

EDI data gathering: Template survey



Introduction

The purpose of this template

This template forms part of an equality, diversity and inclusion (EDI) data gathering toolkit provided by IP Inclusive in collaboration with [CIPA](#), [CITMA](#), the [IP Federation](#), the [UK Intellectual Property Office](#) and [IPReg](#). It is designed for use by signatories to [the IP Inclusive EDI Charter](#) and other IP sector employers, in particular private practices.

The template provides a voluntary “standard” for organisations across the sector, which we hope will make it easier to benchmark data and establish its credibility to external parties such as clients. However, its use is not *required* by any of the organisations involved in this project.

Its design

The template is constructed in two parts:

- I. A “basic level” survey that we hope all EDI data gatherers in the sector can adopt.
- II. Suggested supplementary questions that some data gatherers might choose to include in their surveys, to suit their particular circumstances and purposes.

Compliance with the standard does not require use of the supplementary questions. Users are, however, free to include their own additional questions alongside those in this template.

Its provenance

The template is based on previous IP Inclusive surveys, IPReg’s 2021 and 2024 diversity surveys¹, the SRA’s 2025 diversity questionnaire², CIPA’s 2024 membership survey³ and guidance from the [Office for National Statistics](#) (ONS).

It majors on the so-called “protected characteristics” in the UK’s [Equalities Act 2010](#). It is therefore UK-focused and we appreciate that this may not totally align with overseas clients’ interests. Nevertheless, framing EDI surveys around these criteria has a sound basis in law and also assists compliance with relevant UK legal and regulatory requirements.

¹ See <https://ipreg.org.uk/about-us/equality-diversity-and-inclusion-working-together-encourage-diverse-profession>

² See <https://www.sra.org.uk/solicitors/resources/equality-diversity/your-data/> and <https://www.sra.org.uk/solicitors/resources/equality-diversity/your-data/>

³ See <https://www.cipa.org.uk/report/membership-survey-results/>

The template also includes questions (for example about social mobility and about caring responsibilities) that are not covered by the Equalities Act 2010. We believe, however, that these can be important to the IP sector, its clients and its regulators, and in particular to our ability to recruit talented new professionals and grow healthy businesses.

The IP Inclusive EDI data gathering toolkit

IP Inclusive's EDI data gathering toolkit also includes:

- Guidance on the legal (in particular data protection and employment law) aspects of EDI data handling
- Practical tips for gathering and processing EDI data
- A collection of relevant resources (including benchmarking data) available elsewhere

The full toolkit can be accessed at <https://ipinclusive.org.uk/our-edi-data-gathering-toolkit/>.

We would welcome your feedback on the template survey and any other parts of the toolkit. Let us know about your own experiences of EDI data gathering, what you have found useful, any challenges you have encountered and how you have overcome them, and we will update the toolkit to reflect that. EDI data can be tricky to handle; it will be easier if people in the sector share best practices and align their approaches.

Cautions

Whilst we hope you find this template useful, you should always seek bespoke legal and HR advice before embarking on an internal survey, to ensure compliance with relevant data protection and employment laws. That said, we believe the template should provide some comfort, as a profession-wide standard that mirrors those used by authorities elsewhere.

We recommend that users take particular care when surveying a smaller workforce, and/or when designing questions that allow the resultant data to be "cut" (for example according to role, technical specialism, office location or career level) in such a way as might compromise anonymity. Data from a smaller workforce will also have lower statistical significance and may in any case be less likely to be required by regulators and clients.

Please also note that this document is tailored primarily for IP professionals in private sector organisations. Within in-house departments and teams, different constraints are likely to apply to EDI data gathering due to wider corporate EDI and data protection policies.

