

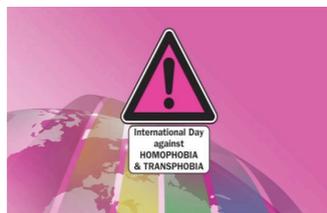
International LGBT2020 Homophobia Report



Report contents

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- > Physical violence
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- > Refusal of goods or services
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- > How 'out' with family
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Out Now Global LGBT2020 Study



The world's best strategic insights
into global LGBT communities

LGBT2020 - Messages of Welcome

Message from Ian Johnson CEO, Out Now

'LGBT' spells people

For 21 years Out Now has worked with LGBT communities, non-government organisations, government departments and companies around the world. In 2013, we extended our operations to more than 20 countries.

An important part of our work is to undertake research so we can help inform the various stakeholders we represent in many different ways. The data comprising the report you are now reading is part of a project of which we are very proud. The **Out Now Global LGBT2020 Study** is the world's largest ongoing LGBT research study - and in 2013 we will extend our reach into new countries in Asia and elsewhere. Out Now has built a world-leading consulting organisation by constantly redefining the leading-edge in LGBT knowledge. In this report you are reading for example you will discover the first ever data measured of homophobia experienced by LGBT people in India, Israel and Turkey.

Of course one of the most important things we say at Out Now is that averages mask diversity. There is no such thing as a 'typical' LGBT person. There are just individuals. People. Living diverse lives in countries around the world - yet all united by one characteristic that unites them - being a member of a minority group in societies known as LGBT. The life experiences of lesbians, gay men, bisexuals and transgender people is what you will read in this report - all distilled into graphs and charts where one fundamental thing can too easily be lost.

The almost clinical acronym 'LGBT' is much more than easy shorthand to group a community around. It is far more profound than that. As we pore over the insights to be found in the charts in this report it is vital to remember one essential thing: at Out Now we say that LGBT spells 'people'.

Out Now is delighted to contribute this LGBT2020 report on homophobia in support of IDAHO - International Day Against Homophobia and Transphobia.



LGBT2020 - Messages of Welcome

Message from Joel Bedos, IDAHO Committee International Day Against Homophobia and Transphobia

Data is Action

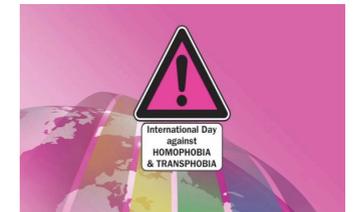
Every year on the International Day Against Homophobia and Transphobia, thousands of activists worldwide take action to fight for their basic human rights.

Companies increasingly stand to be counted as precious allies. In many countries, companies take actions on the Day, such as flying the rainbow flag above their buildings, hosting fundraising events, announcing equality policies for their staff, and through many other creative ways, often developed by their own LGBT staff organisations.

The Out Now Global LGBT2020 Study will no doubt provide renewed momentum for companies to increase their commitment to Human Rights for all, irrespective of sexual orientation and gender identity or expression. Not only within their companies, but within the societies at large that they live and work in. By supporting local LGBT advocates who work every day to fight against stigma and discrimination, companies are proving vital in implementing a core component of their broader corporate social responsibility.

The LGBT2020 Study can also constitute a useful resource directly for Human Rights advocates. Indeed, data collection and analysis, when done by and with the community it serves, constitutes an essential element of effective strategy making, and by all means deserves much more attention from all parts of society.

So for some of us, the LGBT2020 Study can provide valuable evidence of levels of homophobia and transphobia in society. For others, the LGBT2020 Study will constitute a thought-provoking background for the development of their own frameworks, which can be tailored to fit their context and help meet their own advocacy objectives.



Executive Summary - page 1 of 2

The 'Out Now Global International LGBT2020 Homophobia Report' is a new initiative of the LGBT2020 research project, which is the largest study into the lives of people in LGBT communities globally that has ever been undertaken. This report you are now reading focuses solely on data collected on topics of how well integrated and visible LGBT people are in different aspects of their lives as well as reported levels of discrimination and harassment that they suffer as a result of their sexuality or gender identity.

Countries sampled during 2012 for this LGBT2020 research report include: **Argentina, Australia, Austria, Brazil, Canada, Chile, Ecuador, France, Germany, India, Ireland, Israel, Japan, Mexico, Netherlands**, Peru, Poland, **Turkey, United Kingdom, United States**, Uruguay. (Those in bold are included in this report.)

The results highlight several key global trends for LGBT people among findings that are relatively consistent across the various countries tested, including the countries in the LGBT2020 study not included in this new report. These data reveal the prevalence of homophobia, which is still endemic and appears to be culturally ingrained in societies globally.

Firstly discrimination, harassment and violence are occurring to LGBT people because of their sexuality all over the world. Secondly, even in the most progressive western countries not everyone who identifies as being either LGB or T is able to be completely 'out' or open about their sexuality either at work, with friends or with family. And thirdly, the majority of respondents tested also believe that there are problems of varying degrees of severity regarding how LGBT people are treated in the workplace.

While these findings highlight the extent of discrimination and harassment of LGBT people they may only reveal part of the problem. The research shows that even in a country as socially progressive as the Netherlands for example, the percentage of LGBT people who are able to be out to everyone at work (65%), with family (77%) and with their friends (83%) is not total showing that issues in coming out are real and affect interpersonal relationships across society. This ability to be 'out' drops to just 17% (at work), 21% (with family) and 26% (with friends) in Japan, where cultural norms make it far more 'unacceptable' for LGBT people to be open about their sexuality or gender identity.

The new LGBT2020 homophobia figures reveal the true lack of visibility for LGBT people in society, particularly in the workplace, where even in a country as reportedly accepting as the Netherlands - more than one in every three (35%) of all LGBT respondents feel that they are unable to completely be themselves with their colleagues at work.

This lack of visibility because of reluctance amongst many LGBT people to come out about their sexuality or gender identity is explained by another finding of the research.

>>> CONTINUES

Executive Summary - page 2 of 2

There is a very real threat that out and open LGBT people risk harassment, discrimination and violence - both verbal abuse and physical assaults - in the societies in which they live, all over the world due to their sexuality or gender identity. The 'Out Now Global International LGBT2020 Homophobia Report' shows that there is a particular lack of visibility (known as 'being in the closet') for LGBT people globally which is especially prevalent in certain countries including Japan, Turkey, Mexico, France and Brazil. With fewer visible 'out' LGBT people in these countries the actual levels of homophobia could be far higher than reported as people who feel unable to be out are often adopting this tactic as part of a strategy to minimise homophobic and transphobic incidents against themselves.

There is a strong correlation with how out people are in a particular country in their places of work, with how well they feel LGBT people generally are treated in the workplace, indicating that countries where people are less likely to be out at work are also those countries where LGBT respondents feel LGBT people in the workplace are treated poorly.

Issues of homophobia and transphobia are not defined by levels of development within nations.

The findings of the new 'Out Now Global International LGBT2020 Homophobia Report' show that countries such as the USA, UK, Canada, France and Germany (amongst others) all have significant cultural issues affecting how open LGBT people can be in all levels of society, and respondents from these countries also report worryingly high levels of harassment, violence and discrimination which they suffer because of their sexuality or gender identity.

In the USA for example, 59% of respondents believe that there are issues of concern to them regarding how LGBT people are currently treated while at work, which may go some way to explaining why only 44% of LGBT respondents from the USA are out to everyone in the workplace.

Similarly in the UK, only 52% of respondents said that they felt able to be 'out to everyone' at work, and 15% of respondents indicated that they had suffered harassment in the workplace during the past year.

It appears that no matter where LGBT people live in the world today, too many still run very real daily risks of suffering harassment, bullying, violence and intimidation solely on the basis of their sexual orientation.

LGBT2020 - 2013

About LGBT2020

The Out Now Business Class LGBT2020 research project is the largest study into the lives of LGBT people globally that has ever been undertaken. The LGBT2020 research samples the experiences and opinions of lesbians, gay men, bisexuals and transgender people in 12 languages from 21 countries on 6 continents.

The resulting data looks at many aspects of their lives. From LGBT travel and tourism patterns, work issues, lifestyle habits, consumer expenditure, incomes, spending, discrimination, parenting, relationships and even entertainment preferences - the LGBT2020 project is a groundbreaking project from Out Now which is giving unparalleled insight into the lives of real LGBT people from all over the world. This report covers the latest respondents from 15 countries making a total global sample of 22,905 analysed here.

Out Now's LGBT2020 research relies on the responses of nearly 100,000 respondents globally who were sampled between 2010 and 2012. Surveys were undertaken online and collected in association with community organisations, social media networks and leading LGBT media in the UK to provide the broadest possible sample from each country in the LGBT2020 research study.

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LGBT2020 - 2013

About Trans results

The acronym LGBT stands for "lesbian", "gay", "bisexual" and "transgender" people. The first three of these - LGB - relate specifically to an individual's primary sexual orientation.

The letter T though is different in that in the LGBT acronym it relates to a person's gender identity and/or gender expression.

It has traditionally been difficult to measure with sufficient statistical validity the results from transgender people.

One of the benefits of the LGBT2020 study is that with an increasingly large sample and reach as the study expands globally, Out Now expects to soon release first specific transgender findings allowing comparative analyses including transgender responses from sufficiently large sample sizes - particularly from the US and UK.

These transgender data will be analysed and released separately in 2013 and 2014.

For more information, or to register your interest in receiving a copy of these findings, contact Out Now:

info@outnowconsulting.com
www.OutNowConsulting.com



LGBT2020 - 2013

About male / female variations

For each variable, Out Now has analysed separately the difference between male and female respondents.

In most instances there is not a sufficient difference between (gay) and female (lesbian) respondents to warrant separate presentation of the results.

This is encouraging in the sense that in the countries Out Now measures for the LGBT2020 study the sample sizes are statistically robust helping to illuminate the similarities of male and female respondents' experiences of the issues reported on in this report.

To render the report as legible as possible, we present here aggregated data for LGBT respondents.

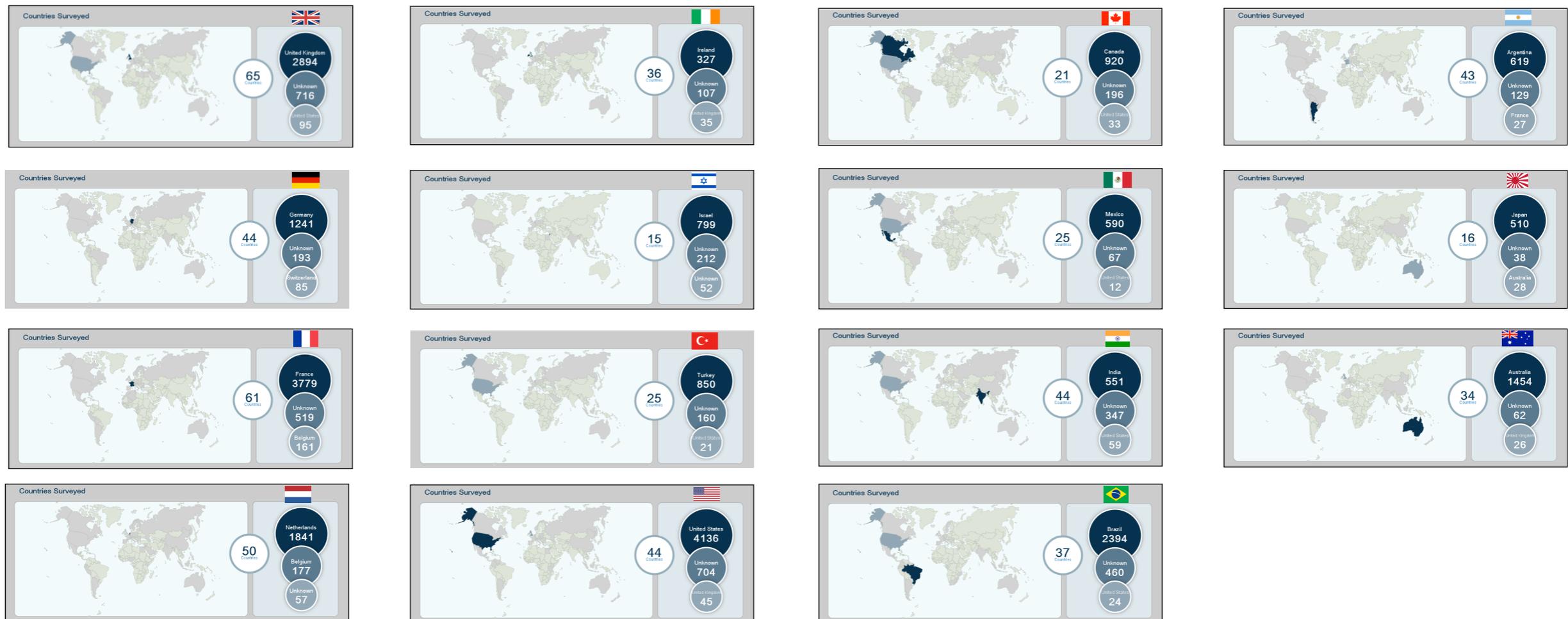
Of course there are occasions when there is a distinction between male and female respondents and if further information is needed for any specific variables, please contact Out Now:

info@outnowconsulting.com
www.OutNowConsulting.com



LGBT2020 - 2013

Number of respondents
15 countries. Total sample 22,905



NOTE: >>>> "Please click on the flag of the country closest to where you live to get started."

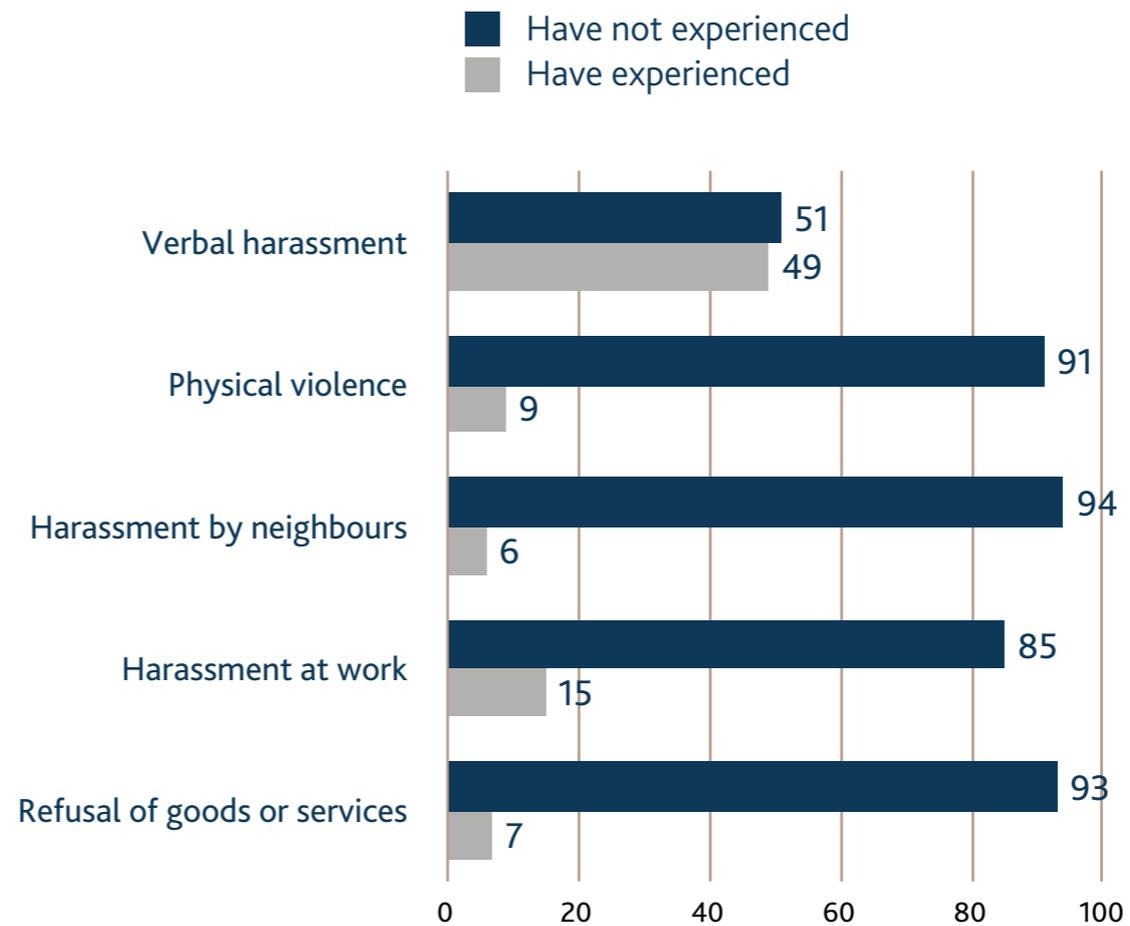
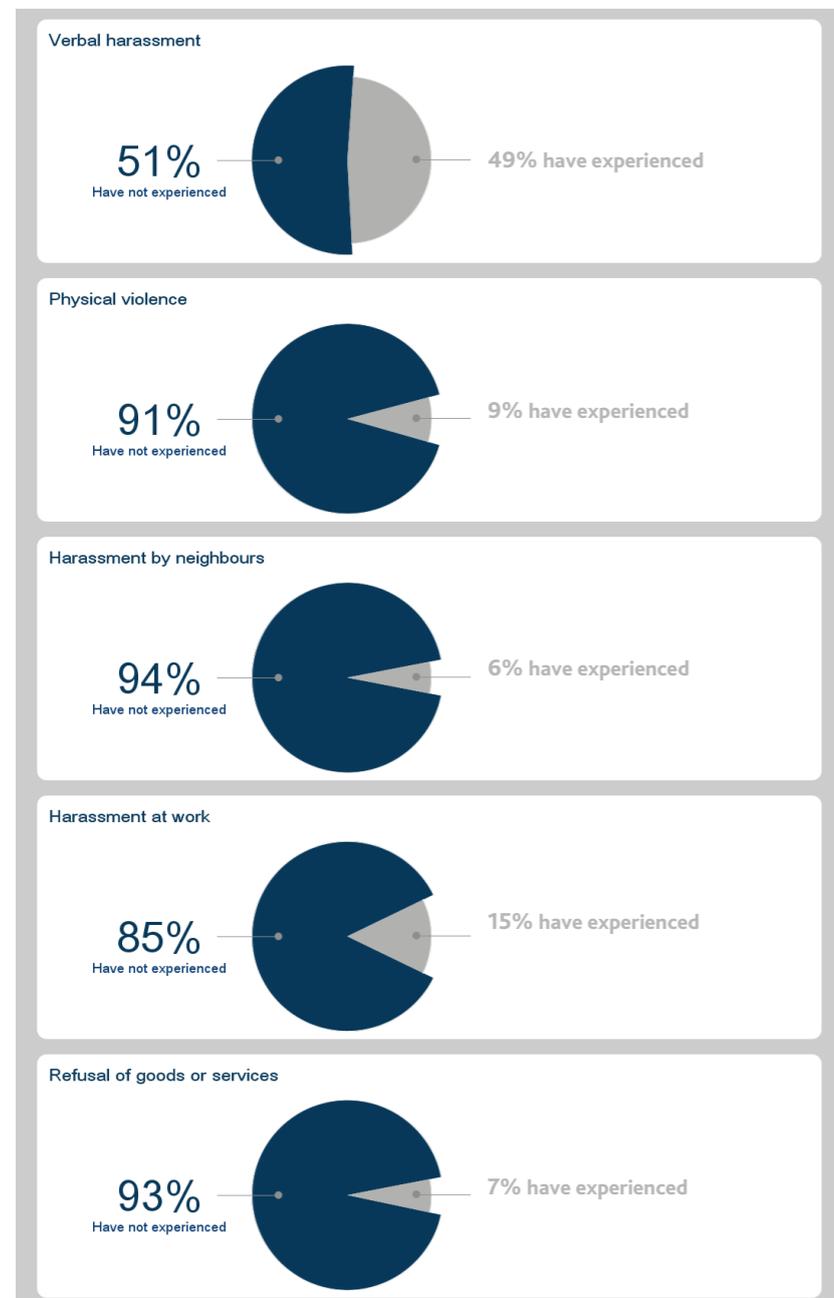
LGBT2020 - UK - 2013



