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LGBT Diversity Show Me The BUSINESS CASE

2015 Launch edition

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LGBT Diversity: Show Me The Business Case

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DATA SOURCE: Out Now Global LGBT2020 Study

The correct title of this report is properly cited as:

‘LGBT Diversity: Show Me The Business Case’.

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Edition 8

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EXECUTIVE SUMMARY

Ways to navigate this report.

The report contains several overview sections in the front part. There are then a series of tables and text relating to each of the ten countries reported on.

There are several Appendices at the back of the report which contain methodology notes and additional background to the LGBT2020 global research initiative.

One of the most important facts to remember is that averages mask diversity and that there is no such thing as an 'average' LGBT person.

At Out Now we constantly remind all that 'LGBT' spells 'people' and you will discover how it feels to be LGBT at work by reading some of the personal stories included in 'Workers' Voices'. These can be found throughout this document and also in their original languages in Appendix 1.

You can find the methodology for the report in Appendix 2, along with background information on the LGBT2020 global research approach in the accompanying background data notes.

There have been many cases of reports in recent years which employ the term 'Business Case' in relation to the implementation of LGBT workplace diversity policies, however these almost universally do not provide dollar valuations to substantiate the effects claimed. While all research is subject to methodological preferences and practical limitations, this report has employed two key aspects to present its findings on the presence of a business case underpinning the need for more effective implementation of LGBT diversity policies at work.

Firstly, the analysis considers savings able to be achieved where members of a workforce can be moved from being out to none of their colleagues to being out to all. We measure this aspect by considering a range for the costs to replace those previously closeted workers that can be expected to stay, as a result of becoming able to be out to all at work. This is done by comparing the response to a specific question on remaining in the respondent's current role and comparing the results from two cohorts: those out to none and those out to all at work. We use the term "Staff retention dividend" to describe the % of previously 'closeted' workers who this analysis shows can then be added to those who "strongly disagree" they are planning to leave their current job.

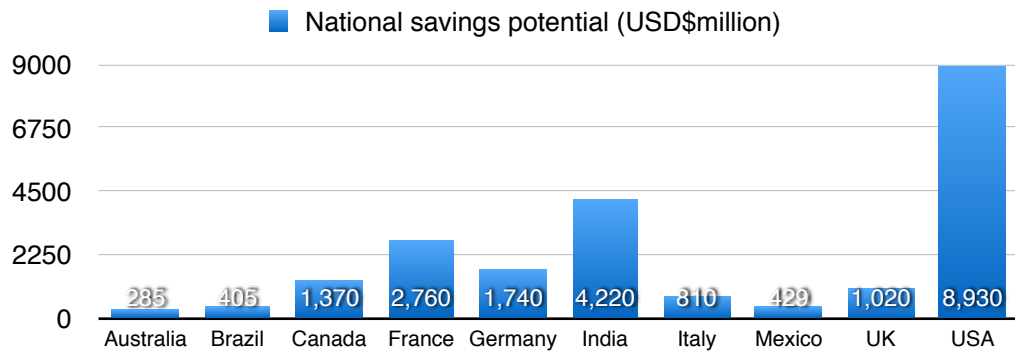
We see that the absolute percentages potentially able to be achieved by shifting workers from one outlying cohort to the other is significant and on a national basis is measurable in the hundreds of millions or even the low billions of dollars in expenditure saved by not having to replace workers who leave because they cannot 'come out' as LGBT at work.

Secondly, we consider the percentage improvements to a quite specific question measuring how valued respondents feel as members of their own workplace teams. There are substantial percentage improvements on offer to business there as well. We compare the responses from people 'not out to anyone' with those 'out to all' to this question: "I feel my work colleagues treat me with respect as a productive and valuable member of the team". The table below shows substantial improvements between out and closeted workers in countries reported on.

India is the country that achieved the lowest score on the number of respondents who feel able to come out to all at work (8%) and Australia scored highest, but this should be lukewarm comfort to business at best as even in Australia a bare majority (51%) of LGBT respondents feel able to be out to all at work.

Our analysis for savings relies on two third-party sources. The Center for American Progress (CAP) undertook detailed analysis on the expected costs to replace workers at all skill levels and we use their 16.1% estimate for our tables in setting the lower level replacement cost for lost LGBT staff. On the upper end, we adopt the national average figure arrived at in the UK by Oxford Economics (OE) in 2014. There are numerous studies setting significantly higher levels for more skilled worker replacement costs but in adopting the 120% figure from the OE report we seek to place conservative limitations on the extrapolations forming the basis of this report.

EXECUTIVE SUMMARY



For national average savings figures we apply a midpoint estimate between these two outlying figures. Income estimates are derived from OECD data for all countries, using USD\$ average PPP figures. Measurement and valuations for the tables in this report are limited to full-time employees only. Including casual and non-salary workers would add to the total dollar amounts reported on in this document. In reality, the OE data - reflecting a mix of low/medium/high skilled workers nationally - suggests our mid-point calculations (68.05% of average OECD annual salaries) to be conservative, in relation to these reported national business savings estimates.

Each country's tables shows a lower savings figure (CAP) and an upper figure (OE) for companies of various sizes. Most companies could expect their realized savings to fall within this range, and many towards - or even exceeding - the upper figure (OE). For workforces with more skilled workers this upper range may indeed prove to be an underestimation of the savings that better implemented LGBT workplace policies can deliver for each individual business.

The following tables provide some key data points covered in the pages below.

It is important to note that each sample is self-selecting. Out Now works extensively with media partners, NGOs, workplace ERGs, through social media channels, using mainstream and LGBT media PR and other avenues from which to source respondents. Where necessary, samples have been weighted to reflect national average age and gender distributions in each country.

Colleagues treat me with respect as a productive and valuable member of the team	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree
	Australia	Brazil	Canada	France	Germany	India	Italy	Mexico	UK	USA
Not out to anyone	41.0%	46.2%	48.2%	29.4%	52.9%	38.5%	51.1%	55.7%	35.6%	37.7%
Out to all	69.0%	75.0%	70.0%	57.0%	68.4%	58.3%	81.5%	61.4%	67.1%	67.2%
Improvement	+30%	+29%	+22%	+28%	+15%	+20%	+30%	+6%	+32%	+30%

EXECUTIVE SUMMARY

The assumptions behind the savings calculations and productivity benefits are important to understand.

We assume that where a workforce consists entirely of low-skilled workers, those that “strongly disagree” they intend to leave their current job would have cost 16.1% of annual full-time wage to replace, had they remained closeted and left their job (source: Center for American Progress, 2012).¹ In the case of medium/higher-skilled workers, we have chosen to use what we believe to be a conservative ‘upper’ limit for our tables and graphs calculations. That figure is 120% of annual full-time wage (source: Oxford Economics) and may in fact be significantly higher for some businesses.²

These estimates yield the savings below for businesses of 100,000 employees, presented here for each of the ten countries reported on.

Company size 100,000 = total workforce	LGBT full-time staff able to be retained because of moved to become ‘out to all’	Savings to business employing <u>only</u> low-skilled staff	Expected business employing mix of low/medium/higher-skilled
Australia	74 employees	USD\$603k	USD\$4.5m
Brazil	61 employees	USD\$93k	USD\$696k
Canada	228 employees	USD\$1.7m	USD\$12.8m
France	266 employees	USD\$1.7m	USD\$12.8m
Germany	120 employees	USD\$844k	USD\$6.3m
India	281 employees	USD\$158k	USD\$1.2m
Italy	113 employees	USD\$629k	USD\$4.7m
Mexico	93 employees	USD\$191k	USD\$1.4m
UK	100 employees	USD\$663k	USD\$4.9m
USA	140 employees	USD\$1.3m	USD\$9.4m

1. Center for American Progress, ‘There Are Significant Business Costs to Replacing Employees’, November 2012. This study analyzed thirty case-studies taken from the eleven ‘most-relevant research papers’ on costs to replace staff who leave. Their assessment found that the typical cost to replace workers earning less than USD\$30,000 was 16.1% of annual full-time wages. They found that very high-skilled positions can cost up to 213% of salary to replace employees.

2. Oxford Economics, ‘The Cost of Brain Drain - Understanding the financial impact of staff turnover’. February 2014. This report values the average cost to replace workers in the UK as being 120% of average full-time wage of £25,000. They state that firms with more skilled workforces can face significantly higher average costs to replace staff that leave.

WHY THIS MATTERS

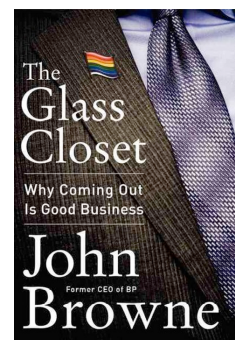


“The experience of an LGBT person in the liberal enclaves of London or New York is the exception rather than the rule.

By mapping the different experiences of LGBT minorities around the world, Out Now’s LGBT2020 research initiative makes an important contribution to the campaign for worldwide acceptance and inclusion.”

LORD BROWNE OF MADINGLEY
Former CEO of BP

Author of *The Glass Closet*
GlassCloset.org



WHY THIS MATTERS



“As a parliamentarian, understanding how important diversity is to fostering progress means that I am very pleased to offer this message of support for the launch of this new report from Out Now’s LGBT2020 research program. As important as diversity is, I believe we all know that there is much work to be done to ensure our society is as inclusive and supportive as it can be for all our citizens, which has always included our LGBT families, friends and work colleagues. I am pleased to see this new business case data helping explain to companies how - and why - LGBT diversity at work is so essential.”

BARRY SHEERMAN, MP
Member of Parliament
United Kingdom



WELCOME

About LGBT2020

Out Now's LGBT research program commenced in 1992 and is the world's longest established continuing research into the lives of lesbian, gay, bisexual and transgender (LGBT) people.

Since 2010 we have undertaken this research globally using a series of samples employing twelve native languages and partnering with leading media and other organizations in each market we research.

This report covers data sourced from the 2014 round of sampling and we have selected ten countries to report on.

Being 'in the closet' at work - when you feel unable to be openly LGBT with all your colleagues - is not usually much fun. You have to invent facts to cover realities. You watch how you present, what you say, who is watching.

I remember clearly how much effort it took to try to conceal my own sexual orientation at the beginning of my working life back in the early 1990s in Australia as a 23 year old graduate trainee with a large international bank. My career mattered little to most people at the firm but I wondered about my potential promotion prospects if people at work learned I was gay. These fears were more than enough to keep me firmly closeted at work, except with a few trusted individuals. That was in Sydney which at the time was arguably one of the best places to be gay in the world. But I was scared of what would happen if I dared to come out and be openly gay. I was actually terrified of the prospect.

Since that time we have seen much change but there remains much that needs to be done. A lot of great work is happening at C-Suite level with management embracing LGBT diversity as an important part of building successful businesses.

This report though is deliberately agnostic when it comes to respondents. We cover findings reported from a diverse range of workers, from the bottom to the top of the workforce, considering carefully the real-world impacts that being able to be openly LGBT at work can have - and measuring the resulting returns to those businesses that take the trouble to implement LGBT workplace policies with maximum effectiveness.

We wish to thank in the strongest possible way all those LGBT people who have been kind enough to share their experiences and stories with us, so we can all learn what is happening in this important area.

One of the exciting new developments is in benchmarking the raw data we have collected with our clients' own LGBT workforces, allowing them to better understand their own areas of strength - and tactical areas for improvement - to advance their own success outcomes in implementing workplace diversity strategies. If you would like to learn more about how your organization can get involved, please do get in touch.



I would like to thank all our sponsors whose generosity makes the production of this report possible. Please support them when you can - their support for LGBT employees and customers is helping make things get better for all people.

We are pleased to welcome you to this report and I want to close by thanking the wonderful team of colleagues I am so fortunate to work with here at Out Now. It is their passion and commitment that makes this document so powerful.

My 23 year old self would likely be delighted to read the findings of this new LGBT2020 report. I hope you will find it similarly enlightening.

Ian Johnson
CEO, Out Now

LGBT2020

Should it be LGBT - or LGBTI - or LGBTQ - or...?

Out Now works in more than twenty countries globally and we work hard to be as culturally sensitive as possible.

Since we were established in 1992, we have seen the description of the communities we serve evolve from 'gay,' to 'gay and lesbian,' then 'lesbian and gay', then 'GLBT' and most recently 'LGBT'.

In some countries (particularly Australia) we work in, 'LGBTI' is becoming a preferred descriptor.

Non-English speaking countries often use a different version acronym.

The LGBT2020 study is focused squarely on providing world's-best data on the issues faced by LGBT people every day.

One of the hallmarks of the research is its focus upon providing a globally comparable data set able to be directly compared across countries and over time. Many of the key questions are repeated in the studies individual samples. Some questions are replaced with new questions sample-to-sample - but always ensuring that the same questions are asked of respondents in their primary language/s.

Since commencing, the study has sampled into 24 countries globally in 12 native languages. Data has been collected and reported on in three main sample periods: 2010, 2012 and 2014 (for reporting throughout 2015).

In the immediate period ahead, LGBT2020 continues to expand its reach into new countries as well as updating its longitudinal data for many key markets. The 2015 sample will be reported on in 2016.

LGBT2020

Have any countries not achieved sufficient sample size to analyze?

To date the 2014 Slovakia sample remains open and is still filling as we prepare to analyze it when sufficient sample is achieved. All other countries sampled in 2014 filled their sample quota requirements for analysis.

India was a difficult sample to fill (as was Turkey in 2012).

Israel in 2012 proved one of the quicker samples to complete.

South Korea (2012) was the only market we endeavoured to achieve a sample from and were (to date) unable to. We are reviewing this country with a view to attempting again to achieve a viable South Korean sample for analysis in 2015.

Our largest samples to date are from USA, UK, Australia, Brazil and Argentina.

In 2015 the LGBT2020 study expands its reach further - including sampling into several additional Asian countries.

The LGBT2020 study covers workplace data as well as a broad range of topics including the following:

Gender
Age
Career
Relationship
Children
Education
Homophobia
Equality
Diversity
Inclusion
Shopping
Leisure
Travel
Investing
Finances
Banking
Insurance
Credit cards
Expenditure
Purchases
Retirement
Legal
Entertainment
TV
Aged care
Media
Discrimination
Harassment
Pets
Respect

Countries for which at least one data set has been collected include the following:

Argentina
Australia
Austria
Brazil
Canada
Chile
Ecuador
France
Germany
India
Ireland
Israel
Italy
Japan
Mexico
Netherlands
Peru
Poland
Slovakia
Switzerland
Turkey
UK
Uruguay
USA

The countries reported on in this report are indicated in bold above.



LEADERSHIP

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Leaders



Champions



Allies



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“I can be me.”



“**AXA** is passionately committed to being a leader in the field of workplace diversity and inclusion and our support for the new LGBT2020 report is in line with that commitment. We understand that the better we help our employees bring their whole selves to work, the better we can earn our position as their employer of choice. We see support for LGBT diversity in our workplaces as being not only the right thing to do, but also an important part of our overall business objectives.”

CHRISTIANE BISANZIO

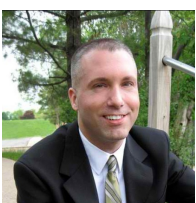
Head of HR for Northern, Central & Eastern Europe
AXA Group Chief D&I Officer



“At AXA, our efforts to foster an inclusive workplace, one where all employees feel engaged, valued, and free to be their whole selves at all times, reflects who we are at the core. Our support for the LGBT2020 study will help further our goal of attracting and welcoming the very best people to the AXA family. By nurturing a fully inclusive environment where each and every person feels inspired to share their individual perspective, we all reap a collective benefit, while enabling all our people to bring the best of who they are to AXA every day.”

MARK PEARSON

CEO, AXA US
Global Champion, Allies@AXA PRIDE



“At AXA I was able to be me: the analytical, progressive and hardworking employee who also happens to be a gay male. I don’t have to hide any part of who I am to be successful, I can be me.”

JOSEPH LEWIS

Senior manager, Metrics AXA US
Chair, Allies@AXA PRIDE

Leaders



“Here at the **Societe Generale Group** we strive to foster an environment where all of our staff feel encouraged, and are supported to be themselves when they come to work. We are proud to be innovating a number of ongoing diversity initiatives that are designed to help and assist our staff feel more confident, and demonstrate that respect and inclusion are an essential part of our core values. Building an environment where we are better able to engage with all of our employees is critical to the success of our business, and Societe Generale continues to foster a climate of professionalism where talent is encouraged, recognised, and developed to its fullest potential. There are no barriers to growth and development of our people at the Societe Generale Group, and our support of the release of the LGBT2020 workplace report demonstrates our commitment to creating organisational structures that are equally equitable for everyone.”

