



Out @ Work Barometer

The Paradox of LGBT+ Talent

2018/19 Edition

Global survey
about LGBT+
inclusion
launched by
BCG's LGBT+
network

4th edition

4.000+ respondents

10+ countries

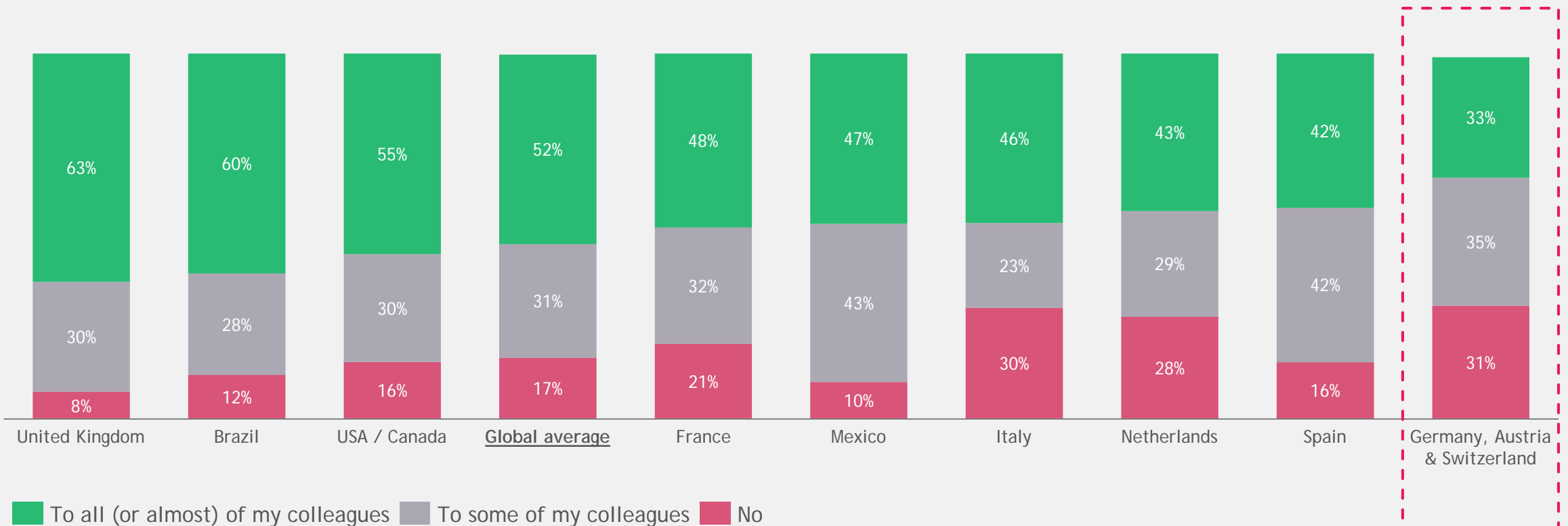
60+ nationalities

Broadly representative of
LGBT+ different profiles (gay,
lesbian, bisexual, transgender, non-binary,...)

In Germany, Austria and Switzerland LGBT+ talents less likely to be out to all their colleagues