Harassment, physical violence, refusal of good and services

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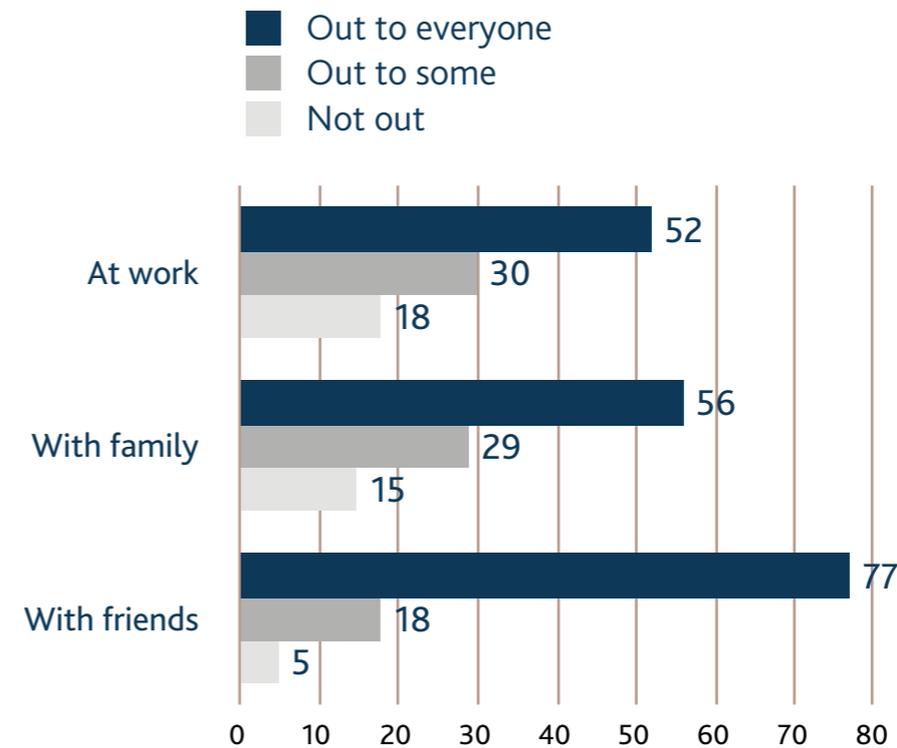
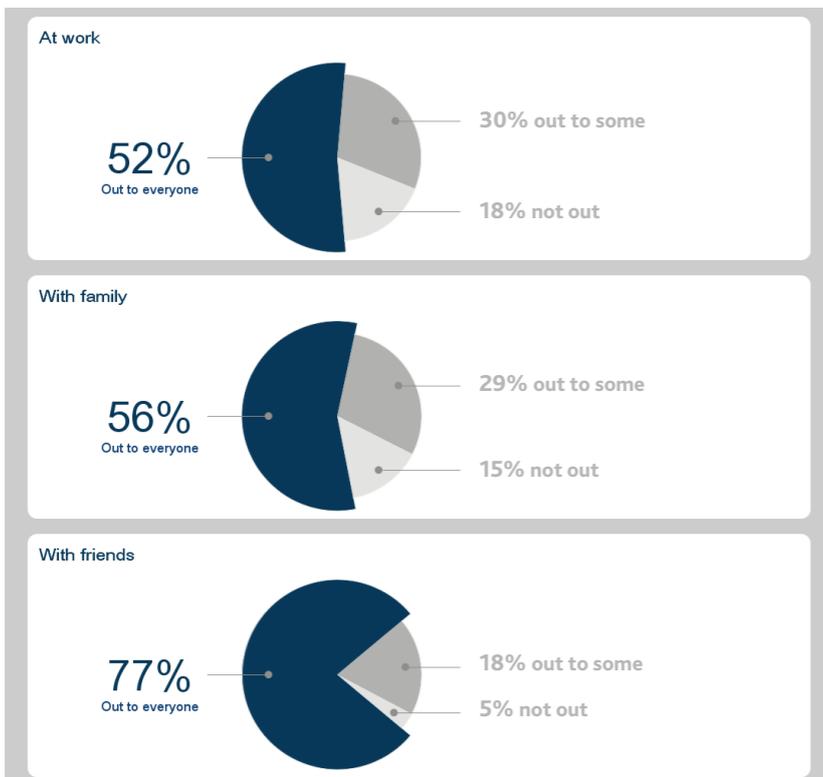
LGBT2020 - UK - 2013



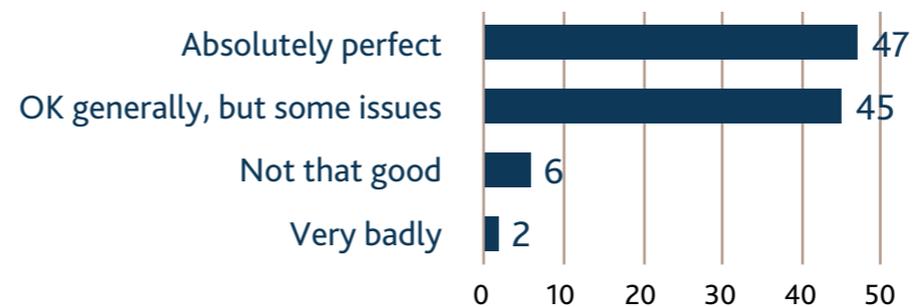
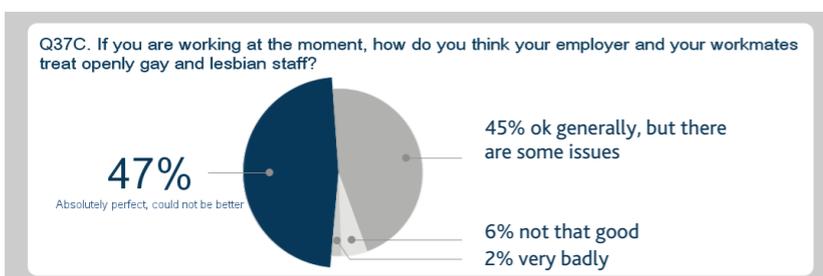
LGBT visibility and workplace issues

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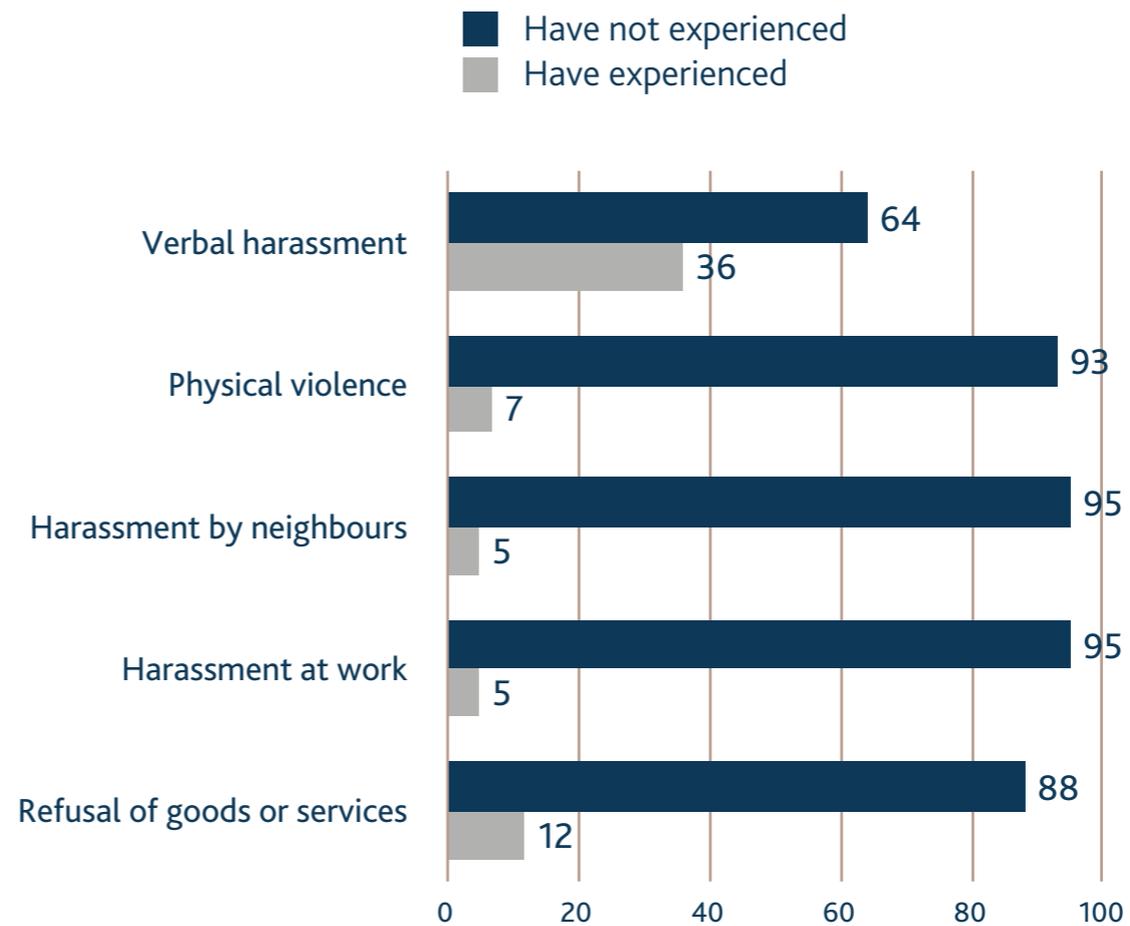
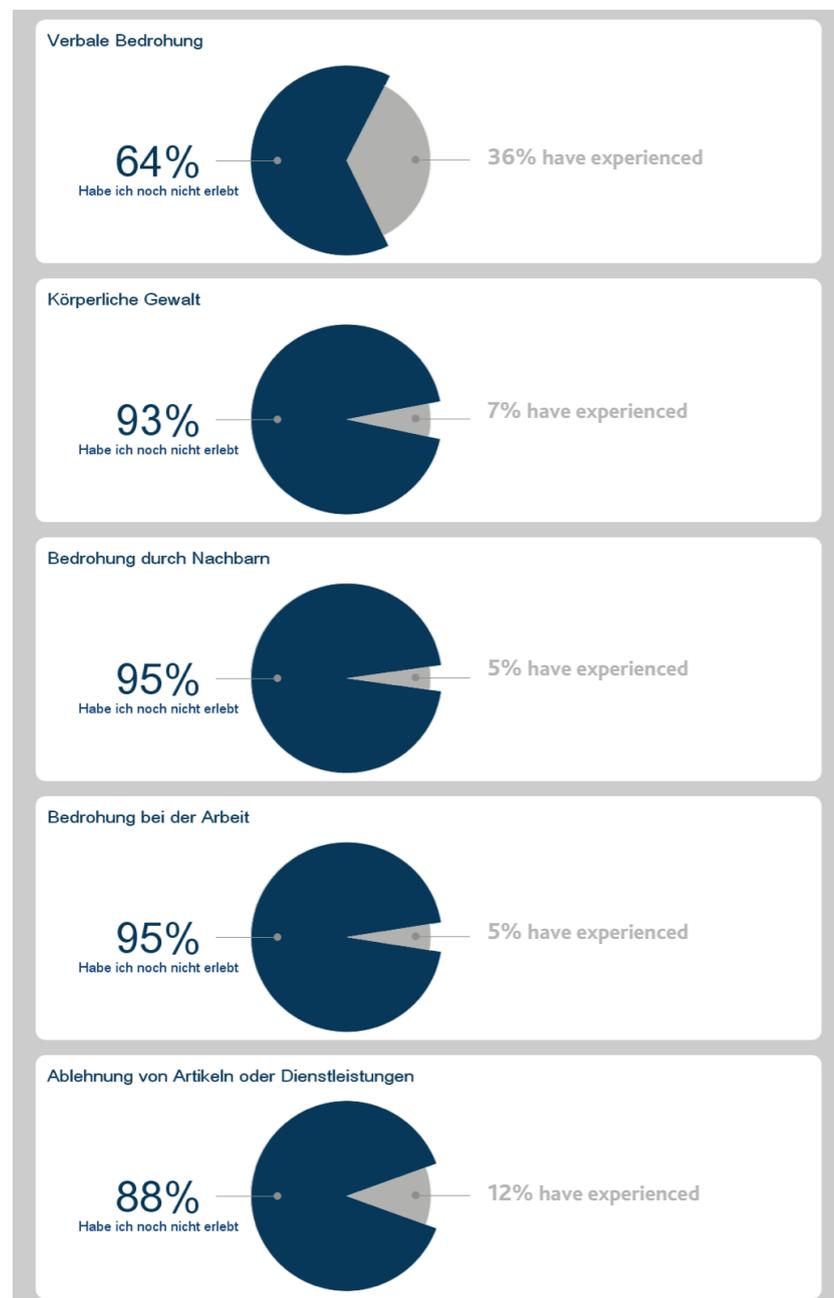
LGBT2020 - DE - 2013



Harassment, physical violence, refusal of good and services

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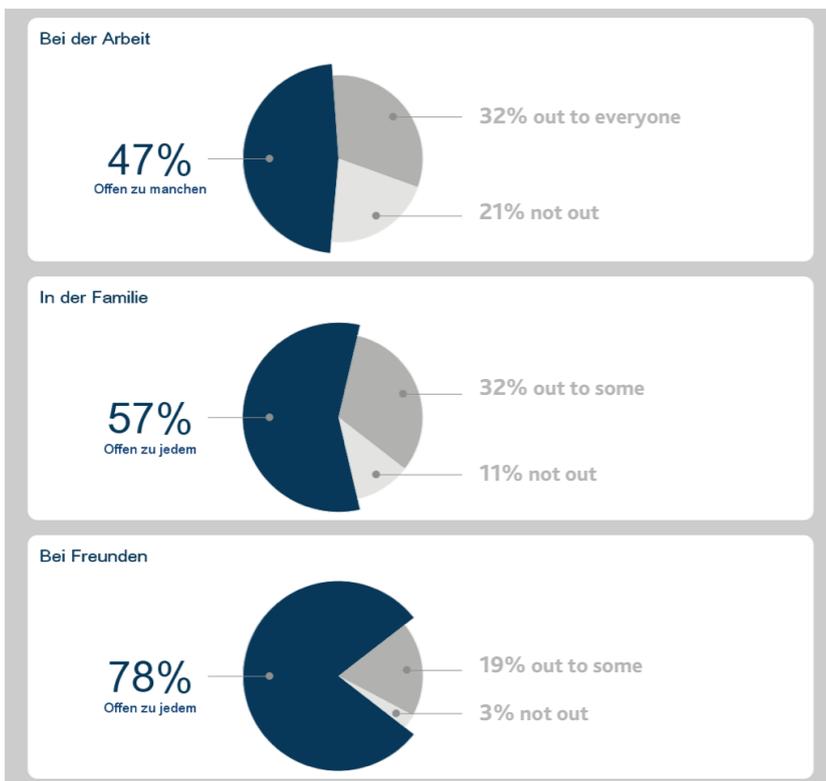
LGBT2020 - DE - 2013



LGBT visibility and workplace issues

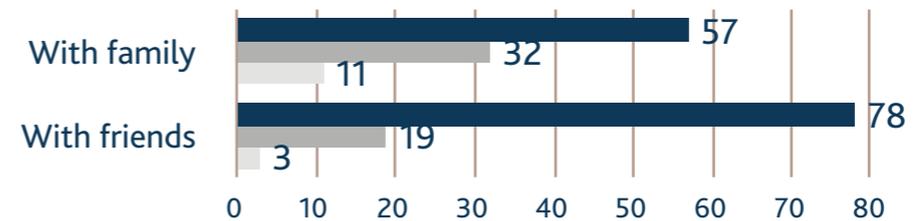
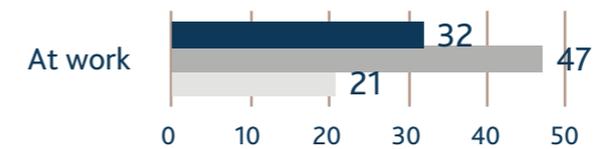
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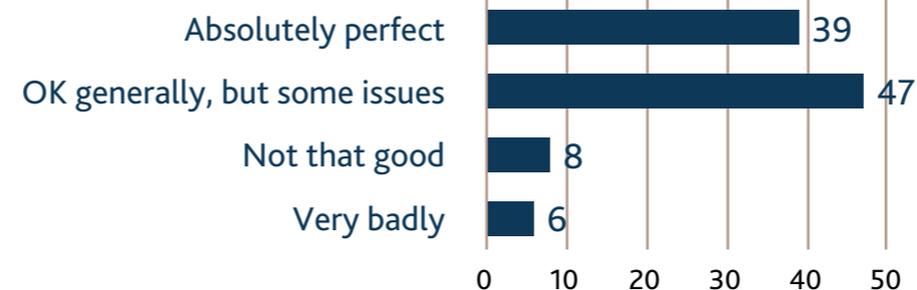
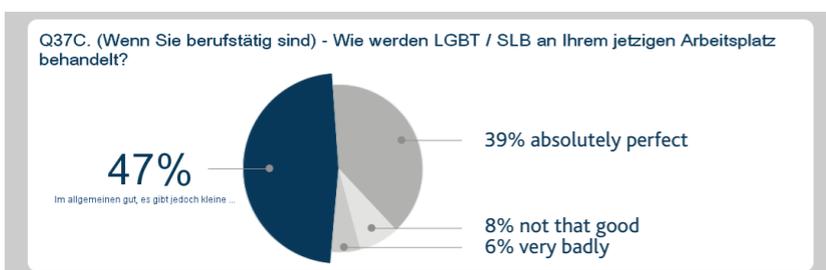


■ Out to Some
■ Out to everyone
■ Not out

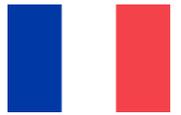
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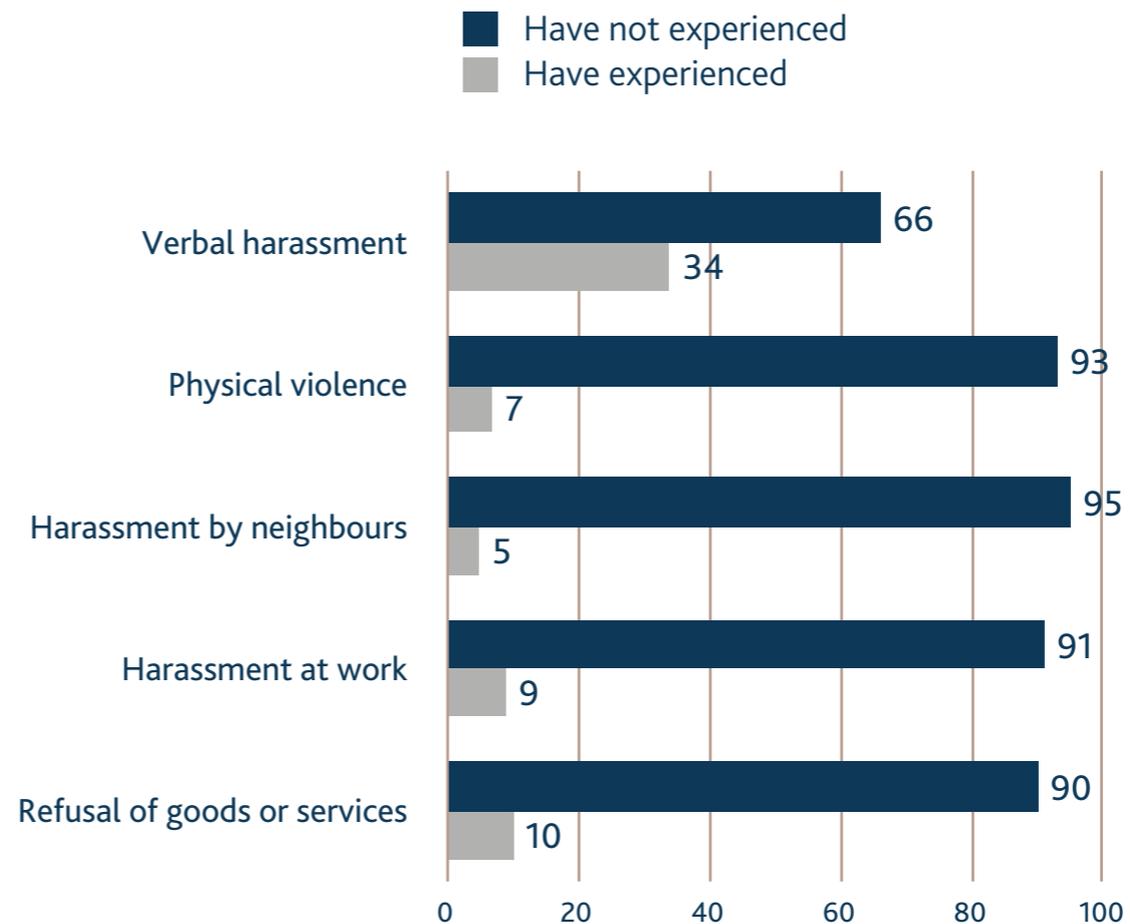
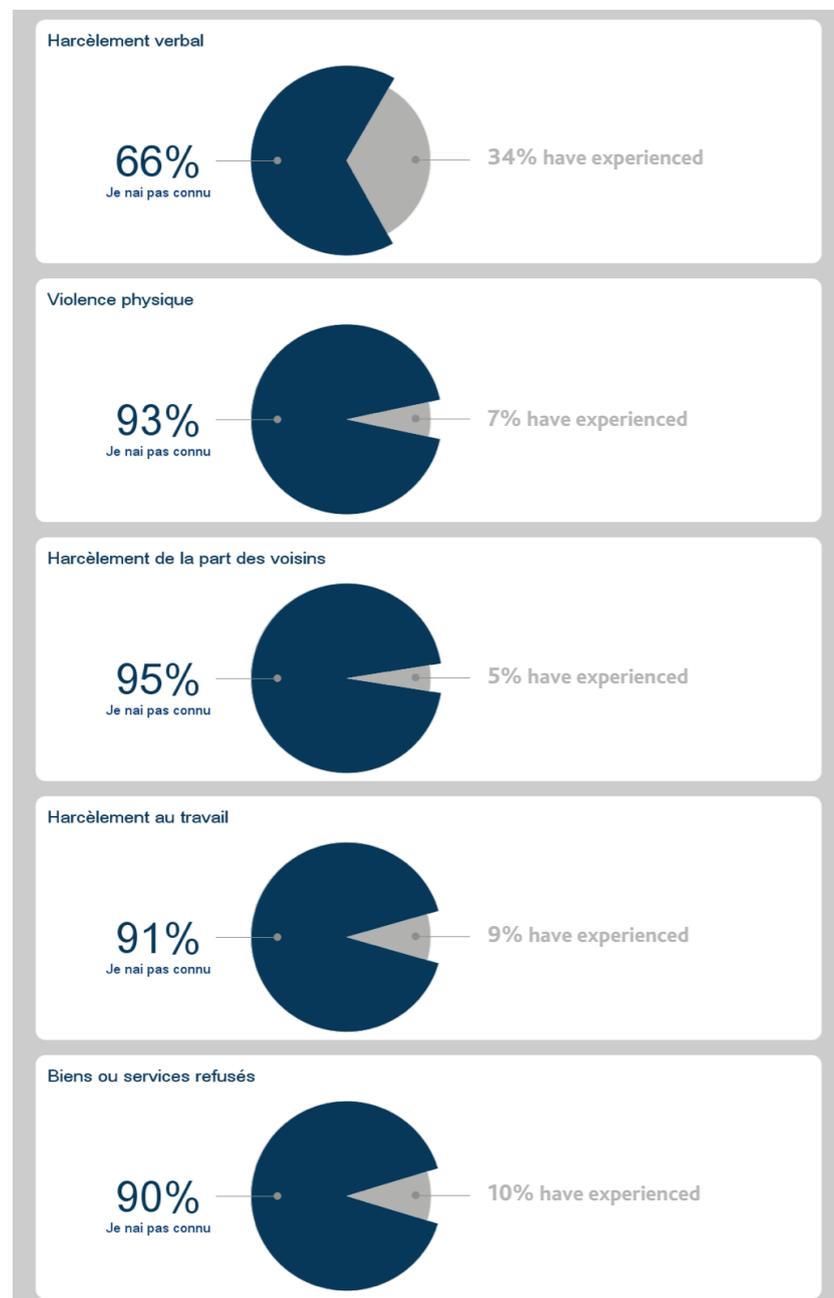
LGBT2020 - FR - 2013



