



#LGBT2030

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BRAZIL

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Relatório em português

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Brazil LGBT2030 Report

About this survey

TITLE:

'Brazil 2017 Report — Out Now Global LGBT2030 Study'

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AUTHOR:

Ian Johnson, Chief Executive Officer, Out Now

DOWNLOAD LINK:

www.OutNow.LGBT

This LGBT (lesbian, gay, bisexual, transgender) market survey is the first of a round of global LGBT2030 research taking place during 2017 and 2018.

The LGBT2030 study is the world's largest global research initiative which has, since 2010, analyzed the responses of more than 100,000 LGBT people living in more than 20 countries across the world. Sampling was undertaken during June and July 2017. Sample size is 4018 respondents. In most cases, totals sum to 100%. Differences can result from rounding within questions or if multiple response options allowed.

About Out Now

For over 25 years, leading organizations have relied on Out Now to deliver tailored specialist services to advance LGBT business development — whether focusing on LGBT people as customers, citizens or employees.

We deliver leading-edge outcomes for clients in diverse areas, including: LGBT research insights, education and training of teams, creative consumer communications, media activations, brand strategy, tactical LGBT marketing guidance and employee engagement strategies.

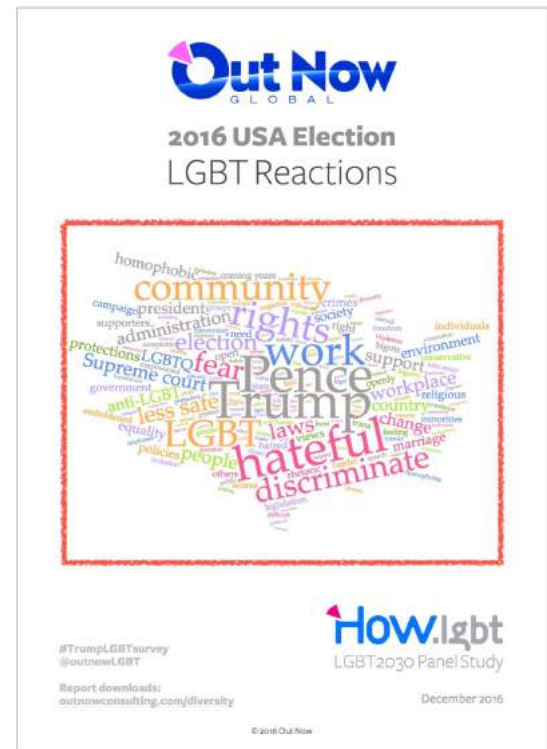
Our work is widely recognised globally.

Out Now is the only LGBT specialist advisory firm recognised in the Global Diversity List, supported by *The Economist*.



LGBT data? Here.

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LGBT LEADERSHIP



Out Now is the global LGBT diversity business specialist. For over 25 years our clients have reaped the results of our Next Level Thinking to take their campaigns and strategies to market-leadership positions, through improving the lives of LGBT people around the world. We always deliver 'what's next' in LGBT business development for our clients by consistently focusing on our vision, namely that 'LGBT spells *people*'.

Research

"Out Now's experience in delivering research into this market, and analysing the data and outcomes, has given us fantastic insight and is pivotal in our market-leading approach."

Val Thorpe
Diversity & Inclusion Manager
Lloyds Banking Group



Communications

"Out Now's output has proved to be of a very high standard; executions have been on time and within budgets and day-to-day communications have been exemplary."

Jeanette Schuchmann
Deputy Director
German National Tourist Office



Strategy

"Your insights and proactive help with the development of the programme and launch logistics have been invaluable."

Lucinda Khun
New Products Manager
Merck Sharp & Dohme



Training

"With the advantages of this innovative learning programme, staff are able to deliver superior service to our lesbian and gay visitors."

Ralf Ostendorf
Sales Director
Berlin Tourismus & Kongress



BUILDING BETTER

LGBT consumer insights
Business development
Outcomes for LGBT people

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Executive Summary

Brazil is home to one of the world's largest and most dynamic LGBT communities.

In this reporting, we make clear that these findings cannot represent the experiences of every individual from the more than 9.5 million Brazilian adults who are LGBT. Indeed, one in three people in Brazil do not live in a household with easy internet access. Having said this, our large-scale sample (more than 4,000 respondents), multiple data sources and weighted sample approach, yields a report which is highly informative.

It is essential in reading the tables in this report to remember that, as Out Now's CEO says frequently: "averages mask diversity". One of the key hallmarks of the global LGBT communities is their breadth of diversity. LGBT people are found

in all parts of society — and an individual LGBT person's experiences can be expected to be unique to that individual.

This report reveals a diverse breadth of experiences in the Brazil LGBT community.

Key data highlights include:

- more than half of all respondents (53%) indicate they are currently in a relationship
- most respondents (73%) would like to enter into a marriage/ civil union at some time in their lives
- more than half of all respondents (55%) would like to become parents
- only a little over one third of respondents (36%) feel able to

- be openly LGBT with all colleagues in the workplace
- almost three in every four respondents (73%) witnessed homophobia in the workplace during the past year
- the LGBT community is very connected: more than half of all respondents (51%) spend at least 12 hours every day online
- one in three respondents (33%) consider LGBT cultural life/ events an important factor when choosing a leisure travel destination
- respondents exhibit strong consumer spending levels and purchase intentions across a broad range of consumer categories.

Data was collected online during June and July 2017.

Methodology notes

Out Now (ON) has worked consistently to improve the level of insights able to be derived from research into the characteristics of lesbian, gay, bisexual and transgender (LGBT) people.

This work began in Australia in 1992, has continued since then and expanded to include research in more than 20 countries globally - across Asia, North America, Latin America and Europe.

ON's research is recognised by leading corporations who rely on our insights to guide their LGBT inclusion and marketing approaches. We are also named in the 'Top 10 Diversity Consultants' of the Global Diversity List, supported by *The Economist*.

About this research

The data in this report must not be reported as representing a 'census' of any LGBT market for plain reasons we know of, including difficulties in people feeling able to come out (although many people do feel happy filling in ON surveys anonymously). Nor can an online survey achieve census-status as it is not compulsory and, although internet penetration runs higher now in Brazil than previously (approx 65%), one in three Brazilian LGBT people are currently not accessible online and reporting must make this fact clear.

The LGBT2030 study comprises the best-available global LGBT market data as at 2017/2018.

The methodology in this sample employed as many different sources as possible when compiling the responses.

The sample comprises a total of 4018 respondents.

The top sources of respondents (ranked) in this sample are as follows:

- Hornet
- Brazil Research Panel - Out Now
- Saw it on Facebook
- Referral by friends
- SuperPride
- Guia Gay
- Other

The sampling methods employed succeeded in reaching a broad and diverse range of LGBT Brazilians.

The report data is weighted to reflect Brazil demographic data including the following weight distribution:

49.5% men, 49.5% women and 1% intersex respondents.

Welcome

Out Now works at better understanding and delivering ways to understand and meet the needs of LGBT people. The firm was established in Australia in 1992 and is now based in the Netherlands, working in more than two dozen countries across the world.

