/// Draft text for publication

Ask users for ....

Equality information

Public sector bodies are required to consider the need to avoid discimination and advance equality of opportunity as part of what they do. This is part of what's called the [public sector equality duty](https://www.gov.uk/guidance/equality-act-2010-guidance#public-sector-equality-duty).

Public sector bodies often collect equality information about service users to help them meet this duty.

When to use this pattern

These patterns are based on the [harmonised standards developed by the Government Statistical Service](https://gss.civilservice.gov.uk/guidances/harmonised-standards-guidance/).

Collecting equality information in a consistent way across the public sector makes the data more useful. For example, an organisation can benchmark its own services against other public sector services or the population in general. And can adjust its approach if it finds a particular group is under-respresented.

Do not use this pattern to collect information for operational reasons - especially if you're legally required to ask for the information in a particular way. For example, you're [asking about the user's gender or sex](https://design-system.service.gov.uk/patterns/gender-or-sex/) to work out how much State Pension they're entitled to.

How it works

When asking users for equality information:

- ask equality questions last, just before the ['check your answers' screen](https://design-system.service.gov.uk/patterns/check-answers/)
- make it clear that these are different from other questions in the service, and be clear why you're asking them - for example, 'we ask these questions to make sure we're treating everyone fairly'
- always include a 'prefer not to say' option

- on the 'check your answers' screen, group answers together under an 'Optional equality questions' heading

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Equality questions

The next [number] questions are optional. We ask them to make sure we're treating everyone equally.

Your answers won't affect your application.

( ) Answer the equality questions (takes 2 minutes)
( ) Skip the equality questions

[Continue]

Be clear why you're asking for equality information

Get approval from your organisation's privacy or data protection expert before you start collecting equality information, and make sure it's covered in the service's privacy notice. You can [read guidance about collecting personal information](https://www.gov.uk/service-manual/design/collecting-personal-information-from-users) in the Service Manual.

Do not use information the user has provided elsewhere in the service for equality monitoring purposes. This may mean you have to ask for the user's date of birth twice, for example - once in the main part of the service, and once ask part of asking for equality information.

Make sure equality information is stored separately from the information that's needed to make decisions about the user's application. Decision makers should not have access to equality information unless it's been anonymised first.

What information to collect

Public sector organisations will have someone who is responsible for making sure the organisation is meeting its obligations under the public sector equality duty. They can help you work out what equality information to collect.

This pattern covers:

- age
- disability
- ethnic group
- marital or partnership status
- religion
- sex and gender identity
- sexual orientation

Collecting more detailed information

Start with the harmonised standards, keeping the categories of responses in the same order. Break them down into subcategories if necessary. For example if your service is aimed at a disabled people in particular, you may want to collect more detailed information about their disability. But make sure any categories you use map back to a 'parent' category in the harmonised standard.

Collecting other types of equality information

See the [full list of Government Statistical Service harmonised standards](https://gss.civilservice.gov.uk/guidances/harmonised-standards-guidance/) if you want to collect other types of equality information. For example, about income or employment status.

Asking about age or date of birth

This approach is based on [the Government Statistical Service harmonised standard on age and date of birth](https://gss.civilservice.gov.uk/policy-store/age-and-date-of-birth/).

What is your date of birth?

For example, 31 3 1980

Day   Month   Year
[   ]   [   ]   [   ]

If you prefer not to say, continue without entering any information.

[Continue]

If the user chooses not to provide their date of birth, ask for their age.

How old are you?

[   ]

If you prefer not to say, continue without entering any information.

[Continue]

If the user doesn't provide their full date of birth but does provide a year assume that's all the information they want to provide about their age - so don't ask how old they are.

Asking about disability

This approach is based on [the Government Statistical Service harmonised standard on disability](https://gss.civilservice.gov.uk/policy-store/measuring-disability-for-the-equality-act-2010/).

Do you have any physical or mental health conditions or illness lasting or expected to last 12 months or more?

( ) Yes
( ) No

Or

( ) Prefer not to say

[Continue]

If the user answers 'yes', ask about the impact of their condition or illness.

Does your condition or illness make it more difficult to carry out day to day activities?

( ) Yes, a little
( ) Yes, a lot
( ) Not at all

Or

( ) Prefer not to say

[Continue]

Asking about ethnic group

The ethnic groups used here are for England. The Government Statistical service harmonised standard for ethnicity uses [different categories for Wales, Scotland and Northern Ireland](https://gss.civilservice.gov.uk/policy-store/ethnicity/). This is to reflect differences in local populations.

If your service covers more than one of England, Wales, Scotland or Northern Ireland, you should accommodate these differences in your design. For example, by changing the ethnic groups shown depending on where the user is based. Where this isn't possible, use the English categories.

First ask about the user's broad ethnic group.

What is your ethnic group?

( ) White
( ) Mixed or multiple ethnic groups

( ) Asian or Asian British
( ) Black, African, Carribean or Black British
( ) Other ethnic group

Or

( ) Prefer not to say

[Continue]

Then ask for a more detailed category, depending on which broad ethnic group the user selects.

Which one best describes your White background?

( ) English, Welsh, Scottish, Northern Irish or British
( ) Irish
( ) Gypsy or Irish Traveller
( ) Another White background

How would you describe your background?
[   ]

Or

( ) Prefer not to say

[Continue]

Which one best describes your Mixed or Multiple ethnic groups background?

( ) White and Black Caribbean
( ) White and Black African
( ) White and Asian
( ) Another Mixed or Multiple ethnic background

How would you describe your background?
[   ]

Or

( ) Prefer not to say

[Continue]

Which one best describes your Asian or Asian British background?