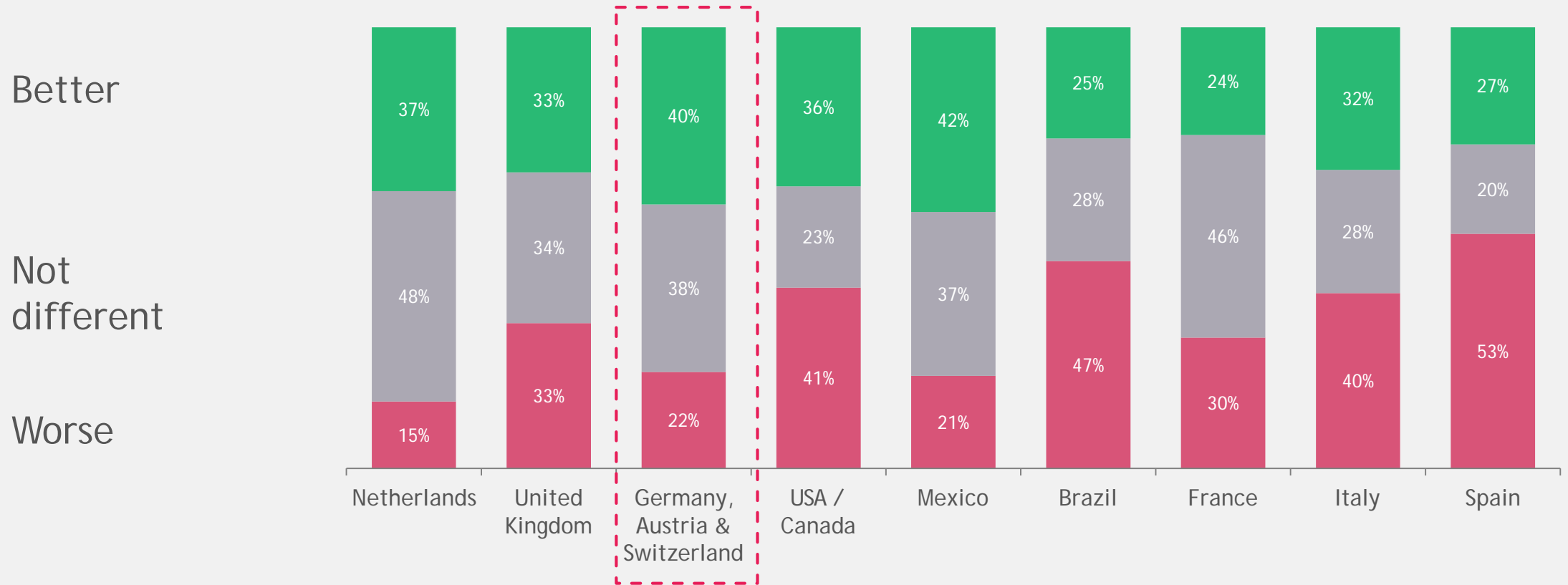


At work, I am out...



In Germany/Austria/Switzerland, 40 % of LGBT+ talent feel being out at work would make their life easier

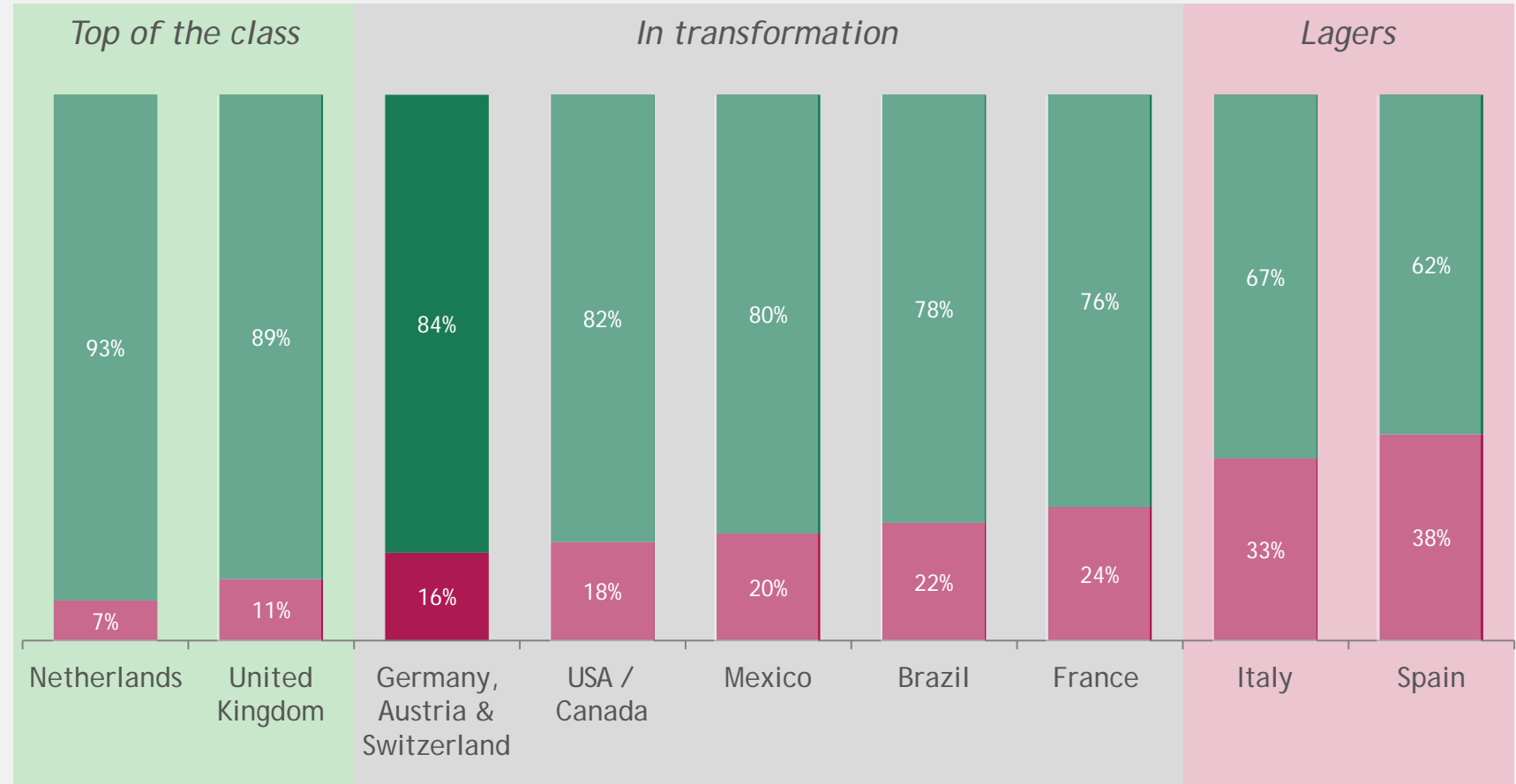
In general, I think that being openly 'out' in the professional environment could make my life:



