BOSTON CONSULTING GROUP

Out @ Work Barometer

The Paradox of LGBT+ Talent

2018/19 Edition

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

4.000+ respondents

10+ countries

60+ nationalities

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

Key results at a glance

- Although 85 % of German LGBT+ talents say they are ready to disclose their sexual orientation at work, only 37 % have actually done so.

- In Germany, 38 % of LGBT+ talents feel being out at work would make their life easier. However, 22 % still see being out at work as a potential career risk. 42 % would lie to their manager about their sexual orientation.

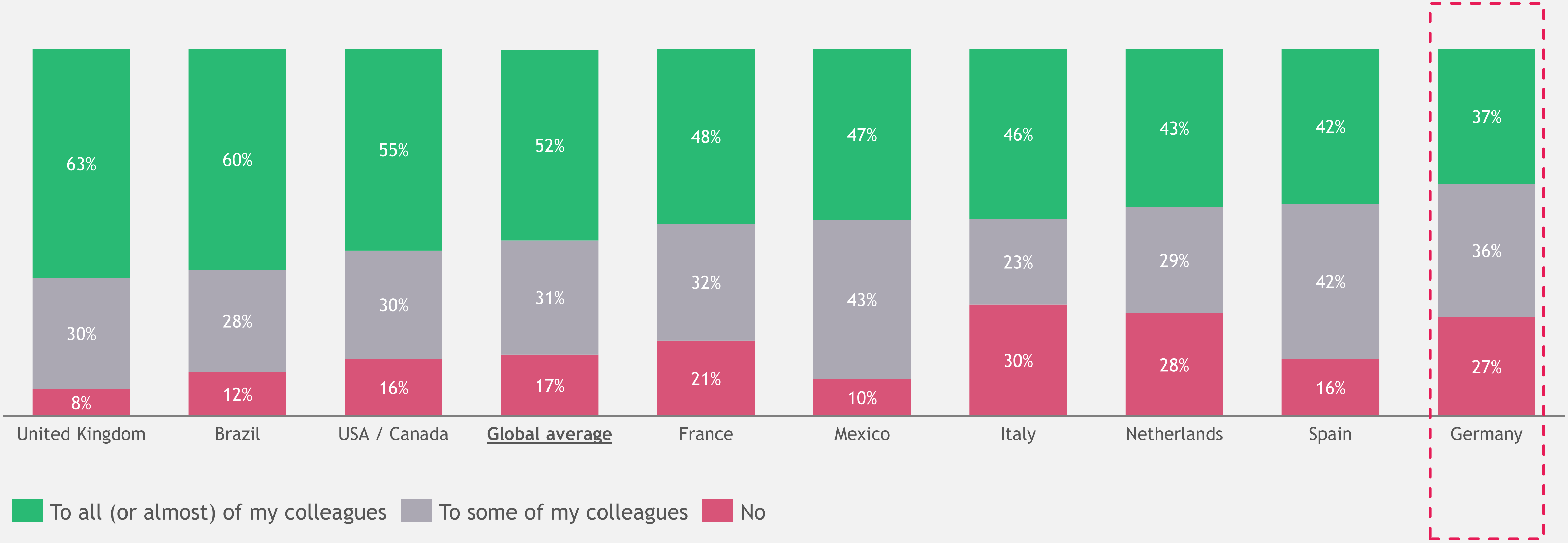
- LGBT+ talents in the United Kingdom (63 %), Brazil (60 %) and the United States (55 %) are most likely to be out at work to all their colleagues (global average: 52 %)

- Besides Germany, Italy (46 %), the Netherlands (43 %) and Spain (42 %) perform below average.

- Among all respondents, Females (43 %) and non-binaries (46 %) are less likely to be out at work than males (57 %).