Part I: Basic survey

1 Gender and gender reassignment

Proposed Question 1A:

How do you describe your gender identity? [Multiple choice]

- Female
- Male
- Non-binary and/or gender-fluid
- I prefer not to say
- None of these; I prefer to describe my gender identity as [text box]

Proposed Question 1B:

Is your gender identity the same as the sex you were registered with at birth? [Multiple choice]

- No
- Yes
- I prefer not to say
- It's more complicated than that; the actual position is that [text box]

Notes

These questions have been phrased to be inclusive of transgender and non-binary identities. Users may want to tailor them to suit their own needs, in particular to ensure that safety, tolerance and inclusion are maintained for all their survey participants.

Question 1A was used in both IPReg's and CIPA's 2024 surveys. The IPReg version also included "intersex" as a response option; we understand that there is debate over whether this is a "gender". The SRA's 2025 diversity questionnaire (which uses the term "sex" instead of "gender") only mentions female, male and "prefer not to say". This approach does, however, risk othering – and therefore alienating – people with non-binary genders.

Question 1B was included in IPReg's 2021 and 2024 surveys, CIPA's 2024 membership survey and IP Inclusive's previous surveys. It is also included in the SRA's 2025 diversity questionnaire. "Gender reassignment" is moreover a protected characteristic under the Equality Act 2010; we therefore feel it appropriate to include the question in a basic-level survey.

In place of “the sex you were registered with at birth”, “the sex you were assigned at birth” also appears to be widely accepted within the LGBTQ+ community.

2 Age

Proposed Question 2:

What age group are you in? [Multiple choice]

- 16-20
- 21-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- I prefer not to say

Notes

It is usual to include a question on age in EDI surveys because it is a “protected characteristic” under the Equality Act 2010.

The 2025 SRA questionnaire and the 2024 IPReg survey combine the first two categories (as “16-24”). However, particularly if employees other than attorneys are to be included in a survey, it can be useful to distinguish between groups who entered the IP professions through different routes and with different levels of academic qualification.

3 Ethnicity

Proposed Question 3:

Which of the following best describes your ethnicity? [Multiple choice]

Asian / Asian British

- Bangladeshi
- Chinese
- Indian
- Japanese
- Pakistani
- Any other Asian or Asian British background

Black / Black British

- African
- Caribbean
- Any other Black or Black British background

Mixed / Multiple ethnic group

- White and Asian
- White and Black African
- White and Black Caribbean
- Any other mixed or multiple ethnic background

White

- British / English / Northern Irish / Scottish / Welsh
- Irish
- Other European
- Gypsy or Irish Traveller
- Roma
- Any other White background

Other ethnic group / background

- Arab
- Hispanic or Latin
- Any other ethnic group or background

Other response options

- I prefer not to say
- None of these; I prefer to describe my ethnicity as [text box]

Notes

These categories are combined from the SRA's 2025 diversity questionnaire, IPReg's 2024 diversity survey and CIPA's 2024 membership survey, further supplemented with the addition of "Japanese", "other European" and – used by IPReg but not the SRA or CIPA – "Hispanic or Latin"). Users of this template are encouraged to tailor the categories if necessary to suit their own workforce, although by adding to rather than reducing the above list.

The SRA's categories align with ONS guidelines based on the 2021 census⁴, although the latter refer to "Asian, Asian British *or Asian Welsh*" (emphasis added) and similarly in the Black category. The ONS provides three different ethnic group classification systems of decreasing granularity, the third being limited to the first five italicised sub-headings above. We have chosen the detailed approach in our template as it generates more nuanced data, reduces the risk of some survey participants feeling excluded, and aligns with the recent IPReg and CIPA surveys.

Note that the sub-headings are not strictly necessary. They are used by the SRA but not, for instance, in the most detailed of the ONS classification systems. They may also prove difficult to implement on survey platforms.

Also of note is that IPReg's 2024 survey referred to "ethnic group", CIPA's to "ethnic group or background" and the SRA questionnaire to "ethnicity". The ONS guidelines use "ethnic group", as did the 2021 UK census.