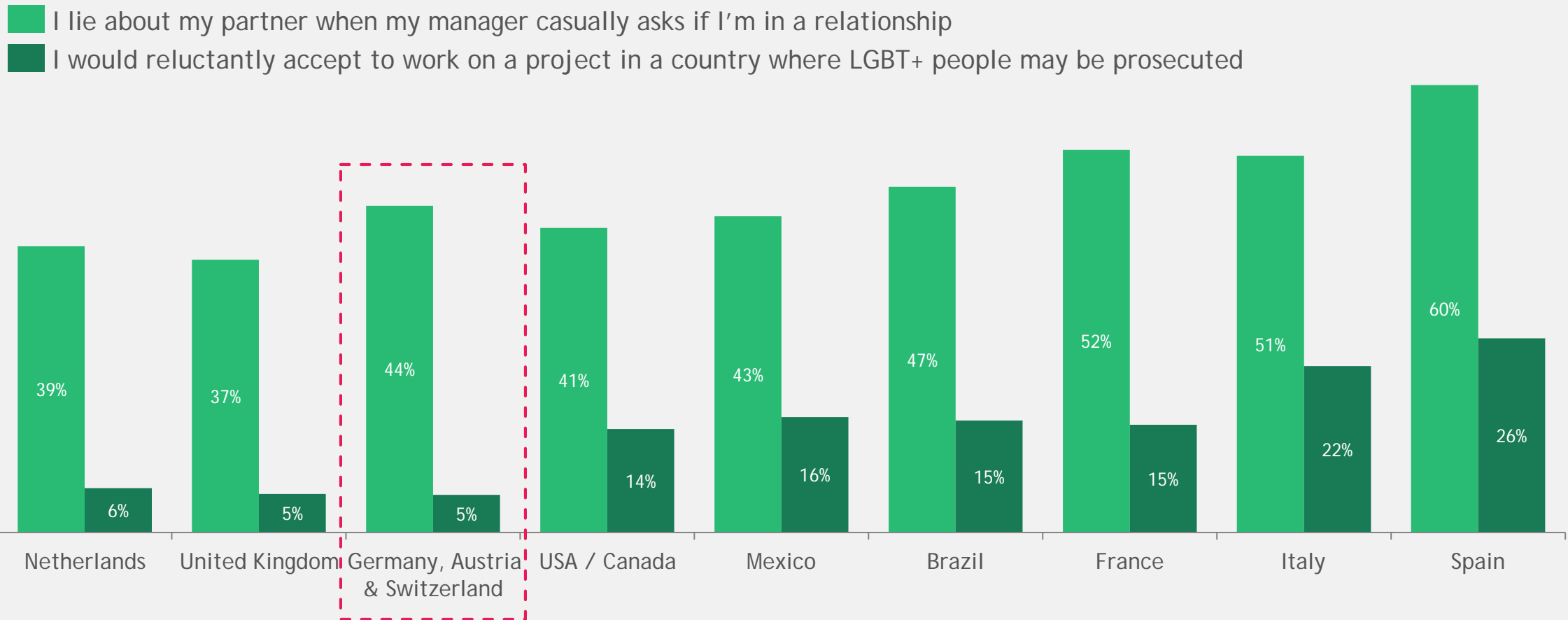
Germany/Austria/Switzerland among countries in transformation with 84% LGBT+ feeling comfortable in the business environment