RESEARCHER:

“For more than a quarter century, Out Now has worked at doing one key thing: better understanding and meeting the needs of LGBT people. We do this in many ways in many countries across the world. What is important to us is *people*. This is expressed most clearly in our corporate mantra: ‘LGBT spells people’. We work in a lot of different ways to help understand how the needs of LGBT people — as employees, as customers and as members of their societies — can be better understood and met. Meeting these needs is what drives us. We focus on constantly improving our work. Every year we track and build on progress of years past. I am so pleased we commence the new 2017/18 round of global LGBT2030 research in Brazil — an important country in the region and the world. The study findings reveal a great deal of new insights into the experiences lived every day by LGBT people in Brazil and I want to thank the more than 4,000 LGBT Brazilians who shared their information with us. I also want to thank our sponsors — Hornet and Switzerland Tourism — for making the new research possible. It is through our sponsors’ generous and much appreciated support we are able to bring this new research to the world to help us all better understand the many different aspects of being LGBT and Brazilian in 2017.”



Ian Johnson
Chief Executive Officer, Out Now

Commentary

There is no such thing as an LGBT census. Too many factors affect the likelihood of LGBT people feeling able to be out with everyone, including in this market research. Having said that, we are pleased that people who report being secretive about their sexual orientation or gender identity in their daily lives did choose to complete the LGBT2030 online survey in Brazil. To assist in interpreting these findings, we have been privileged to benefit from the views of some leading economic specialists. Their comments appear below.

DIRECTOR, WORLD BANK, COMMENT:

“LGBTI people enjoy growing social acceptance and financial and market clout in some countries, even while anti-LGBTI discrimination and violence continue in others. Little is known about the diverse economic and social conditions, contributions and concerns of LGBTI people around the world.

More and better data are essential to raise awareness, underpin tailored public policies and programs, and inform private investment and business practices, to promote equal opportunities and the full economic and social participation of LGBTI people in their communities.

Out Now's LGBT2030 research initiative is innovative in combining commercial consumer and public opinion and attitude survey work. Along with academic, policy, and advocacy research, I believe, such work can help foster the inclusion and improve the lives of LGBTI people, and ultimately contribute to building better societies, for all people, everywhere.”

Ulrich Zachau
Director, World Bank, Bangkok

Commentary

CHAMBER OF COMMERCE, COMMENT:



“The LGBT community has become a visible and active part of societies around the world - and Brazil is no exception. We are experiencing a growing recognition that LGBT Brazilians contribute to the economy and culture at all levels. The Brazilian LGBT Chamber of Commerce and Tourism, an entity dedicated to promoting entrepreneurship, employability and economic development for the LGBT community and business in Brazil, recognises the importance of the data revealed by the new Out Now survey. The LGBT2030 Global Report sheds new light on how the immense LGBT population consumes, thinks, decides and faces different problems. For the first time, a survey deals with the LGBT segment in Brazil in a reliable and realistic way, addressing issues such as discrimination in the workplace, formation of families and how this group earns and spends its money. We can all learn a lot from this report. We are convinced that the best results emerge through better understanding, and it can benefit the market and the entire Brazilian society. It would not be overstating the situation to say that access to these new data can even accelerate our social and economic progress.”

Ricardo Gomes

President of the Brazilian LGBT Chamber of Commerce and Tourism

Sponsor messages

Out Now thanks our sponsors, whose support makes the new 2017/18 LGBT2030 Brazil Study possible.

SPONSOR COMMENTS:



“The growing interest in the LGBT segment did not find any counterpart in data that could corroborate the importance of these consumers in Brazil. There was also a lack of consistent information about the experiences of these citizens. With access to reliable data, provided for the first time on a large scale in the country by the Out Now LGBT2030 Brazil Survey, we can finally know more precisely who we are, what are the demands and the best way to reach the Brazilian gay audience.”



André Fischer
Country Manager, Brazil, Hornet



“Switzerland Tourism has long been proud of our work to welcome our LGBT guests. We appreciate and respect greatly all those who choose to visit us to discover what makes so many people love telling others about their first time visiting our beautiful country. It is our pleasure to be able to support this global LGBT2030 research initiative by Out Now, to help us all better understand how to meet the needs of LGBT people, wherever they live in the world. We know there is still so much work to be done in this important area to make all feel equally valued around the world, so we see our support of this project as one way we can help to advance respect for LGBT people, wherever they may live.”



Urs Eberhard
Head of Markets, Switzerland Tourism
#inlovewithSwitzerland



2
BILLION
monthly ad impressions



2.6
MILLION
monthly actives



1.6
MILLION
places visited per day



7
number of daily logins per user



42
MILLION
daily messages sent

25 MILLION
users

250 MILLION
messages sent weekly



HORNET

WHERE GUYS CONNECT

Hornet redefines what it means for gay men to connect online. By integrating robust, social profiles with original, thought-provoking content, Hornet's superior mobile platform enables gay men to engage with each other in multiple levels.

How large is Brazil's LGBT market?

Yankelovich MONITOR research (1993) combined with Out Now research undertaken since 1992 provides useful calculations as to total LGBT numbers in Brazil.

This approach has the advantage of being both conservative as well as robust — yielding a total of at least 6% of all BR adult people who can be reasonably expected to be LGBT.

On this basis, we measure Brazil's LGBT communities as comprising just over 9.5 million adults within the total Brazil population.

In this report, for calculations involving consumer expenditures

and product quantities, we have discounted this population by 40% — to allow for a minimum 60% expected internet penetration in 2017 (source: ITU - International Telecommunications Union).

This implies a total of 5.7 million people who comprise the total LGBT market (internet reachable) for the purposes of analysis in this report.

We apply average expenditure figures across all LGBT respondents (weighted) and in calculating the total annual LGBT spend figures we use the 5.7 million figure (ie 5,770,992) as the multiplier to

calculate estimated total spend and purchase data.

9.5 million
Brazilians are LGBT

5.7 million
are internet-reachable

Total market value

Applying Yankelovich and Out Now analysis to the total adult population of Brazil, 9.5 million Brazilians can be expected to comprise the LGBT community. Of these, at least 5.7 million are currently reachable by internet.

These two benchmarks allow us to attribute a proportionate share of the total value of Brazil's annual PPP GDP income per capita (being USD\$14,810 annually, World Bank 2016 data) to each group.

That yields a total annual income of USD\$84.7 billion (R\$ 266,5 billion) for the 5.7 million internet 'reachables'.

Applying that same World Bank 2016 average income figure across the total LGBT Brazil adult population yields total annual income of USD\$141 billion (R\$ 444,2 billion).

It is essential to acknowledge that poverty impacts on LGBT people as it can on any members of a society LGBT Brazilians and it is incorrect to think all people earn at or above an average income estimate.

R\$ 444,2 billion
annual PPP GDP income total LGBT

Sources: World Bank PPP. Out Now, Yankelovich

USD\$141 billion
annual PPP GDP income total LGBT

Sources:
World Bank PPP
Out Now
Yankelovich

Shopping (1/2)

We do not contend in this report that Brazil's LGBT shoppers are any more or less likely than the average to earn and spend.

However, the sheer scale of the LGBT market opportunity makes the total consumer spend rather interesting in many consumer categories.

Here are some examples, showing the average annual spend by the 5.7 million LGBT adults in Brazil who we include in our internet-reachable calculations. Data calculated from average reported respondent spend.

ANNUAL SPEND:

Clothes / Vestuário
R\$ 9,5 billion
USD\$3.0 billion

Designer brand underwear /
Roupas íntimas de grife
R\$ 1,75 billion
USD\$556 million

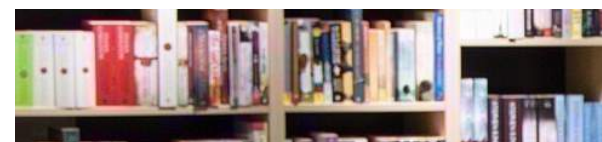
Footwear / Calçados
R\$ 5,5 billion
USD\$1.8 billion

Concert, cinema, theater tickets
/ Entradas para concertos,
cinema, teatro
R\$ 3,5 billion
USD\$1.1 billion

Music/video Downloads /
Baixar música/vídeo
R\$ 783 million
USD\$249 million

Books / Livros
R\$ 2,8 billion
USD\$888 million

DVDs / DVDs
R\$ 503 million
USD\$160 million



Shopping (2/2)



Annual spend 5.7 million LGBT adults.