VINCENT FRANCOIS

Managing Director
Regional Chief Audit Executive
(United Kingdom, Ireland, Channel Islands, Turkey,
Gibraltar, Spain, Portugal and Middle-East)
Société Générale



“**Aviva** is one of the UK’s leading insurers and one of Europe’s leading providers of life and general insurance. Understanding our customers’ and staff needs is fundamental to what we do – and that is no different for our LGBT customers or LGBT employees. This is why we are pleased to support the launch of this important piece of diversity research, Out Now’s LGBT2020 report. We need to keep challenging our assumptions about what it’s like to be LGBT in the workplace and to better understand and build the business case in support of our efforts.”

JAN GOODING

Group Brand Director
Aviva

Leaders



“**.LGBT** is proud to sponsor Out Now’s latest installment of the LGBT2020 research program, ‘LGBT Diversity: Show Me The Business Case’, as the information gathered within this report reiterates the benefits and ‘power of diversity’ in the workplace. While there are still many hurdles for the community to overcome, we believe .LGBT plays a part in advancing equality in the workplace by helping organizations showcase diversity initiatives and other LGBT-related content with an internet address that is inclusive by design and dedicated to the community.”

BRETT SAMUELS
Brand Manager
.LGBT

ACTIVATED JANUARY 28, 2015

World’s first allocated .LGBT domain address



www.OutNow.LGBT

Champions

“**IBM** has always understood the power of information to change people’s lives. HR analytics enable organizations to use their wealth of employee data to make better decisions about their workforces, improve operational performance, and increase employee engagement. We are pleased to support this innovative LGBT2020 analysis about the lived experiences behind LGBT people’s experiences at work and believe it will help to create more inclusive working environments. For over 30 years, we’ve been proud supporters of the LGBT community.”



MARIJN PIJNENBURG

IBM Business Development Executive

“**Tedstrom Associates** is proud to sponsor LGBT2020, which is must reading for all executives responsible for their businesses’ competitiveness and success. New data show how addressing shortcomings in LGBT workplace rights can contribute to improved staff retention, team productivity and savings for the business. At Tedstrom Associates, our integrated solutions address core issues and are designed to work for the entire company, not just one department. For example, our solutions for a compliance problem are designed with the goals of the marketing, recruiting and government affairs teams, among others, in mind. The result is better performance, a stronger reputation in the community, more loyalty in the marketplace and better value for investors.”



JOHN TEDSTROM

Tedstrom Associates

Media friends

“**Yagg** is the leading news media dedicated to LGBT issues in France. It covers a wide range of topics from politics to sport, health, social issues, diversity in the workplace, public debates and entertainment. Yagg welcomes 20,000 unique visitors each day and serves 2.5 million page views per month. More than 1,000 individual bloggers contribute to Yagg, which has a Facebook page with 20,000+ fans and a Twitter page with 15,000 followers.”



“**Lesbians on the Loose** is a Sydney-based magazine, which was first published as an eight-page newsletter in 1989. **LOTL** is a free-to-street monthly magazine distributed to city centres of Sydney, Melbourne and Brisbane focusing on community events, entertainment, political and social developments and local lesbian life in Australia. **LOTL** magazine enjoys the undisputed leading lesbian market share in Australia and celebrates over 25 years in publishing in 2015.”



“**MPG**’s print and digital publications - like *GT* and *DIVA* - websites, apps and e-newsletters along with its retail stores are visited or read by well over 500,000 people at least once a month. If your business needs to reach this valuable market, in Europe and around the world, we can offer a range of ways to successfully achieve this, by advertising or sponsored features in our publications, e-newsletters or websites, or by having MPG distribute your products.”



“**Gay Ad Network** is the world’s largest advertising marketplace for connecting advertisers with LGBT consumers worldwide. With a powerful database marketing platform, Gay Ad Network makes it simple for advertisers to target unique LGBT audience segments across popular gay websites and mobile apps, as well as Youtube, Facebook and other major digital media outlets.”



“**Curve**, the USA’s best-selling lesbian magazine, spotlights all that is fresh, funny, exciting, controversial and cutting-edge in our community. *Curve* brings you the latest in lesbian-related celebrity interviews, news, politics, pop culture, style, travel, social issues and entertainment. *Curve* tackles the tough topics, like “Don’t Ask, Don’t Tell,” same-sex marriage, breast cancer and the challenges facing queer youth.”



“**Foro Enehache** is an open space to celebrate and talk about our homosexuality. An innovative forum, with a particular mixture of social network, blog and editorial magazine, presenting a new and fresh way of viewing, understanding and perceiving the world that surrounds all Spanish speaking non-heterosexuals in the world.”



“**Special Media** publications are special interest media catering to a specific and unique target audience the LGBT community. For homosexuals in German-speaking Europe, there are few media they read. Includes SIEGESSÄULE and L-MAG.”



‘LGBT’ HAS FOUR LETTERS

Said to a USA lesbian:

“I can’t add your wife to your health insurance because your marriage isn’t ‘real’.”

From a respondent in France:

“Je travaille chez moi sur mon ordinateur donc je n’ai pas de collègue. Mes voisins et autres personnes dans la rue de ma ville m’ont témoigné leur Transphobie. Mais comme je m’en fiche et que je ne leur demande pas leur avis, je les ai remis à leur place et depuis j’ai la paix.

I work at home on my computer so I do not have a colleague. My neighbors and other people in the streets of my city have shown me their Transphobia. But as I do not care and I do not ask them their opinion, I have put them in their place - and since then I have peace.”

More? See Appendix: ‘Workers’ Voices’

Well in fact, LGBTQIAA has even more than the four letters contained in ‘LGBT’, and there are various formulations of the amalgam acronym which - in many English speaking countries - has become the most accepted acronym - *LGBT* - to designate the community comprised of people who identify their sexual orientation as lesbian, gay, bisexual and/or their gender identity as trans. The categories are sometimes disputed by members of what is commonly known as the ‘LGBT community’. The more accurate approach is to consider that there exists an affinity grouping of people who are often considered by some people in society - usually forming part of more dominant hegemonic groupings - as being ‘other’ than themselves.

In simple terms, the terms might be understood as follows:

L - Lesbian

G - Gay

B - Bisexual

T - Transgender

Specific mention should to be made about two additional categories.

I - Intersex - Intersex people are born with physical, hormonal or genetic features that are neither wholly female nor wholly male; or a combination of female and male; or neither female nor male.

More information on intersex people is at this link for [OII International](#) and also this link [OII Australia](#) - which has achieved much progress for intersex people recently.

A - Allies (see next page).

Lesbians are women who fall in love with - or are attracted by - other women.

Gay men are men who fall in love with - or are attracted by - other men.

Some lesbians prefer to be known as ‘gay women’.

Bisexual people are men or women who can fall in love with - or are attracted by - either women or men.

These three letters: LGB, refer to a sexual orientation.

Transgender people are people who, as they grow, experience a gender identity that is other than that they are born into. So a boy who knows she is really a girl. Or a girl who knows he is really a boy. Some trans people choose to reassign their gender by surgery, others prefer not to. Trans people may be homosexual, bisexual, heterosexual - or none of these.

Our LGBT2020 respondents also select various ‘other’ write-in options, commonly including ‘pansexual’, ‘asexual’ or other categories personally most relevant to them.



THE POWER OF FRIENDS

From a respondent in India:

"I came out at work to my whole team this year, thanks to my CIO who is a huge ally of the LGBT movement in my firm.

Unfortunately, because of the Dec 2013 Supreme Court of India ruling criminalizing gay sex, my company is not launching the India chapter of their Pride Employee Resource Group, even though the CEO of India supports it.

We are a multinational company with thriving LGBT Pride chapters in south east Asia."

More? See Appendix: 'Workers' Voices'

People who know you that are supportive of your right to have genuine equality in society as an LGB or T person are often called "allies". Please be sure to count any individual person in only one of these categories. How many work colleagues would you count as "allies"?

This question is currently being collated from the 2014 LGBT2020 study and is now being analyzed for reporting.

Perhaps the largest group in total, little has previously been known about the scale of this 'Allies' group.

Out Now is in the analysis stages for its next LGBT2020 report, being released in the first half of 2015: **"The Power of Friends. How LGBT Allies are transforming business - and society"**.

This report utilises LGBT2020 data to measure the numbers of allies respondents report among three specific groups: their family, friends and work colleagues.

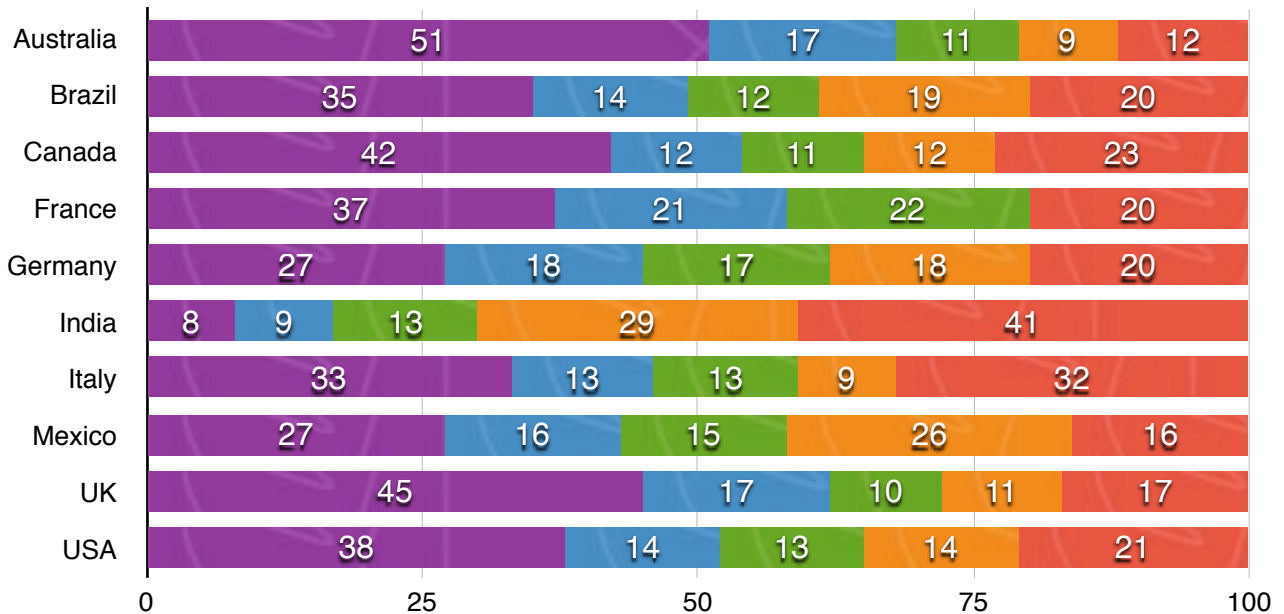
In many countries being analyzed the data supports the contention that a 'tipping point' has been passed - and businesses now have more to gain than lose by being seen to be consistent supporters of their LGBT customers and employees.

In the US sample for example, preliminary results show that the most common response category selected is "1-5" allies at work, which was selected by 32.0% of respondents.

The second most selected category for the number of workplace allies is "0" selected by 17.3% of respondents.

OUT AT WORK

■ Out to everyone ■ Out to most people ■ Out to some people ■ Out to few trusted people ■ Not out to anyone



From a respondent in Mexico:

“Comentarios despectivos sobre compañeros que están abiertamente fuera del closet, o que no están fuera del closet pero que son ‘obvios’.

“Disparaging remarks about colleagues who are openly out of the closet, or they are not out of the closet but are ‘obvious.’”

More? See Appendix: ‘Workers’ Voices’

If you are working at the moment, how out are you as an LGBT person at work? (Choose the one option that most closely matches your situation)

I am not out to anyone at work

I am only out to just a very few close and trusted people at work

I am out to some of the people I work with

I am out to most people at work

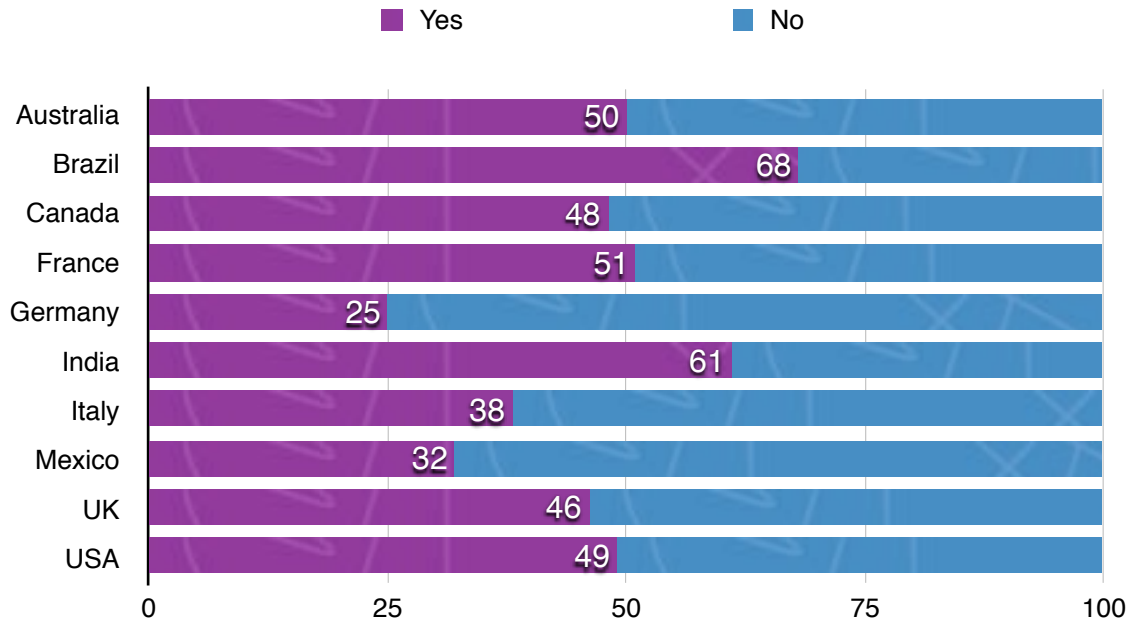
I am out to everyone at work

It could be tempting to claim that Australia is a ‘poster child’ for acceptance in this instance, with fully 51% of all LGBT respondents reporting they can be out with everyone at work. This however is not the maximum reported for this metric from all LGBT2020 countries sampled to date. In 2012, the Netherlands LGBT2020 sample showed 66% of all respondents could be completely out with all colleagues at work (See related infographic in Appendix 2.) In any case, even in the case of the 2012 Dutch sample, we still see that one in three workers in Holland (34%, 2012) and almost half in Australia (49%, 2014) are unable to be out with all colleagues at work.

It is clear that workers in some countries, especially India (9%) and Brazil (20%) face substantial obstacles coming out to all at work and respondents in Italy are also relatively more likely to not be out to anyone as LGBT at work (32%).

Note that the French sample included only four options for this question, as indicated in the graph above.

HOMOPHOBIA



From a respondent in Germany:

“Ein Kollege wurde darauf hingewiesen sich in der Nähe des Arbeitsplatzes nicht zu küssen.

A colleague was told not to kiss near the workplace.”

More? See Appendix: ‘Workers’ Voices’

If you are working at the moment, have you seen or heard anything at work in the last year that you think is homophobic?

The LGBT2020 study includes a specific question on homophobia in the workplace. This question helps benchmark the prevalence of anti-gay and anti-lesbian attitudes at work.

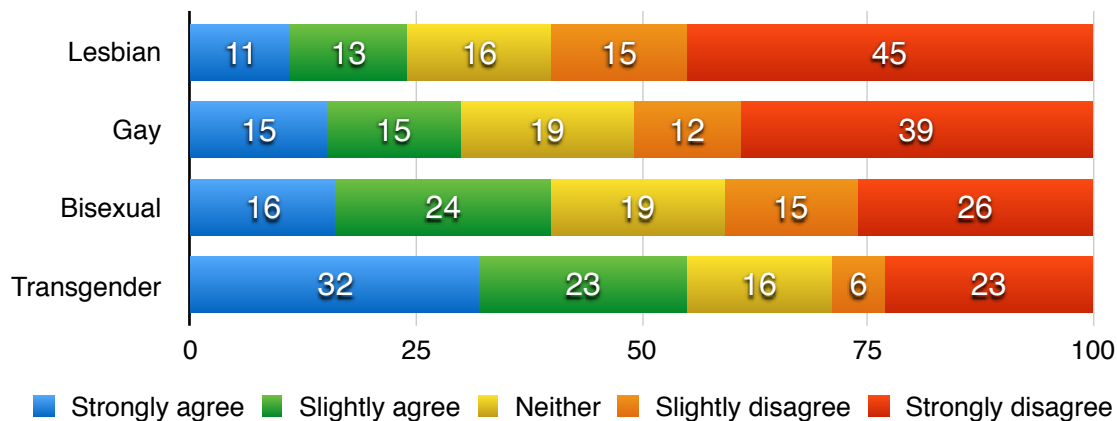
We see that the country with the least amount of observed homophobia in 2014 is Germany and the worst is Brazil, followed closely by India.