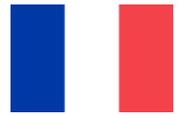
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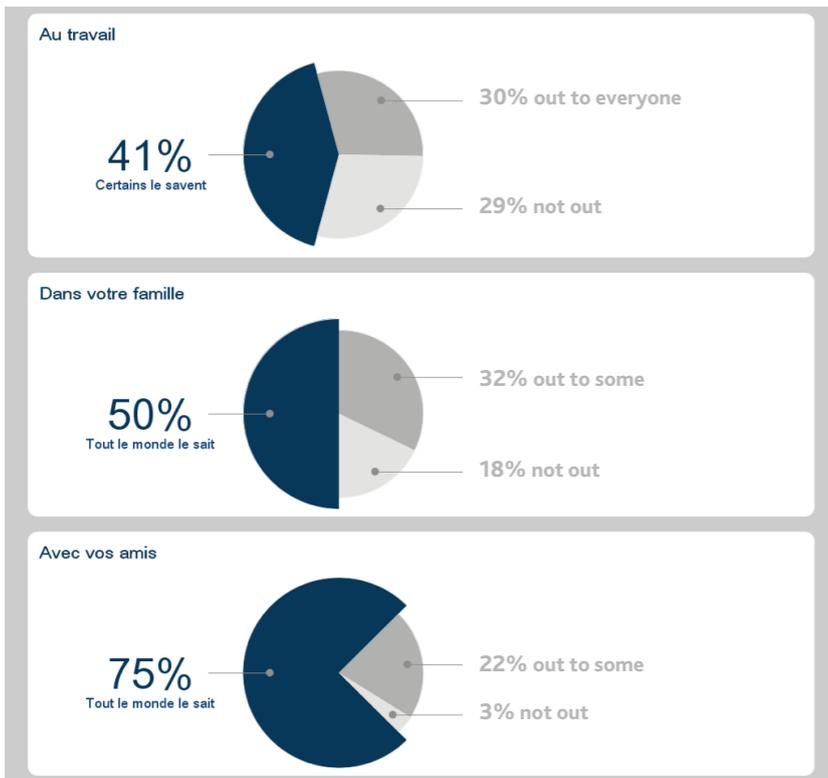
LGBT2020 - FR - 2013



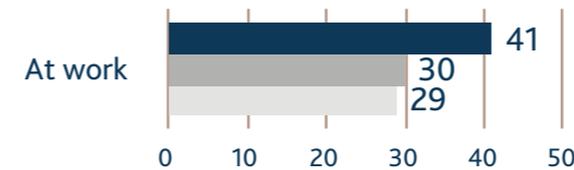
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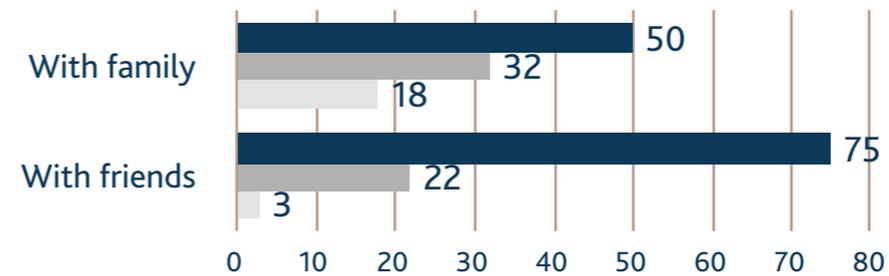
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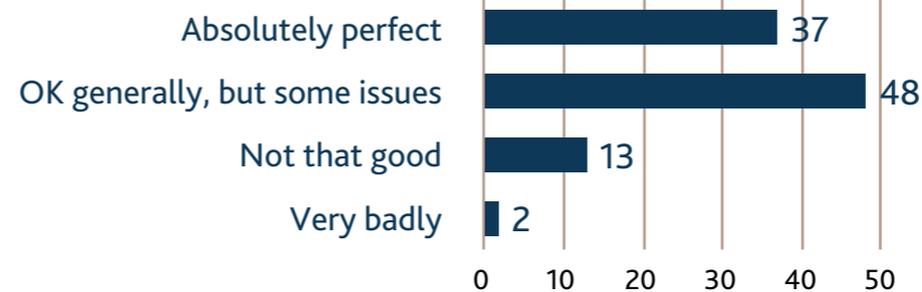
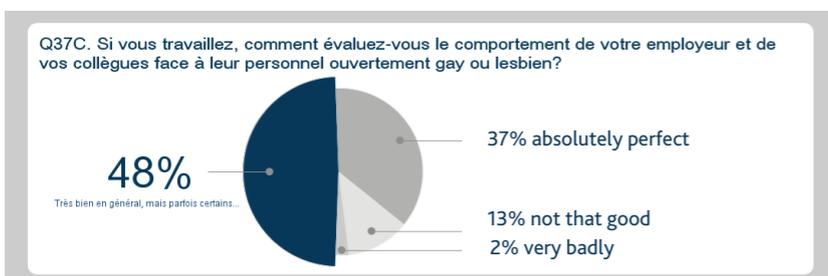
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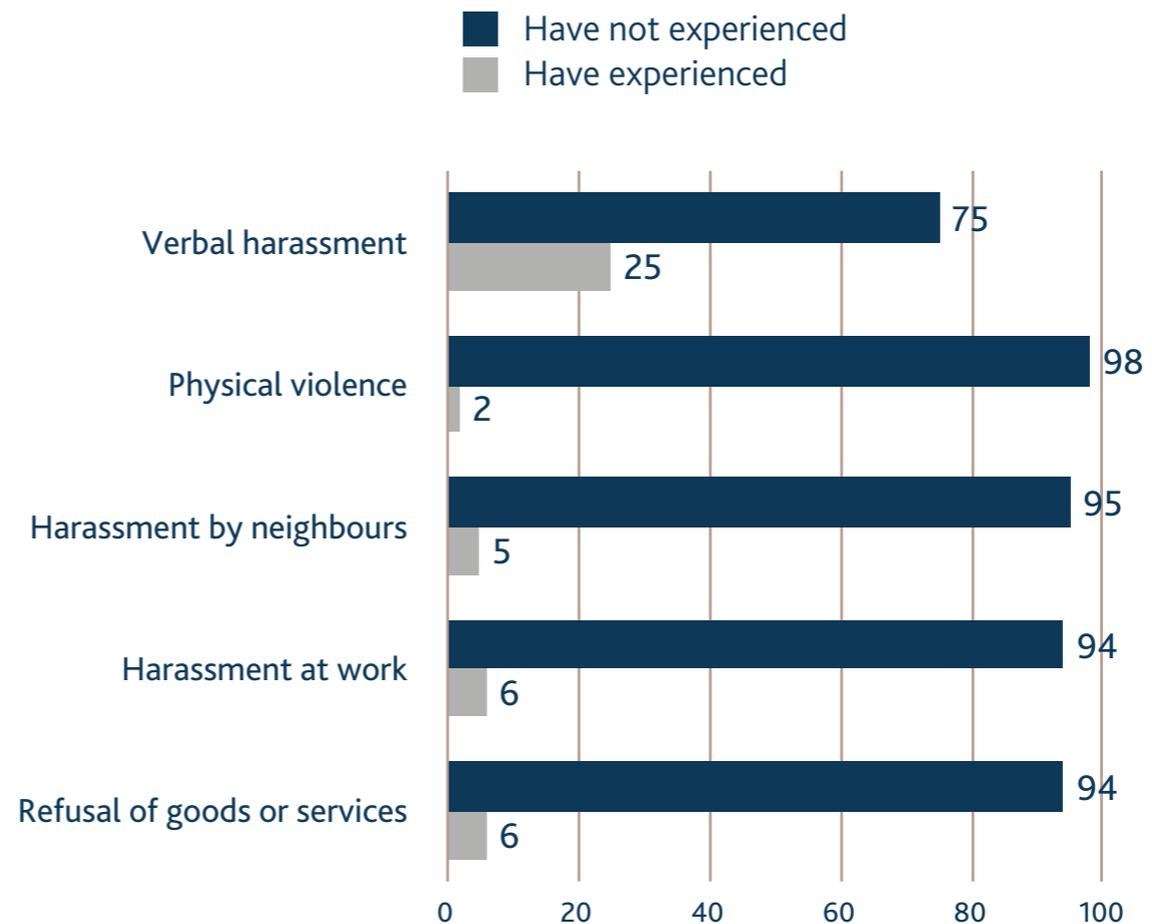
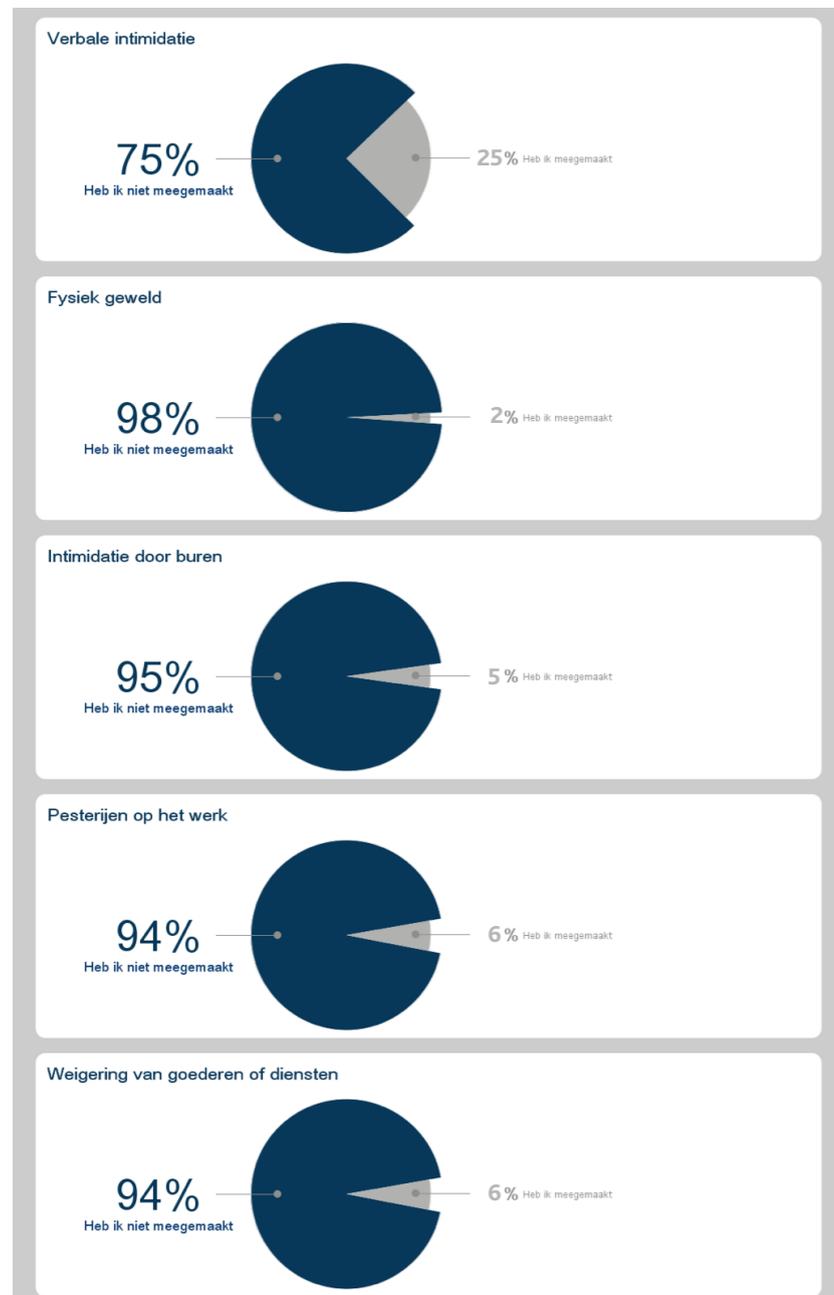
LGBT2020 - NL - 2013



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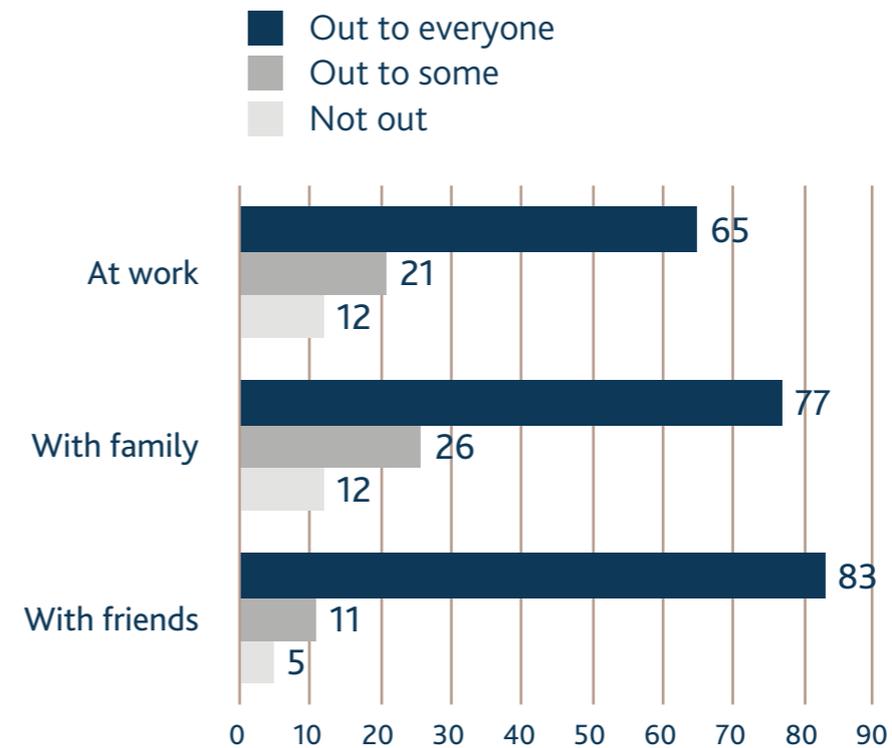
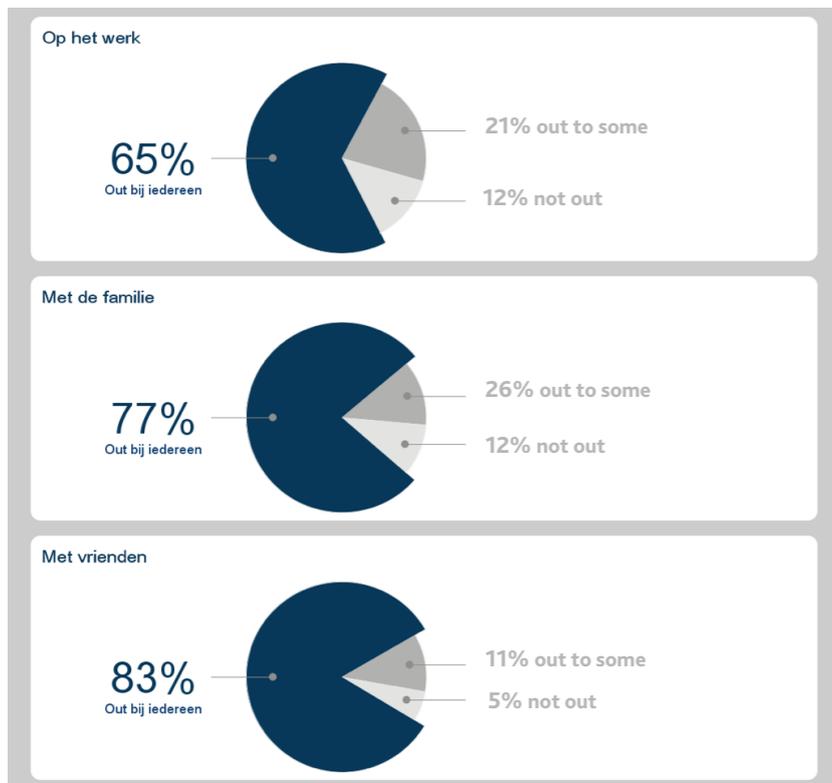
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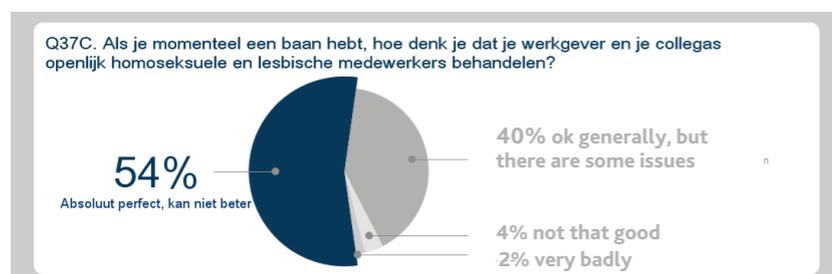
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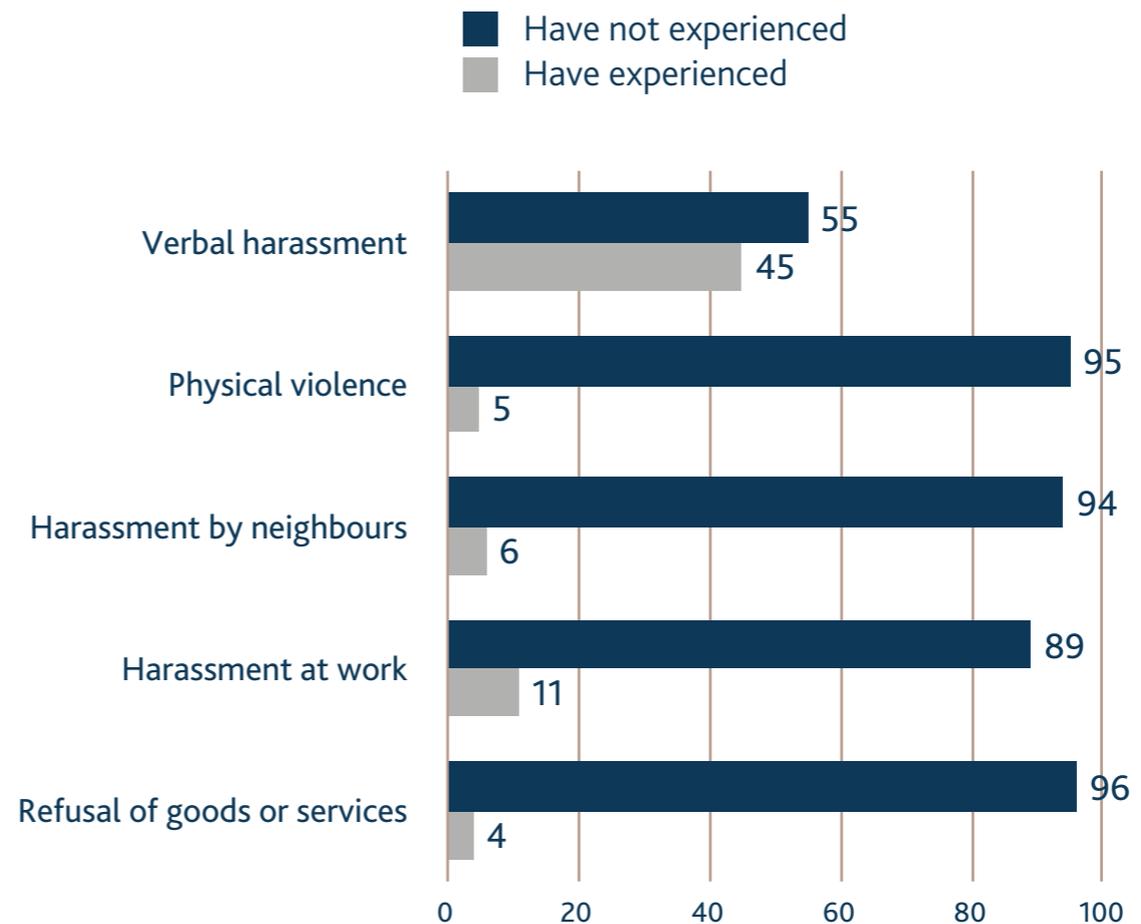
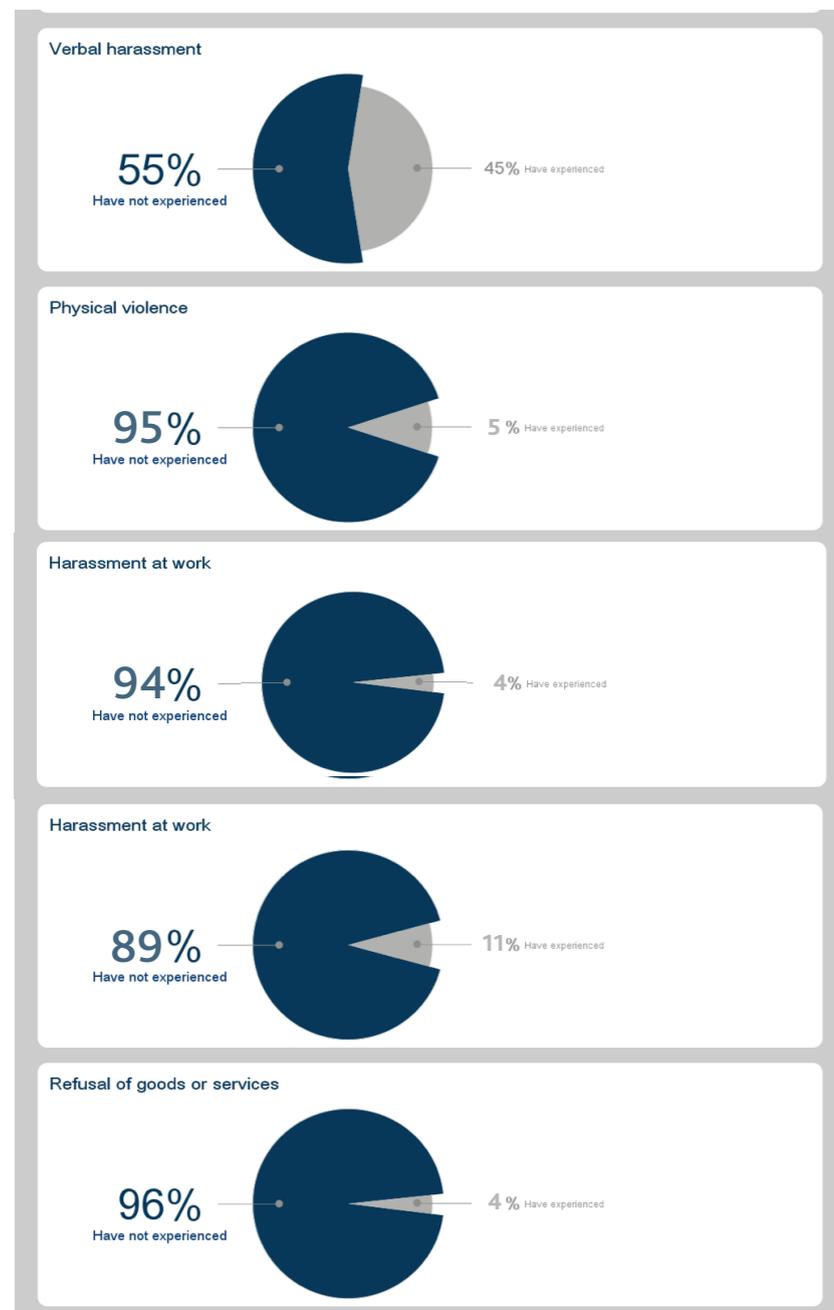
LGBT2020 - EI - 2013