⁴ See <https://www.ons.gov.uk/census/census2021dictionary/variablesbytopic/ethnicgroupnationalidentitylanguageandreligion/variables/census2021/ethnicgroup/classifications>

4 Religion / faith

Proposed Question 4:

How do you describe your religion or faith? [Multiple choice]

- I don't have one
- Atheism
- Buddhism
- Christianity (including Church of England, Catholic, Methodist, Protestant and all other Christian denominations)
- Hinduism
- Islam
- Jainism
- Judaism
- Sikhism
- I'm unsure or questioning
- I prefer not to say
- None of these; I prefer to describe my religion/faith as [text box]

Notes

These categories are based on those in the SRA's 2025 diversity questionnaire, supplemented based on previous IP Inclusive and IPReg surveys and input from the IP Inclusive community.

The SRA questionnaire does not include options for "atheism", "Jainism" or "unsure/questioning". IPReg's 2024 survey did not include options for "Jainism" or "unsure/questioning". Other possible categories that emerged from CIPA's 2024 survey responses include agnosticism, humanism, Quakerism, satanism and spiritualism.

Note that the SRA questionnaire refers to religion "or belief". CIPA's survey question referred to "religion, faith or belief". We believe the inclusion of "belief" could risk complicating the data as the term could extend to all manner of things that make up someone's ethical and moral approaches to life, not only those that would conventionally be associated with religion and faith.

5 Sexual orientation

Proposed Question 5:

How do you describe your sexual orientation? [Multiple choice]

- Asexual
- Bisexual
- Heterosexual
- Homosexual (gay or lesbian)
- Attraction beyond gender or pansexual
- Unsure/questioning
- I prefer not to say
- None of these; I prefer to describe my sexual orientation as [text box]

Notes

In the SRA's 2025 diversity questionnaire, the response options here are simply "bi", "gay/lesbian", "heterosexual" and "other preferred description". We favour offering more options, based on input from our [IP Out](#) community (which supports LGBTQ+ IP professionals and their allies): this should allow people with other sexualities to feel included and also increase the accuracy of reporting.

This question appeared in both the IPReg and the CIPA 2024 surveys. The IPReg version did not include the terms "attraction beyond gender" and "(gay or lesbian)".

6 Disabilities and neurodivergence

Proposed Question 6:

Do you consider yourself to have a disability as defined in the Equality Act 2010?

[Multiple choice]

- No
- Yes
- I'm not sure
- I prefer not to say

Notes

This question should be accompanied by the following notes, ideally in the introduction to, or as part of, the question itself:

[The Equality Act 2010](#) defines a disabled person as someone who has “a physical or mental impairment” that “has a substantial and long-term adverse effect on [their] ability to carry out normal day-to-day activities.” If you have a condition that fits this definition, please tick “yes” even if you do not feel you are limited by the condition.

The same question was used in the 2024 IPReg and CIPA surveys and the 2025 SRA questionnaire, although in the latter there is no “not sure”/“don’t know” response option.

7 Caring responsibilities

Proposed Question 7:

Which if any of these caring responsibilities do you have (please select as many as applicable)? [Check-box]

- None
- Primary or joint primary carer for a child/children under 18
- Primary or joint primary carer for a child/children under 18 requiring additional support
- Primary or joint primary carer for an adult/adults aged 18-65 requiring additional support
- Primary or joint primary carer for an adult/adults over 65
- I prefer not to say
- Other caring responsibility(ies) (please tell us more if you feel able) [text box]

Notes

Being a carer is not a protected characteristic under the Equality Act 2010. However, having information about our profession's ability to accommodate workers in this position could be important for evaluating its accessibility and inclusivity. Moreover, there can in practice be links between caring roles and protected characteristics such as gender, thus impacting on the profession's overall diversity.