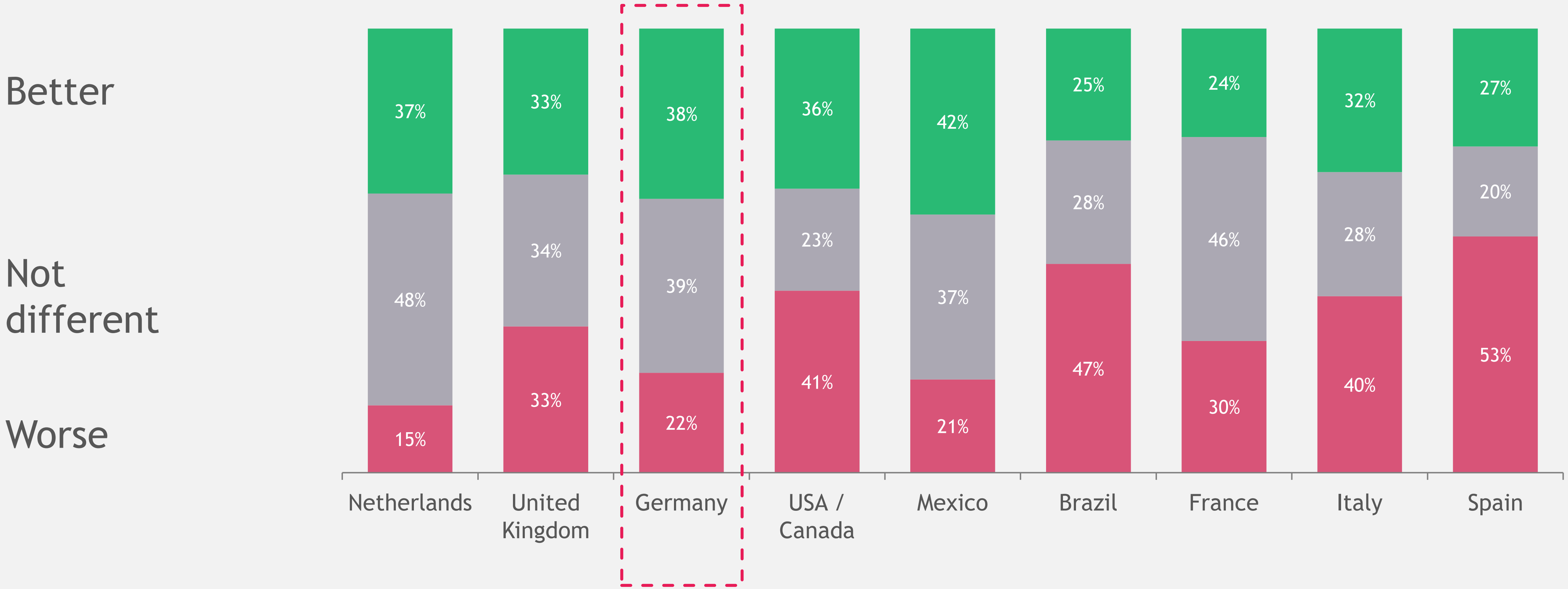
In Germany, LGBT+ talents less likely to be out at work to all their colleagues

At work, I am out…

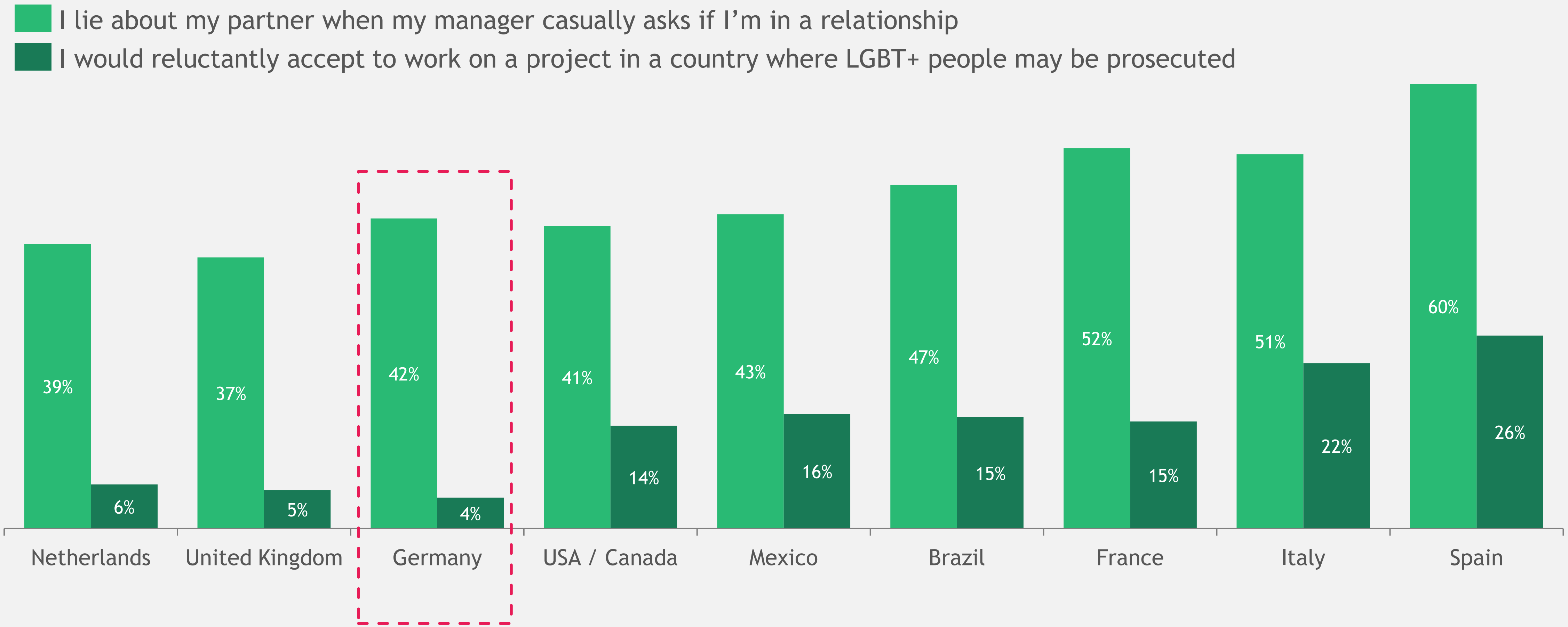


In Germany, 38 % of LGBT+ talent feel being out at work would make their life easier