Magazines / Revistas

R\$ 469 million

USD\$149 million

Pet Food and Accessories /
Alimentação e acessórios para animais
de estimação

R\$ 4,0 billion

USD\$1.3 billion

Gasoline / Gasolina

R\$ 6,2 billion

USD\$2.0 billion

Other car expenses (- insurance,
repairs etc) / Outras despesas com
automóvel (seguro, consertos, etc.)

R\$ 6,5 billion

USD\$2.1 billion

Baby/toddler products
(- eg baby food, clothing,
strollers, car seats etc) / Produtos
infantis/para bebês (por ex., comida,

roupas, carrinhos de bebê, cadeirinhas
para automóvel, etc.)

R\$ 961 million

USD\$306 million

School children's clothing, footwear /
Vestuário e calçados para crianças em
idade escolar

R\$ 1,2 billion

USD\$367 million

Other child-related expenses /
Outras despesas com crianças

R\$ 1,7 billion

USD\$549 million

Leisure trips / Viagens de lazer

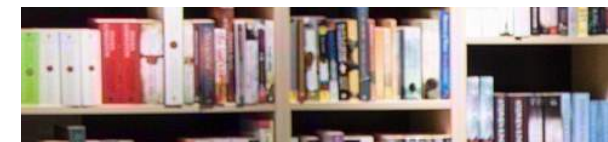
R\$ 21,1 billion

USD\$6.7 billion

Business trips / Viagens a trabalho

R\$ 6,3 billion

USD\$2.0 billion



Shopping — Individual annual spend

Average annualised spend indicated by the LGBT2030 Brazil sample.

CATEGORY	SPEND
Clothes / Vestuário	R\$ 1.675
Designer brand underwear / Roupas íntimas de grife	R\$ 306
Footwear / Calçados	R\$ 968
Concert, cinema, theater tickets / Entradas para concertos, cinema, teatro	R\$ 607
Music/video Downloads / Baixar música/vídeo	R\$ 137
Books / Livros	R\$ 488
DVDs / DVDs	R\$ 88
Magazines / Revistas	R\$ 82
Pet Food and Accessories / Alimentação e acessórios para animais de estimação	R\$ 704
Gasoline / Gasolina	R\$ 1.084
Other car expenses (- insurance, repairs etc) / Outras despesas com automóvel (seguro, consertos, etc.)	R\$ 1.128
Baby/toddler products / Produtos infantis/para bebês	R\$ 168
School children's clothing, footwear / Vestuário e calçados para crianças em idade escolar	R\$ 202
Other child-related expenses / Outras despesas com crianças	R\$ 302
Leisure trips / Viagens de lazer	R\$ 3.691
Business trips / Viagens a trabalho	R\$ 1.105



Financial products

Respondents indicated which of the listed products they currently have.

CATEGORY	HAVE ?
Cartão de Crédito - Visa / Visa Credit Card	49%
Cartão de Crédito - MasterCard / MasterCard	61%
Cartão de Crédito - American Express / Credit Card - American Express	9%
Cartão de Crédito - Diners Club / Credit Card - Diners Club	2%
Cartão de Crédito - outro / Credit Card - other	18%
Cartão de crédito de lojas de varejo / Retail store charge card	29%
Conta corrente/cheques em banco / Checking/current banking account	72%
Conta poupança / Savings account	72%
Conta de pensão / Pension account	6%
Ações / Shares	7%
Seguro de vida pessoal / Personal life insurance	31%
Seguro imobiliário / Building insurance	16%
Seguro de automóvel / Car insurance	28%
Plano de saúde / Sickness insurance	65%
Seguro para animais de estimação / Pet insurance	2%
Outro seguro / Other insurance	10%
Empréstimo pessoal / Personal loan	22%
Financiamento sobre o imóvel em que vive / Mortgage on the property you live in	11%
Financiamento sobre imóvel para investimento / Mortgage on an investment property	2%

Tech



The research reveals a high propensity for consumption of technology and related items.

As with all extrapolations in this report, we limit the calculations to the 5.7 million internet-reachable members of the Brazil LGBT community.

Key tech data includes:

Most respondents (78.7%) spend at least 6 hours per day active online

50.6% of respondents spend 12 hours or more active online per day

4.8 million LGBT Brazilians have high-speed internet access

2.7 million LGBT Brazilians have a Windows-based laptop

515,000 LGBT Brazilians already have an Apple laptop and a further 744,000 want to buy one during the next 12 months

1.9 million have a tablet computer

1.3 million own an Apple iPhone and 743,000 want to buy one during the next year

1.9 million own a Samsung Galaxy

Mobile Phone Bills (including data, voice and texts) / Contas de telefone celular spend is R\$ 4,5 billion / USD\$1.4 billion annually

R\$ 6.9 billion / USD\$2.2 billion
annual spend on Home Phone, Internet, TV Bills

Durables

Our research sample demonstrates robust levels of current ownership levels for a range of consumer durable items.

In addition, there exists a high number of aspirational respondents wishing to buy these items during the course of the next year.

Durables responses included:

New car / Carro novo
Already own: 1.3 million respond.
Want to buy: 1.9 million

An investment property / Imóvel para investimento
Already own: 458,000
Want to buy: 973,000

Your own home / Casa própria
Already own: 2.1 million
Want to buy: 2.0 million

973,000
LGBT Brazilians

want to buy an investment property



Consumables (1/2)

Respondents consumed a broad range of measured spend categories.

As with other consumer items, our submission is not that LGBT people are intrinsically more likely to shop, but rather that scale in the Brazilian market creates substantial market impacts.

Annual spend of 5.7 million internet-reachable LGBT adults.

ANNUAL SPEND:

Non-alcoholic beverages (soda/soft drinks/juice etc) / Bebidas não alcoólicas (refrigerantes/sucos etc.)
R\$ 8,9 billion
USD\$2.8 billion

Groceries / Alimentos
R\$ 16,2 billion
USD\$5.15 billion

Takeaway food / Comida para viagem
R\$ 9,8 billion
USD\$3.1 billion

Meal at a restaurant, cafe / Refeição em restaurante, café
R\$ 21,8 billion
USD\$6.9 billion

Wine / Vinho
R\$ 5,6 billion
USD\$1.8 billion

Spirits / Destilados
R\$ 4,5 billion
USD\$1.4 billion

Beer / Cerveja
R\$ 9,7 billion
USD\$3.1 billion

Champagne / Champanhe
R\$ 2,2 billion
USD\$687 million



Consumables (2/2)

Annual spend of 5.7 million internet-reachable LGBT adults.