% of LGBT+ talent that would be ready to disclose their sexual orientation

% of LGBT+ talent that would not be ready to disclose their sexual orientation



Germany/Austria/Switzerland is the group of countries where LGBT+ talents are least likely to accept reluctantly to work in a country hostile to LGBT+



LGBT+ friendly culture is LGBT+ talent top 1 criteria to chose a company in Germany/Austria/Switzerland

Top criteria per country	Nether-lands	United Kingdom	Germany, Austria & Switz.	USA / Canada	Mexico	Brazil	France	Italy	Spain
Salary level	1	3	2	3	1	1	1	1	1
LGBT+ friendly culture	3	2	1	1	2	2	3	3	2
Geographical location	2	1	3	2	6	3	2	5	5
Prestige of employer	6	4	4	5	3	5	5	2	4
Public statements on LGBT+	7	7	5	6	4	4	6	6	3
Geographical mobility opp.	8	6	6	8	7	6	8	4	7
People met during rec. process	4	5	8	4	5	8	4	7	6
Fun and social life (events,...)	5	8	7	7	8	7	7	8	8

Top 3 criteria

LGBT+ related criteria in top 3

Top 2 attributes of a LGBT+ friendly company are concrete guarantees: not enough for companies to stand out

Top LGBT+ friendly attributes per country	Netherlands	United Kingdom	Germany, Austria & Switz.	USA / Canada	Mexico	Brazil	France	Italy	Spain
Non discrimination policy towards LGBT+	2	1	2	1	1	1	2	1	2
No obligation to work in non LGBT+ friendly count.	1	2	1	2	2	2	1	2	1
LGBT+ network	3	4	3	4	3	4	5	4	4
Inclusive social benefits	4	3	4	3	4	6	3	3	3
Subscription to a charter to defend LGBT+ rights	6	5	5	7	6	5	4	5	6
Mandatory training for everyone on diversity	5	6	6	5	5	3	6	6	5
Mentorship program for LGBT+	7	7	8	6	7	7	7	8	7
Participation in Pride parade	8	8	7	8	8	8	8	7	8

■ Top 3 attributes

Further global survey results



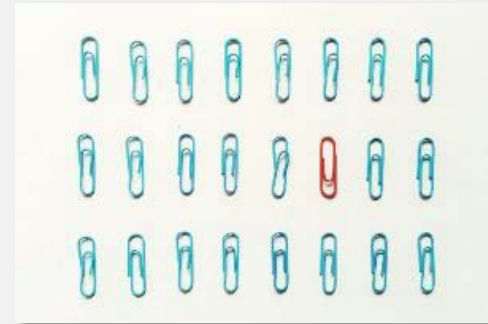
4 LGBT+ archetypes at work are emerging

Out & Proud



“
*I'm glad to be out
at work because I
can be myself*

Out & Uncomfortable



“
*I regret telling
my colleagues that
I'm LGBT+*

Silent & Comfortable



“
*My sexual
orientation doesn't
define who I am*

Silent & Troubled



“
*I have to hide
that I'm LGBT+, it's
exhausting*

The paradox of LGBT+ inclusion: while 4/5 of LGBT+ are comfortable at work, only 50% are openly out