This question is based on the carers' questions in previous IP Inclusive surveys and the responses to them. It is similar to questions in IPReg's and CIPA's 2024 diversity surveys. The 2024 IPReg survey asked two separate questions: firstly, "Do you have any caring responsibilities for minors or otherwise look after, or give any help or support to anyone because they have long-term physical or mental health conditions or illnesses, including problems related to old age?" and secondly, if "yes" was selected, about the type of caring responsibilities.

The SRA's 2025 diversity questionnaire also poses two questions: "Are you a primary carer for a child or children under 18?" and "Do you look after or care for someone 18 or over with long term physical or mental ill health caused by disability or age (not in a paid capacity)?" For the latter, the response options include:

- Yes, 1 - 19 hours a week
- Yes, 20 - 49 hours a week
- Yes, 50 or more hours a week

8 Social mobility and access

Proposed Question 8A:

What was the occupation of your main (or highest income) household earner when you were about 14? [Multiple choice]

- *Modern professional and traditional professional occupations such as:* teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer.
- *Senior, middle or junior managers or administrators such as:* finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager.
- *Clerical and intermediate occupations such as:* secretary, personal assistant, call centre agent, clerical worker, nursery nurse.
- *Technical and craft occupations such as:* motor mechanic, plumber, printer, electrician, gardener, train driver.
- *Routine, semi-routine manual and service occupations such as:* postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter/waitress, bar staff.
- *Small business owners who employed fewer than 25 people such as:* corner shop owners, small plumbing companies, retail shop owner, single restaurant or cafe owner, taxi owner, garage owner.
- *Long-term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year).*
- Retired
- I don't know
- I prefer not to say
- Other (please provide more information if you can) [text box]

Proposed Question 8B:

Which type of school did you attend for the most time between the ages of 11 and 16?

[Multiple choice]

- A state-run or state-funded school which was selective on academic, faith or other grounds
- A non-selective state-run or state-funded school
- An independent or fee-paying school, where I received a means-tested bursary covering 90% or more of the total cost of attending throughout my time there
- An independent or fee-paying school where I received either no bursary or a bursary covering less than 90% of the cost of attending
- A school outside the UK
- I don't know
- I prefer not to say
- Other (please provide more information if you can) [text box]

Proposed Question 8C:

From what type of educational establishment did you obtain your highest academic qualification (in the UK or another country)? [Multiple choice]

- School or sixth form college
- College of further education
- Polytechnic
- University
- Law and/or business school
- Specialist institute (for example for the creative arts)
- Not applicable
- I prefer not to say
- Other (please provide more information if you can) [text box]

Notes

There are no provisions in the Equality Act 2010 that relate specifically to social mobility. Nevertheless, it is both responsible and sensible for our professions to monitor their ability to recruit from a range of socioeconomic backgrounds and to provide fair access. We have therefore included a number of questions that we believe could provide useful information for the UK's IP sector, whether or not required by clients or employment law.

Questions 8A and 8B above are based on those recommended by the Social Mobility Commission (SMC) as good indicators of socioeconomic diversity in the UK⁵. They are mirrored in the SRA's 2025 diversity questionnaire and were used in the 2024 IPReg survey. A version of Question 8B was also

⁵ See <https://socialmobilityworks.org/toolkit/measurement/>

included in IPReg’s 2021 diversity survey, as it was in IP Inclusive’s most recent (2020) survey. CIPA’s 2024 survey included Question 8B but not 8A.

Note that the SMC version of Question 8A defines small businesses as employing fewer than 20 people, and its version of Question 8B does not distinguish between selective and non-selective state schools.

In the 2024 IPReg survey, Question 8B was broadened to the ages of 11 to 18.

Versions of Question 8C were included in IPReg’s 2021 and 2024 surveys and IP Inclusive’s 2020 survey. The 2024 IPReg survey did not include the “Law and/or business school” or “Specialist institute” categories. Although the question is not used in the SRA’s 2025 questionnaire, we have included it here because we feel it could be useful for evaluating the accessibility of the – relatively niche – IP professions.