Fragrances/toiletries /
Perfumes/artigos de higiene
R\$ 6,3 billion
USD\$2.0 billion

Hair Styling Products / Produtos para o cabelo
R\$ 3,0 billion
USD\$955 million

Skin Care Products /
Produtos para a pele
R\$ 2,7 billion
USD\$862 million

Grooming (Hairdressing, Facials, Waxing etc.) / Uso pessoal (cabeleireiro, tratamentos faciais, depilação etc.)
R\$ 3,6 billion
USD\$1.1 billion



Consumables — Individual annual spend

CATEGORY	SPEND
Non-alcoholic beverages (soda/soft drinks/juice etc) / Bebidas não alcoólicas (refrigerantes/sucos etc.)	R\$ 1.563
Groceries / Alimentos	R\$ 2.832
Takeaway food / Comida para viagem	R\$ 1.719
Meal at a restaurant, cafe / Refeição em restaurante, café	R\$ 3.813
Wine / Vinho	R\$ 978
Spirits / Destilados	R\$ 795
Beer / Cerveja	R\$ 1.698
Champagne / Champanhe	R\$ 378
Fragrances/toiletries / Perfumes/artigos de higiene	R\$ 1.098
Skin Care Products / Produtos para a pele	R\$ 474
Hair Styling Products / Produtos para o cabelo	R\$ 525
Grooming (Hairdressing, Facials, Waxing etc.) / Uso pessoal (cabeleireiro, tratamentos faciais, depilação etc.)	R\$ 628



Society (1/2)

There is much in Brazil that has improved for LGBT people in recent decades.

However, the LGBT2030 study shows that there remains significant issues and problems faced by LGBT people in their day-to-day lives: at work, with neighbours, in shops and elsewhere in society.

One of the most concerning factors is the large number of respondents who report experiencing verbal harassment against them during the past 12 months.

More than half experienced this, due to the perception that they were lesbian, gay, bisexual or transgender.

That implies 5.3 million LGBT people in Brazil were verbally harassed for being who they are during the past 12 months.

56%
of LGBT
Brazilians
were verbally
harassed in the
past 12 months



Society (2/2)

Perhaps of most concern in these findings is the fact that 7% of all respondents indicate they were physically attacked during the past year, because the aggressor perceived the respondent to be LGBT.

If that translates across all LGBT people in Brazil, it amounts to two thirds of a million people (667,500 people) who were physically attacked.

Other data shows that 18% (1.7 million people) experienced harassment from neighbours in the past year.

One in four respondents (25.0%) were harassed at work during this same period due to being perceived to be an LGBT person in the workplace.

13% of respondents said they were refused goods or services by vendors in the past year due to being perceived to be an LGBT customer. That implies 1.2 million people nationally.

667,500
LGBT
Brazilians
physically
attacked in
past 12 months

2.4million
harassed
at work



Relationships



Marriage equality has been available in Brazil for almost five years (since 2013).

Just over half of all respondents (53%) indicate they are currently in a relationship.

Just under one in ten (8%) are already parents, with 6% of all respondents having children who currently live with them at home.

Female respondents are more likely than men to already be parents. One in ten (10%) female respondents are already mothers with children living at home, while a further 2% have children living elsewhere.

Across the entire sample, 55% of all respondents said they hope to one day become parents.

This situation can likely be expected to become more common in Brazilian society over coming years.



Workplace (1/2)

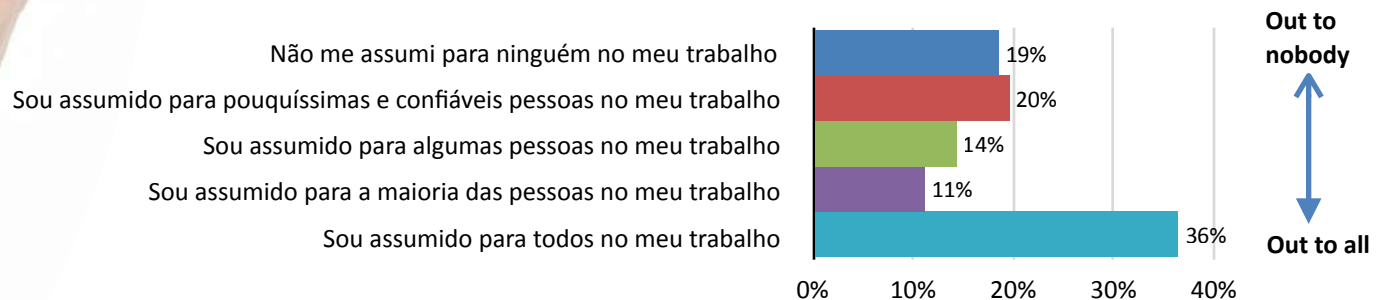


Unfortunately, it appears that only just over one in three employees (36% of respondents) in Brazilian workplaces feel they are able to be openly LGBT with colleagues at work.

This compares favourably with some other countries sampled in the global LGBT2030 study such as India (where only 8% of LGBT employees feel able to 'come out' to their work colleagues), Slovakia (9% 'out to all') and Mexico (where 27% of LGBT2030 respondents felt able to be openly LGBT at work). It compares less favourably with some other countries such as Canada (42%), UK (45%), Australia (51%) and the Netherlands (66%). The USA has seen a decline in this metric in recent years, declining from 44% to just 38% of LGBT2030 respondents 'out to all' in US workplaces (source: 2014 Out Now Global LGBT2030 Study).

Results for Brazil in 2017 appear below.

How 'openly LGBT' do you feel able to be with colleagues at work?



Workplace (2/2)

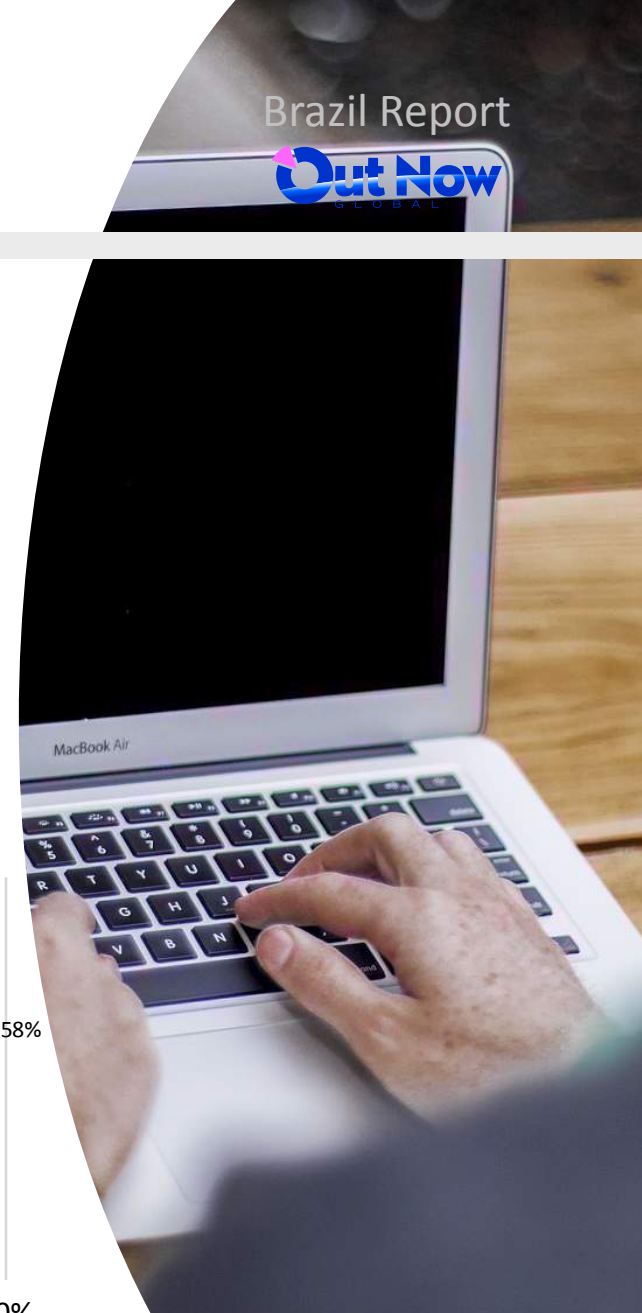
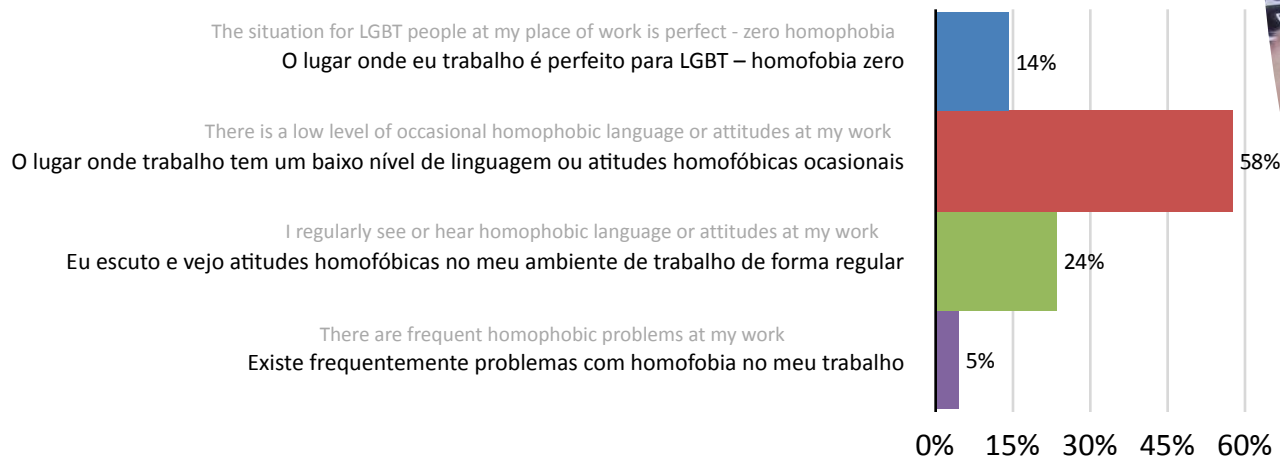
Brazil workplaces seem to experience relatively high levels of LGBT/ homo-phobia, of varying severity.