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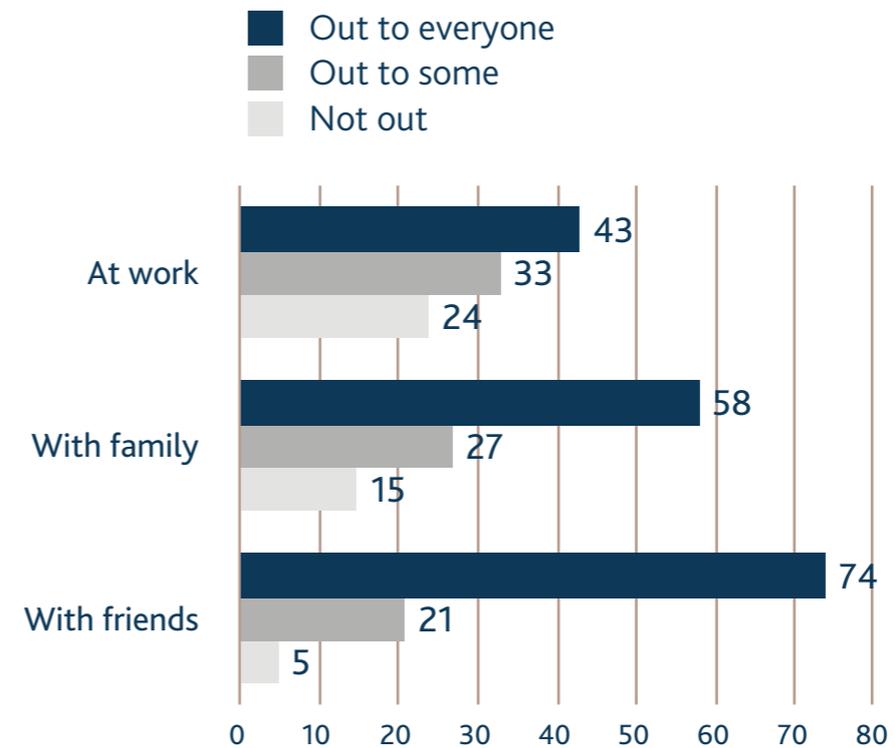
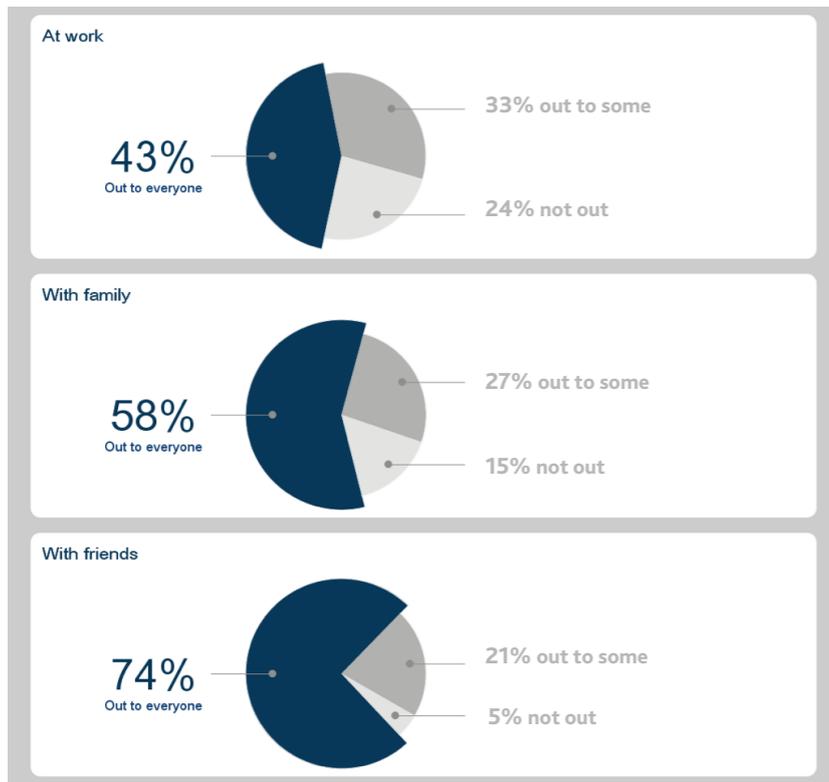
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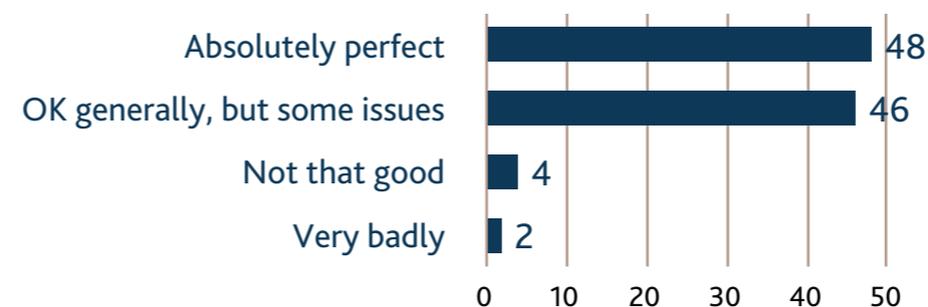
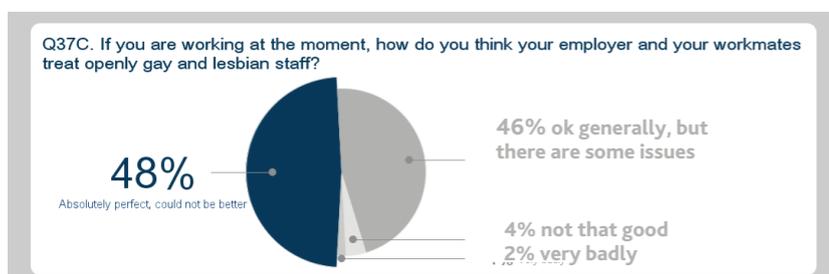
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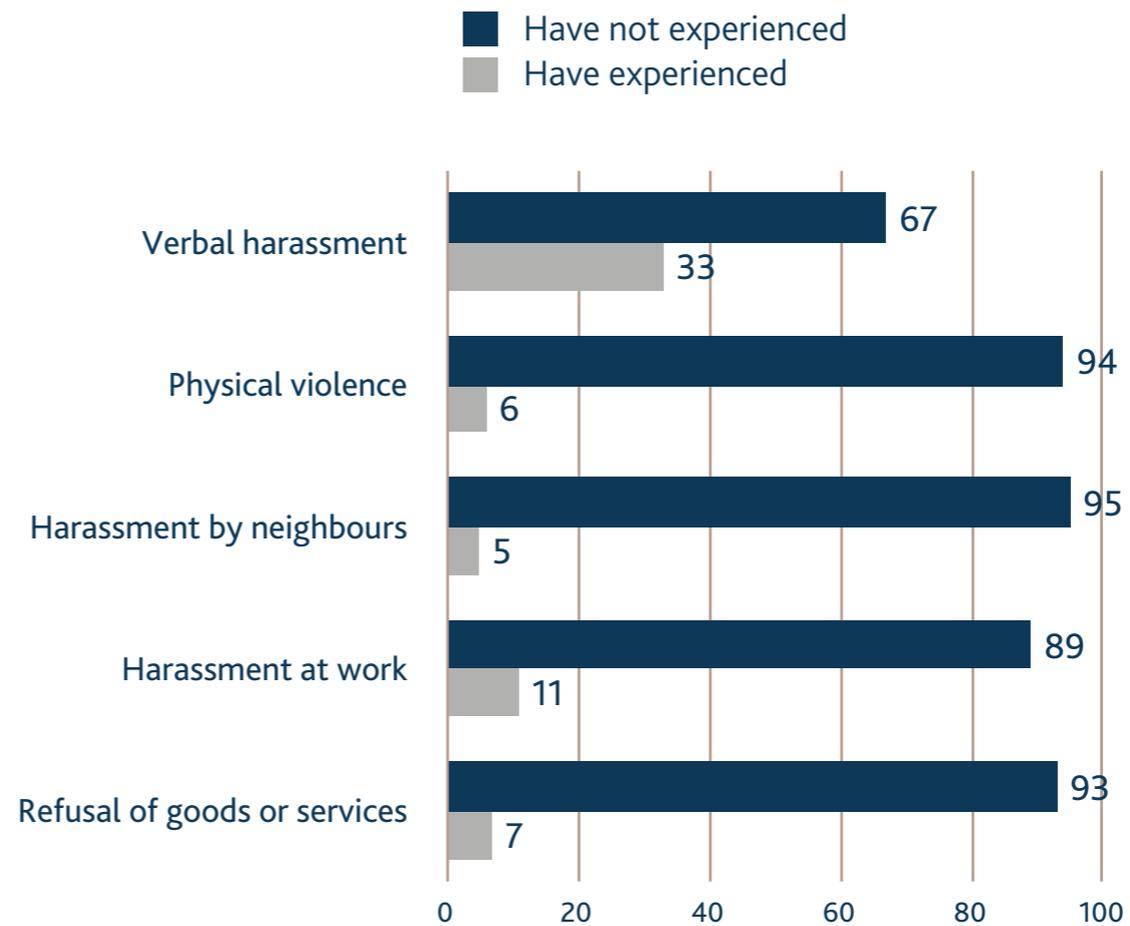
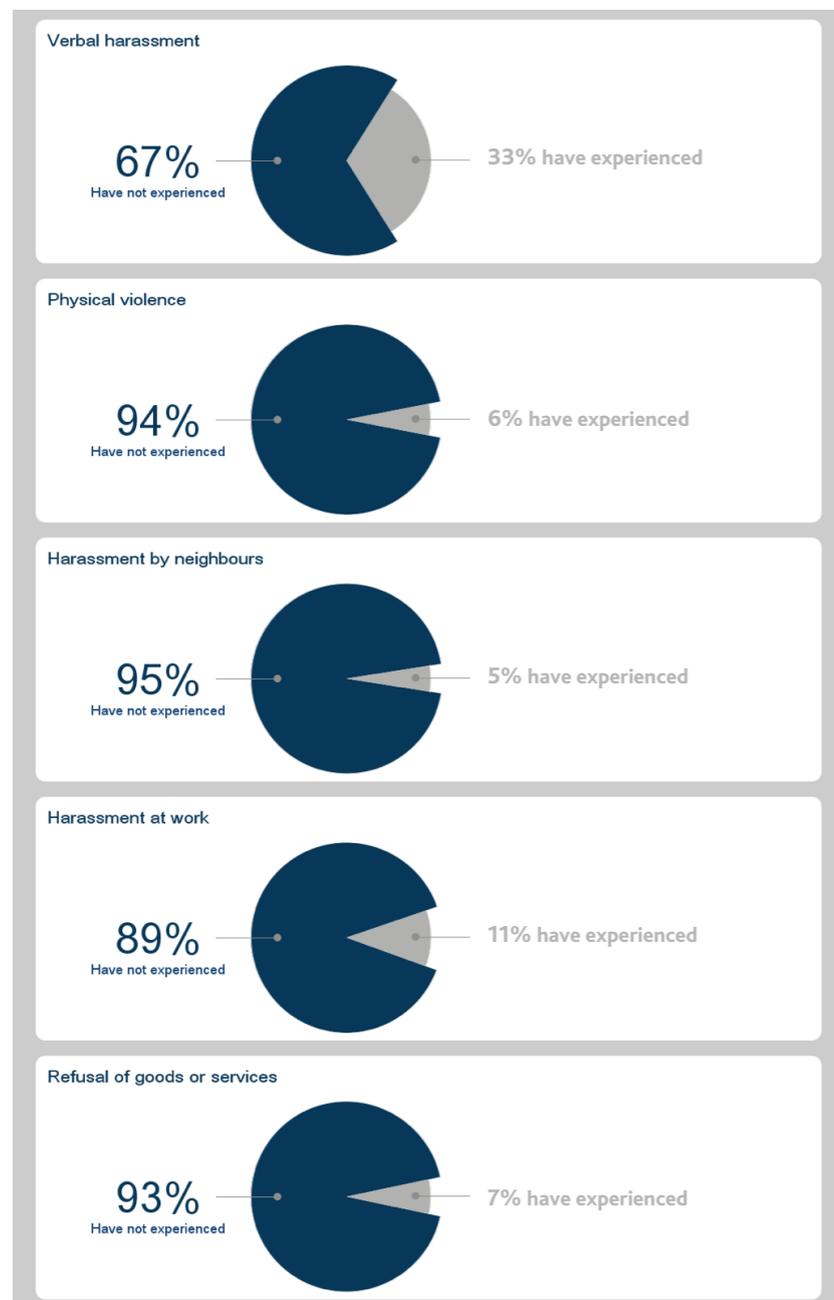
LGBT2020 - IL - 2013