Part II: Supplementary questions

S1 Pronouns

Proposed Question S1:

What are your pronouns? [Check-box]

- He/him/his
- She/her/hers
- They/their/theirs
- I prefer not to say
- None of these; my preferred pronouns are [text box]

Notes

This question is unlikely to be relevant for the purposes of gathering externally-required data, but may be useful for internal purposes, to demonstrate support for people of non-binary gender. See the notes to Question 1 in the basic survey.

The response options should be check-box, not multiple choice, because some people use more than one set of pronouns.

S2 Disabilities and neurodivergence

Proposed Question S2A:

Are your day-to-day activities limited by a disability or condition that has lasted, or is expected to last, for at least twelve months? [Multiple choice]

- Yes, limited a lot
- Yes, limited a little
- No
- I'm not sure
- I prefer not to say

Notes

This question is included in the SRA's 2025 diversity questionnaire, although there it is linked directly to the main disability question (see Question 6 in the basic survey) rather than being limited to a condition lasting twelve months or more. It was not included in the 2024 IPReg and CIPA surveys.

The question goes beyond the "protected characteristics" defined in the Equalities Act 2010 and looks at the practical effects of a "disability" in the workplace. We believe it could provide valuable information about how our sector accommodates people who need additional support.

Proposed Question S2B:

Do you consider yourself to be neurodivergent? [Multiple choice]

- Yes
- No
- I'm not sure
- I prefer not to say

Notes

This question was included in IPReg's 2024 survey, although not in CIPA's nor in the SRA questionnaire. We have included it because neurodiversity has become an increasingly popular topic in IP Inclusive events and we believe it may be of particular interest to the IP-related parts of the legal sector.

We recommend the question be accompanied by an explanatory note, for example (as in the IPReg survey):

Neurodiversity refers to the different ways the brain can work and interpret information.

Neurodivergence includes a range of conditions including attention deficit disorders, autism, dyslexia and dyspraxia. You can select “yes” even if you do not have a formal diagnosis.

S3 Social mobility

Proposed Question S3A:

If you went to school in the UK and finished school after 1980, were you eligible for free school meals at any point during your school years? [Multiple choice]

- No
- Yes
- Not applicable (I finished school before 1980 or went to school overseas)
- I'm not sure
- I prefer not to say

Notes

This is one of the three “key” questions recommended by the Social Mobility Commission (SMC)⁵, cited as an easily-understood “measure of extreme economic disadvantage”. It was included in IPReg’s 2021 and 2024 surveys, CIPA’s 2024 membership survey and previous IP Inclusive surveys, which could provide useful benchmarks in the short term at least. However, responses to the IP Inclusive surveys suggested that it is becoming less useful with time as the availability of free school meals changes with the political and economic climate as well as with geographical location. The question does not appear in the SRA’s 2025 diversity questionnaire.

Proposed Question S3B:

What is the highest level of academic qualification achieved by at least one of your parent(s) or guardian(s) by the time you were 18? [Multiple choice]

- Degree level qualification or higher
- Qualification below degree level (for example GCSE, O-level, A-level, Scottish Highers, International Baccalaureate or the equivalent in another country)
- No formal qualifications
- I'm not sure
- I prefer not to say
- Other (please provide more information if you can) [text box]

Notes

This question was included in IPReg’s 2021 diversity survey and the 2020 IP Inclusive one. A simpler version appears in the SRA’s 2025 diversity questionnaire and follows the SMC recommendations: “Did either of your parents attend university and gain a degree (for example BA/BSc or equivalent)

by the time you were 18?”, to which the response options include “No, neither of my parents attended university” and “Yes, one or both of my parents attended university”.

Note that to interpret data from this question meaningfully, it is probably also necessary to determine the level of qualification of the respondent. The SMC recommends that the question only be asked of graduates.

