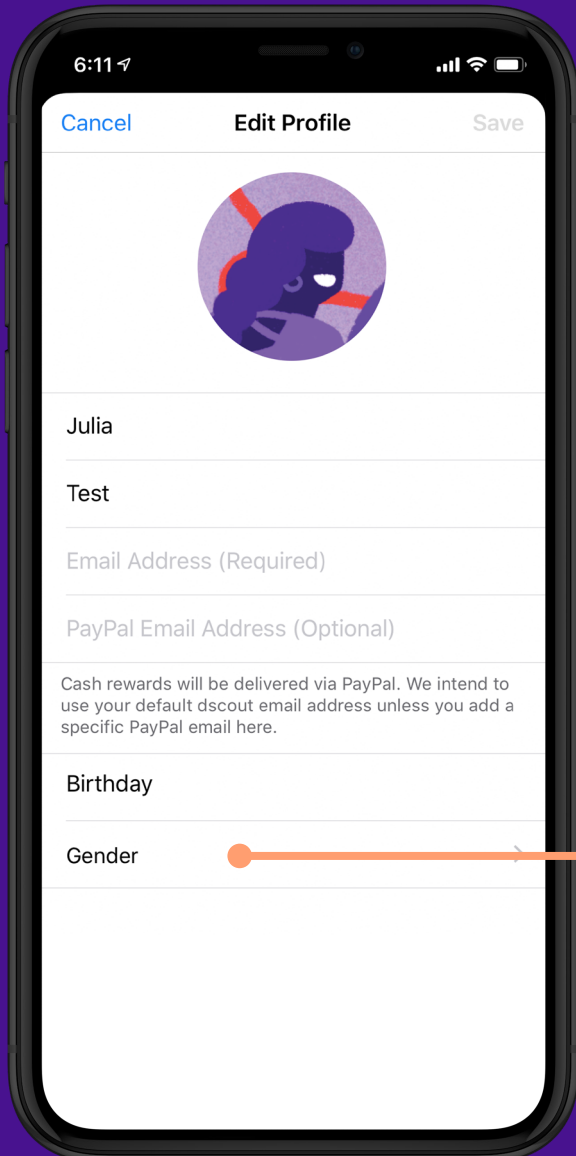the change and updated options for studies launched after the change

Where We Landed

After our redesign, we returned to the scouts to gather feedback. The final part of our mission prompted them to click through an Invision prototype of our redesigned participant profile and share their reactions in real-time through a screen and audio recording.

Before

Prompt/Question

Options

6:11

‹ Back   **Select Gender**

Male

Female

6:11

Cancel   **Edit Profile**   Save

Julia

Test

Email Address (Required)

PayPal Email Address (Optional)

Cash rewards will be delivered via PayPal. We intend to use your default dscout email address unless you add a specific PayPal email here.
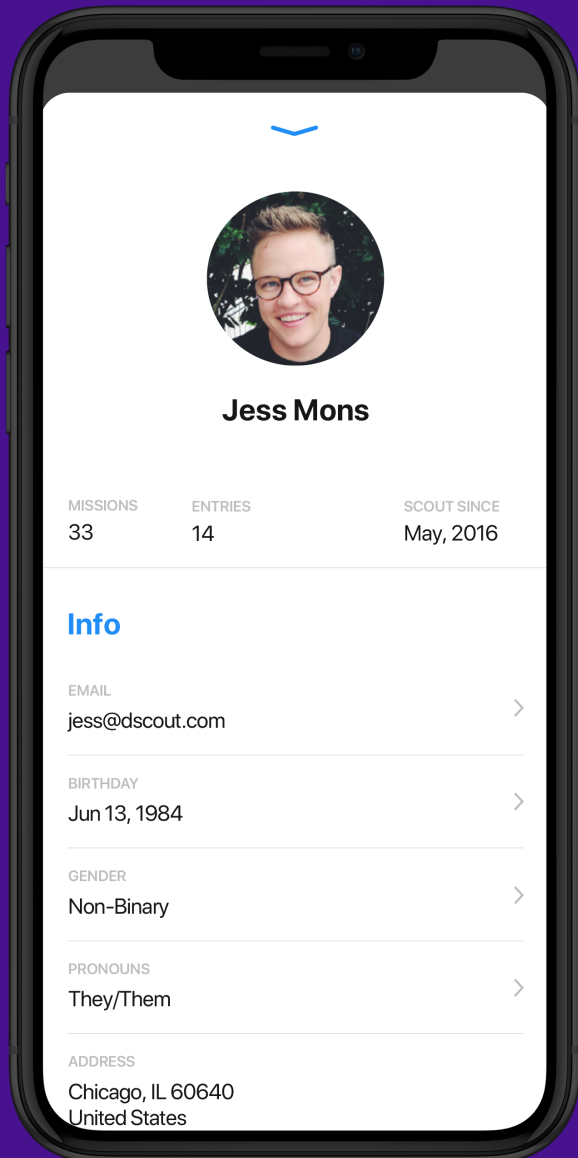
Birthday