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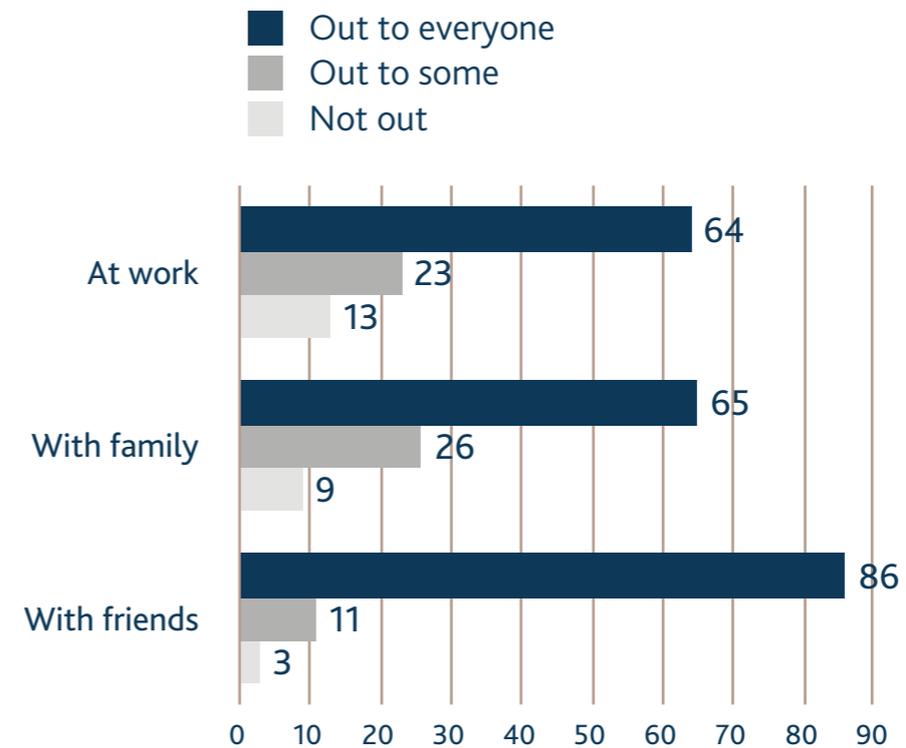
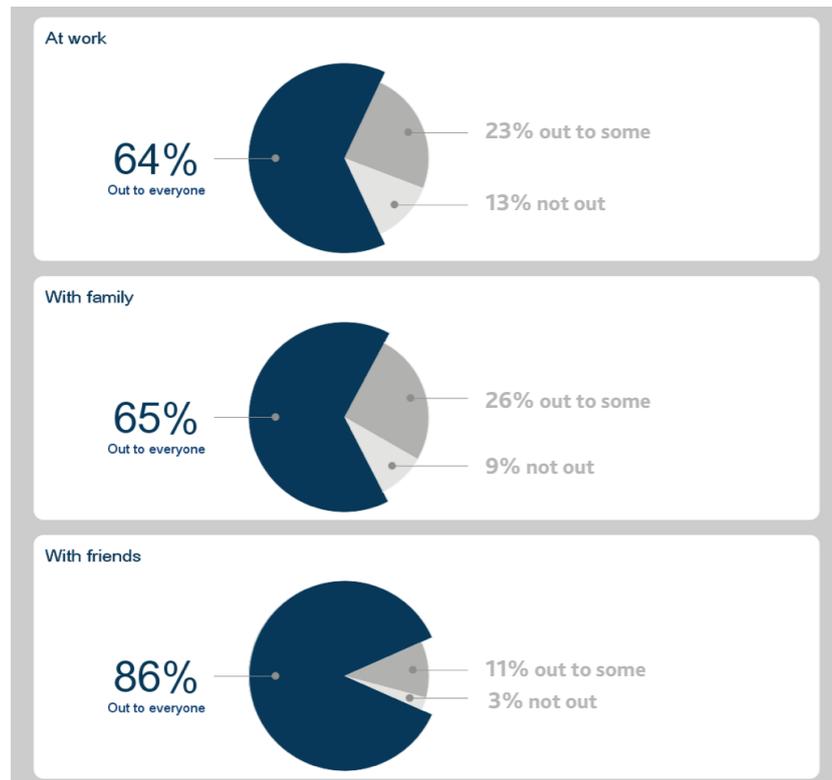
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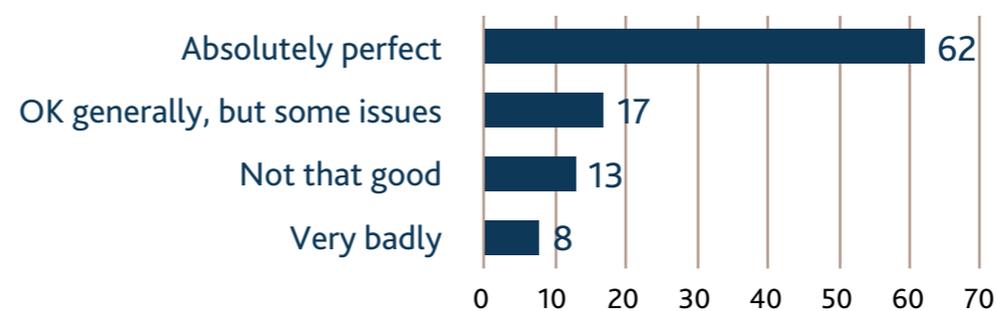
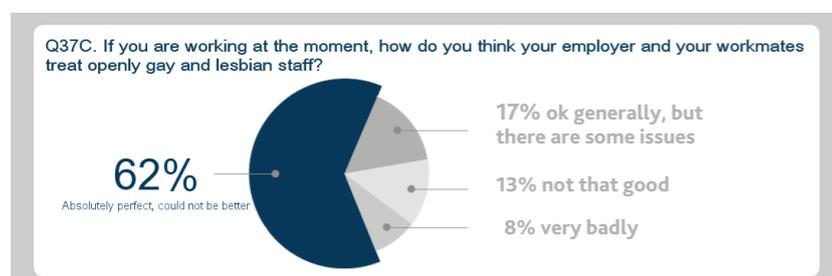
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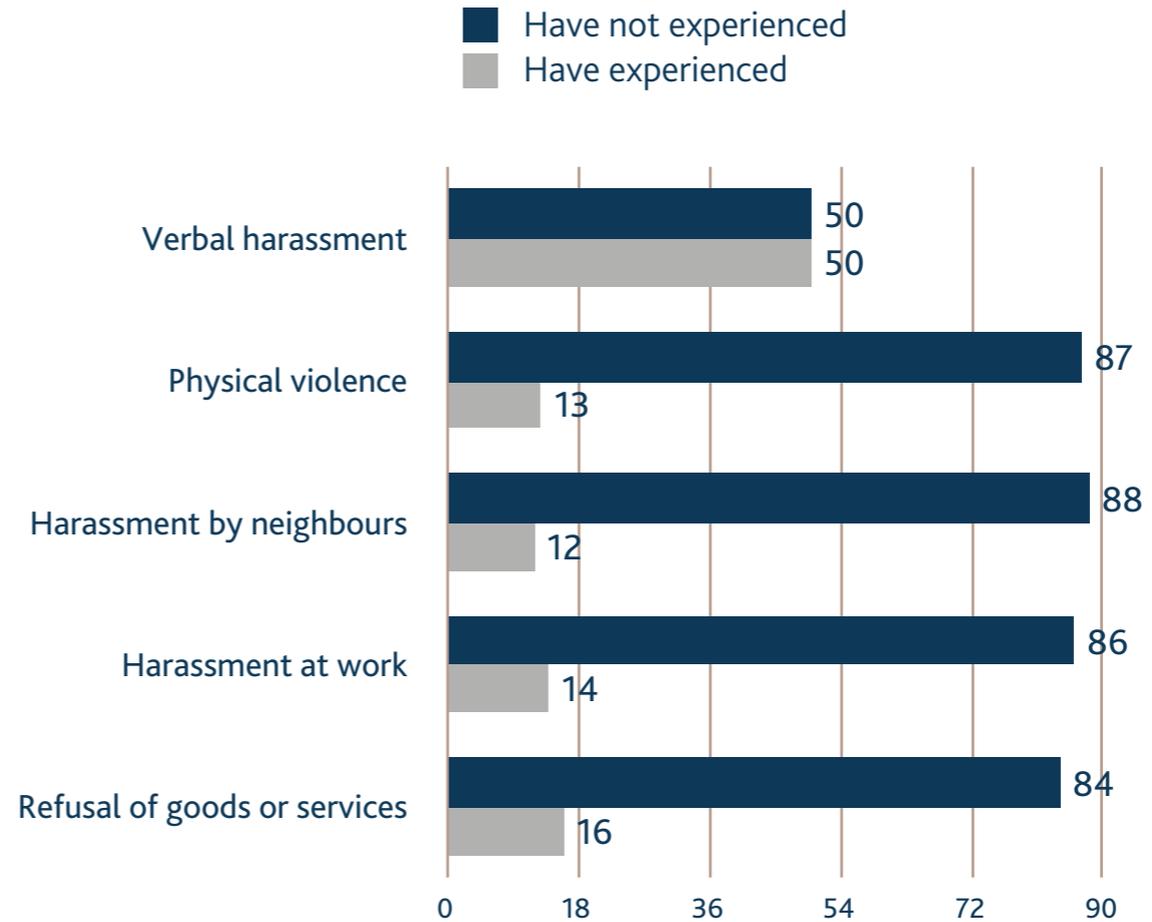
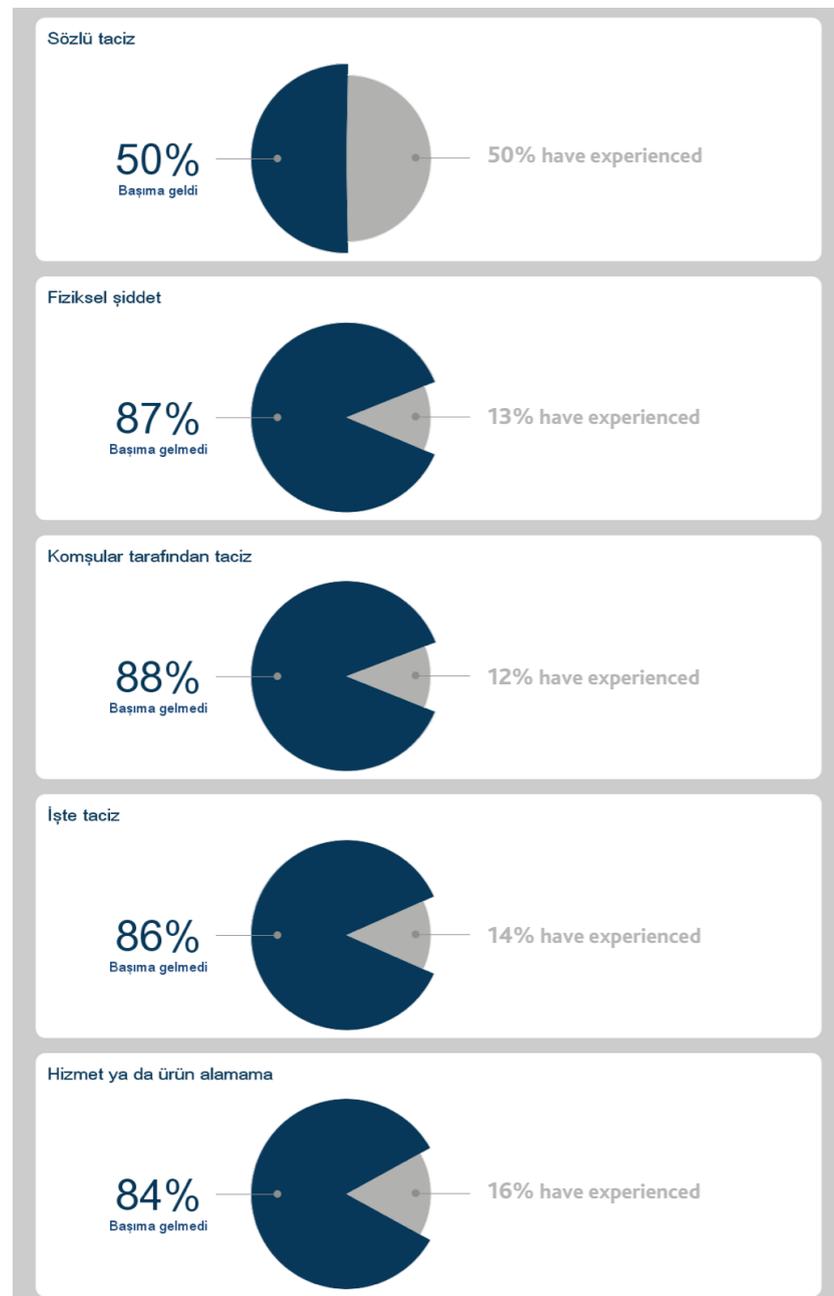
LGBT2020 - TR - 2013



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LGBT2020 - TR - 2013



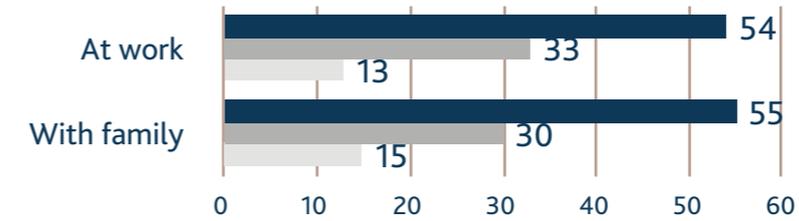
LGBT visibility and workplace issues

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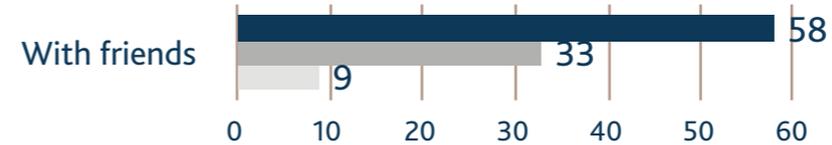
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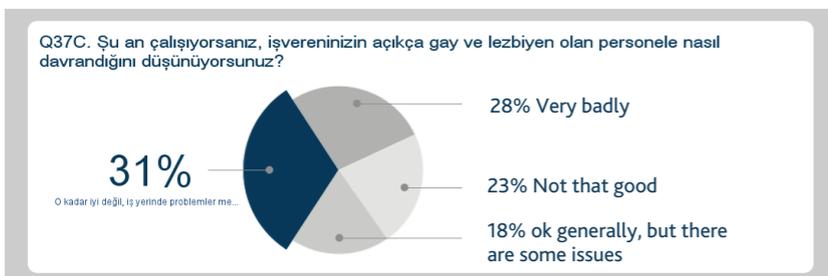
■ Not out
■ Out to some
■ Out to everyone



■ Out to some
■ Out to everyone
■ Not out



Q: If you are working at the moment, how do you think your employer and your workmates treat openly gay and lesbian staff?



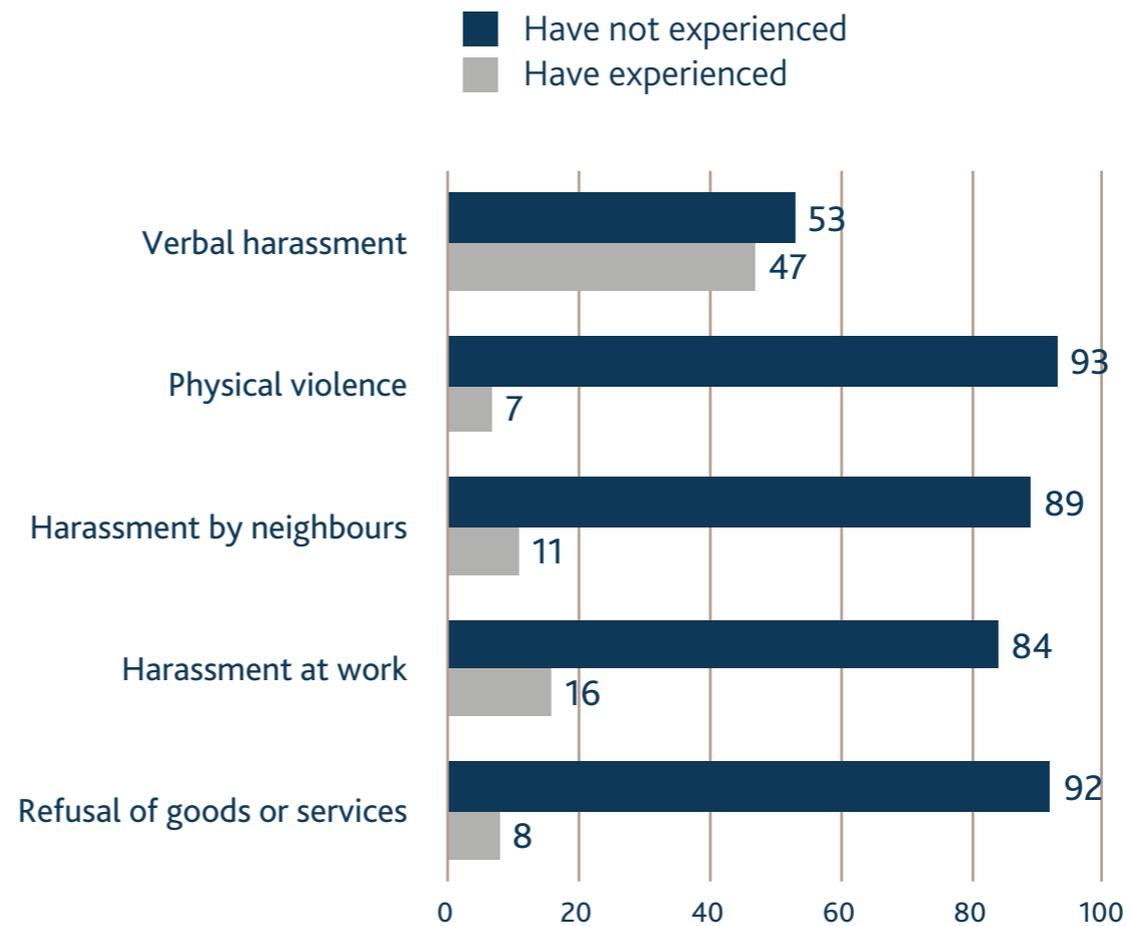
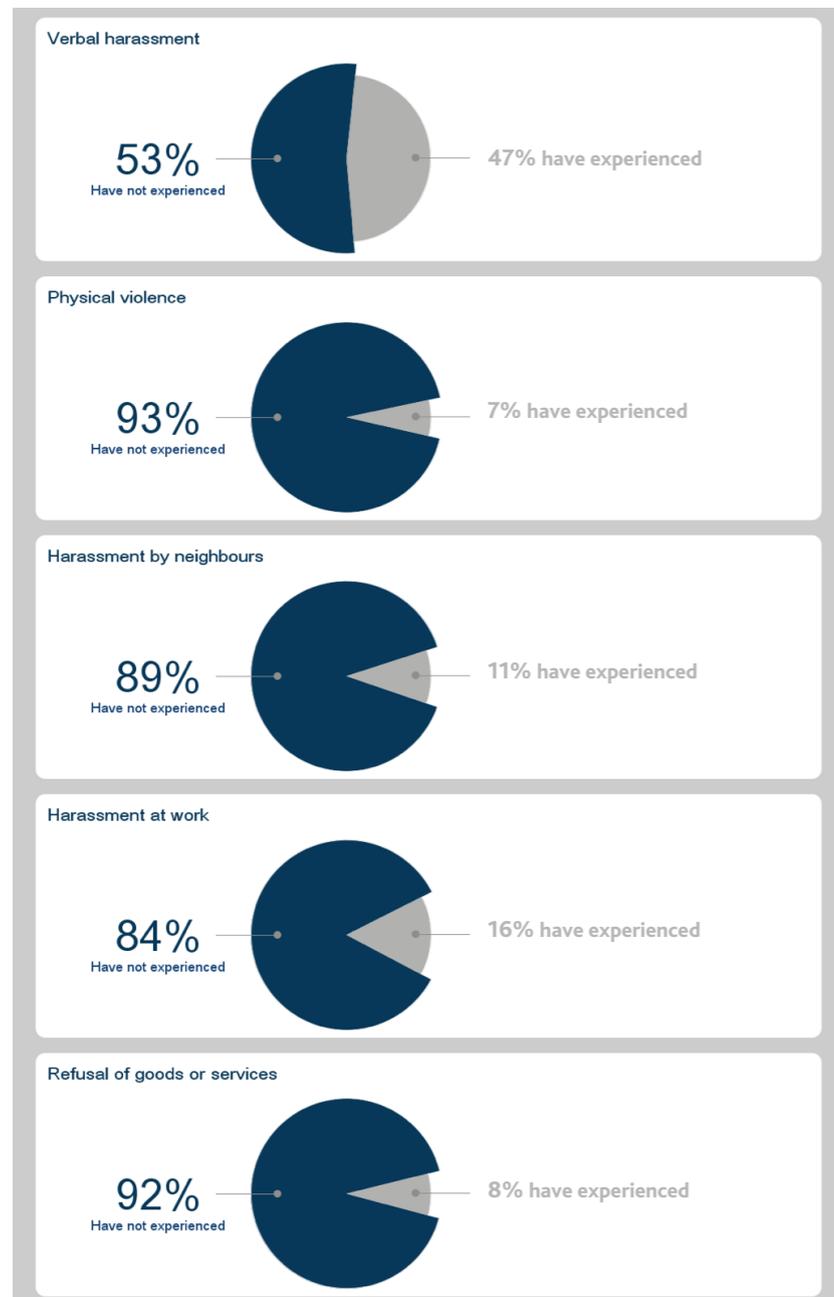
LGBT2020 - US - 2013



Harassment, physical violence, refusal of good and services

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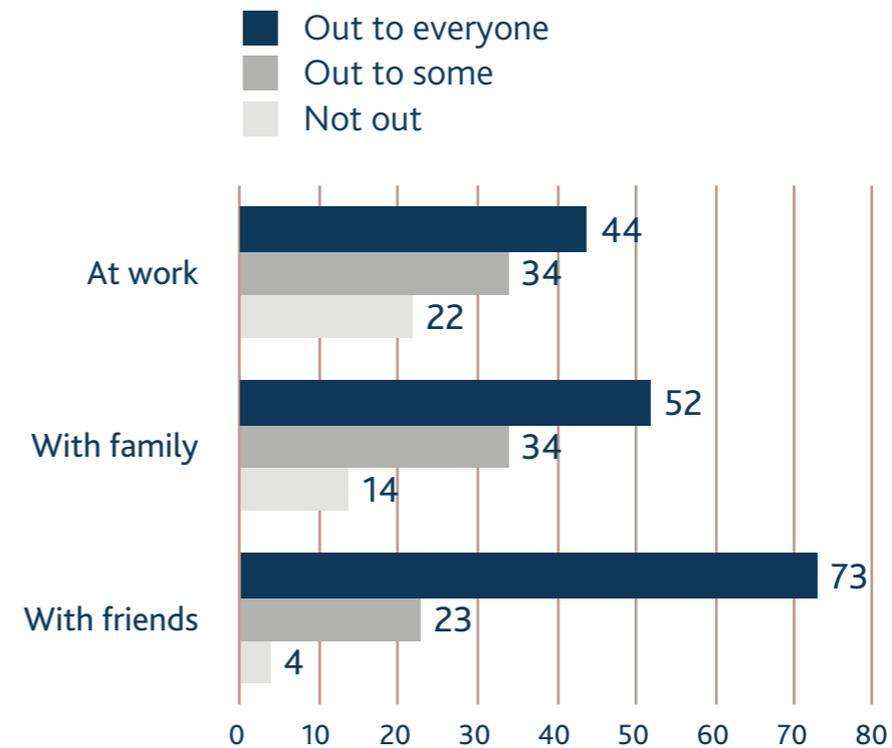
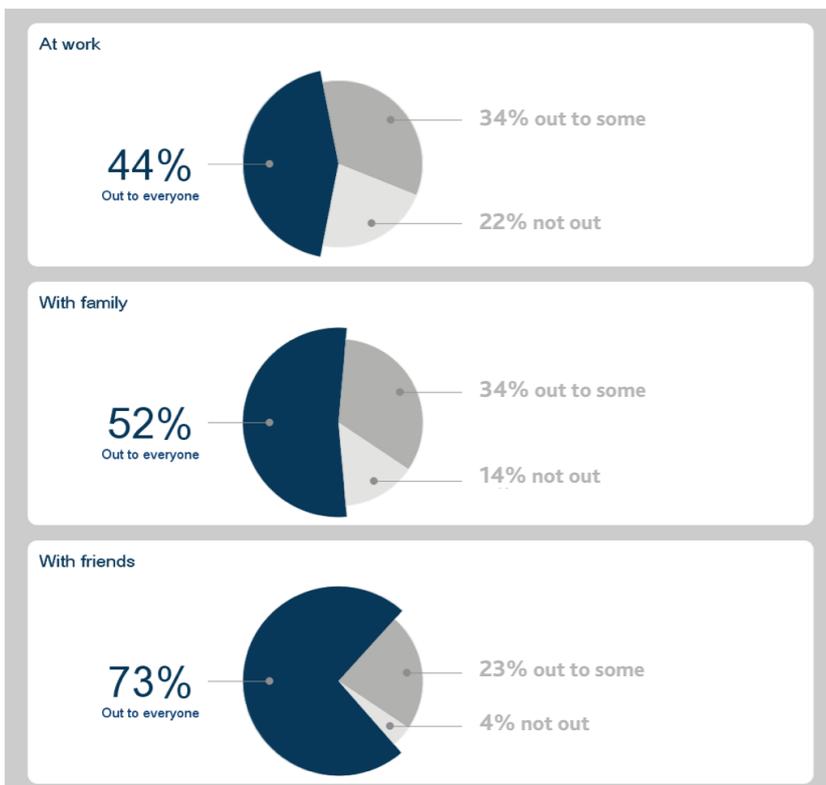
LGBT2020 - US - 2013