Of course one is tempted to state that Germany is a standout place for the reason that it tests relatively lower on this metric.

However the reality of course is that one in every four respondents in Germany last year heard or saw something in their own workplaces they consider to be against lesbian or gay people.

We see there are also many examples of trans-phobia and bi-phobia at work and some of these are reflected by the comments made by respondents in ‘Workers’ Voices’.

BI, TRANS AND PROMOTIONS



If I come out at work I think it might have an effect on my prospects for future promotions.

Overheard by a respondent at work in UK:

"I wouldn't let my daughter use a bathroom if 'that' [a transgender woman] was in there, I don't want it waving its penis in her face."

Overheard by a respondent at work in UK:

"She only says she's bisexual because she's just trying to get attention."

More? See Appendix: 'Workers' Voices'

Trans people - like bisexuals - experience generally higher levels of concern about promotions at work than lesbian or gay respondents do.

In larger samples from the LGBT2020 study, we are able to assess bisexual and trans respondents as separate groupings for analysis.

Data for the USA is presented above, separating out responses from lesbian, gay, bisexual and trans respondents.

We see in the table above that 55% of trans respondents think that if they come out as trans at work this might have an effect on prospects for future promotions.

That compares to 40% for bisexuals, 30% for gay men and 24% for lesbian respondents.

Bisexuals are perhaps the most under-discussed letter of the LGBT acronym.

Many report they are poorly perceived by heterosexual people - who think they are actually gay but have not come to terms with that fact - and they also report concerns they face rejection by homosexual people for being opportunistic, or somehow not being a 'real' member of the LGBT community.

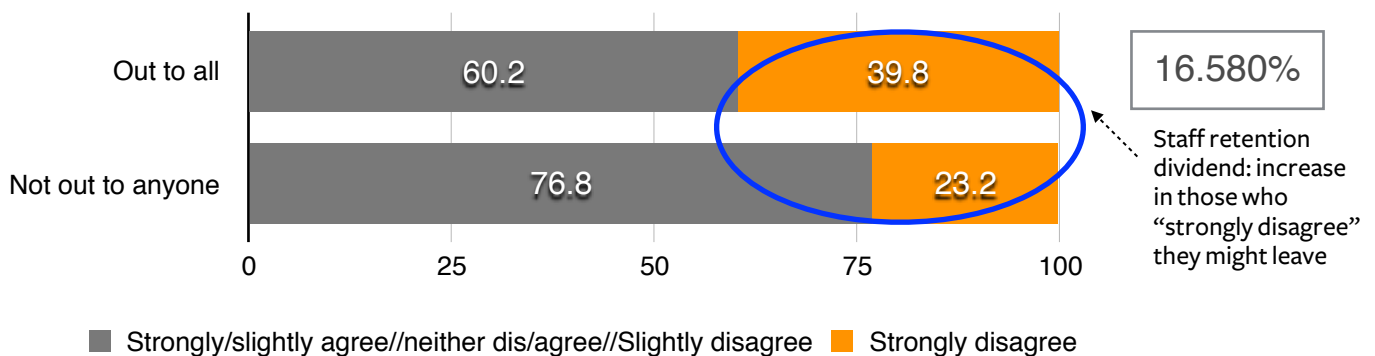
The LGBT2020 data reveals significant problems are faced by bisexual and trans people at work.

Of course, 24% of lesbians being concerned that coming out may impact on their promotion prospects is very concerning, so even higher levels of concern among gay men, bisexuals and transgender people serves only to highlight the serious concerns LGBT people have about the implications of coming out at work.

STAY OR GO?



I'm thinking of leaving this job in the future.



It's not stated - it's just known.

"At my work you might think there was little or no homophobia. Not overtly. But if you hung around the staff room, listened in on the banter during social functions or just felt obliged to laugh along to yet another joke where gay people are the punchline - you might think differently.

It's not stated outright in your face that LGBT people are "them" but it is made clear in so many ways and it's just 'known'.

I wish I felt stronger and spoke up against it but it's hard enough just fitting in and doing the work. I wish it was different but that's just how it is for me at work."

More? See Appendix: 'Workers' Voices'

One of the most significant costs to business is the cost to rehire workers who choose to leave. These costs usually increase as the skills level of the worker increases.

Various studies globally have been undertaken seeking to measure the impacts of these costs.

In this report, we make use of two specific sources:

1. Center for American Progress (CAP), 'There Are Significant Business Costs to Replacing Employees', November 2012. This study analyzed thirty case-studies taken from the eleven 'most-relevant research papers' on costs to replace staff who leave. Their assessment found that the typical cost to replace workers earning less than USD\$30,000 was 16.1% of annual full-time wages. They found that very highly-skilled positions can cost up to 213% of salary to replace employees.

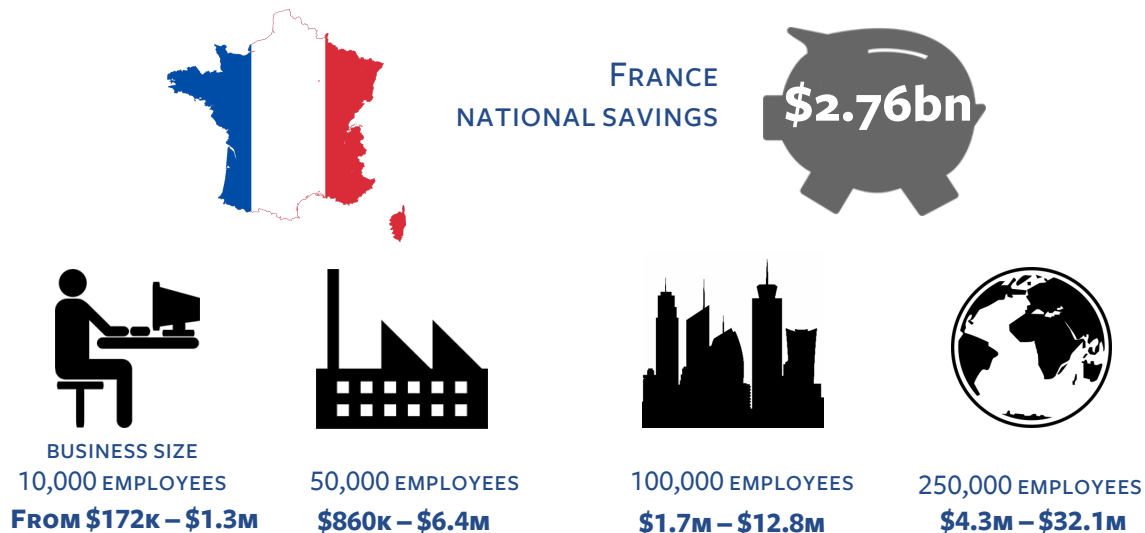
2. Oxford Economics (OE), 'The Cost of Brain Drain - Understanding the financial impact of staff turnover'. February 2014. This report values the average cost to replace workers in the UK as being 120% of average full-time wage of £25,000. They state that firms with more skilled workforces can face significantly higher average costs to replace staff that leave.

We have utilised CAP data for measuring the average cost of replacing lower skilled workers. OE data is used for the estimate for replacing more skilled workers.

It should be noted that in any extrapolation it is important to understand the assumptions being made when deciding whether the figures arrived at can be considered robust. Out Now has endeavoured to utilise conservative estimates where possible.

DOLLARS & SENSE

Business savings



From a respondent in Australia:

“There is a constant use of the derogatory term of: ‘that’s so gay’.

There are men calling each other poofs, fag*ots or homos in a derogatory manner - and a strong dislike of women in the workplace (I work in a male dominated industry).”

Heard by a respondent in USA:

“It’s just a decision - I don’t support the choice to be unnatural. Just be straight like the rest of us.”

More? See Appendix: ‘Workers’ Voices’

In measuring national net savings impacts on a country’s economy from helping LGBT people move from not being out to anyone to being out to all at work, we use the midpoint (68.05%) between the CAP (16.1% of annual salary for only low-skilled employees) and OE (mixed skills/likely) estimates.

It can be argued that for many companies, where workforces comprise a mix of low, medium and highly-skilled employees, the OE figure should be preferred for estimates - as it represents the average cost to replace staff which that study determined by assessing varying employee skills levels, across a national workforce.

In reporting the impacts of rehiring savings for businesses of different sizes we present a range expressed in USD\$, from low (CAP) to high (OE). Income estimates for all calculations are derived from OECD data for each country, using USD\$ average PPP figures (2012).

Except for workforces where almost all staff are low-skilled, we suggest the higher figure in the organizational estimates (using the OE figure of 120% of annual wage cost for average expected cost to replace staff members) should be preferred as more realistic.

We utilize the 1992 study by Yankelovich Partners (Yankelovich MONITOR 1993 report, USA) in arriving at a total estimate of 6% of the adult population which comprises the LGBT population. Our analysis measures full-time employees only.

Our calculations measure only a percentage of those moved from “not out to anyone” to being “out to all”, applying what we describe as the ‘staff retention dividend’ for each country. Namely, the increase in each country of those that can be expected to then “strongly disagree” with the statement ‘I’m thinking of leaving this job in the future’ as a result of becoming out to all at work.

PRODUCTIVITY

Respected as productive + valuable team member	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree	Strongly agree
	Australia	Brazil	Canada	France	Germany	India	Italy	Mexico	UK	USA
Not out to anyone	41.0%	46.2%	48.2%	29.4%	52.9%	38.5%	51.1%	55.7%	35.6%	37.7%
Out to all	69.0%	75.0%	70.0%	57.0%	68.4%	58.3%	81.5%	61.4%	67.1%	67.2%
Improvement	+30%	+29%	+22%	+28%	+15%	+20%	+30%	+6%	+32%	+30%

I feel my work colleagues treat me with respect as a productive and valuable member of the team.

From a respondent in Mexico:

“En general el ambiente es machista y homofóbico al tener yo un puesto directivo. No lo sufro pero se de casos en otras áreas donde se burlan de gays o lesbianas al grado que una amiga se cambió de trabajo.

Overall the atmosphere is sexist and homophobic when having a management position.

I did not suffer but know of cases in other areas where they make fun of gays and lesbians - to the degree that a friend is having to change jobs.”

More? See Appendix: ‘Workers’ Voices’

One of the truisms of many work roles in the 21st century is the importance of teamwork to drive productivity improvements.

Each team member relies on the input of others to enhance their own outcomes and the results achieved by the team as a whole.

Translated to a whole company, these intra-team interactions are - for most businesses - a critical element in the ability to increase revenues from a fixed cost base.

A number of other studies report similar conclusions.¹

So, in addition to the savings able to be realised by retaining LGBT talent that otherwise would have left the firm by facilitating the coming out of more workers, the LGBT2020 study also considers the impacts on reported engagement by respondents with their fellow workers.

We asked how strongly respondents felt valued and respected by work colleagues as a member of the team.

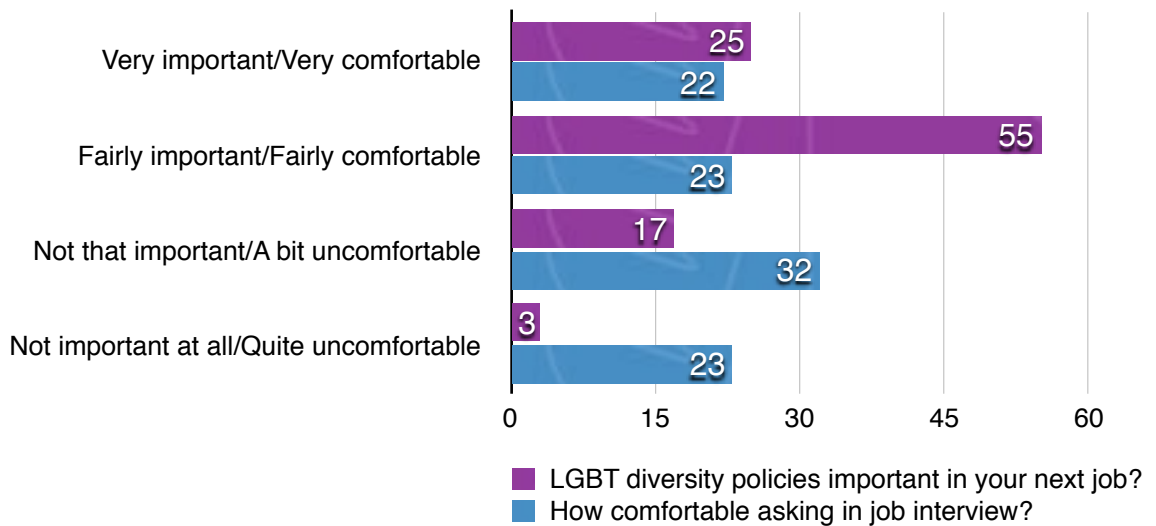
We then compared the percentage of respondents that “strongly agree” with this proposition between two cohorts: those who indicated they are ‘not out to anyone at work’ compared to those who indicate they are ‘out to all’.

As the results above show, there is a marked and significant difference in each country when moving employees from being out to nobody to out to everyone at work.

The smallest reported increase was 6% for workers in Mexico and was as high as 32% in the UK. The average result across all ten countries is a 24% reported increased sense of value and respect as a team member when workers are able to be out to all.

1. See for example: The Williams Institute, ‘The Business Impact of LGBT-Supportive Workplace Policies’. May 2013.

THE DIVERSITY GAP



From a respondent in Italy:

“Frase del tipo i gay mi fanno schifo.”

I hear phrases like ‘gay people make me sick’.”

From a respondent in Germany:

“Beim morgendlichen gemeinsamen Kaffeetrinken im Team ärgerte sich ein Vorgesetzter über verschiedene Mitarbeiter aus anderen Abteilungen; einen davon nannte er mehrmals ‘Schwuchtel’.

In the morning coffee we were together as a team, and a supervisor was angry with various employees from other departments - one of them he called ‘f**got’ several times.”

More? See Appendix: ‘Workers’ Voices’

Although outside the scope of this report, we want to include mention of another data set that forms part of the LGBT2020 global research set.

There exists a substantial difference between the importance of LGBT workplace diversity policies existing in a future employer’s workplace and the comfort respondents feel about asking prospective employers about such policies.

Question: “When you apply for a job, how important is it for your potential employer to have an LGBT equality and diversity staff policy already in place?”

- We see that one in four (25%) of US respondents (Out Now Global LGBT2020 Study, 2012 - USA sample) state that this is “Very important, I would not work for an employer without an LGBT staff policy” and a further 55% stated: “Fairly important, I would hope they had such a policy in place”.

However we see substantial differences in the comfort of respondents to ask about such policies during interview.

In response to this question: “How comfortable would you feel during a job interview asking a potential employer whether they treat LGBT workers with equal benefits and the same respect as all employees?”

- We see that 32% of respondents state they would feel “a bit uncomfortable” asking about LGBT diversity policies and a further 23% would feel “quite uncomfortable”.

We suggest that employers have a role to play in further emphasising, in specific terms, their workplace diversity policies - of all kinds - to become a more visible aspect of the recruitment process. Such an approach can be expected to send a clear signal to all prospective employees that the workplace they are interviewing is one that respects and values all members of staff.

GLOBAL DATA

TOTAL n = 12,029

AV PER COUNTRY n = 1,203

SMALLEST IS INDIA n = 345

BI = 944

TRANS = 294



From a respondent in Australia:

“In my previous workplace, four years ago - I experienced extreme workplace bullying, even including threats of violence towards myself and my partner.”

From a respondent in Brazil:

“Fiquei sabendo que algumas pessoas não conversam comigo porque existe uma desconfiança na empresa de que sou homossexual.

I learned that some people do not talk to me because there is a suspicion in the company that I am gay.”

More? See Appendix: ‘Workers’ Voices’

The LGBT2020 study is the only research of its kind in the world.