73% of respondents personally have seen or heard, in the last year, something in their own workplace that they consider homophobic.

58% of respondents characterised the frequency of this as “occasional”, while 24% of respondents “regularly see or hear homophobic language or attitudes” at their work.

5% of respondents said “there are frequent homophobic problems at my work.”

Please select the opinion that most applies to you:





#LGBT2030

www.OutNow.LGBT

Channel to market

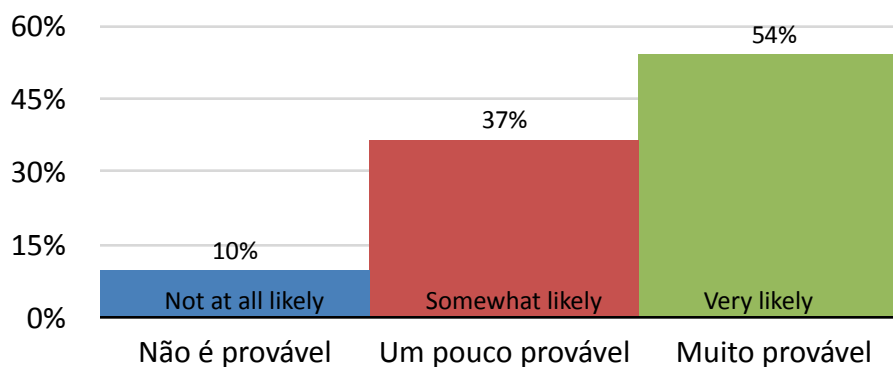
Out Now's research sees that enhanced visibility of LGBT people in many countries across the world has caused an increasing number of organizations to seek out the most effective ways to target LGBT people, as both employees and as customers.

One of the most cost-effective channels to reach LGBT consumers is through media directed towards a predominantly LGBT audience.

Brazil LGBT2030 results show that, in 2017, LGBT people in Brazil are highly influenceable via directed communications through targeted LGBT media channels.

Likelihood to choose a brand made by a particular company:

"If I know the brand advertises and markets itself in LGBT media"



Some FAQs

Q1. Is the LGBT2030 survey a commercial project or a piece of social research?

A1: Out Now is a for-profit LGBT consulting firm which has for 26 years been relied on by a broad range of clients — including non-government organizations, government bodies and commercial clients. In each case one fundamental aspect of our LGBT research work always remains consistent, no matter what the topic: to produce research that can present the most accurate possible picture of LGBT experiences. In doing so, we always remain closely focused on minimising the sources of bias able to affect any quantitative research of this type.

Our work has covered research into issues including LGBT community attitudes to policing, gay and bi mens attitudes to safe sex, LGBT community responses to HIV information awareness advertising, commercial research into a broad range of consumer activities for corporate clients, pro-bono research into topics that Out Now believes deserve to be better understood, such as the dollar value of helping create workplaces where more people feel able to ‘come out’ to colleagues and benchmarking measurements of anti-LGBT violence and harassment in more than 20 countries globally.

This new LGBT2030 research is a piece of work with two components: a public report covering a broad measurement of social and commercial data for LGBT communities in Brazil as well as a paid-for component specifically for our sponsor Hornet which provides them with a specific analysis of their own user-base in Brazil. This funding by Hornet allows the new LGBT2030 Brazil public report to be produced and released in full, free-of-charge.

Q2. Is there a control ‘non-LGBT’ sample in this study?

A2: There is no available non-LGBT Brazil sample able to be used as comparator sample for this data. We make no conclusions as to the differences between LGBT and non-LGBT Brazil populations in this report. What the research shows is specific data results from the more than 4,000 LGBT respondents in Brazil during mid-2017. The data and sample resulting is planned to be used to compare in a longitudinal analysis between this period and a mid-2019 period in the next round of the LGBT2030 research study.

Some FAQs

Q3. How do you arrive at a 6% figure for the size of the LGBT communities in Brazil?

A3: There exists no definitive figure for the prevalence of homosexuality or transgender populations globally. There does exist a range of estimates in various studies around the world that apply various methodologies, many of which risk under-reporting or over-sampling of LGBT populations. One particularly poorly implemented study in recent years included measurements that included babies and children in populations calculations. While one could argue that sexual orientation and gender identity are factors present from birth, Out Now only ever uses calculations based on young adults and older (15+ years) to create estimated populations figures in the LGBT study.

To date, Out Now believes the most convincing methodology applied to the task of estimating how many people can be expected to be lesbian or gay is the Yankelovich MONITOR research of 1992/93 which applied random sampling across the United States within a personal interview approach that ensured each respondent knew (through anonymising of individual responses) that they could answer without the interviewer knowing exactly what response they

gave to a sexual orientation question. That approach reported a figure of just under 6% of nationally representative US sample respondents identifying as lesbian or gay. The research does not illustrate how many of the sample were bisexual nor did it address issues related to gender identity. Nonetheless, Out Now is satisfied that a 6% estimated figure applied to those aged over 15 years old in a given population is a better methodological approach to apply than the estimates revealed in any other piece of research work on the topic to date. Several peer-reviewed studies since then have suggested slightly higher levels of gay men than lesbians in a US sample (8% vs. 7%; University of Indiana).

Given a paucity of reliable methodologies to accurately measure the true numbers of bisexual and transgender individuals in a given population, Out Now contends that the 6% estimate applied by the organization towards population estimates is indeed a conservative approach but one that is justified given the findings of the earlier US research (Yankelovich MONITOR Study 1992).

Some FAQs

Q4. Did the survey data collection methods (online surveys) cause a skewing of data towards more affluent, urban-based populations? Namely, can this research be relied upon for the extrapolations presented in this reporting?