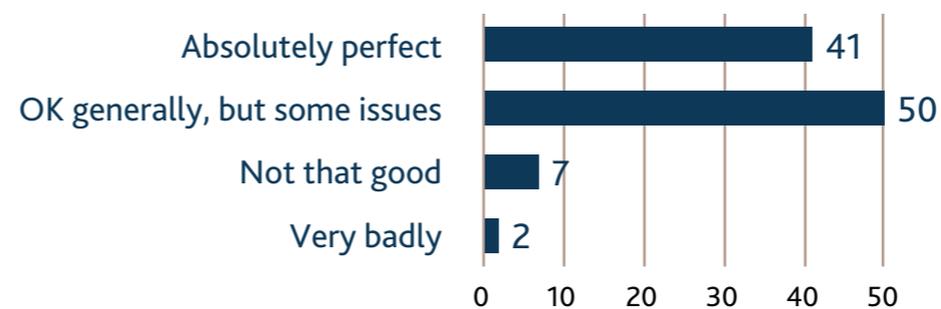
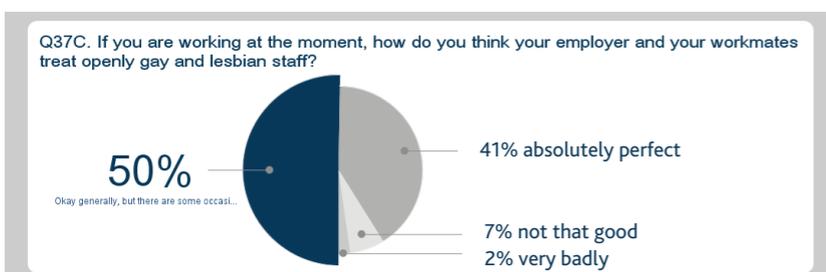
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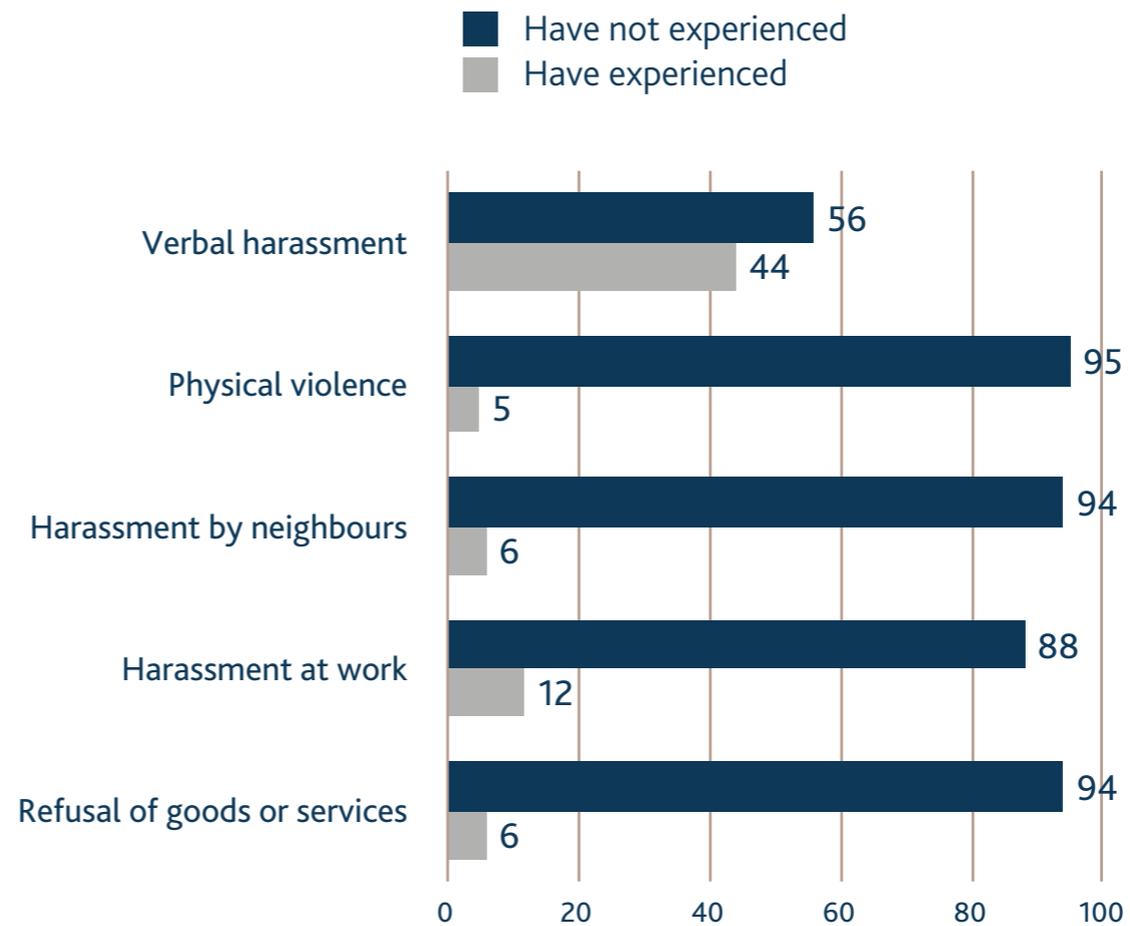
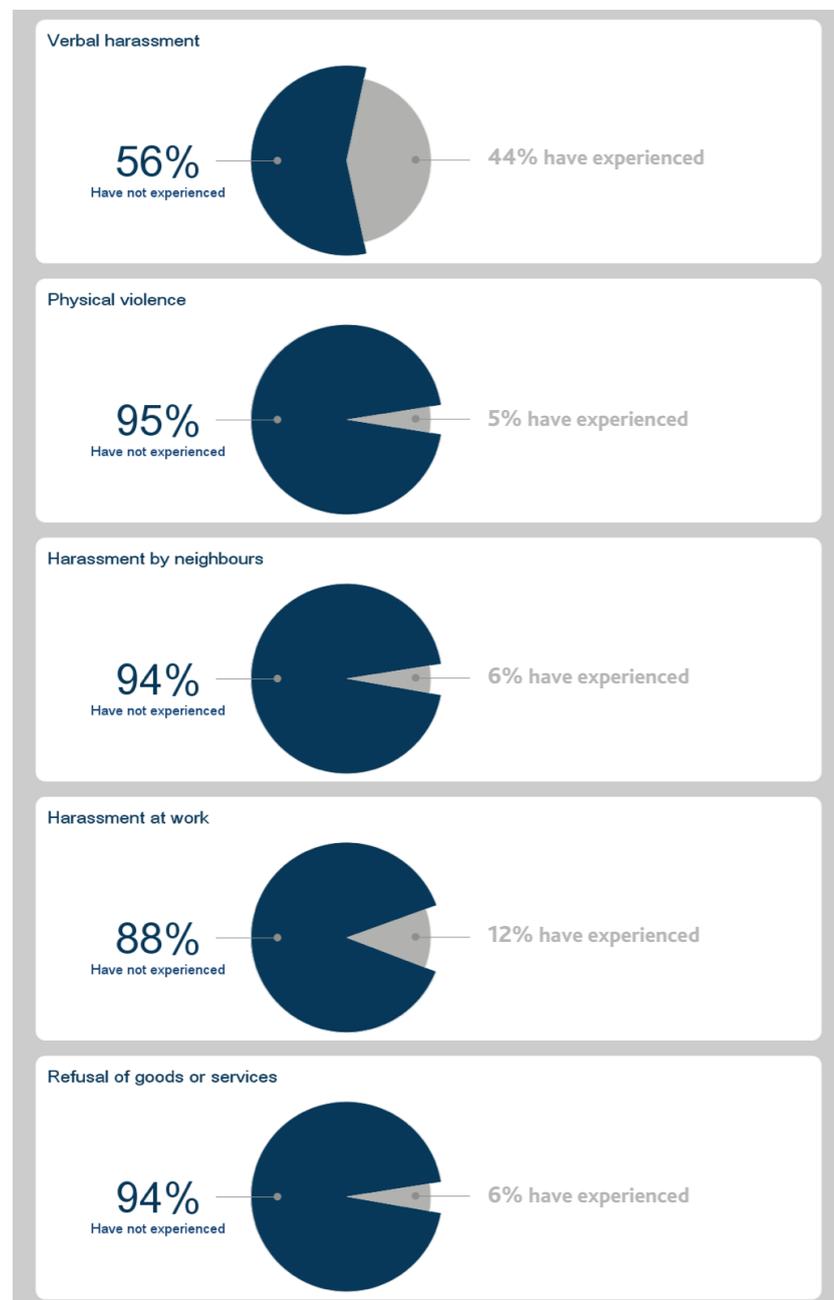
LGBT2020 - CA - 2013



Harassment, physical violence, refusal of good and services

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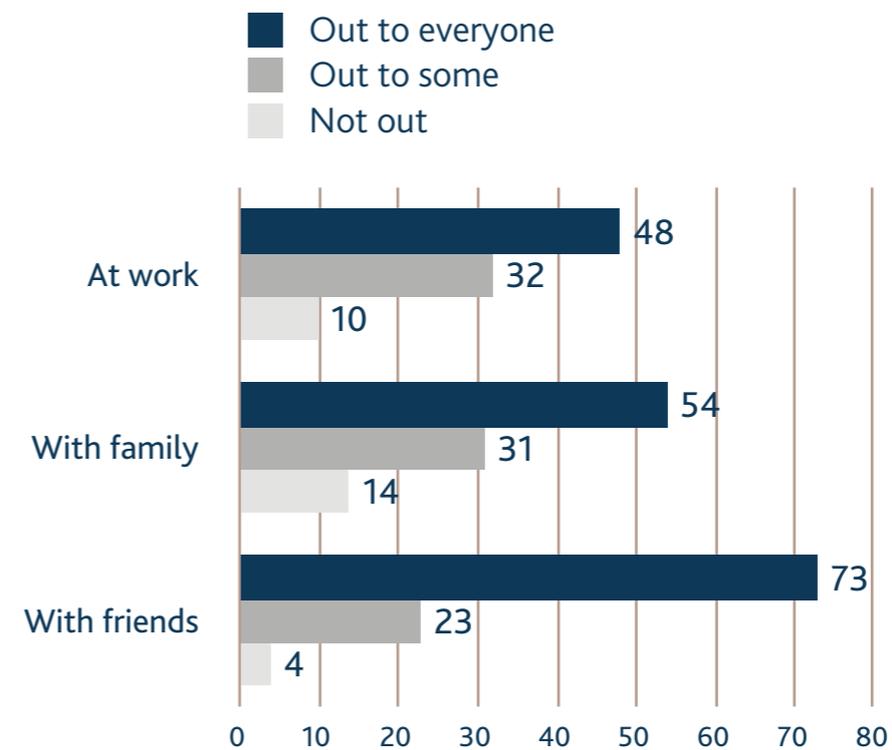
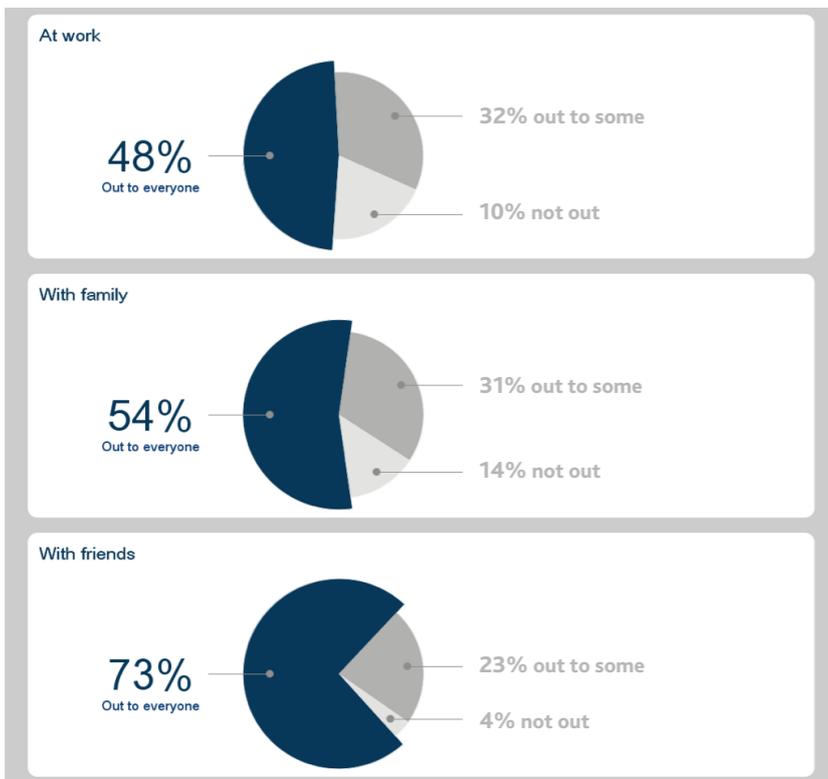
LGBT2020 - CA - 2013



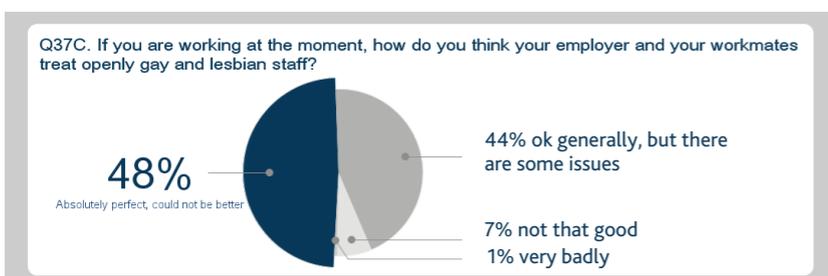
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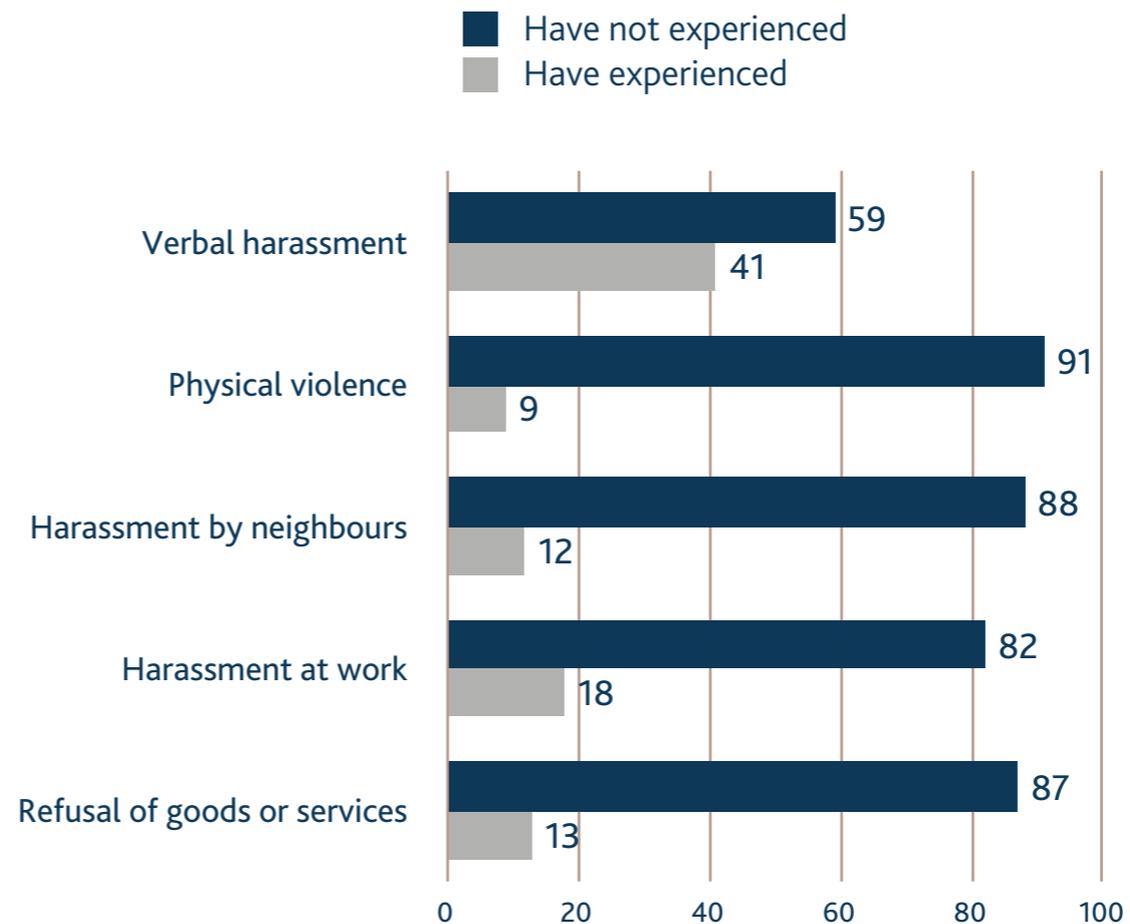
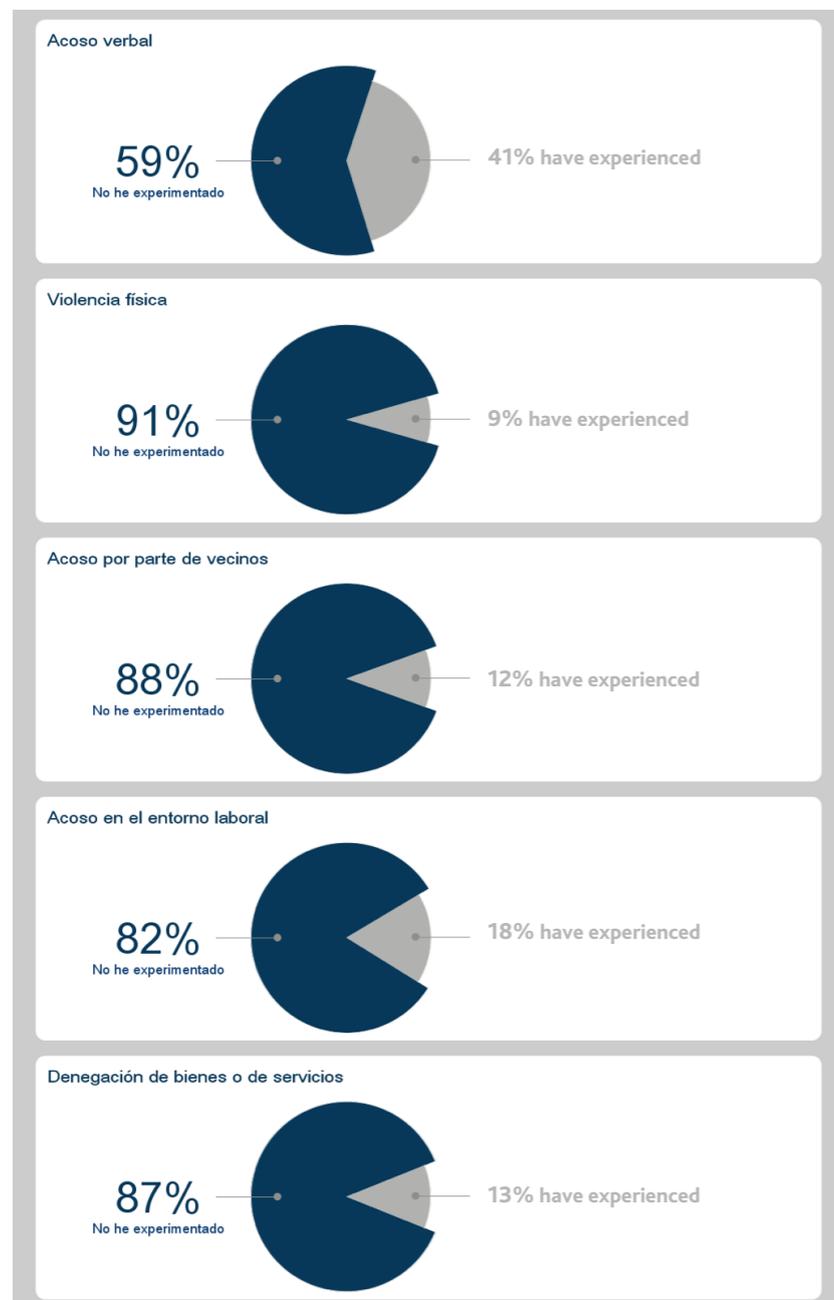
LGBT2020 - MX - 2013



Harassment, physical violence, refusal of good and services

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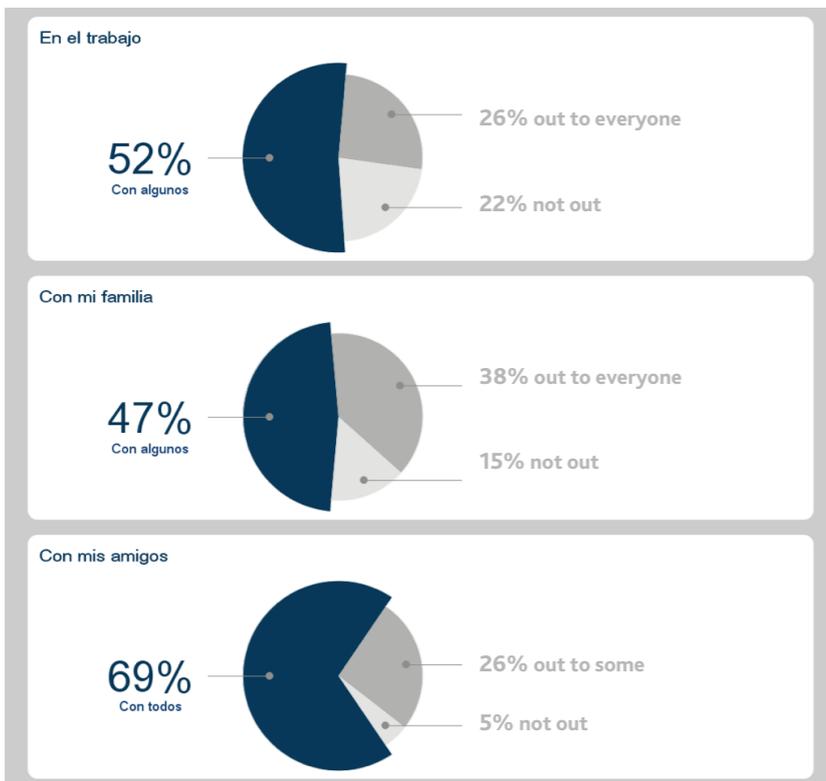
LGBT2020 - MX - 2013