Since 2010, we have measured data relying on native language translations of identical question sets.

The total sample since commencing that study is over 100,000 respondents.

This report relies upon just over 12,000 respondents who undertook research in ten countries with the LGBT2020 program.

The complete data set contains a diverse range of questions. This report focuses upon key questions asked of respondents measuring their responses to issues relating to their own workplaces.

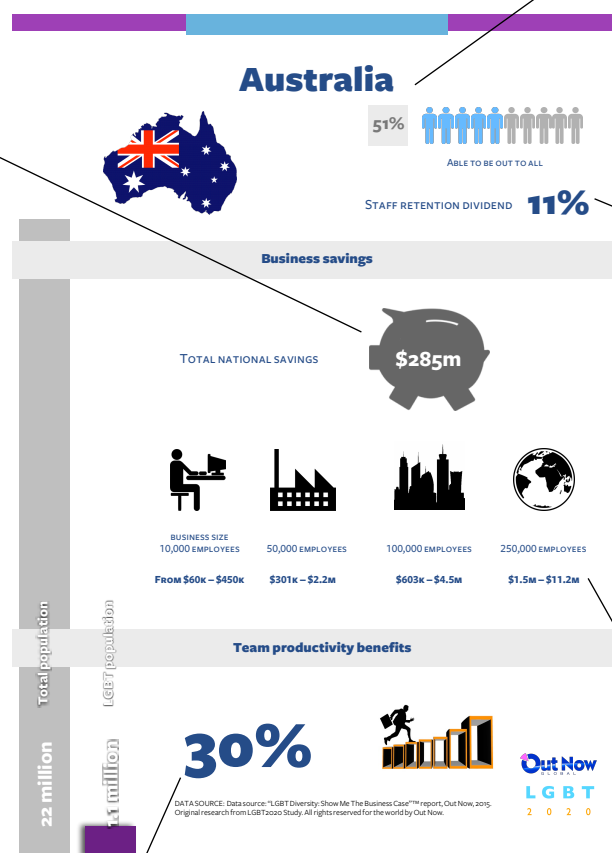
Translations of write-in responses appear throughout this report and can also be found in Appendix 1: ‘Workers’ Voices’.

These personal comments add much context to the data you find reported here.

LEGEND

This is how many respondents in this country report that they can be 'out to all' their colleagues at work. The other categories are: 'out to a trusted few', 'out to some', 'out to most' and 'out to none'. There is a graph for each country showing the results for each response category.

National savings show the total expressed in millions ("m") or billions ("bn") of USD\$ dollars. This calculation uses the mid-point between the low-skilled replacement cost estimate of 16.1% (Center for American Progress, 2012) of annual salary and the higher/average skilled replacement estimate of 120% of annual salary (Oxford Economics, 2014). The calculation is for moving the 'out to none' segment to being 'out to all' for the national full-time workforce, assuming that the LGBT community comprises 6% of the adult population (Yankelovich, 1993).



This is the total percentage of LGBT workers who become much more likely to stay in their current job if they can move from being 'not out to anyone' to being 'out to all'. A precise valuation of this % figure is used to estimate total business savings resulting.

This shows the percentage of respondents selecting 'Strongly agree' for this question: "I feel my work colleagues treat me with respect as a productive and valuable member of the team" and compares the results from respondents who are 'not out at all' to those who are 'out to all'. It reflects each cohort's perceptions of their workplace treatment and is used in this report as a productivity representing team-building and productivity benefits arising from moving 'closeted' workers to become 'out to all'.

The savings able to be achieved for companies of the sizes indicated where the lower amount is if all workers are defined as low-skilled (Center for American Progress), and the upper level in our calculations is the average figure found in 2014 as the costs to replace staff (Oxford Economics).

AUSTRALIA

Of all countries included in this report, respondents from Australia were most likely to be comfortable to be 'Out to all' at work (51%).

Respondents from the Australian sample were also more likely than other countries (with the exception of Germany) to indicate that the situation at their own workplace was 'perfect' and entirely free from homophobia.

Despite the relative acceptance for LGBT people this would appear to indicate in the Australian workplace, 50% of respondents said that they had personally heard something said that they considered homophobic in their own workplace in the past year.

15%, or one in seven respondents, said that they had personally experienced LGBTI harassment while at work in the last twelve months.

Of the ten countries included in this report, Australia reports the highest percentage of 'out' LGBTI individuals in the workplace. Despite the comparatively high LGBTI visibility in the workplace in Australia, anti-LGBTI attitudes are still concerning many respondents in their places of work.

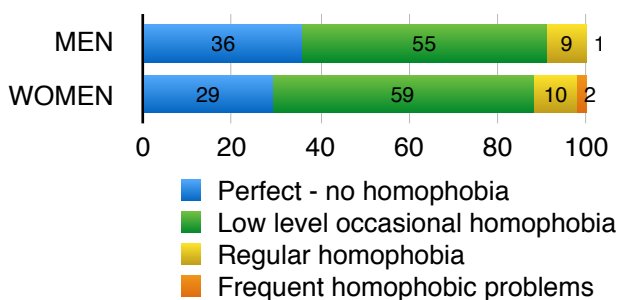
In total, two thirds of respondents from Australia reported that there was at least some level of homophobia at work, with more than half indicating that this was a low level of 'occasional' homophobia.

Total sample: n = 1159

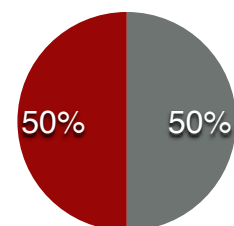
Bi = 96

Trans = 42

Homophobia: Perfect or not?

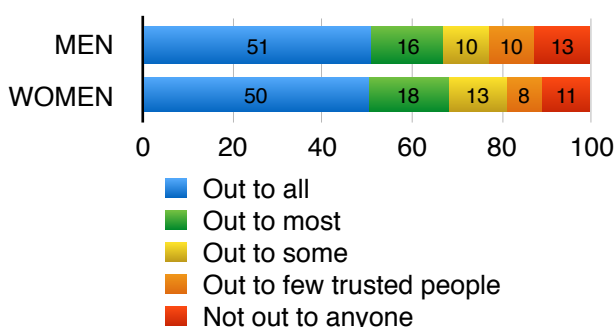


Heard anything homophobic said at work past year?

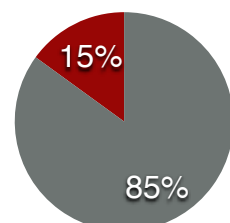


● No
● Yes

Out at work - or not?



Experienced LGBTI harassment at work personally past year





Australia



51%



ABLE TO BE OUT TO ALL

STAFF RETENTION DIVIDEND **11%**

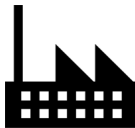
Business savings

TOTAL NATIONAL SAVINGS



BUSINESS SIZE
10,000 EMPLOYEES

FROM \$60k – \$450k



50,000 EMPLOYEES

\$301k – \$2.2m



100,000 EMPLOYEES

\$603k – \$4.5m



250,000 EMPLOYEES

\$1.5m – \$11.2m

Total population

22 million

LGBT population

1.1 million

Team productivity benefits

30%



DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015. Original research from LGBT2020 Study. All rights reserved for the world by Out Now.



BRAZIL

With just over one third, or 35% of LGBT respondents from Brazil indicating that they are out to everyone, nearly two thirds of respondents are not comfortable enough to be completely out with everyone at their places of work in Brazil.

Total sample: n = 968

Bi = 18

Trans = 4

68%, almost seven in ten respondents, reported hearing homophobic comments at work in the past year.

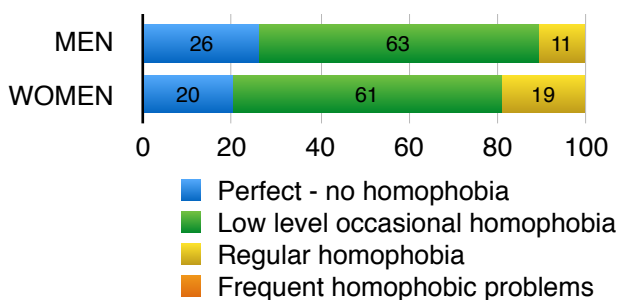
Only one in four male respondents (26%), and one in five female respondents (20%), reported that theirs is a workplace entirely free from homophobia. A further one in ten male respondents (11%) and one in five female respondents (19%) report that there is 'regular homophobia' at their own places of work.

Female respondents were more likely to not be out to anyone at work: 28% of female respondents are 'not out to anyone', compared to 18% of male respondents.

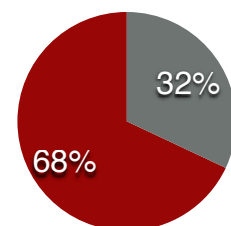
Since 2013, same sex unions have been legal for Brazilians, and LGBT equality has received much publicity after a Federal Court ruling in favour of marriage equality. New legislation now provides legal recognition for same sex couples in all Brazilian states.

This new equality legislation in Brazil reflects increasing levels of community acceptance across the country and more widely within the greater Latin America region. Despite this, one in five respondents (19%) indicated that they had personally experienced harassment at work because they were L, G, B or T.

Homophobia: Perfect or not?

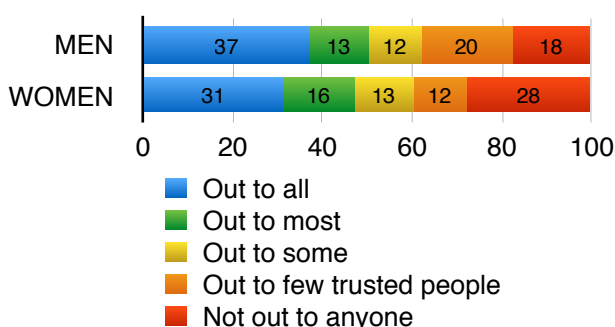


Heard anything homophobic said at work past year?

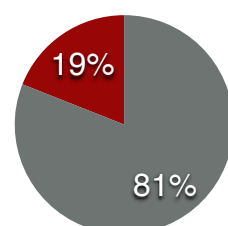


● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year



203 million
Total population

9.3 million
LGBT population

Brazil



35%



ABLE TO BE OUT TO ALL

STAFF RETENTION DIVIDEND

5%

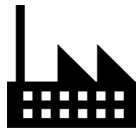
Business savings

TOTAL NATIONAL SAVINGS



BUSINESS SIZE
10,000 EMPLOYEES

FROM \$9k – \$70k



50,000 EMPLOYEES

\$47k – \$348k



100,000 EMPLOYEES

\$93k – \$696k



250,000 EMPLOYEES

\$233k – \$1.7m

Team productivity benefits

29%



DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015. Original research from LGBT2020 Study. All rights reserved for the world by Out Now.

CANADA

Just over four in ten (42%) of Canadian respondents indicated that they were out to everyone at work. Nearly one in four male respondents (23%) indicated that they were not out to anyone at their places of work, compared to 15% for female respondents.

Total sample: n = 934

Bi = 63

Trans = 19

Approximately one third of Canadian respondents regard their workplace as 'perfect' with 'no homophobia', although 48% of respondents indicate that they had heard something that they considered to be homophobic said in their own workplace in the past year.

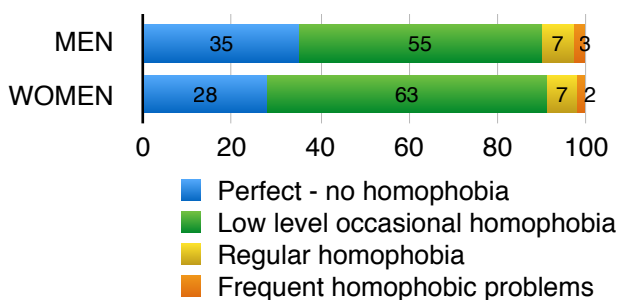
13% of respondents said that they had personally been the victim of harassment at work in the past year, because of being perceived to be LGBT.

Canada is regarded as one the most liberal and progressive countries in the Americas when it comes to LGBT equality in the workplace, with marriage equality becoming law in the country as a whole back in 2005.

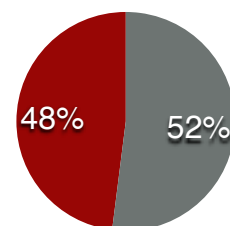
These findings are comparable with some of the more progressive countries in Europe in certain respects, but, as with all countries tested, there is much that could be done to improve the workplace experiences for LGBT Canadians.

Note that the savings per business for France and Canada resolve to be similar numbers and appear as identical amounts in certain sections for the national tables in this report. This is not an error, has been checked and has been found to be correct.

Homophobia: Perfect or not?

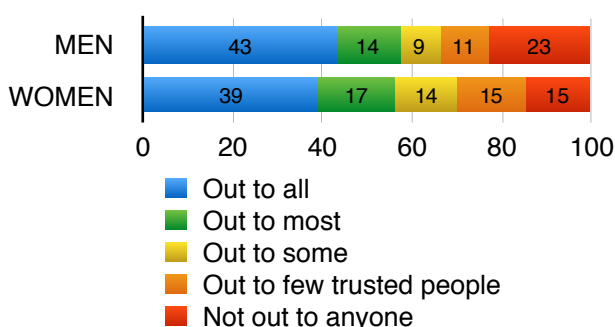


Heard anything homophobic said at work past year?

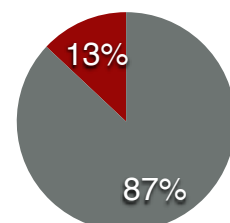


● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year



Total population

35 million

LGBT population

1.8 million

Canada



42%



ABLE TO BE OUT TO ALL

STAFF RETENTION DIVIDEND **17%**

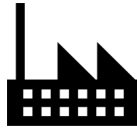
Business savings

TOTAL NATIONAL SAVINGS



BUSINESS SIZE
10,000 EMPLOYEES

FROM \$172k – \$1.3M



50,000 EMPLOYEES

\$861k – \$6.4M



100,000 EMPLOYEES

\$1.7M – \$12.8M



250,000 EMPLOYEES

\$4.3M – \$32.1M

Team productivity benefits

22%



DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015.
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FRANCE

In total, 37% of French respondents indicate that they are out to everyone at work, which is the second highest for European countries reported on in this report, but is still less than the result in both the USA and Canada for the same metric.

More than one in five male respondents (22%) and more than one in every seven female respondents (15%) answered that they are not out to anyone at their place of work.

Three in ten respondents (30%) for men, and one in four (25%) of women respondents, indicated that they thought their places of work are entirely free from homophobia.

51% of respondents answered that they had heard something that was homophobic at work in the past year.

A comparatively small number of just 5% indicated that they personally experienced harassment at work in the last 12 months.

France became the 13th country in the world to legalise same sex marriage in 2013, which received a great deal of publicity in the country. Of all the countries tested in this report, France had the highest staff retention dividend of all - meaning that the effects of moving workers from being 'not out to anyone' to become 'out to all' will generate the greatest level of resulting staff retention - and business savings.

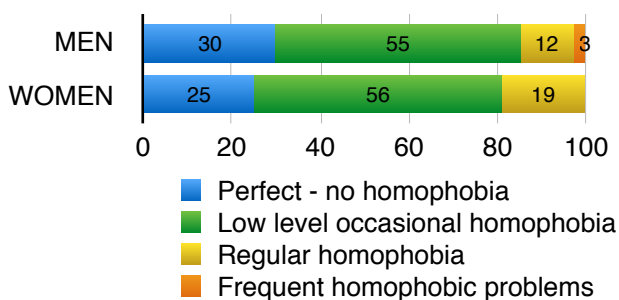
Note that the savings per business for France and Canada resolve to be similar numbers and appear as identical amounts in certain sections for the national tables in this report. This is not an error and has been checked to be correct.

Total sample: n = 829

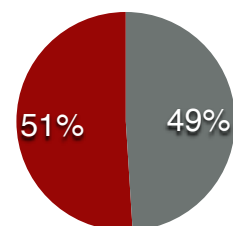
Bi = 42

Trans = 15

Homophobia: Perfect or not?

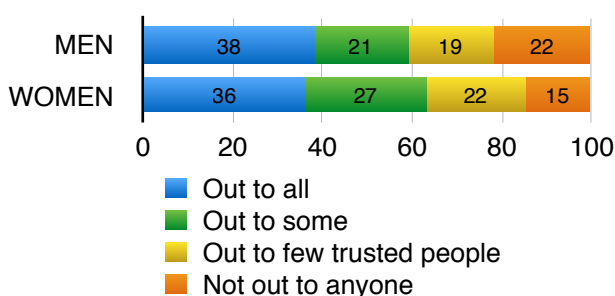


Heard anything homophobic said at work past year?