A4. The use of internet-based data collection has become increasingly common in many countries in recent years. It is to be noted though that in using any data collection method, the methodologies employed necessarily affect the veracity of the data that results. In the case of countries where internet penetration levels are so high as to have become almost ubiquitous (eg Scandinavia, Netherlands, Canada and many more) online collection can provide a more robust data collection mechanism than in many poorer countries where internet access is more limited.

Over the past ten years, Brazil has seen a dramatic increase in the reach of the internet — rising from barely 30% of the population with internet access in 2007 to an estimated reach level of more than 139 million people (66.4% of the population) by 2016 (source: InternetLiveStats.com). Several studies place Brazil at or near the top of time spent per person actively on the internet. The International Telecommunications Union (Geneva) in 2015 ranked Brazil as the country with the fourth highest number of internet users (more than 120 million, or 59% of the population).

Out Now has applied a discount estimate on each extrapolation figure included in this report, discounting to a 60% level the total expenditure estimates appearing in the report as we can only report on the estimated numbers of LGBT people with access to the internet. The actual total expenditure levels per category in our analysis can therefore be expected to be somewhat higher than the levels reported however as our methodology relied solely on internet collection we can make no viable estimate as to the extent to which non-internet users add to the reported totals.

For example, data on shopping expenditures applies average reported spend levels from our 4,000+ respondents and extrapolates only for the average annual spend by the 5.7 million LGBT adults in Brazil who we include in our internet-reachable calculations. That means we report on the expected expenditures of the 60% of an expected total of 9.5 million LGBT Brazilians.

It is important to note that we have assumed that an LGBT Brazilian respondent is expected to be no more nor less likely to be internet-reachable than the average Brazilian. It is important to note we have also applied a 60% figure closer to the published 2015 data from the Internet Telecommunications Union for our calculations, rather than the higher 2016 figure (66.4%) published online by InternetLiveStats.com (a site which has been cited by WC3 / World Wide Web Foundation).

Some FAQs

Q5. Does this research show that LGBT people are richer or poorer than an ‘average’ Brazil person?

A5. There exists other studies that contend that gay men may earn less than non-gay men or that lesbians may earn more than non-lesbian women, however in our calculations of the total incomes earned by Brazil LGBT people, we have applied average PPP income per capita data (source: World Bank) to the reachable number of LGBT people and to the total expected numbers of LGBT people in Brazil. This report makes no statement as to whether LGBT Brazilians earn more or less than other Brazilians but the report shows the extent of the annual GDP Brazilian income likely to be earned by LGBT Brazilians.

Q6. Does this research show that LGBT people spend more than an ‘average’ Brazil person?

A6. The data in this report is not compared to non-LGBT Brazil spend figures.

It is interesting to consider how one of the key demographic facts of most LGBT markets affects spending, which we see on page 16 of this report.

A relatively lower presence of children in LGBT households means that annual spend figures should be expected to be relatively lower on categories such as baby/toddler products, school children’s clothing/footwear and other child-related expenses. This then suggests relatively higher levels of available discretionary income able to be applied to other product spend categories or savings.

About the LGBT2030 study

The LGBT2030 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 four main sample periods: 2010, 2012 and 2014/15 and 2017/18.

In the immediate period ahead, LGBT2030 continues to expand its reach into new countries as well as updating its longitudinal data for many key markets.

The 2017 LGBT2030 Brazil sample is reported on in this document.

Comparative data from other global countries from this round of LGBT2030 research is to be released in the first half of 2018.





#LGBT2030

www.OutNow.LGBT

BRASIL

NOVEMBRO 2017

Relatório Brasil LGBT2030

Sobre esta pesquisa

Este é um documento do Relatório Brasil LGBT2030 de 15 de novembro de 2017.

TITLE:

'Brazil 2017 Report — Out Now Global LGBT2030 Study'

AUTHOR:

Ian Johnson, Chief Executive Officer, Out Now

DOWNLOAD LINK:

www.OutNow.LGBT

Esta pesquisa de mercado LGBT (lésbicas, gays, bissexuais e transgêneros) é a primeira de uma série de pesquisas globais LGBT2030 que ocorrem em 2017 e 2018. O estudo LGBT2030 é a maior iniciativa de pesquisa global do mundo que, desde 2010, analisou as respostas de mais de 100 mil pessoas LGBT que vivem em mais de 20 países em todo o mundo. A amostragem foi realizada em junho e julho de 2017. O tamanho da amostra é 4018 respondentes. Na maioria dos casos, os totais somam 100%. As diferenças podem resultar do arredondamento de números ou se forem permitidas múltiplas opções de resposta.

Sobre o Out Now

Por mais de 25 anos, marcas líderes usaram pesquisas da Out Now para oferecer serviços especializados e no desenvolvimento de negócios no segmento LGBT - seja com foco em pessoas LGBT como clientes ou como funcionários.

Fornecemos resultados de ponta para clientes nas áreas de informações e pesquisa LGBT, educação e treinamento de equipes, comunicação direta com consumidor, ativações de mídia, estratégia de marca, consultoria de marketing e estratégias de engajamento de funcionários.

Nosso trabalho é reconhecido globalmente.

Out Now é a única empresa de consultoria especializada no seguimento LGBT reconhecida na Lista de Diversidade Global, da *The Economist*.





Resumo

O Brasil abriga uma das maiores e mais dinâmicas comunidades LGBT do mundo.

Nesse relatório, deixamos claro que essas descobertas não podem representar as experiências de cada indivíduo dos mais de 9,5 milhões de adultos brasileiros que são LGBT. Na verdade, uma em cada três pessoas no Brasil não vive em uma casa com fácil acesso à Internet. Dito isto, nossa amostra em larga escala (mais de 4.000 entrevistados), com múltiplas fontes de dados e abordagem de amostra ponderada, produz um relatório altamente informativo.

É essencial na leitura das tabelas neste relatório lembrar que, como o CEO da OutNow diz com frequência: "a média mascara a diversidade". Uma das principais características das comunidades LGBT globais é a sua diversidade.

Pessoas LGBT são encontradas em todas as partes da sociedade - e as experiências individuais de uma pessoa LGBT podem ser específicas para esse indivíduo.

Este relatório revela uma diversidade de experiências na comunidade LGBT brasileira.

Os principais destaques de dados incluem:

- Mais da metade de todos os entrevistados (53%) estão atualmente em um relacionamento
- A maioria dos entrevistados (73%) gostaria de se casar / entrar em união civil em algum momento de suas vidas
- Mais da metade de todos os inquiridos (55%) gostariam de ter filhos

- Apenas um pouco mais de um terço dos entrevistados (36%) se assumem para os todos os colegas no trabalho
- Quase três em cada quatro entrevistados (73%) testemunharam atos de homofobia no local de trabalho durante o último ano
- A comunidade LGBT está muito conectada: mais da metade dos entrevistados (51%) passam pelo menos 12 horas online diariamente
- Um em cada três entrevistados (33%) considera a vida / eventos culturais LGBT um fator importante ao escolher um destino de viagem de lazer
- Os entrevistados exibem altos níveis de despesas e intenções de compra em uma ampla gama de categorias de produtos e serviços.

Os dados foram coletados on-line durante junho e julho de 2017.

Notas metodológicas

Out Now (ON) trabalhou consistentemente para melhorar o nível de insights derivados da pesquisa sobre as características das pessoas lésbicas, gays, bissexuais e transgêneros (LGBT).

Este trabalho começou na Austrália em 1992, continuou desde então e expandiu-se para incluir pesquisas em mais de 20 países em todo o mundo - Ásia, América do Norte, América latina e Europa.