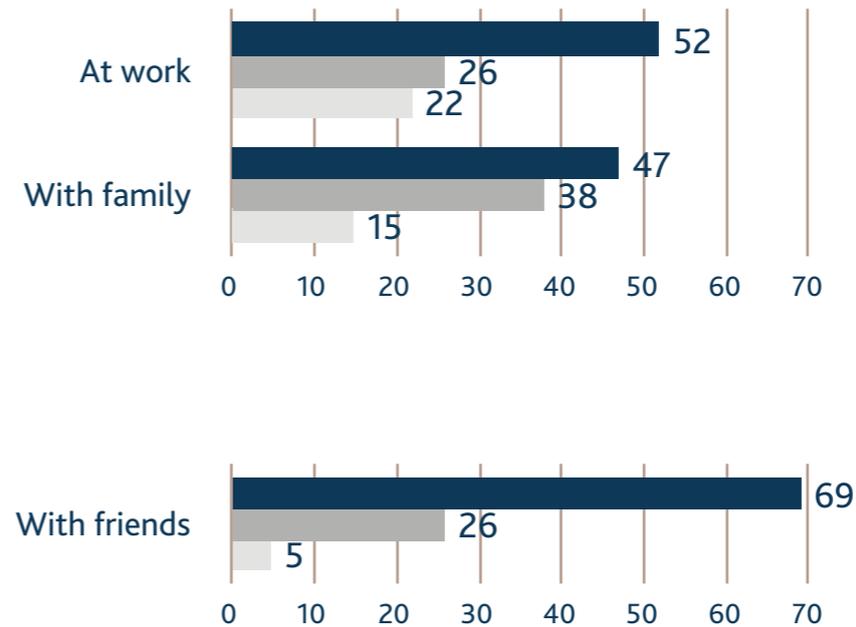
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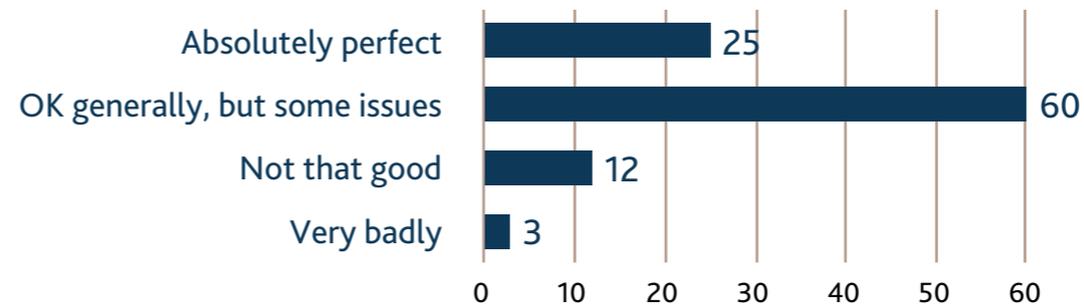
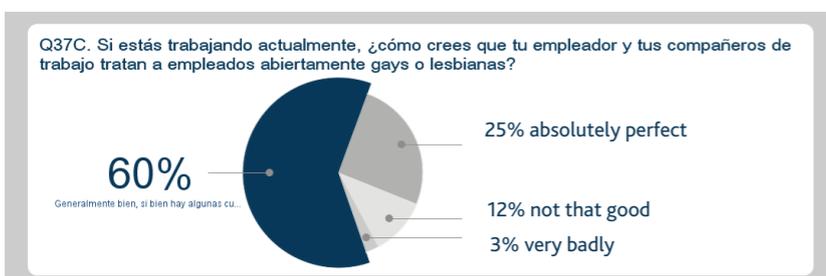
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- Out to some
- Out to everyone
- Not out



Q: If you are working at the moment, how do you think your employer and your workmates treat openly gay and lesbian staff?



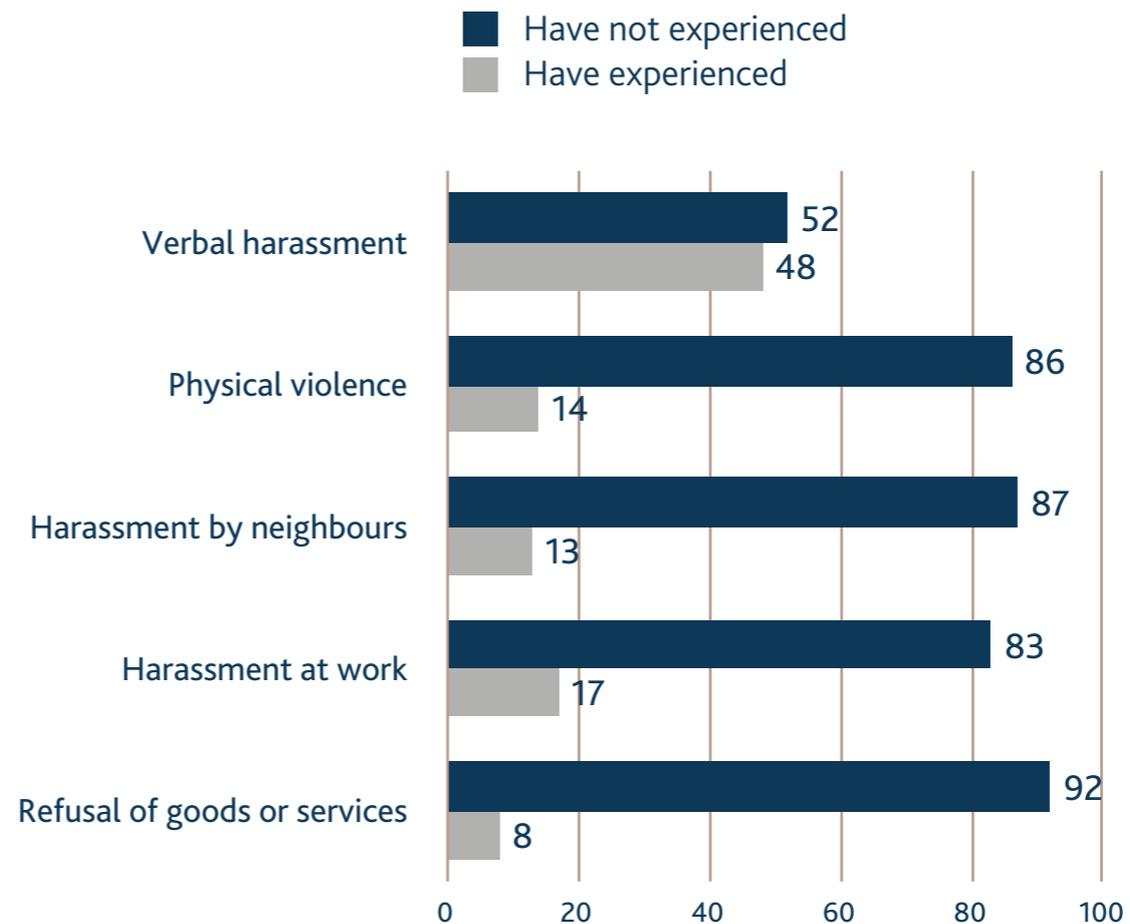
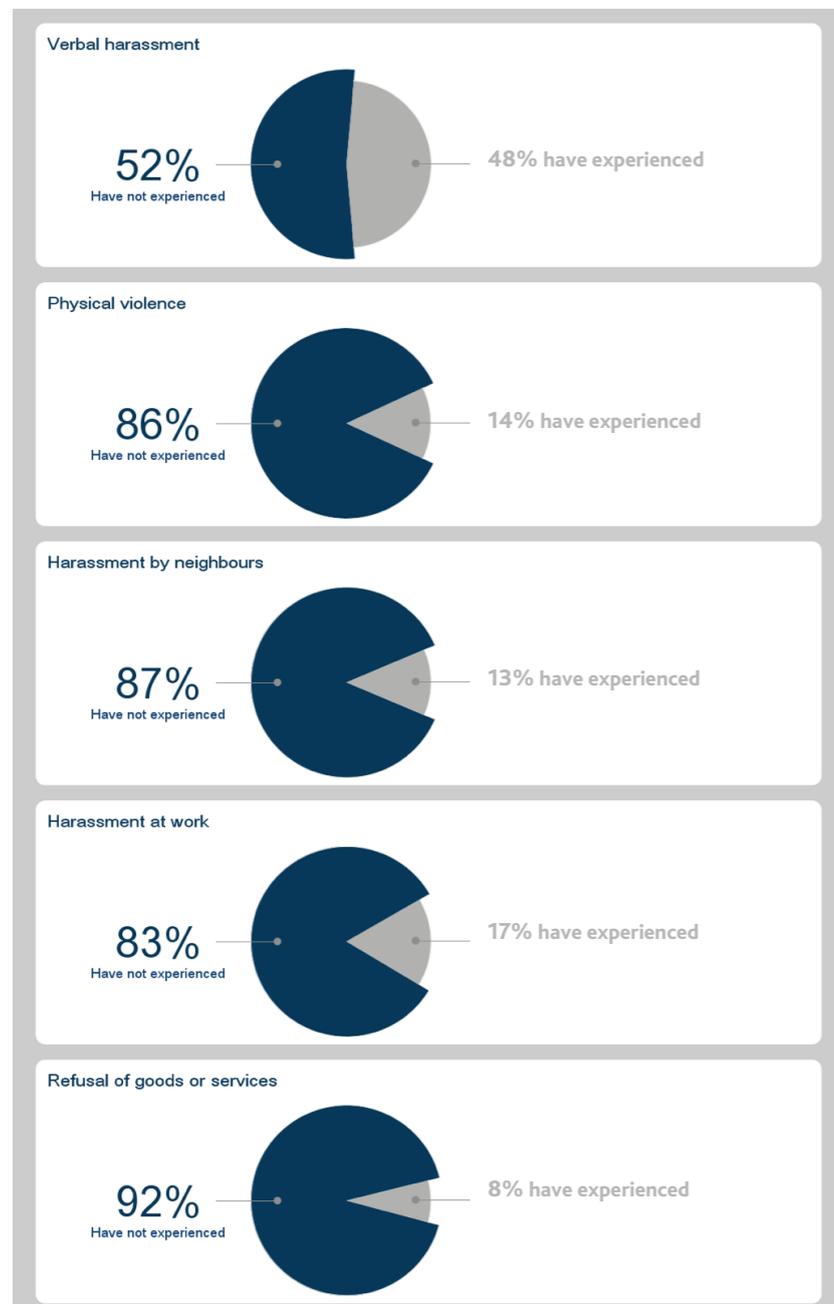
LGBT2020 - IN - 2013



Harassment, physical violence, refusal of good and services

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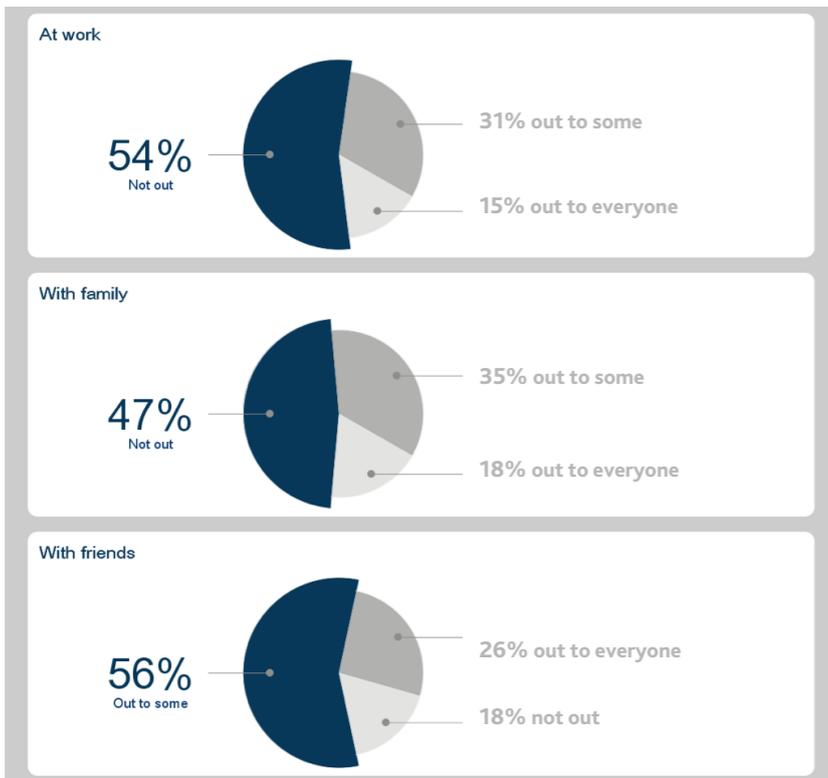
LGBT2020 - IN - 2013



LGBT visibility and workplace issues

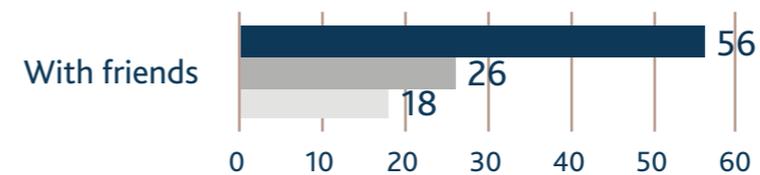
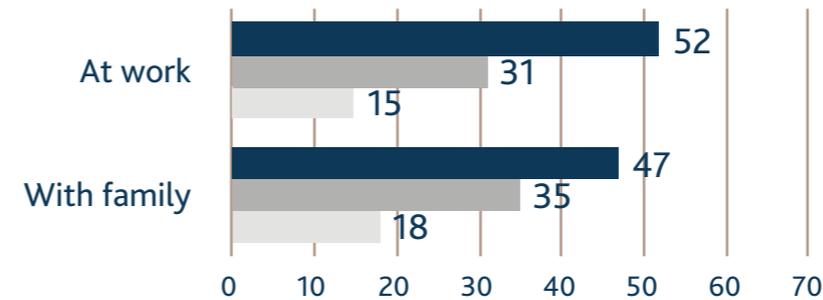
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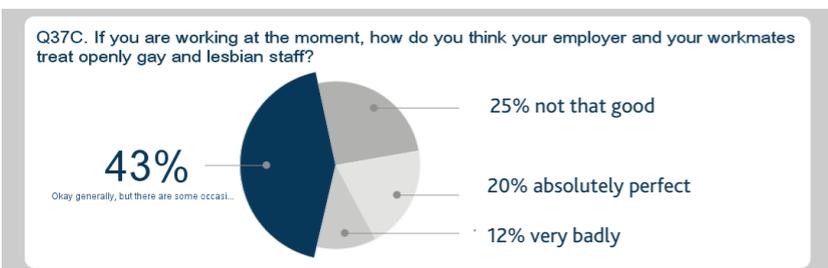


■ Not out
■ Out to some
■ Out to everyone

■ Out to some
■ Out to everyone
■ Not out



Q: If you are working at the moment, how do you think your employer and your workmates treat openly gay and lesbian staff?



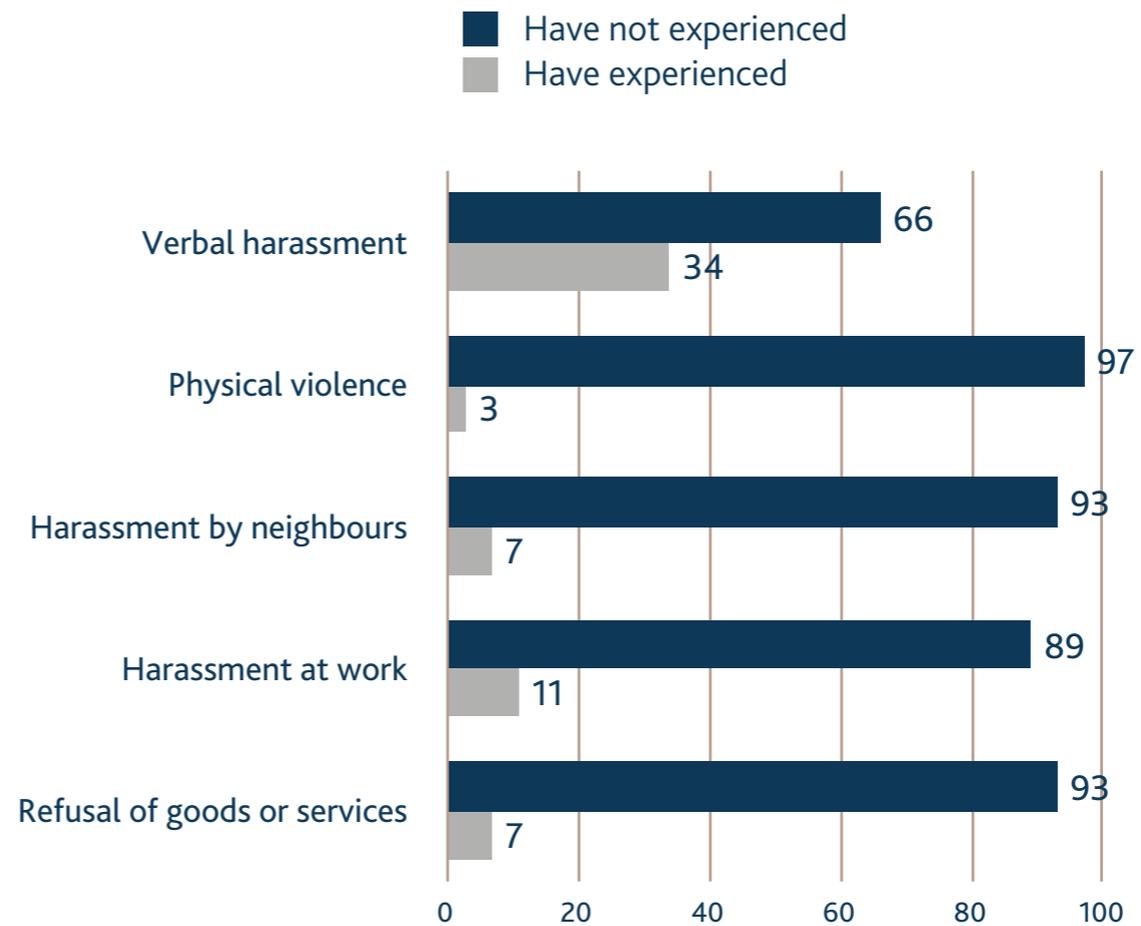
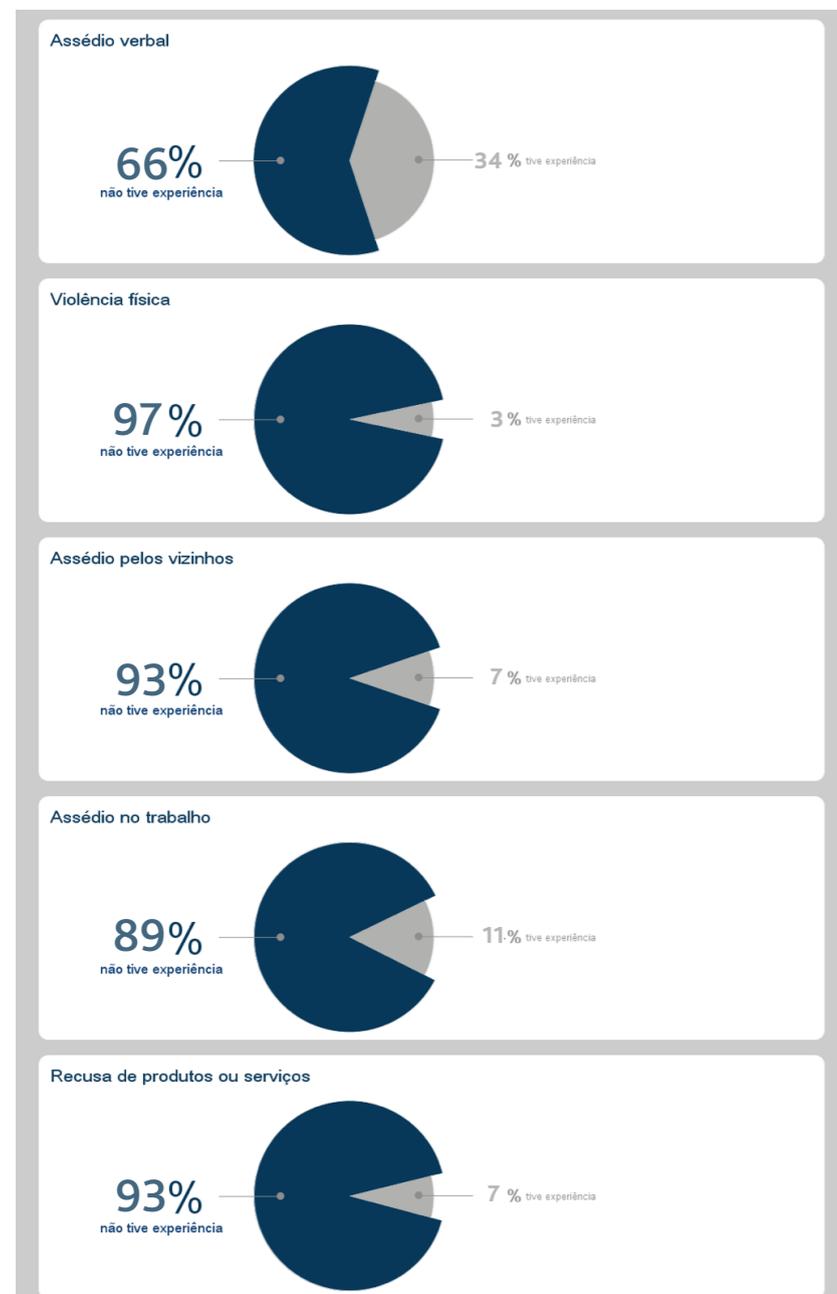
LGBT2020 - BR - 2013