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



Germany is the country where LGBT+ talents are least likely to reluctantly accept to work in a country hostile to LGBT+



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

Top criteria per country	Nether-lands	United Kingdom	Germany	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

Companies need to embrace LGBT+ friendly attributes to effectively attract LGBT+ talent

Top LGBT+ friendly attributes per country	Nether-lands	United Kingdom	Germany	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

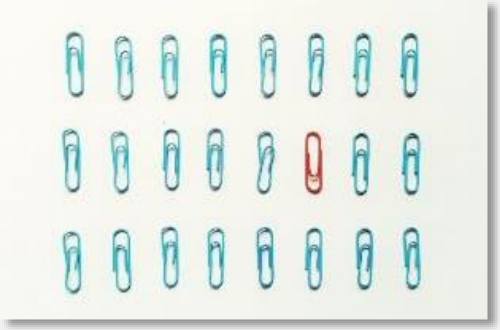
Further global survey results

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

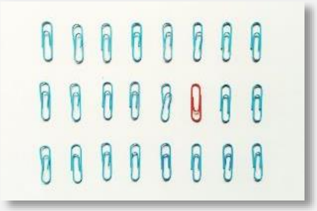
The paradox of LGBT+ inclusion: while 4/5 of LGBT+ are comfortable at work, only 50% are openly out

Out & Proud

44%

Out & Uncomfortable

8%



50% of LGBT+ are openly out at work

Silent & Comfortable

35%

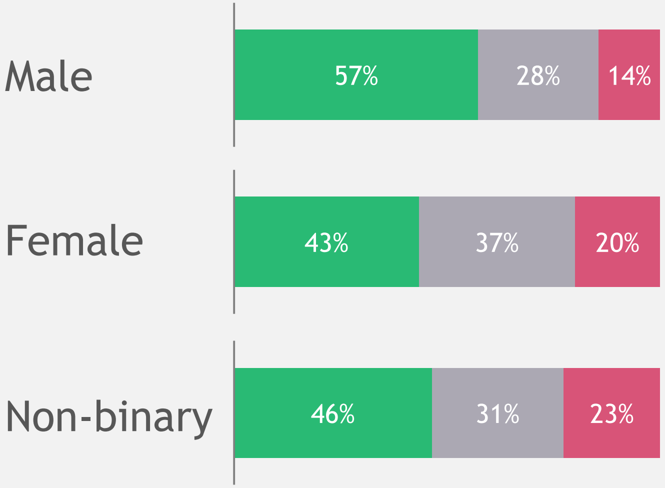
Silent & Troubled

13%

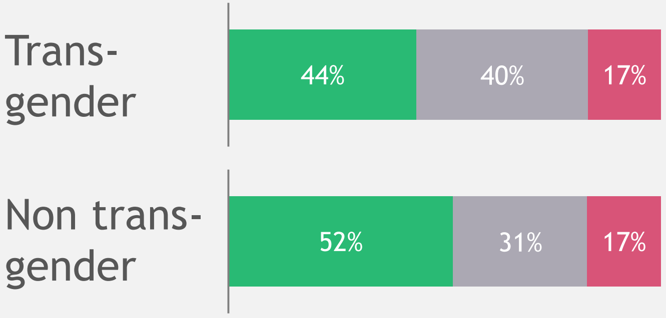
4/5 LGBT+ would be ready to disclose their sexual orientation

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

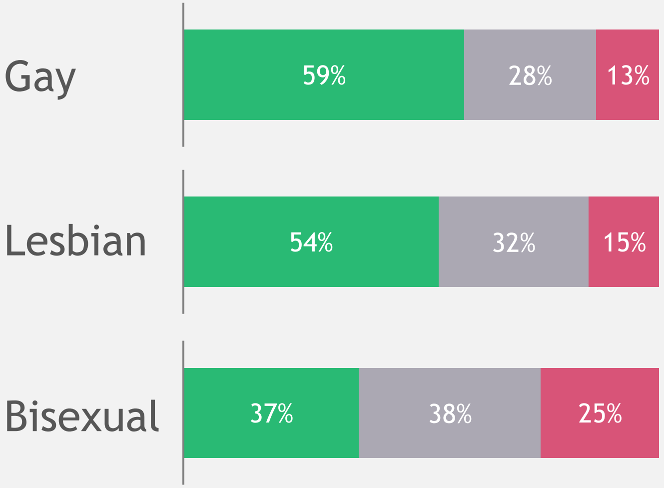
Gender
Females and non binaries less likely out than males



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

My preferred type of company would be:		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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