A pesquisa da ON é reconhecida por corporações líderes que dependem de nossas idéias para orientar suas abordagens de inclusão e marketing LGBT. Também fomos incluídos nos "Top 10 Consultores de Diversidade" da Lista de Diversidade Global, da *The Economist*.

Sobre esta pesquisa

Os dados neste relatório não devem ser relatados como representando um "censo" de qualquer mercado LGBT por razões simples, incluindo dificuldades de várias pessoas de se assumirem (embora muitas pessoas se sintam seguras em responder pesquisas ON anonimamente). Nem uma pesquisa on-line pode atingir o status de um censo, pois não é obrigatória e, embora a penetração da internet seja mais alta agora no Brasil do que anteriormente (cerca de 65%), uma pessoa LGBT em cada três ainda não está incluída digitalmente e todo relatório deve deixar claro esse fato.

O relatório LGBT2030 inclui os melhores dados de mercado LGBT globais disponíveis em 2017/2018.

A metodologia nesta amostra empregou o maior número possível de fontes ao compilar as respostas.

A amostra é composta por um total de 4018 entrevistados.

As principais fontes dos entrevistados nesta amostra são as seguintes:

- Hornet
- Painel de Pesquisa do Brasil - Out Now
- Viu no Facebook
- Indicado por amigos
- SuperPride
- Guia Gay
- Outros

Os dados do relatório são ponderados para refletir a seguinte distribuição:

49,5% de homens, 49,5% de mulheres e 1% de respondentes intersexuais.

Welcome

RESEARCHER:



"Há mais de 25 anos, a Out Now vem se aproximando em torno de sua missão :compreender melhor e atender as necessidades das pessoas LGBT. Fazemos isso de várias maneiras e em várias partes do mundo. O importante para nós são as pessoas. Isto é expresso com maior clareza no nosso mantra corporativo: LGBT spells people ("LGBT é um sigla de pessoas"). Trabalhamos de modos diferentes para ajudar a entender como as necessidades das pessoas LGBT podem ser melhor compreendidas e atendidas, - sejam funcionários, clientes ou membros de suas sociedades Satisfazer estas necessidades é o que nos impulsiona. Estou muito feliz que tenhamos começado a nova rodada da pesquisa global LGBT2030 pelo Brasil - um país fundamental no mundo hoje. Os resultados do estudo revelam uma grande quantidade de novas informações sobre as experiências vividas todos os dias pelas pessoas LGBT no Brasil e quero agradecer aos mais de 4.000 brasileiros que compartilharam suas informações conosco. "

Ian Johnson
Diretor executivo da Out Now

Comentário

Não existe um censo LGBT. Muitos fatores afetam a probabilidade das pessoas LGBT se assumirem para todos a sua volta, inclusive nesta pesquisa de mercado. Dito isto, consideramos satisfatório o fato de que pessoas que relatam não assumirem sua orientação sexual ou identidade de gênero em suas vidas diárias terem optado por completar a pesquisa on-line LGBT2030 no Brasil. Para ajudar a interpretar esses resultados, tivemos o privilégio de contar com assessoria de alguns especialistas com reconhecimento internacional. Seus comentários aparecem aqui.

ECONOMISTAS PARTICIPANTES:

"As pessoas LGBTI têm vivido uma crescente aceitação social e reconhecido seu potencial financeiro e como consumidores em vários países, enquanto a discriminação e a violência anti-LGBTI continuam em outros. Pouco se sabe sobre as diversas condições econômicas e sociais, contribuições e preocupações das pessoas LGBTI ao redor do mundo. Mais e melhores dados são essenciais para aumentar a conscientização, apoiar políticas, programas públicos, gerar dados sobre investimento privado e práticas comerciais, promover a igualdade de oportunidades e a plena participação econômica e social das pessoas LGBTI em suas comunidades. A iniciativa de pesquisa LGBT2030 da Out Now é inovadora ao combinar o trabalho de pesquisa de opinião pública e dados de consumo. Junto com a pesquisa acadêmica, política e de advocacy, acredito que esse trabalho pode ajudar a promover a inclusão e melhorar a vida das pessoas LGBTI e, em última análise, contribuir para a construção de sociedades melhores, para todas as pessoas, em todos os lugares. "

Ulrich Zachau
Diretor, Banco Mundial, Bancoc

Comentário

“A comunidade LGBT se tornou parte muito mais visível e atuante das sociedades em todo o mundo - e o Brasil não é exceção. Estamos vivendo um reconhecimento crescente de que os brasileiros e brasileiras LGBT contribuem para a economia e cultura de forma significativa e em todos os níveis. A Câmara de Comércio e Turismo LGBT Brasileira, entidade dedicada à promoção do empreendedorismo, da empregabilidade e do desenvolvimento econômico da comunidade e dos negócios LGBT no Brasil reconhece a importância dos dados apresentados pela nova pesquisa Out Now.



O Relatório Global LGBT2030 traz nova luz sobre a maneira como consomem, pensam, decidem e os tipos de problemas enfrentados diariamente pela imensa população LGBT.

Pela primeira vez uma pesquisa trata do segmento LGBT no Brasil de maneira confiável e com real alcance, abordando questões como discriminação no local de trabalho, formação de famílias e como esse grupo ganha e gasta seu dinheiro. Todos podemos aprender muito com este Relatório. Estamos convencidos de que através de uma melhor compreensão é que surgem os melhores resultados, o que pode beneficiar o mercado e toda a sociedade brasileira. Não seria exagero dizer que o acesso a esses novos dados pode até mesmo acelerar nosso progresso social e econômico.”

Ricardo Gomes
Presidente da Câmara de Comércio e Turismo LGBT Brasileira



Sponsor messages

Out Now thanks our sponsors, whose support makes the new 2017/18 LGBT2030 Brazil Study possible.

SPONSOR COMMENTS:



O crescente interesse dos mercados pelo segmento LGBT não encontrava contrapartida em dados que pudessem corroborar a importância desses consumidores no Brasil. Havia uma carência também de informações consistentes sobre as vivências destes cidadãos. Com acesso a dados confiáveis, fornecidos pela primeira vez no país pelo Estudo Out Now LGBT2030, podemos finalmente saber com maior precisão quem somos, quais as demandas e formular as melhores maneiras de atingir o público gay brasileiro.



André Fischer
Country Manager, Brazil, Hornet



“Switzerland Tourism has long been proud of our work to welcome our LGBT guests. We appreciate and respect greatly all those who choose to visit us to discover what makes so many people love telling others about their first time visiting our beautiful country. It is our pleasure to be able to support this global LGBT2030 research initiative by Out Now, to help us all better understand how to meet the needs of LGBT people, wherever they live in the world. We know there is still so much work to be done in this important area to make all feel equally valued around the world, so we see our support of this project as one way we can help to advance respect for LGBT people, wherever they may live.”



Urs Eberhard
Head of Markets, Switzerland Tourism
#inlovewithSwitzerland



7

*média de
logins diários
por usuário*



42

MILHÕES

*mensagens
enviadas/dia*



1,6

MILHÃO

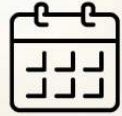
*lugares
visitados/dia*



2

BILHÕES

*Impressões de
anúncios/mês*



2,6

MILHÕES

*usuários
ativos/mês*

25 MILHÕES
de usuários

250 MILHÕES
*de mensagens
enviadas
semanalmente*



HORNET

WHERE GUYS CONNECT

Hornet redefine o significado de conexão para homens gays. Ao integrar perfis sociais completos com conteúdo original e instigante, a inovadora plataforma mobile do Hornet permite que os usuários interajam e se engajem em múltiplos níveis.