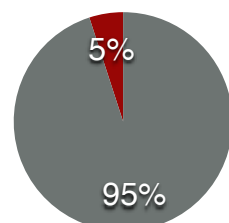


● No
● Yes

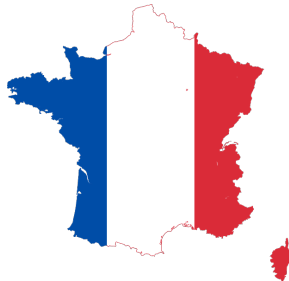
Out at work - or not?



Experienced LGBT harassment at work personally past year



France



37%



ABLE TO BE OUT TO ALL

STAFF RETENTION DIVIDEND **22%**

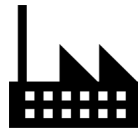
Business savings

TOTAL NATIONAL SAVINGS



BUSINESS SIZE
10,000 EMPLOYEES

FROM \$172k – \$1.3M



50,000 EMPLOYEES

\$860k – \$6.4M



100,000 EMPLOYEES

\$1.7M – \$12.8M



250,000 EMPLOYEES

\$4.3M – \$32.1M

Team productivity benefits

28%



DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015. Original research from LGBT2020 Study. All rights reserved for the world by Out Now.

Total population

66 million

LGBT population

3.2 million

GERMANY

Germany is an interesting example in this report, with the lowest reported incidence of LGBT harassment as well as perceived homophobia of all ten countries reported on.

German respondents also report the lowest percentage of people who are 'out to all' at work for European countries, with just 27% choosing this option.

It could be argued that such a low percentage of people being 'out' in the workplace in Germany is part of the reason that reported harassment levels and homophobic behaviour is also comparatively lower.

However, the German sample also reports the highest percentages of those countries tested where respondents indicate that there is zero homophobia in their own workplace, with 40% of men and 38% of women from Germany's respondents indicating this.

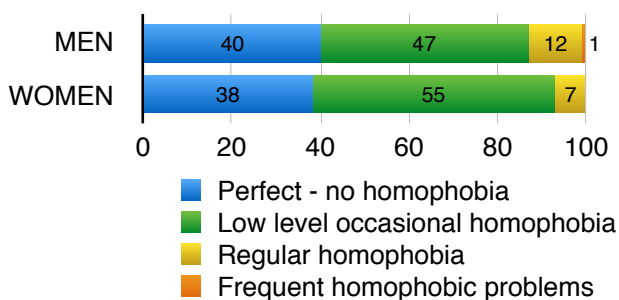
There are of course many cultural and societal issues that influence each of the samples, and for Germans these could mean that they are simply less inclined to be out at work in any case. This may be seen for example in a relatively high percentage - 24% of German men in this sample - being respondents not out to anyone at work.

Total sample: n = 947

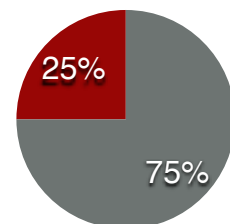
Bi = 71

Trans = 15

Homophobia: Perfect or not?

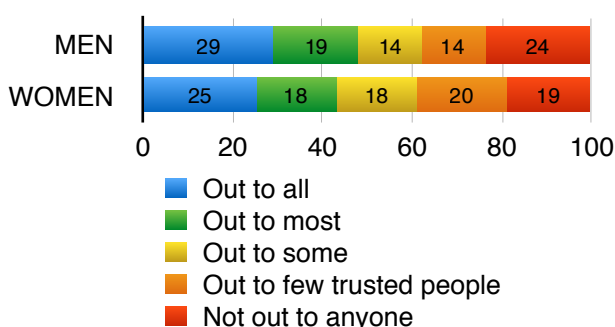


Heard anything homophobic said at work past year?

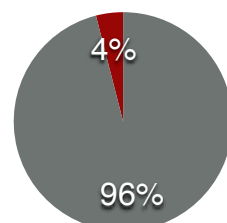


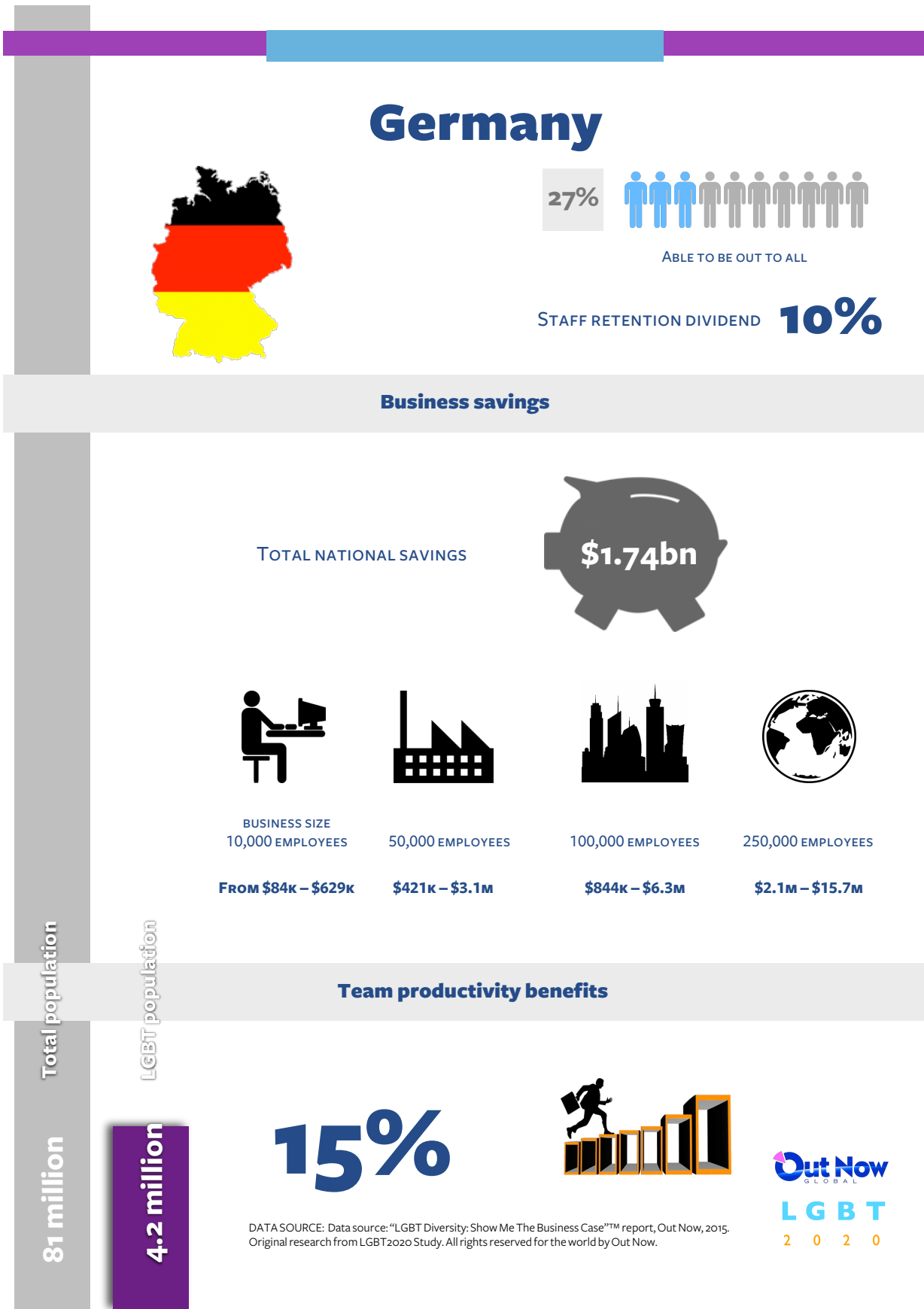
● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year





INDIA

Respondents to the Indian sample were the least likely to be 'out to all' at work, with just 8% of the sample choosing this option. The Indian sample were also the most likely to be 'not out to anyone' at work, with 41% of the sample choosing this as their response to this question.

Total sample: n = 345

Bi = 26

Trans = 12

Fewer than one in five men and women, 18% and 19% respectively, said that their workplace was perfect with 'no homophobia'.

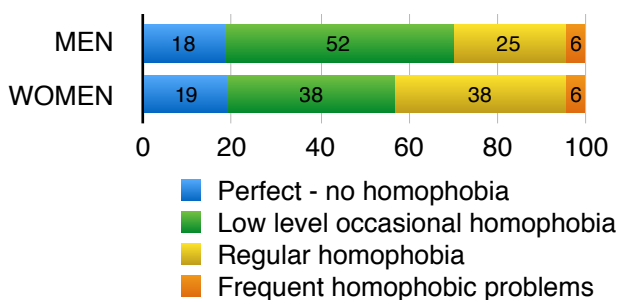
More than six in ten respondents (61%) said that they had heard something that was homophobic at their place of work in the last year.

Incidents of harassment at work for LGBT people in India were the highest of the ten countries sampled, with 23% of respondents saying that they had personally experienced harassment during the past year because of being perceived to be L, G, B or T.

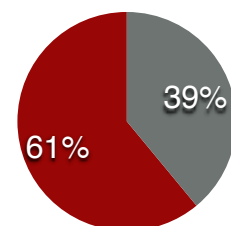
When viewed collectively, the difficulties for LGBT workers in India become apparent. Despite low visibility because of a reluctance of LGBT people to be out at work, incidents of homophobia and harassment remain very high, indicating a substantial prevalence of homophobic attitudes in Indian workplaces.

We note that India is the smallest sample size in this study. Analysis can also therefore be subject to data sampling factors.

Homophobia: Perfect or not?

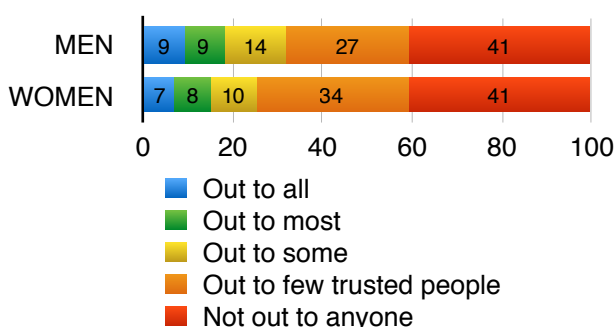


Heard anything homophobic said at work past year?

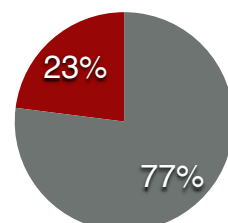


● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year



1.24 billion
Total population

53 million
LGBT population



India

8%



ABLE TO BE OUT TO ALL

STAFF RETENTION DIVIDEND **12%**

Business savings

TOTAL NATIONAL SAVINGS



BUSINESS SIZE
10,000 EMPLOYEES

FROM \$16k – \$118k



50,000 EMPLOYEES

\$79k – \$590k



100,000 EMPLOYEES

\$158k – \$1.2m



250,000 EMPLOYEES

\$396k – \$3.0m

Team productivity benefits

20%



Out Now
GLOBAL
LGBT
2 0 2 0

DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015.
Original research from LGBT2020 Study. All rights reserved for the world by Out Now.

ITALY

One third (33%) of all Italian respondents indicated that they are 'out to all' in their places of work. This is contrasted with 35% of men from the study's Italian respondents who are not out to anyone at work - the second highest recorded percentage (after India).

Total sample: n = 481

Bi = 21

Trans = 3

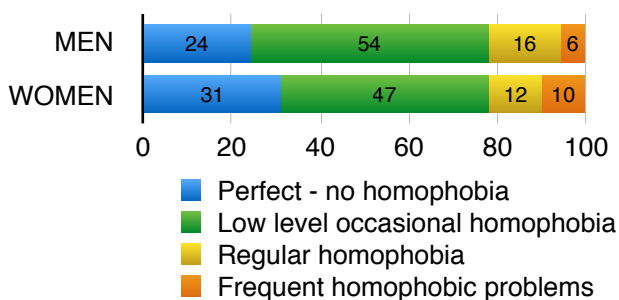
Compared with other European countries in this report, many Italian respondents report a more homophobic work environment.

One in four men (24%) and 31% of women say that the situation is perfect, with 'zero homophobia'.

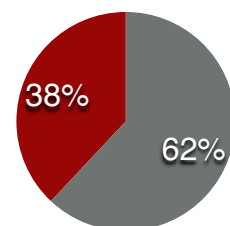
More than one in five women and men (22%) indicated that there were 'regular' or 'frequent' homophobic problems at work, with nearly four in ten (38%) saying they had heard something that was homophobic in the last year.

Less than one in ten Italian respondents (8%) said that they had personally experienced LGBT harassment at work in the last year. Once again cultural norms, and low levels of visibility for LGBT people may account for lower comparative incidents of homophobia in Italy.

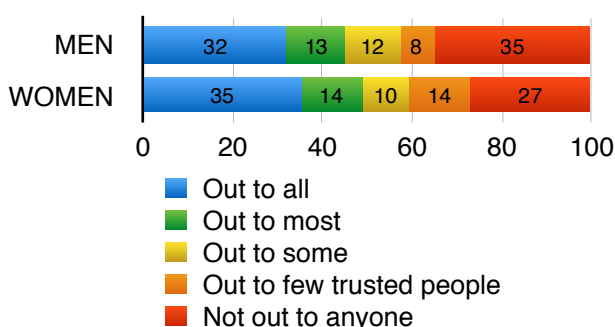
Homophobia: Perfect or not?



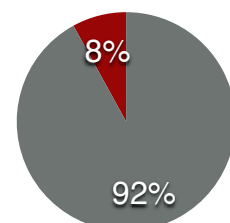
Heard anything homophobic said at work past year?

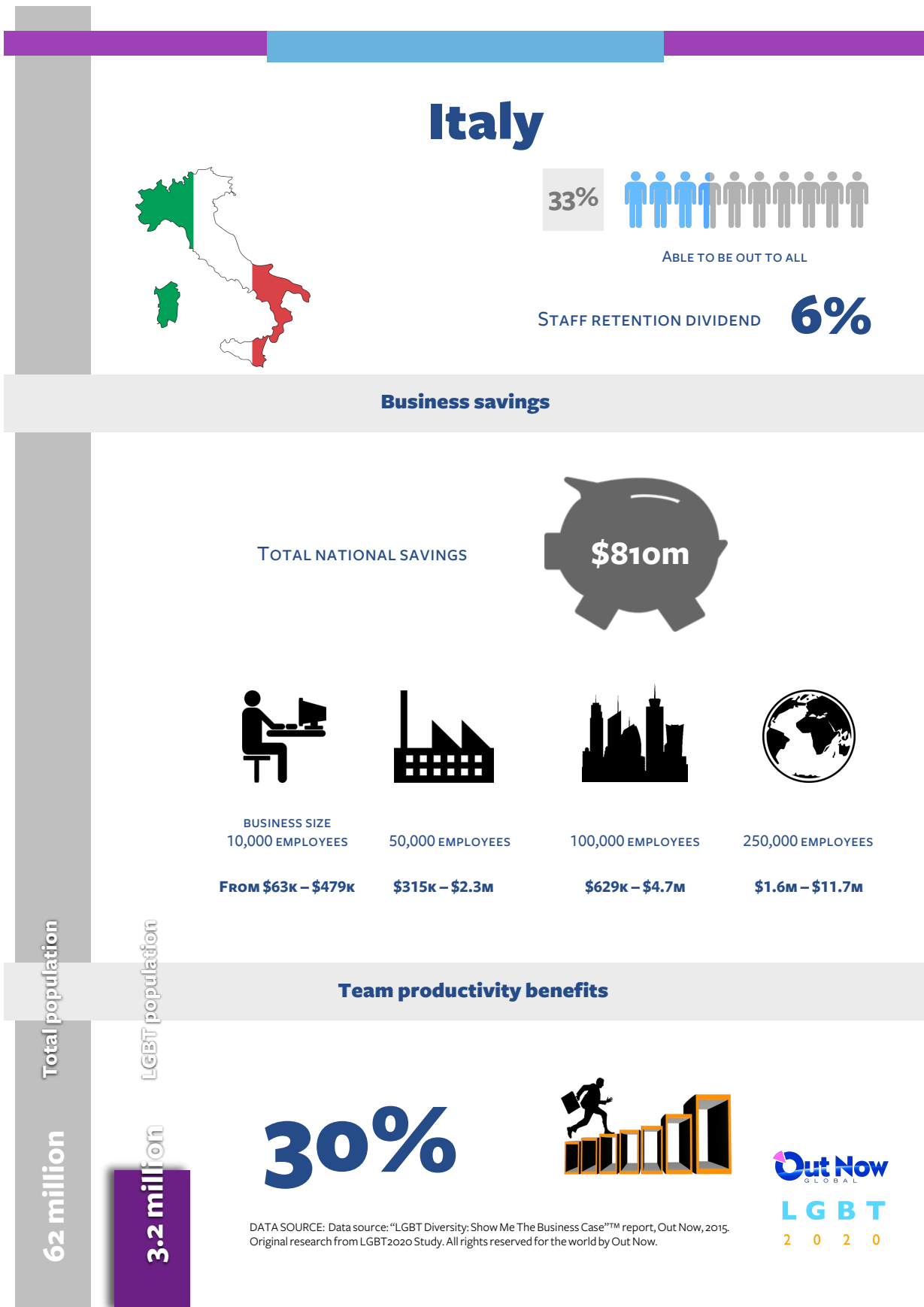


Out at work - or not?