Gender

Section Title

After

Gender

Which of the following best describes you?

- ◯ Woman
- ◯ Man
- ◯ Non-Binary
- ◯ Prefer to Self-Identify (tap to type)
- ◯ Prefer Not To Say

Why are we asking?

It's common practice for researchers to seek people from a range of identities and demographics to participate in a study. We want you to be able to identify (or not!) as you see fit. This information will not be used to limit which opportunities you can see and apply for in dscout.

Jess Mons

MISSIONS	ENTRIES	SCOUT SINCE
33	14	May, 2016

Info

EMAIL
jess@dscout.com

BIRTHDAY
Jun 13, 1984

GENDER
Non-Binary

PRONOUNS
They/Them

ADDRESS
Chicago, IL 60640
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Pronouns

What are your pronouns?

- ◯ She/Her
- ◯ He/Him
- ◯ They/Them
- ◯ Custom (tap to type)

Why are we asking?

We want researchers to know how to address you when they communicate with you in scout messages or refer to you in reports. E.g. "This scout did a great job on their entries."

Ending

So, what's next? Based on the reaction and input to our prototype, dscout will be implementing these changes in the mobile app and web platform in September.

These changes will have an impact on the research we conduct for many large and |small companies. Having more inclusive design allows us to better understand an individual. With this, our data is more precise and truer to real life.

As one individual told us, "It makes me more comfortable to be... on this platform. There is a whole subset of people who aren't welcomed into the convo [otherwise]."

The changes we are making are a step in the right direction for us, but this is not a one-size-fits-all approach. While we can't claim that this is the perfect way to ask questions about gender identity, we know it's a way to move forward in better form.

Endnotes

1   Meade-Kelly, Veronica. "Male or Female? It's Not Always so Simple." *UCLA*, UCLA, 21 Aug. 2015, newsroom.ucla.edu/stories/male-or-female.

2   Wong, Curtis M. "Poll Reveals Shift In Support Of Gender As A Spectrum With Unconventional Categories." *HuffPost*, HuffPost, 2 Feb. 2016, www.huffpost.com/entry/fusion-millennial-poll-gender_n_6624200.

3   *Study: Generation Z and Gender*. J. Walter Intelligence, 2015, *Study: Generation Z and Gender*, www.jwtintelligence.com/2015/05/data-point-generation-z-and-gender/.

4   *Accelerating Acceptance 2017*. Harris Poll, 2017, *Accelerating Acceptance 2017*, www.glaad.org/publications/accelerating-acceptance-2017.

5   *Broadly*. J. Walter Thompson Innovation Group, 2016, *Broadly*, www.vice.com/en_us/article/kb4dvz/teens-these-days-are-queer-af-new-study-says.

Questions? Comments?
We'd love to hear from you!

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