Qual tamanho do mercado brasileiro de LGBT?

A pesquisa MONITOR de Yankelovich (1993) combinada com a pesquisa Out Now realizada desde 1992 fornece cálculos úteis quanto ao total de números LGBT no Brasil.

Esta abordagem tem a vantagem de ser tanto conservadora quanto robusta - considerando ser razoável que cerca de 6% de todas as pessoas adultas podem ser consideradas LGBT.

Com base nesse dado, avaliamos que a comunidade LGBT brasileira, totalize cerca de 9,5 milhões de adultos.

Neste relatório, para cálculos envolvendo despesas de consumo e quantidades de produtos, reduzimos 40% o total desta população - para adequar a uma penetração avaliada

em 60% da internet em 2017 (fonte: UIT - União Internacional de Telecomunicações).

Isso implica um total de 5,7 milhões de pessoas que compõem o mercado LGBT total (acessível pela internet) para fins de análise neste relatório.

Nós aplicamos números de despesa média em todos os respondentes LGBT (ponderados) e para o cálculo dos números de gastos anuais totais, usamos o valor de 5,7 milhões (ou seja, 5,770,992) como o multiplicador para calcular o gasto total estimado e os dados de compra.

9.5 milhões
de brasileiros são LGBT

5.7 milhões
são acessíveis pela internet

Valor total de mercado

Aplicando a análise de Yankelovich e Out Now para a população adulta total do Brasil, 9,5 milhões de brasileiros fariam parte da comunidade LGBT.

Destes, pelo menos, 5,7 milhões são atualmente acessíveis pela internet.

Esses dois pontos de referência nos permitem atribuir uma parcela proporcional do valor total da renda anual per capita do PIB do Brasil (sendo US \$ 14.810, dados do Banco Mundial 2016) para cada grupo.

Isso produz uma renda anual total de US \$ 84,7 bilhões para os 5,7 milhões de LGBT "acessíveis" da internet.

A aplicação desse mesmo índice de renda média do Banco Mundial 2016 em toda a população adulta do LGBT Brasil produz renda anual total de US \$ 141 bilhões.

USD\$141 bilhões
annual PPP GDP income total LGBT

Sources:
World Bank PPP
Out Now
Yankelovich

Compras

Não afirmamos neste relatório que os compradores LGBT brasileiros ganham e gastam mais ou menos do que a média geral.

No entanto, a grande escala da oportunidade de mercado LGBT torna o gasto total do consumidor bastante interessante em muitas das categorias de produtos e serviços.

Aqui estão alguns exemplos, que mostram o gasto anual médio dos 5,7 milhões de adultos LGBT no Brasil que incluímos em nossos cálculos acessíveis pela internet.

DESPESA ANUAL:

Vestuário
R\$ 9,5 bilhões
USD\$3.0 billion

Roupas íntimas e roupas de grife
R\$ 1,75 bilhão
USD\$556 million

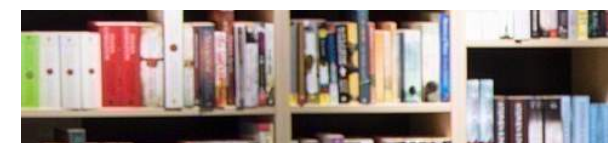
Calçados
R\$ 5,5 bilhões
USD\$1.8 billion

Entradas para concertos, cinema, teatro
R\$ 3,5 bilhões
USD\$1.1 billion

Download e serviços digitais de músicas /vídeos
R\$ 137 por pessoa anualmente
USD\$44 per person annually

Livros
R\$ 488 por pessoa anualmente
USD\$155 per person annually

DVDs
R\$ 88 por pessoa anualmente
USD\$28 per person annually





Tech



A pesquisa revela uma alta propensão ao consumo de tecnologia e itens relacionados.

Tal como acontece com todas as extrapolações neste relatório, limitamos os cálculos aos 5,7 milhões de membros acessíveis pela internet da comunidade brasileira LGBT.

Os principais dados técnicos incluem:

A maioria dos entrevistados (78,7%) passa pelo menos 6 horas por dia on-line

50,6% dos entrevistados passam 12 horas ou mais on-line por dia

4,8 milhões têm acesso à internet de alta velocidade

2,7 milhões de brasileiros LGBT possuem um laptop com Windows

515 mil já possuem um laptop Apple e outros 744 mil querem comprar um nos próximos 12 meses

1,9 milhão tem um tablet

1,3 milhões possuem um iPhone da Apple e 743 mil querem comprar um no próximo ano

1,9 milhões possuem um Samsung Galaxy

Contas de celular (incluindo dados, voz e textos) é de R\$ 4,5 bilhões

R\$ 6.9 bilhões / USD\$2.2 billion
anual gastos em celulares, internet, TV e contas a pagar



Bens duráveis

Nossa amostra de pesquisa demonstra níveis robustos para uma variedade de itens de bens de consumo duráveis.

Além disso, existe um grande número de entrevistados que desejam comprar esses itens no decorrer do próximo ano.

Carro novo
Já possui: 1,3 milhão
Pretende comprar: 1,9 milhão

Imóvel para investimento
Já possui: 458 mil
Pretende comprar: 973 mil

Casa própria
Já possui: 2,1 milhões
Pretende comprar: 2,0 milhões

973 mil pretendem comprar um imóvel como investimento
LGBT brasileiros



Bens de consumo

Tal como acontece com outros itens de consumo, nossa apresentação não afirma que LGBTs são intrinsecamente mais propensos a comprar, mas sim que a escala no mercado brasileiro cria impactos substanciais.

DESPESA ANUAL:

Bebidas não alcoólicas
(refrigerantes/sucos etc.)
R\$ 8.9 bilhões
USD\$2.8 billion

Alimentos
R\$ 16,2 bilhões
USD\$5.15 billion

Refeição em restaurante, café
R\$ 21,8 bilhões
USD\$6.9 billion

Artigos de higiene
R\$ 6,3 bilhões
USD\$2.0 billion

Vinho
R\$ 978 por pessoa anualmente
USD\$311 per person annually

Spirits / Destilados
R\$ 795 por pessoa anualmente
USD\$253 per person annually

Cerveja
R\$ 1.698 por pessoa anualmente
USD\$540 per person annually



LGBT LEADERSHIP



Out Now is the global LGBT diversity business specialist. For over 25 years our clients have reaped the results of our Next Level Thinking to take their campaigns and strategies to market-leadership positions, through improving the lives of LGBT people around the world. We always deliver 'what's next' in LGBT business development for our clients by consistently focusing on our vision, namely that 'LGBT spells *people*'.

Research

"Out Now's experience in delivering research into this market, and analysing the data and outcomes, has given us fantastic insight and is pivotal in our market-leading approach."

Val Thorpe
Diversity & Inclusion Manager
Lloyds Banking Group



Communications

"Out Now's output has proved to be of a very high standard; executions have been on time and within budgets and day-to-day communications have been exemplary."

Jeanette Schuchmann
Deputy Director
German National Tourist Office



Strategy

"Your insights and proactive help with the development of the programme and launch logistics have been invaluable."

Lucinda Khun
New Products Manager
Merck Sharp & Dohme



Training

"With the advantages of this innovative learning programme, staff are able to deliver superior service to our lesbian and gay visitors."

Ralf Ostendorf
Sales Director
Berlin Tourismus & Kongress



BUILDING BETTER

LGBT consumer insights
Business development
Outcomes for LGBT people

More information?
Visit www.OutNowConsulting.com

LGBT LEADERSHIP



#LGBT2030

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#LGBT2030

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