Experienced LGBT harassment at work personally past year





MEXICO

One quarter of all respondents in Mexico (27%) indicated that they are able to be 'out to all' at their place of work, with almost one in six (16%) indicating that they are 'not out to anyone' at work. A further 23% of respondents are only out to 'a few trusted people' at work, meaning that four out of every ten LGBT workers in Mexico are either out to nobody at work or are only open about their sexuality or gender identity to people they feel they can really trust at work.

Total sample: n = 1015

Bi = 100

Trans = 24

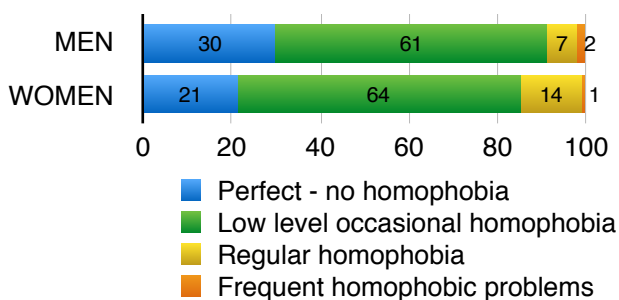
Male respondents in Mexico are more likely than female respondents to think that theirs is a workplace that is free from homophobia, with 30% of men compared to 21% of women believing this about where they work.

Women respondents from the Mexico sample are also twice as likely to believe that there are 'regular' problems with homophobia (14%) in the workplace in Mexico than men (7%).

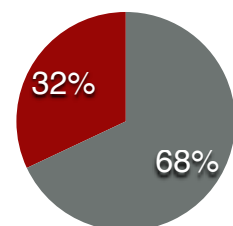
One third of all respondents (32%) indicated in their responses that they had heard something that was homophobic at work.

13% of all respondents indicate that they personally experienced harassment at work during the past year.

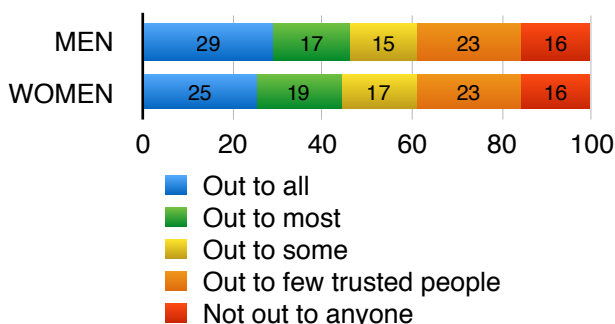
Homophobia: Perfect or not?



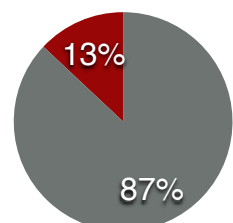
Heard anything homophobic said at work past year?

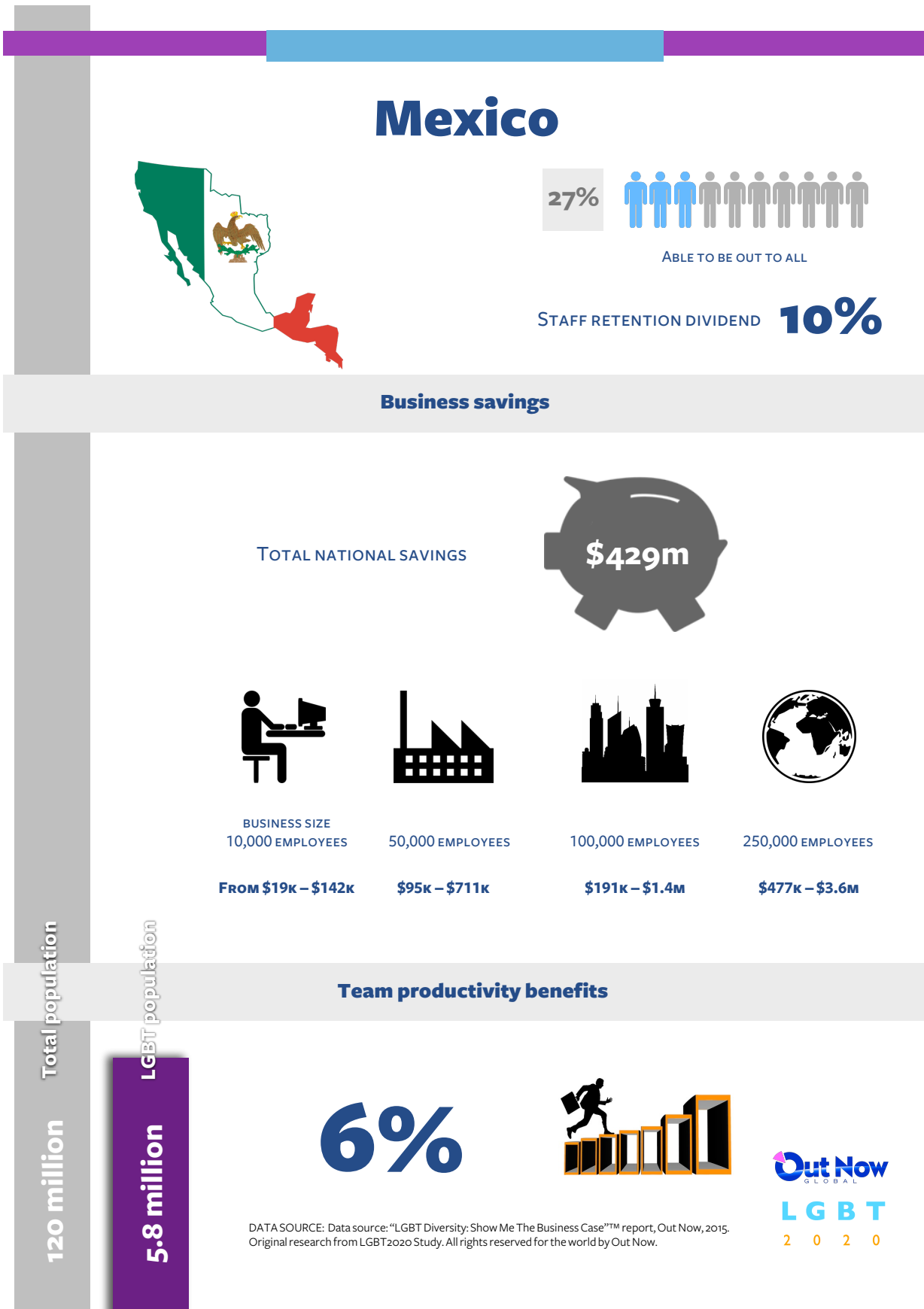


Out at work - or not?



Experienced LGBT harassment at work personally past year





45% of all respondents from the UK indicated that they were 'out to all' at their places of work. This was the second highest score for this metric of any country in this report (behind Australia at 51%).

The percentage of UK women respondents not out to anyone was also comparatively low at just 9% although UK men are much more likely to be completely 'in the closet' (21%) - meaning they are not out to anyone at all at work about their sexual orientation or gender identity.

One out of three respondents indicated that their place of work was 'perfect', with no homophobia. One in ten respondents from the UK though do indicate that there are 'regular' or 'frequent' problems at their own place of work.

Of all respondents, 46% report that they heard something they considered to be homophobic said at their place of work last year.

13% say that they personally experienced harassment at work during the past year because they were perceived to L, G, B or T.

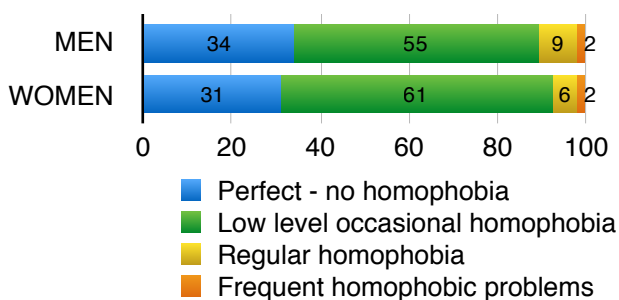
The recent introduction of marriage equality in 2014 in the UK has brought LGBT rights to the forefront of society as well as politics. While there is largely majority support in that country for LGBT equality, there is clearly room for improvement in the workplace experiences of many LGBT people in the UK, based on the findings of this study.

Total sample: n = 2379

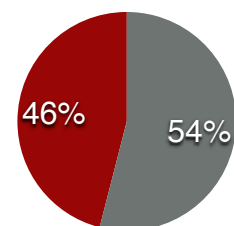
Bi = 240

Trans = 56

Homophobia: Perfect or not?

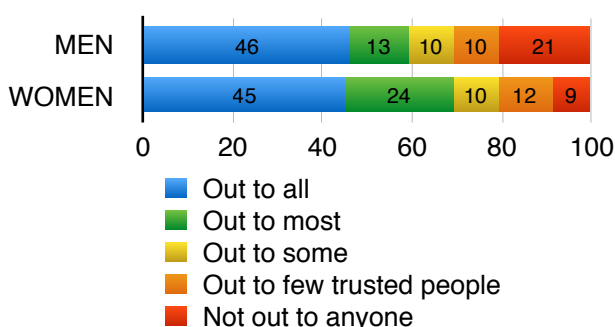


Heard anything homophobic said at work past year?

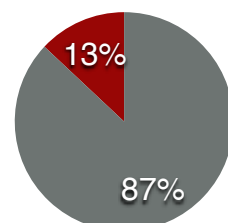


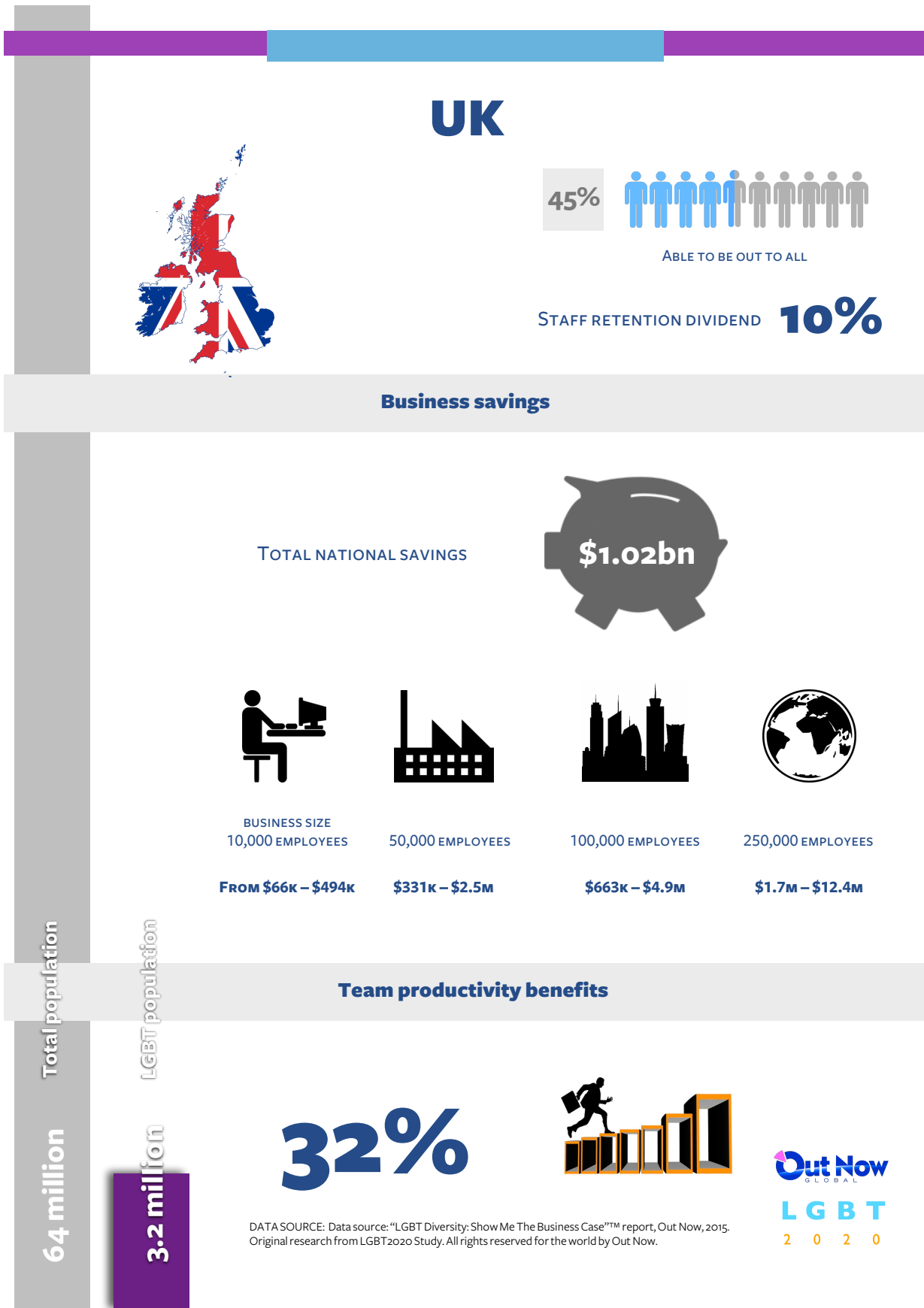
● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year





With 38% of US respondents indicating that they are 'out to all' at work, the number of people who are comfortable to reveal their sexuality in the US has fallen by 6% (from 44%) during the last two years according to Out Now's previous research data (LGBT2020, 2012 sample). This represents a statistically significant and worrying fall, especially given that LGBT workplace diversity has been placed onto the agendas of an increasing number of larger US companies during this same time period.

Total sample: n = 2972

Bi = 267

Trans = 104

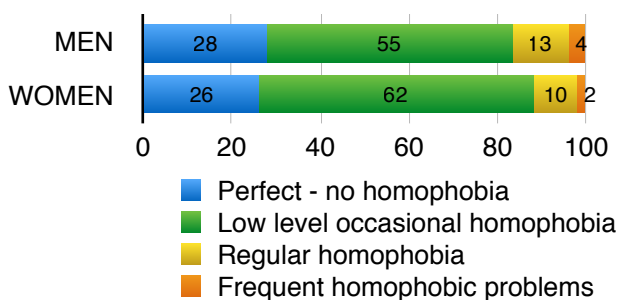
A little over one in four US respondents (27%) indicate that they think their own workplace is perfect, with 'no homophobia', but more than one in six of all men responding (17%) reported that there are 'regular' or 'frequent' homophobic problems in their own workplace.

49% of US respondents indicated that they had heard homophobic things said at work in the last 12 months, with around one in six respondents (16%) saying they personally experienced harassment at work over the last year.

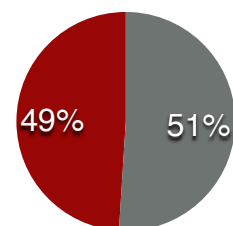
The debate around marriage equality in the US in recent years has brought the topic of LGBT equality to the forefront of American society, which has frequently been pitched as incompatible with some aspects of more conservative Christian religious beliefs.

This may go some way to explaining the lower percentage of respondents in 2014 who are 'out to all' at work compared to countries with more secular societies. Of all countries sampled, the US sees the greatest number of personal comments made by respondents citing religion as a factor causing anti-LGBT problems at work.

Homophobia: Perfect or not?