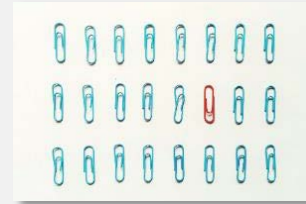
Out & Proud

44%



Out & Uncomfortable

8%



Silent & Comfortable

35%



Silent & Troubled

13%



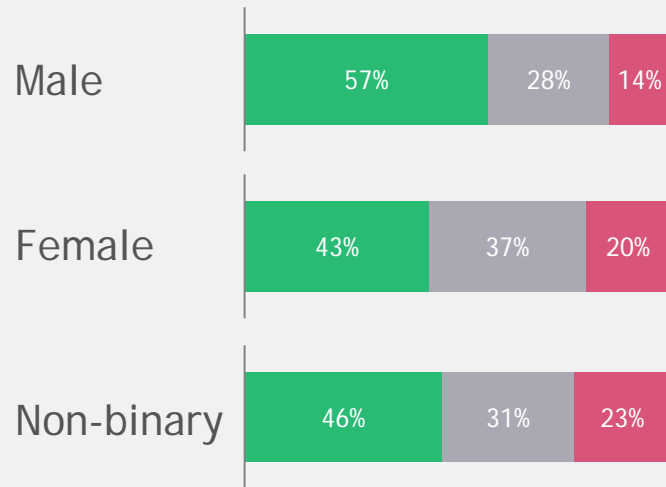
50%
of LGBT+ are
openly out
at work

4/5 LGBT+ would be ready to disclose their sexual orientation

The diverse gender identifications and sexual orientations are not similarly out at work

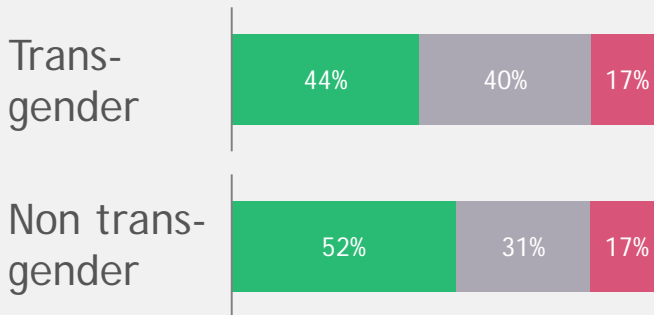
Gender

Females and non binaries less likely out than males



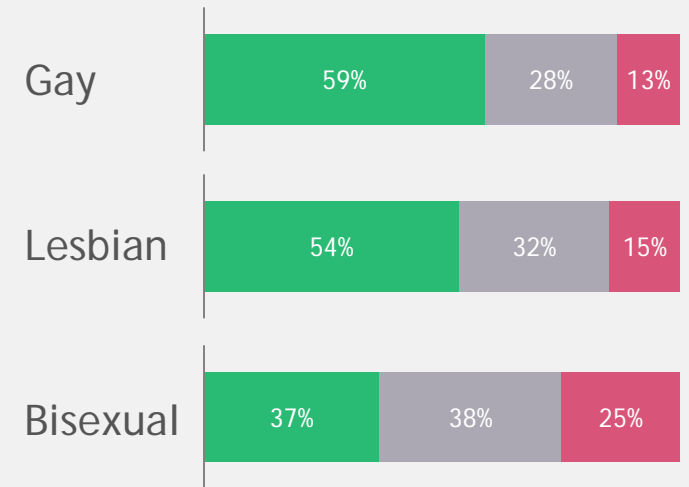
Transgender

Transgender less likely out than other LGBT+



Sexual orientation

Bisexual less likely out than homosexuals



At work, I'm out...

■ To all (or almost) of my colleagues
 ■ To some of my colleagues
 ■ No

Private sector lacks attractiveness to LGBT+ and is missing out on talent

<i>My preferred type of company would be:</i>		For LGBT+	For Non LGBT+	Gap LGBT+ vs. non-LGBT+
Private sector	Multinational / Blue chip company	58%	69%	-11pt
	SME	28%	30%	-2pt
	Start-up	19%	26%	-7pt
Public sector		40%	34%	+6pt
Non-profit		29%	19%	+10pt

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