( ) Indian
( ) Pakistani

( ) Bangladeshi
( ) Chinese
( ) Another Asian background

How would you describe your background?
[   ]

Or

( ) Prefer not to say

[Continue]

Which one best describes your Black, African, Caribbean or Black British background?

( ) African
( ) Caribbean
( ) Another Black, African or Caribbean background

How would you describe your background?
[   ]

Or

( ) Prefer not to say

[Continue]

Which one best describes your background?

( ) Arab
( ) Another ethnic background

How would you describe your background?
[   ]

Or

( ) Prefer not to say

[Continue]

Asking about marriage or civil partnership status

This approach is based on [the Government Statistical Service harmonised standard on marital or partnership status](https://gss.civilservice.gov.uk/policy-store/marital-or-partnership-status/).

What is your legal marital or registered civil partnership status?

( ) Never married and never registered in a civil partnership
( ) Married
( ) In a registered civil partnership
( ) Separated, but still legally married
( ) Separated, but still legally in a civil partnership
( ) Divorced
( ) Used to be in a civil partnership which is now legally dissolved
( ) Widowed
( ) Surviving partner from a civil partnership

Or

( ) Prefer not to say

[Continue]

Asking about religion

The categories used here are for England. The Government Statistical service harmonised standard for religion uses [different categories for Wales, Scotland and Northern Ireland](https://gss.civilservice.gov.uk/policy-store/religion/). This is to reflect differences in local populations.

If your service covers more than one of England, Wales, Scotland or Northern Ireland, you should accommodate these differences in your design. For example, by changing the categories shown depending on where the user is based. Where this isn't possible, use the English categories.

What is your religion?

( ) No religion
( ) Christian
( ) Buddhist
( ) Hindu
( ) Jewish
( ) Muslim
( ) Sikh
( ) Another religion

    What is your religion?
    [   ]

Or

( ) Prefer not to say

[Continue]

Asking about sex and gender identity

This approach is based on the [Government Statistical Service harmonised standard on sex and gender identity](https://gss.civilservice.gov.uk/policy-store/gender-identity/).

Sex and gender identity

What is your sex?
( ) Female
( ) Male
( ) Prefer not to say

Is the gender you identify with the same as your sex registered at birth?
( ) Yes
( ) No

    What gender do you identify with?
    [   ]

( ) Prefer not to say

[Continue]

Asking about sexual orientation

This approach is based on the [Government Statistical Service on sexual orientation](https://gss.civilservice.gov.uk/policy-store/sexual-orientation/).

What is your sexual orientation?

( ) Heterosexual or straight
( ) Gay or lesbian
( ) Bisexual
( ) Something else

    How would you describe your sexual orientation?
    [   ]

Or

( ) Prefer not to say

[Continue]

Error messages

Error messages should be styled like this -

What is your ethnic group?
Select an ethnic group or 'Prefer not to say'
( ) White
( ) Mixed or multiple ethnic groups
( ) Asian or Asian British
( ) Black, African, Carribean or Black British
( ) Other ethnic group

Or

( ) Prefer not to say

[Continue]

Which one best describes your Asian or Asian British background?
Select the option which best describes your background, or 'Prefer not to say'
( ) Indian
( ) Pakistani
( ) Bangladeshi
( ) Chinese
( ) Another Asian background

    How would you describe your background?
    [   ]

Or

( ) Prefer not to say

[Continue]

Research on this pattern

The two-step approach to asking for ethnicity information is based on:

- user research by the [Race Disparity
  Unit](https://www.gov.uk/government/organisations/race-disparity-unit)
- [examples of ways to ask about ethnic
  groups](https://designnotes.blog.gov.uk/2019/01/29/researching-how-we-ask-users-about-their-ethnicity/) from a number of different government services
- [ONS guidance on collecting data about ethnic
  groups](https://www.ons.gov.uk/methodology/classificationsandstandards/measuringequality/ethnicgroupnationalidentityandreligion#ethnic-group)

The Race Disparity Unit carried out pop-up research with over 30 people from different ethnic backgrounds. They found that:

- almost all participants were able to answer the questions quickly and easily, with no-one needing to back-track to the previous page
- five participants identified as being from another ethnic group, showing that this option was needed
- two participants preferred not to provide details of their ethnicity

Questions we'd like to answer through research

More research is needed to help answer the following questions:

- we've suggested placing the equality and diversity questions before the 'check your answers' screen - would it be better to place them after 'check your answers' but before the confirmation screen?
- do users understand from the first 'Equality questions' screen that the questions they're about to answer are different from other questions in the service?
- do we need to explain why we're asking each question individually, or is it enough to have an explanation at the start?
- is including the `If you prefer not to say, continue without entering any information` text the clearest way to get across that all the text inputs on that screen are optional?

/// End of draft text

/// Workshop questions

Question 1. We're suggesting a screen to introduce the equality questions. Do people think it's a good explanation of what the questions are for - and gives enough reassurance about what the data will and won't be used for?

Equality questions

The next [number] questions are optional. We ask them to make sure we're treating everyone equally.

Your answers won't affect your application.

( ) Answer the equality questions (takes 2 minutes)
( ) Skip the equality questions

[Continue]

Question 2. Lots of these questions are optional. That's fairly straightforward with radio buttons - you just include a 'Prefer not to say' option. But what do we do with optional text inputs? Can people think of a better approach than this?

What is your date of birth?

For example, 31 3 1980

Day   Month   Year
[   ]   [   ]   [   ]

If you prefer not to say, continue without entering any information.

[Continue]

Question 3. Do people anticipate linking data collected in this way to a specific form submission? There's an argument that doing this would make the data more useful (because you could potentially compare what sort of outcomes different groups are getting). Can we make recommendations on internal processes for handling that? Can we make recommendations on what to say to the user about this (eg through the service's privacy notice)?