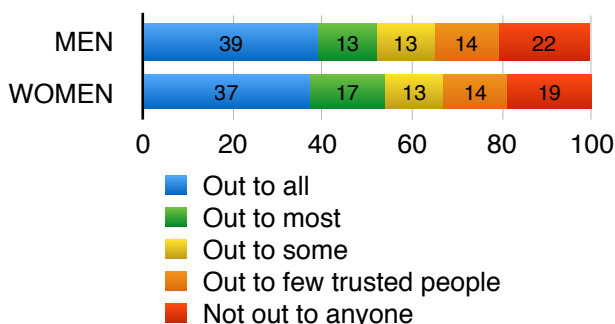


Heard anything homophobic said at work past year?

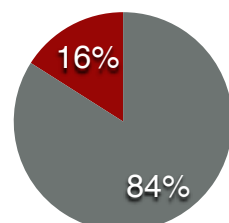


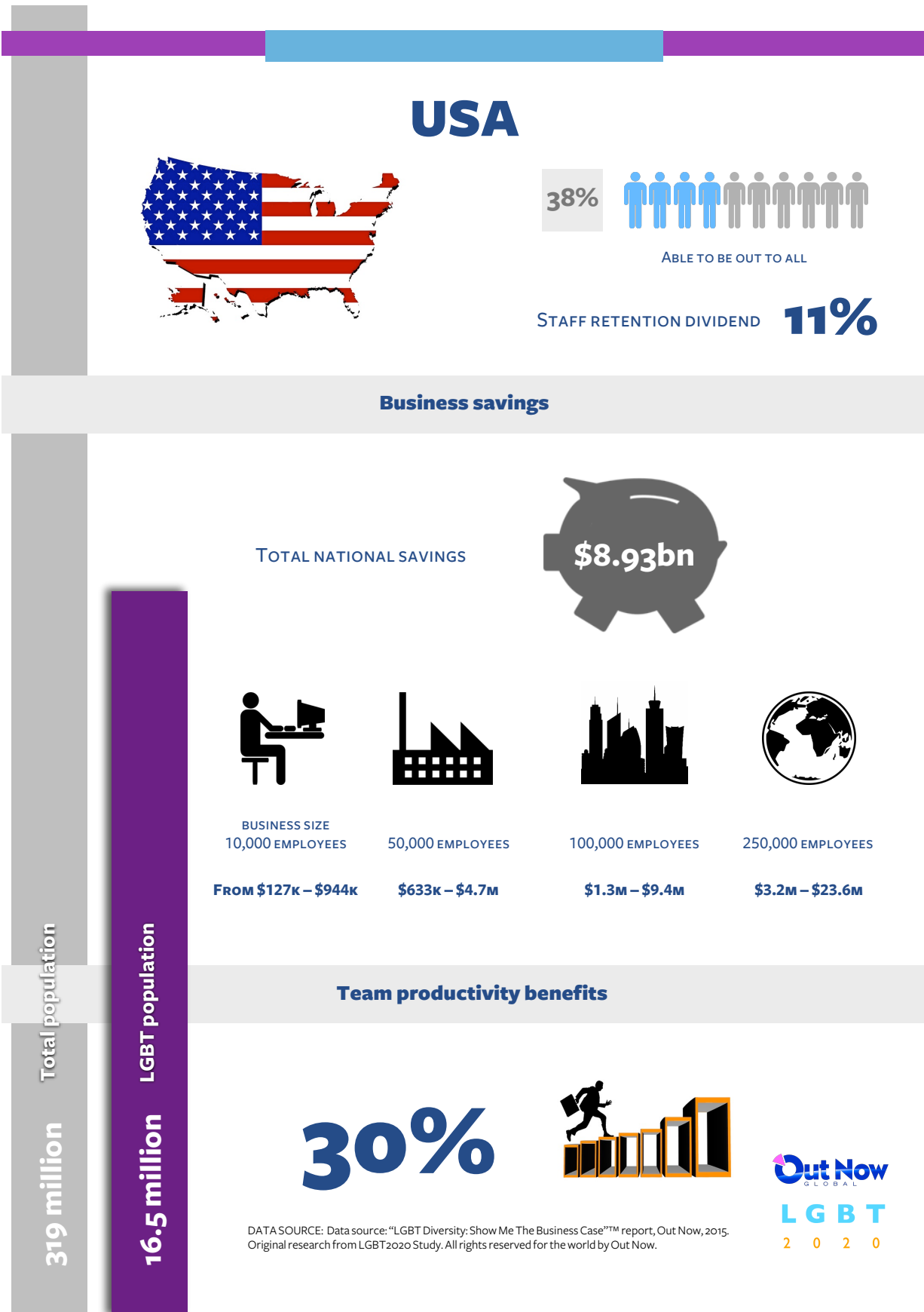
● No
● Yes

Out at work - or not?



Experienced LGBT harassment at work personally past year





APPENDIX 1:

WORKERS' VOICES

About this section

The LGBT2020 study has received more than 100,000 responses to our research since 2010.

On many occasions we invite respondents to share their own experiences by writing in their own words examples that illustrate the impacts of important issues.

In the next ten pages we present ten voices from each of the ten countries presented in this report 'LGBT Diversity: Show Me The Business Case'. For every voice you read, you can be certain there are many thousands more experiencing similar things every day at work.

Text in this Appendix is as written by respondents so may include some spelling errors.

One thing Out Now is always clear on is this: 'LGBT' spells people.

Work is a place most people have to spend considerable amounts of time. Very often being in close proximity with people they might not otherwise come into regular social contact with.

Data is invaluable of course.

The data contained in this report shows the impacts LGBT diversity policies can have to increase productivity, and to save retraining and rehire costs - through retaining more LGBT staff over time.

People's own words can often add meaning and depth to interpreting data so we get to understand the feelings of people experiencing workplace homophobia, transphobia and biphobia at work.

Dreading going into work is not good. Neither is choosing to stay in

the closet as we see in the metrics in this report.

Ideally, what should happen is employers understand that the business imperative that 'underwrites' the implementation of effective LGBT diversity policies is reason enough to provide safe workplaces for LGBT people to bring their whole selves to work.

In addition, we invite employers to consider how they would feel if the comments below were being told to them by their friend, their daughter, their son, their parent, their brother or their own sister.

Workplace issues for LGBT people are not just data points. They are a daily lived experience which impacts greatly on their whole life. It is up to business to do even better as we strive to create better workplaces for all in the 21st century. Better places for people to be.

APPENDIX 1: AUSTRALIA

WORKERS' VOICES



Gay jokes. That's it, but since I have come out, it has improved greatly.

Constant use of derogatory term of 'that's so gay' men calling each other poofs, f**gots or homos in a derogatory manner, strong dislike of women in the workplace (I work in a male dominated industry).

In my previous workplace, four years ago - I experienced extreme workplace bullying, even including threats of violence towards myself and my partner.

A work mate compared gay people to pedophiles and another said 'I don't care if people are gay' ... (shudders) ... 'as long as they act normal'.

Comments about lesbians getting promotions only because of their sexual orientation.

Have been called a f**got and AIDS f**ker by supervisors. Situations are called gay by management.

When management heard I was travelling overseas to marry, they cancelled my leave and tried to stop things proceeding. Have been forced to seek interventions from the equal opportunity commissioner.

Mainly women assuming I want them because I'm a lesbian and I'm a woman. Sometimes I'm told I'm too pretty to be a lesbian or men tell me I just need the right man when I don't hate men I'm just gay.

Very homophobic boss always cracking poofter jokes and put down comments about gays he is a Catholic.

There was a picture of a Gay woman with short hair up on a board and some one had written that she had penis envy and the just did not have the balls to be a man but just wanted to look like one.

About this section

'Workers' Voices' contains write-in text and approximate translations to English (where applicable). Some spelling errors may apply.

It includes some language that some may find coarse but which is reflecting the experiences respondents are reporting on.

APPENDIX 1: **BRAZIL**

WORKERS' VOICES



I work offshore on Oil Rigs. I have been fired during my probation period, I strongly believe due to my homophobic manager but I can't prove it to take any legal procedure.

Fiquei sabendo que algumas pessoas não conversam comigo porque existe uma desconfiança na empresa de que sou homossexual.
I learned that some people do not talk to me because there is a suspicion in the company that I am gay.

Um colega informalmente contou com orgulho que espancou um gay no o final de semana.
A colleague told me informally he was proud to beat up a gay on the weekend.

Em conversas as pessoas designam de forma preconceituosa, tipo 'bicha', 'viado' etc, alguém que é gay ou lésbica...
In conversations people designate with prejudice, like 'f**got', etc, someone who is gay or lesbian ...

Bullying. Homofobia camuflada como brincadeira no trabalho para deixar o ambiente mais agradável.
Bullying. Homophobia camouflaged as little joke at work to make it as pleasant environment.

Que as doenças sexualmente transmissíveis eram causadas e difundidas por homossexuais.
That sexually transmitted diseases are caused and spread by homosexuals.

Uma colega afirmou que sentia nojo em ter que trabalhar com homossexual, foi um caso isolado e criticado, mas sim foi homofobia
A colleague said he felt disgust at having to work with gay people, was an isolated case and criticized, but it was homophobia.

Pessoas religiosas relatando sobre maldicoes em suas familias pelo fato de alguém ser gay.
Religious people reporting on curses in their families by someone actually be gay.

Piadas que acabam se tornando homofóbicas, usando xingamentos de forma como se fosse brincadeira.
Jokes that turn out to be homophobic, using curses so as if it were a joke.

About this section

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APPENDIX 1: CANADA

WORKERS' VOICES



In a discussion about a football game, one quarter back was described as a homo several times. This was in a meeting with over 20 people and it was a department-wide meeting. Nobody said or did anything.

Supervisor admitted to being homophobic. Does not like men or women who are gay.

Jokes like 'suck it up princess' or 'fairy'

Unwillingness to modify health information to make it more inclusive for all patients.

Small gay jokes, 'thats gay', 'this is gay', 'what a fag', butt sex jokes, 'you're so gay'.

Le milieu militaire est de plus en plus ouvert d'esprit meme dans les métiers les plus conservateur comme celui de l'infanterie, il suffit de prouver notre valeur comme tout le monde mais je reconnais que j'ai parfois moins droit a l'erreur que les autres.

The military is becoming more open minded even in the most conservative professions such as infantry, it suffices to prove our worth as everyone but I admit that I sometimes don't correct the errors of others.

Just the usual anti-homosexual joking around. Treating same sex relationships as 'unnatural' and man to man sex as obscene, immoral, against Christian beliefs. One comment that sticks out was a reference to how could a man not be attracted to such a gorgeous set of breasts.

A very senior person in the organisation alluded once in an informal after work event that LGBT persons are inherently depressive people that have mental issues.

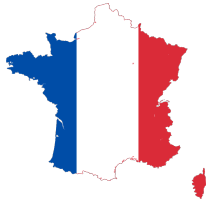
People who are thought to be gay are run out of the company, through various techniques that circumvent legislation prohibiting discrimination. ie: company claims employee is disruptive to work environment, when in fact the only thing disruptive is the fact the employee is gay.

Previous jobs: Asked not to wear wedding ring, coincidentally let go the same evening I refused to take my ring off. Asked to remove pictures from my desk of my partner and I. Occasionally I would find bibles on my desk, when I complained I was told there was nothing that could be done.

About this section

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APPENDIX 1: FRANCE

WORKERS' VOICES

Je travail dans un hôpital et nous avons un jeune gay comme patient. Une chef de clinique a fait quelques 'blagues' homophobes et personne n'a réagit. Même pas moi, tellement j'étais choqué d'entendre quelqu'un de jeune et qui plus est futur médecin faire ce genre de remarques.

I work in a hospital and we had a young gay as a patient. A clinical director has made some 'jokes' homophobic and nobody reacts. Not even me, I was so shocked to hear someone young and moreover future doctor do this kind of remarks.

Des blagues homophobes 'générales' ou contre moi. Pour être plus clair: on m'a demandé plusieurs fois si il y avait une selle sur mon vélo

Homophobic jokes 'general' or against me. To be clear: I was asked several times if there was a saddle on my bike.

Homophobie ordinaire et involontaire dans un contexte de pauses déjeuner propices aux échanges personnels: 'non, je veux dire, un vrai mec'. Quel est le sous-entendu? Un homo n'est pas un 'vrai mec'? Et une femme sans talons, n'est-elle pas une femme...?

Ordinary and unintentional homophobia in lunch breaks context conducive to personal exchanges: 'No, I mean a real man'. What is the implication? A gay is not a 'real man'? And a woman without heels, she is not a woman ...?

Humour insultant et assimilation sans que ça soit ciblé sur une personne homosexuelle, les malheureusement 'traditionnels' tapettes, fiottes, etc sont monnaies courantes dans un milieu machiste tel que celui de l'automobile.

Insulting humor and assimilation without it is targeted on a homosexual person, unfortunately the 'traditional' fags, pussies, etc are common currency in a macho environment such as that of the automobile.

Membres de la direction ayant des convictions personnels contre la mariage pour tous.. mais souhaitant les partager avec le plus grand monde, quitte à faire circuler des tracts...

Officers with personal convictions against marriage for all .. but want to share them with the world's largest, even circulate leaflets ...

Ces derniers mois avec les débats autour du mariage pour tous (et de l'adoption), le sujet revenait souvent dans les conversations et le personnel opposé au projet ne se cachait pas pour dire ce qu'il pensait et régulièrement les propos allaient très loin; parfois, ils étaient même violents (les propos).

In recent months with the debates of marriage for all (and adoption), the subject often came up in conversations and staff opposed the project was not hiding to say what he thought and regularly about going too far ; sometimes they were even violent (the words).

Horreur sur le Mariage pour Tous et la possibilité d'avoir des enfants pour les homos

Horror on Marriage for All and the possibility of having children for gays

Je travaille chez moi sur mon ordinateur donc je n'ai pas de collègue. Mes voisins et autres personnes dans la rue de ma ville m'ont témoigné leur Transphobie. Mais comme je m'en fiche et que je ne leur demande pas leur avis, je les ai remis à leur place et depuis j'ai la paix.

I work at home on my computer so I do not have a colleague. My neighbors and other people in the streets of my city have shown me their Transphobia. But as I do not care and I do not ask them their opinion, I have put them in their place, and since then I have peace.

Je travail en milieux scolaire où les insultes homophobes sont quotidiennes et banalisées

I work in a school environment where homophobic insults are everyday and commonplace.

Par rapport au mariage pour tous, une de mes collègues racontait qu'elle avait expliqué à sa fille que le mariage entre deux personnes de même sexe était contre nature.

In relation to marriage for all, one of my colleagues said that she had told her daughter that marriage between two people of the same sex was against nature.

APPENDIX 1: GERMANY

WORKERS' VOICES



Das Wort Schwul wird nach wie vor als Abwertung benutzt
The word gay is still used as a devaluation

Die üblichen Geschichten wie 'ich habe nichts gegen Homosexuelle, aber
Duschen würde ich nicht mit denen etc.
The usual stories like 'I have nothing against homosexuals, but I would not use those showers etc.

Das outing von Fußballer Thomas Hitzlsperger wurde kritisiert und belächelt.
The outing of footballer Thomas Hitzlsperger was criticized and ridiculed.

Ein Kollege wurde darauf hingewiesen sich in der Nähe des Arbeitsplatzes nicht
zu küssen.
A colleague was told not to kiss near the workplace.

Schülerinnen und Schüler benutzen das Wort 'Schwul' oder 'Schwuchtel' im
allgemeinen Sprachgebrauch für Beleidigungen.
Students use the word 'gay' or 'fgot' in common usage for insults.**

'Schwul' ist eine beliebtes, negative Attribut in der Umgangssprache: 'schwules'
schreiben, 'schwule' Verträge. 'Schwuler' Mist etc...
'Gay' is a popular, negative attribute in the vernacular: 'gay' write 'gay' contracts. 'Fgot' crap etc ...**

Beim morgendlichen gemeinsamen Kaffeetrinken im Team ärgerte sich ein
Vorgesetzter über verschiedene Mitarbeiter aus anderen Abteilungen; einen
davon nannte er mehrmals 'Schwuchtel'.
In the morning coffee we were together as a team, and a supervisor was angry with various employees from other departments; one of them he called 'fgot' several times.**

Ich arbeite mit jugendlichen zusammen und es kommt öfter vor das sie
homophob reden und ich habe selber erlebt, dass mir ein junger erwachsener
damit gedroht hat; dafür zu sorgen das ich aufgrund meiner sexuellen
Neigung meinen job verliere.

I work with young people together and it often happens that they are talking about homophobic and I have personally experienced that myself a young adult has threatened me to ensure that I will lose my job because of my sexual orientation.