Proposed Question S3C:

If you went to university, were you part of the first generation of your family to do so?

[Multiple choice]

- Not applicable; I didn’t go to university
- No
- Yes
- I’m not sure
- I prefer not to say

Notes

This question gathers similar information to Question S3B, but does not align directly with the version recommended by the SMC (see the notes to Question S3B) and may therefore be harder to benchmark against the wider UK population. It was however included in IPReg’s 2021 and 2024 diversity surveys, CIPA’s 2024 membership survey and previous IP Inclusive surveys, so may be preferable for benchmarking within the IP sector. The SRA’s 2025 questionnaire uses the SMC version of the question.

Proposed Question S3D:

If you have a degree or higher academic qualification, which of the following route(s) did you obtain it through (please select as many as applicable)? [Check-box]

- Not applicable; I don’t have a degree or higher academic qualification
- A degree apprenticeship
- A remote access study course (for example Open University)
- A university that is not part of the “Russell Group”
- A “Russell Group” university other than Oxford or Cambridge
- Oxford or Cambridge University
- An academic institution outside the UK
- I prefer not to say
- Other (please provide more information if you can) [text box]

Notes

This is based on a question included in IP Inclusive's 2020 survey, and was also used in CIPA's 2024 membership survey. We believe it yields information relevant to the profession's accessibility, and it is particularly useful to our [Careers in Ideas](#) outreach initiative in establishing the institutions from which would-be recruits are – for whatever reason – not finding their way into IP careers (and where we can therefore target our awareness-raising activities).

The question is not included in the SRA's 2025 diversity questionnaire and was not used in IPReg's 2021 or 2024 surveys.

Russell Group universities are listed at <https://www.russellgroup.ac.uk/our-universities>; this link should be included in the question.

Proposed Question S3E:

In which region of the UK did you live for the most time between the ages of 11 and 16?

[Multiple choice]

- Not applicable; I mostly lived outside the UK during that period
- East of England
- East Midlands
- Greater London
- North East
- Northern Ireland
- North West
- Scotland
- South East
- South West
- Wales
- West Midlands
- Yorkshire and Humber
- I prefer not to say
- Other (please provide more information if you can) [text box]

Notes

This question was included in CIPA's 2024 membership survey. In view of the distribution of wealth and opportunity across the UK regions, we believe it could provide useful insights into the accessibility and inclusivity of the IP professions. It was not used in previous IPReg or IP Inclusive surveys, however, and does not appear in the SRA's 2025 diversity questionnaire, so benchmarking options are at present relatively limited.

S4 Questions relevant to inclusivity in the workplace

In addition to questions that provide a quantitative “snapshot” of diversity levels, an EDI survey can also usefully include questions that offer a more qualitative feel for people’s experiences in the workplace, for example how “out” they feel able to be about aspects of their identity and the level of individual support they receive when they need it. Such questions are beyond the scope of the current template but ideas are available from IP Inclusive’s 2019 and 2020 surveys⁶ and from the “practical tips” section of this toolkit.

S5 Gathering associated metrics

An EDI survey also ideally includes questions that allow for a more granular analysis of the data, for example:

- According to professional role, technical specialism and/or career level
- According to working environment and/or location
- According to working patterns
- For route to qualification
- For regulated status
- For membership of relevant representative bodies
- In ways required by specific clients

Gathering this additional data can facilitate benchmarking of individual organisations’ data against that gathered across the wider sector. This should, however, be approached with caution due to the increased risk of loss of respondent anonymity: see the legal guidance and practical tips that also form part of this toolkit.

For patent and trade mark professionals, ideas for further questions and response options can be found in the IPReg and CIPA surveys (although note the former was only relevant to regulated professionals and not, for example, their business support colleagues).

⁶ See <https://ipinclusive.org.uk/diversity-data-for-the-ip-sector/>; the 2020 survey results were not formally published, but summaries can be made available on request.