Durch Witze, die von Kunden kommen.
By jokes that come from customers.

über 'Homohe' wird scherzhaft geredet unter älteren Kollegen (bei denen ich
nicht geoutet bin)
'Gay marriage' is spoken about in jest among my older colleagues. I am not out at work.

About this section

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It includes some language that some may find coarse but which is reflecting the experiences respondents are reporting on.

APPENDIX 1: INDIA

WORKERS' VOICES



It's complex at work. There is a definite strain of homophobia but since I am not openly out at work it doesn't affect me. But I am sure I'd be the subject of ridicule and indirect discrimination if I do come out.

Work for an company headquartered in Europe. While the European office is as cosmopolitan as it gets with no homophobia, the India office is exactly the opposite. Gay jokes, objectification of women all are a norm.

Disparaging comments about gay relationships, support for continuance of Section 377, mocking at any suggestion of a man loving a man

I am an Indian and here Society sucks. I cant be out. I am not a slut or sex seeker. I fear so much that cant ever risk to tell about my sexuality. I cant trust Gays around. Cant have a relation and unable to find a genuine gay friend. I would need to get marry to a girl and have kids.

Gay employee' can win the award cause he doesn't have a family to go back to hence afford working long hours.

My Lead cracked a gay joke recently and was also engaged in a conversation with another colleague that how LGBT people are destroying the culture of India and he expressed genuine happiness when SC brought back section 377.

Water cooler jokes, people (those that know my orientation) stating in my presence that they are grossed out, thinking of two men together, alienation from group chats, people disclosing my orientation over lunch to others, people asking me why I make an issue of being gay, people saying they'd love to come for the Pride, but none turning up, when I ask questions on the Sexual Harassment policy, it is taken as If I have an LGBT agenda and two leaders came to discuss it with me.

Majority of my colleagues have described gays as diseased people.

As I work as a government employee, I have heard people saying that I got the job because I had agreed for sexual favor with someone who could get me through. This had really hurt me a lot.

I came out at work to my whole team this year, thanks to my CIO who is a huge ally of the LGBT movement in my firm. Unfortunately, because of the Dec 2013 Supreme Court of India ruling criminalizing gay sex, my company is not launching the India chapter of their Pride Employee Resource Group, even though the CEO of India supports it (we are a multinational company with thriving LGBT Pride chapters in south east Asia).

About this section

'Workers' Voices' contains write-in text and approximate translations to English (where applicable). Some spelling errors may apply.

It includes some language that some may find coarse but which is reflecting the experiences respondents are reporting on.

APPENDIX 1: ITALY

WORKERS' VOICES



Frasi del tipo i gay mi fanno schifo.
I hear phrases like 'gay people make me sick'.

Si pensa che un omosessuale non possa aver figli per vari motivi.
You think that a homosexual can not have children for various reasons.

La maggior parte delle persone attribuiscono l'omosessualità ad una condizione patologica causata sempre e cmq da traumi infantili (ebbene si, sono tutti psicanalisti).
Most people attribute homosexuality to a pathological condition caused by childhood trauma and everyway always (yes, they are all psychoanalysts).

Gran parte degli uomini fanno battute di cattivo gusto x la mia eccessiva femminilità (non sono proprio il prototipo di lesbica mascolinità per cui secondo loro non ho trovato 'il pane giusto'.... patetici!)
Most men make jokes in bad taste x my excessive femininity (not just the prototype lesbian masculinity) that they think I have not found 'the right person' pathetic!

Non sono normale brucerò all'inferno
'Not normal' and 'burn to hell'.

Ci sono state battute da parte di alcune clienti.
There have been attacks by some customers.

Pregiudizi battute continue ed offensive...allusioni che passano nel volgare nella intimo della sfera privata....si prendono confidenze anche non permesse...
Prejudices continuous jokes and offensive innuendo ... that pass into the vernacular in the intimate privacy take confidences also not permitted. ...

Usano parole come: ricchione, frocio, checca; In modo offensivo verso persone non omosessuali. Anche se con me non hanno nessun tipo di problema.
They use words like fgot, fag; So offensive to gay people. Although with me I have not had any problem.**

About this section

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Sto lavorando come un ufficiale pubblico in ministero degli esteri, opinioni negative di alcuni colleghi riguardo al mondo LGBT in generale
I'm working as a public official in the ministry of Foreign Affairs, there are negative views of some colleagues about the LGBT world in general.

Nulla di esplicitamente diretto a me ma, diverse battute e considerazioni omofobiche su persone omosessuali e sui loro diritti
Nothing explicitly directed at me, but I hear different jokes and homophobic remarks about homosexuals and their rights.



APPENDIX 1: MEXICO

WORKERS' VOICES

En general el ambiente es machista y homofóbico al tener yo un puesto directivo. No lo sufro pero se de casos en otras áreas donde se burlan de gays o lesbianas al grado que una amiga se cambió de trabajo.
Overall the atmosphere is sexist and homophobic when having a management position. I did not suffer but know of cases in other areas where they make fun of gays and lesbians -to the degree that a friend is having to change jobs.

Comentarios despectivos sobre compañeros que están abiertamente fuera del closet, o que no están fuera del closet pero que son 'obvios'.
Disparaging remarks about colleagues who are openly out of the closet, or they are not out of the closet but are 'obvious'.

Uno de los jefes me sacó de la oficina a la entrada por ser gay.
One of the bosses took me out of the office to sit away from the entrance, for being gay.

Comentarios conservadores, miedo, no saber cómo referirse a mí y/o a mi pareja.
Comments conservative, fear, not knowing how to relate to me and/or my partner.

Sienten que por el simple hecho de ser mujeres, me siento atraída a ellas.
They feel that just because they are women, I will feel attracted to them.

Se burlan de todo lo que es diferente y no heteronormativo (ambiente de ingeniería).
They make fun of everything that is different and not heteronormative (engineering environment).

Un director de Banca Corporativa dice comentarios homofóbicos enfrente de los clientes o hace burlas a mi persona en cuanto a que soy gay, la intención es hacer una broma pero lo que realmente hace es atacar con sus comentarios.
A director of Corporate Banking says homophobic comments in front of customers or makes teasing remarks that I'm gay, the intention is to make a joke but what it really does is attack me with his comments.

Se ha discutido el 'peligro' de contratar personal con amaneramientos y el efecto que tendría entre la clientela.
Discussed the 'danger' to recruit staff with mannerisms and the effect it would have among the clientele.

Se hacen chistes de mal gusto acerca de los homosexuales, también discriminan a personas por su forma de vestir o de hablar y sea por ser amanerados o muy 'machorras'.
Tasteless jokes about homosexuals are made, also discriminate against people by the way they dress or speak either for being effeminate or too 'butch'.

En una reunión de trabajo llevaron a un expositor que en su plática incluyó un apartado sobre 'sanar la homosexualidad' recomendando el retrogrado libro de Richard Cohen. Eso me pareció totalmente homofóbico.
I am a teacher and in my previous job I was fired because of homophobia. I understand it was a Christian school and the position was conservative but I was dismissed unfairly and it was clear that

APPENDIX 1: **UK**

WORKERS' VOICES



People like you shouldn't have children ... Because it's not natural.

You're not in a proper marriage.

Do you take medicine for homosexuality?

Watch your a*s with him around.

I wouldn't let my daughter use a bathroom if that [a transgender woman] was in there, I don't want it waving its penis in her face.

Why do they need to get married?

You should be told if someone is LGBT at work.

You only turn gay if you've had a f*cked up childhood.

She only says she's bisexual because she's just trying to get attention.

I demand to know if you have got AIDS.

About this section

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APPENDIX 1: **USA**

WORKERS' VOICES



I can't add your wife to your health insurance because your marriage isn't 'real'.

It's just a decision, I don't support the choice to be unnatural. Just be straight like the rest of us.

You are not angry enough to be a real lesbian: you're not like the other girl who works here.

I would just like to round up the people suffering like you and shoot them all, or to torture you -- just to make fun of you.

People like you can't be a Christian, you're a sinner but I love you despite your choices.

Now you and that other f*g can add your boyfriends to the work medical plans, that way when you get AIDS you will all be covered.

You will burn down the gates of hell for being gay.

I don't like those kind of people with 'scary' sexual preferences.

Please, I don't want to hear the details of your lifestyle.

That patient is gay and HIV+, why isn't he in some kind of isolation?

About this section

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APPENDIX 2:

METHODOLOGY

The LGBT2020 study evolved in 2010 as an online extension of an LGBT research program commenced by Out Now in 1992 (as our founding company, Significant Others).

Since 2010 we have sampled more than 100,000 respondents online - living in 24 countries, using twelve languages.

Three main sample periods have been undertaken, the most recent of which was in 2014.

Respondents answer identical question sets during a given sampling period. We utilize a broad range of means to obtain samples, including: partnering with leading media in the countries we work into, PR into mainstream and LGBT media about LGBT2020 research, social media channels, sharing survey links via past respondents and networking with LGBT sporting, cultural and social groups.

Samples are self-selecting. Where necessary, samples have been weighted to reflect national average age and gender distributions in each country.

In 2015 new sections of the study will focus on transphobia and biphobia in greater depth, primarily as a result of issues revealed by research to date.

This report focuses on the potential business benefits able to be achieved when concentrating on moving people 'not out to anyone' to becoming 'out to all'.

Additional data notes

What currently goes on in the name of LGBT diversity is too often a 'beauty contest' - as existing Workplace Indexes can tend to be - where those that think they 'look good already' jockey to be judged 'the best', when in fact the most important people in the issue so far as Out Now is concerned - LGBT workers, who in most countries find it problematic to be out to all at work - are not prioritised sufficiently within that frame.

This new LGBT2020 report - 'LGBT Diversity: Show Me The Business Case' is very different, as it is sourced from data collected from more than 100,000 respondents over four years and reports on over 12,000 of these who have told us what it is like - day-to-day - to be out (or closeted) as an LGBT person in their own workplaces.

The research shows - for example - that employee resource groups (ERGs) are significant to assist workplace growth and change but are not sufficient, as they are currently woefully under-utilised, with a strong majority of respondents choosing not to engage with them at all - if their workplace even has an ERG - for varying reasons.

We believe the future for better LGBT diversity policy that drives effective results - for both business and for workers - is in large-scale measuring of LGBT workers' key concerns. That is what Out Now is doing globally with our LGBT2020 study and this constitutes the essence of the new report: 'LGBT Diversity: Show Me The Business Case'.

APPENDIX 2:

DATA NOTES

We know that what ultimately motivates corporations is profit - so we use the workers' situations and response data to prove that when a company creates workplaces where people feel fully able to come out and be themselves at work they can expect to benefit substantially.

In major economies they can expect average increases of 15%-30% in productivity potential (respondents reporting they 'feel valued as a member of my workplace team') from those workers who become 'out to all' - and they can also expect to see, on average, a 5%-22% increased retention of previously closeted workers, who had been planning to leave.

For the average company, the savings that arise from these two factors are substantial from retaining experience and talent in their workforces and from resulting productivity improvements.

Out Now has created this new report from our LGBT2020 data set for two primary reasons.

i) Nobody else seems to be focusing on better understanding the day-to-day impacts (and failings) of LGBT workplace diversity policies for those people we think should matter most: namely, LGBT employees themselves.

LGBT diversity policies keep getting better (on paper) but data results are standing still, or sometimes going backwards, such as in the US where there has been a 6% fall from 2012 to 2014 in respondents reporting they are 'out to all' at work.

ii) At so many conferences - and in media reporting - there are vague claims made about the importance of the 'Business Case' that underpins diversity, without any hard numbers being attached. By analysing the decrease in likelihood of some previously closeted workers leaving analyzed in terms of average staff replacement costs, we are able to provide a viable financial savings measure to business resulting from best-practice diversity policy implementation.

APPENDIX 2:

DATA NOTES

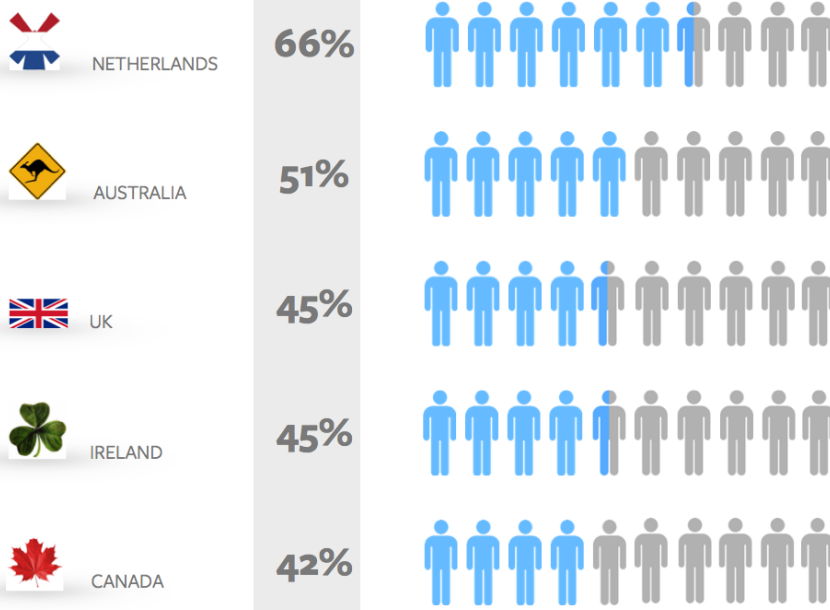
Out Now's LGBT2020 research has to date sampled respondents living in 24 countries utilizing twelve languages.

This infographic shows the Top 5 countries where workers feel able to be out with all colleagues at work.

As was remarked on earlier, it is tempting to suggest the Netherlands might in this graphic be considered the 'poster child' for best practices, however we note that anecdotally several Scandinavian countries such as Sweden and Denmark are said to have even greater levels of support for LGBT staff. The LGBT2020 study is set to expand into these countries in 2016 to measure this to see what more can be learnt.

In the meantime, consider this: while two out of three Dutch workers will be able to be out to all their colleagues today at work - one in three cannot.

LGBT: Able to be out with everyone at work



DATA SOURCE: Data source: "LGBT Diversity: Show Me The Business Case"™ report, Out Now, 2015. Top 5 countries from all countries surveyed, 2012-2014, in the LGBT2020 global research initiative.

APPENDIX 2:

SURVEY QUESTIONS

Q9B: If you are working at the moment, how out are you as an LGBT person at work? (Choose the one option that most closely matches your situation)

- I am not out to anyone at work
- I am only out to just a very few close and trusted people at work
- I am out to some of the people I work with
- I am out to most people at work
- I am out to everyone at work

Q9C: If you are working at the moment, does your work have an LGBT employee staff network group?

- No there is no LGBT group at my work
- Yes - but I don't really participate in it
- Yes - and I am an active member

Q10: If you are working at the moment, please indicate whether you agree or disagree with each of the following statements. Your responses are completely confidential.

- Strongly agree
- Slightly agree
- Neither agree nor disagree
- Slightly disagree
- Strongly disagree

- This is not a very nice place to work
- This is a great place to work
- I'm supported professionally, but I don't feel supported as an LGBT individual at work
- I don't really feel that I fit in that well in this workplace
- I'm thinking of leaving this job in the future
- I like my job and have no plans to leave
- This is a workplace entirely free of homophobia
- I sense a level of homophobia in my workplace but it DOES NOT affect how I feel about work
- I sense a level of homophobia in my workplace and it DOES affect how I feel at work
- If I come out at work I think it might have an effect my prospects for future promotions
- I feel my work colleagues treat me with respect as a productive and valuable member of the team

APPENDIX 2:

SURVEY QUESTIONS

Q11: If you are working at the moment, have you seen or heard anything at work in the last year that you think is homophobic?

Yes
No

(Optional) Would you like to share some details? (WRITE-IN-BOX)

Q12: Please select one option that best applies for you:

The situation for LGBT people at my place of work is perfect - zero homophobia
There is a low level of occasional homophobic language or attitudes at my work
I regularly see or hear homophobic language or attitudes at my work
There are frequent homophobic problems at my work

Q13: If you were looking for a new job, how important would it be that there was a supportive environment for LGBT people?

Very important, I'd actively prefer a company with policies that specifically recognise and support LGBT staff over one that didn't
Quite important, a supportive work environment is important, but other staff policies are just as important
A bit important, LGBT equality policies would be nice but it isn't a deal breaker for me
Not important at all



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DATA SOURCE: Out Now Global LGBT2020 Study

The title of this report is correctly cited as:

‘LGBT Diversity: Show Me The Business Case’.

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