Harassment, physical violence, refusal of good and services

All data copyright 2013 Out Now - this data can be referred to but must correctly be cited as "Out Now Global LGBT2020 Study" and if referred to online article/item MUST also link back to <http://www.outnowconsulting.com/lgbt2020>

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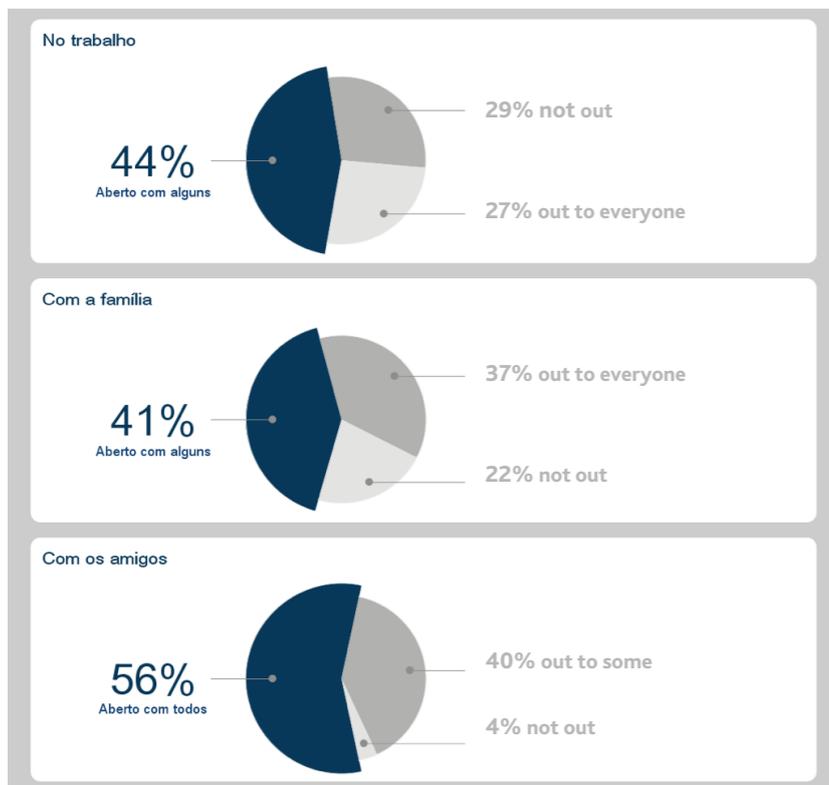
LGBT2020 - BR - 2013



LGBT visibility and workplace issues

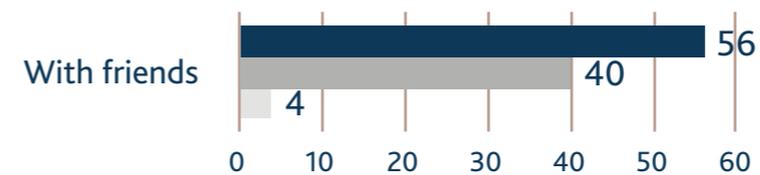
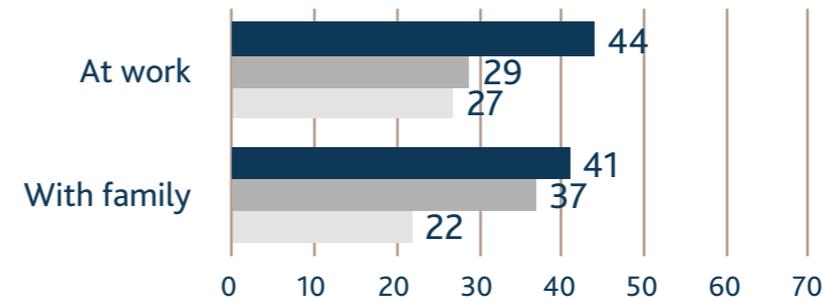
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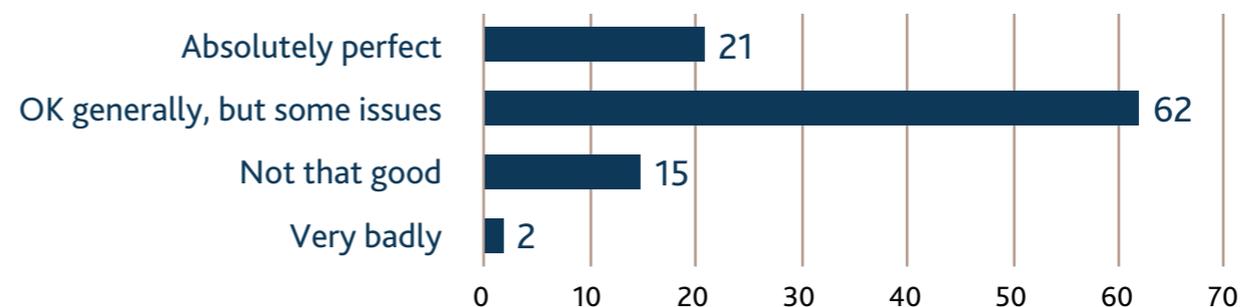
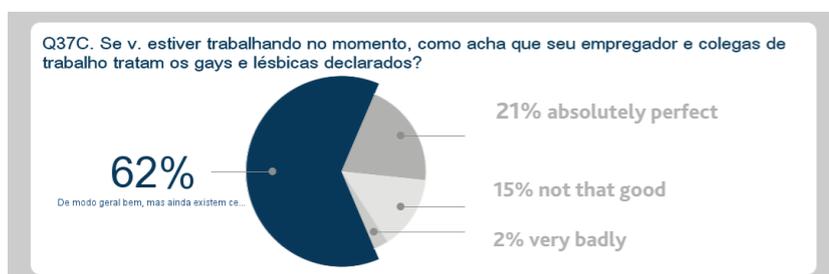


■ Out to some
■ Out to everyone
■ Not out

■ Out to everyone
■ Out to some
■ Not out



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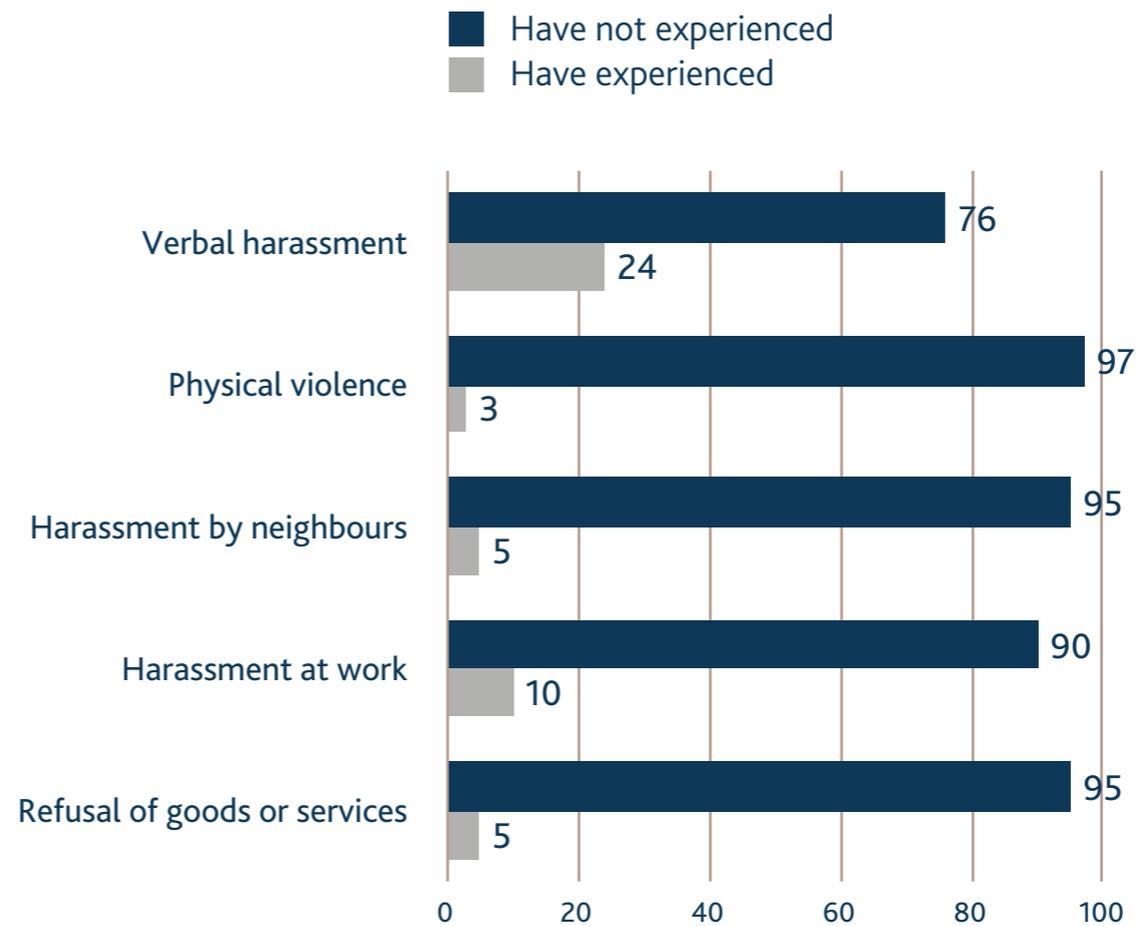
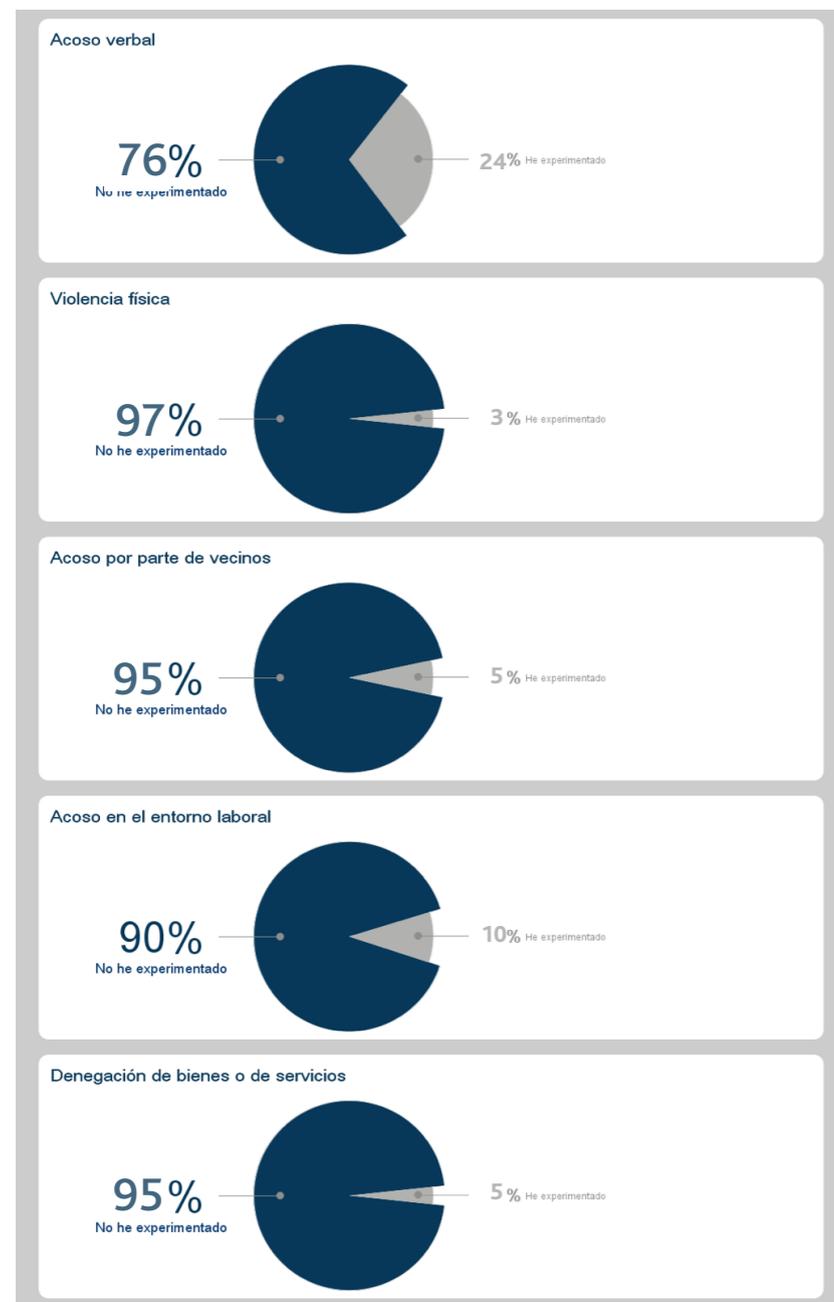
LGBT2020 - AR - 2013



Harassment, physical violence, refusal of good and services

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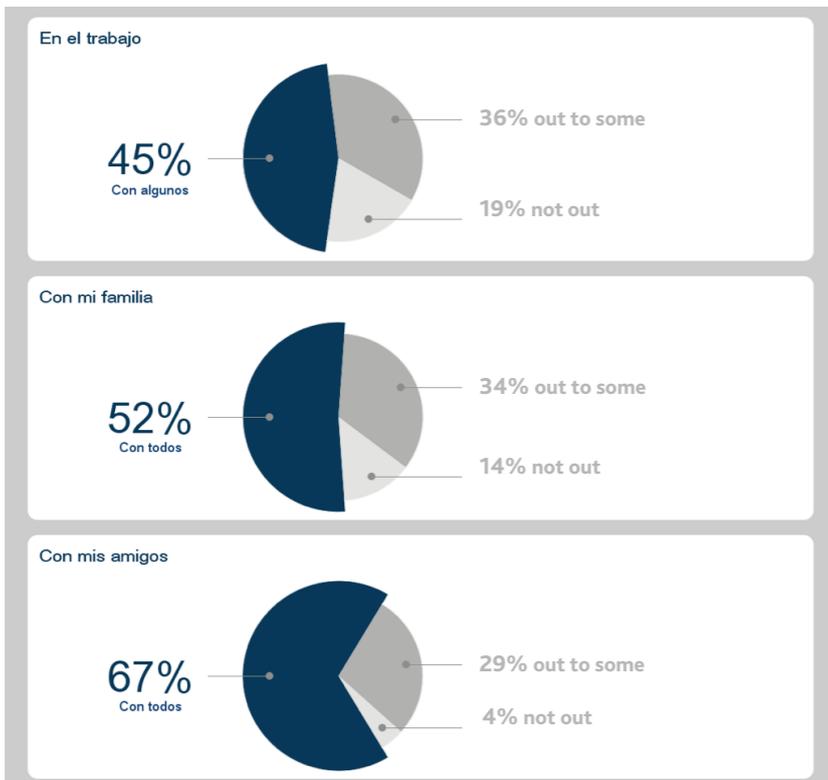
LGBT2020 - AR - 2013



LGBT visibility and workplace issues

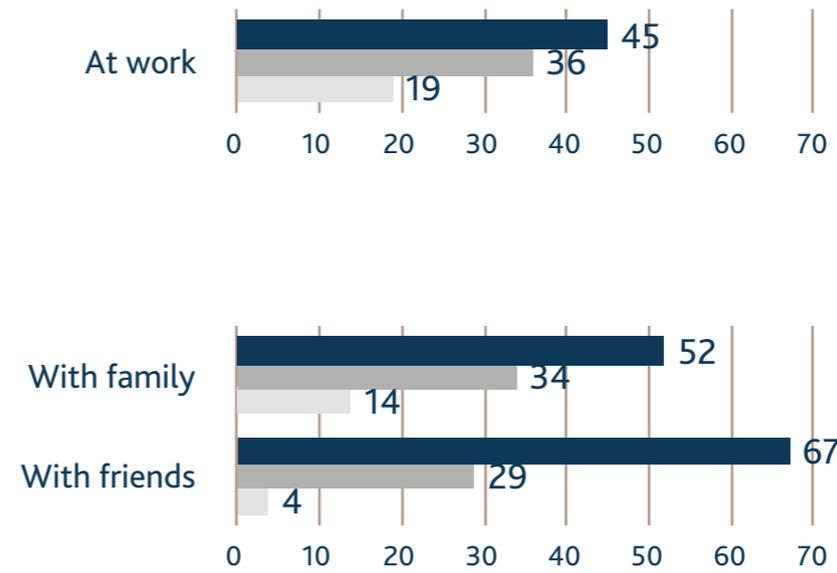
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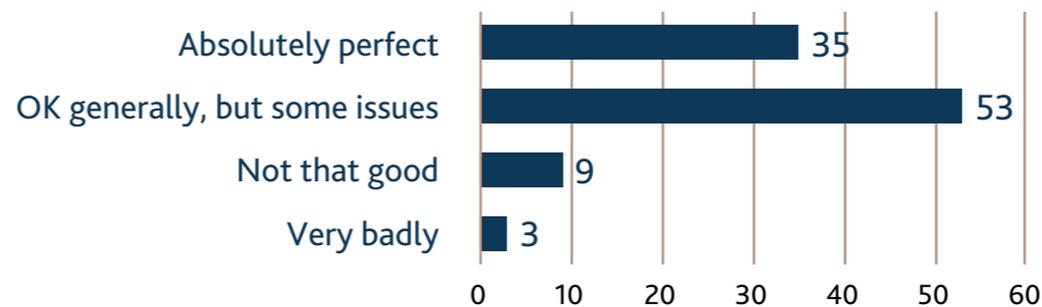
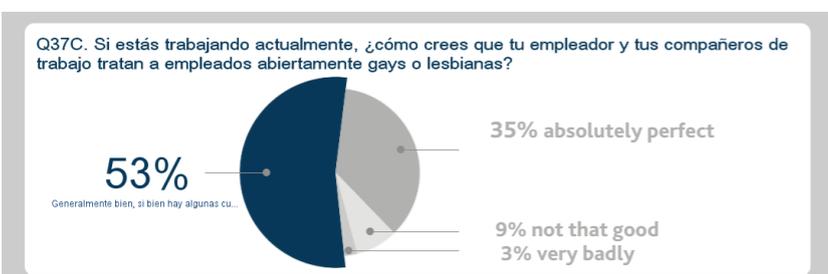


Legend for work situation:
 ■ Out to some
 ■ Out to everyone
 ■ Not out

Legend for family and friends situations:
 ■ Out to everyone
 ■ Out to some
 ■ Not out



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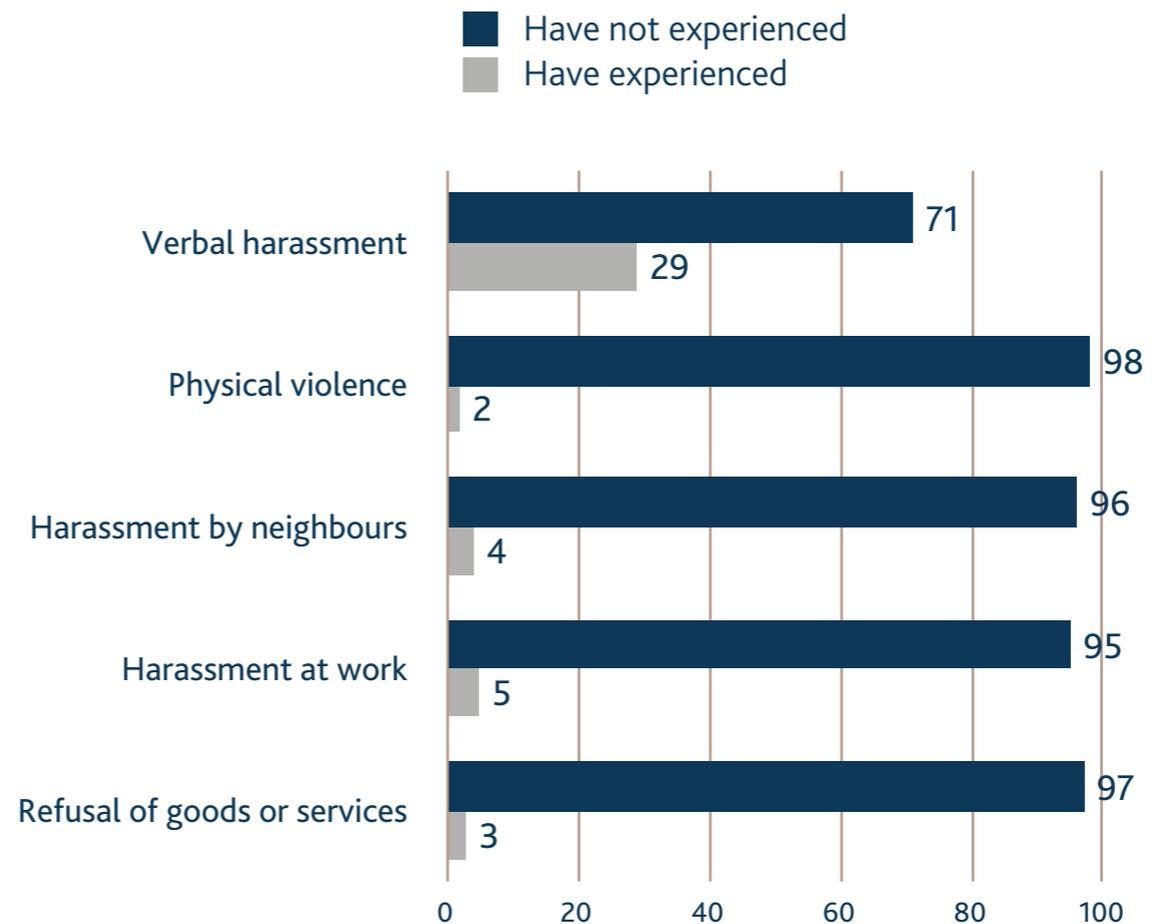
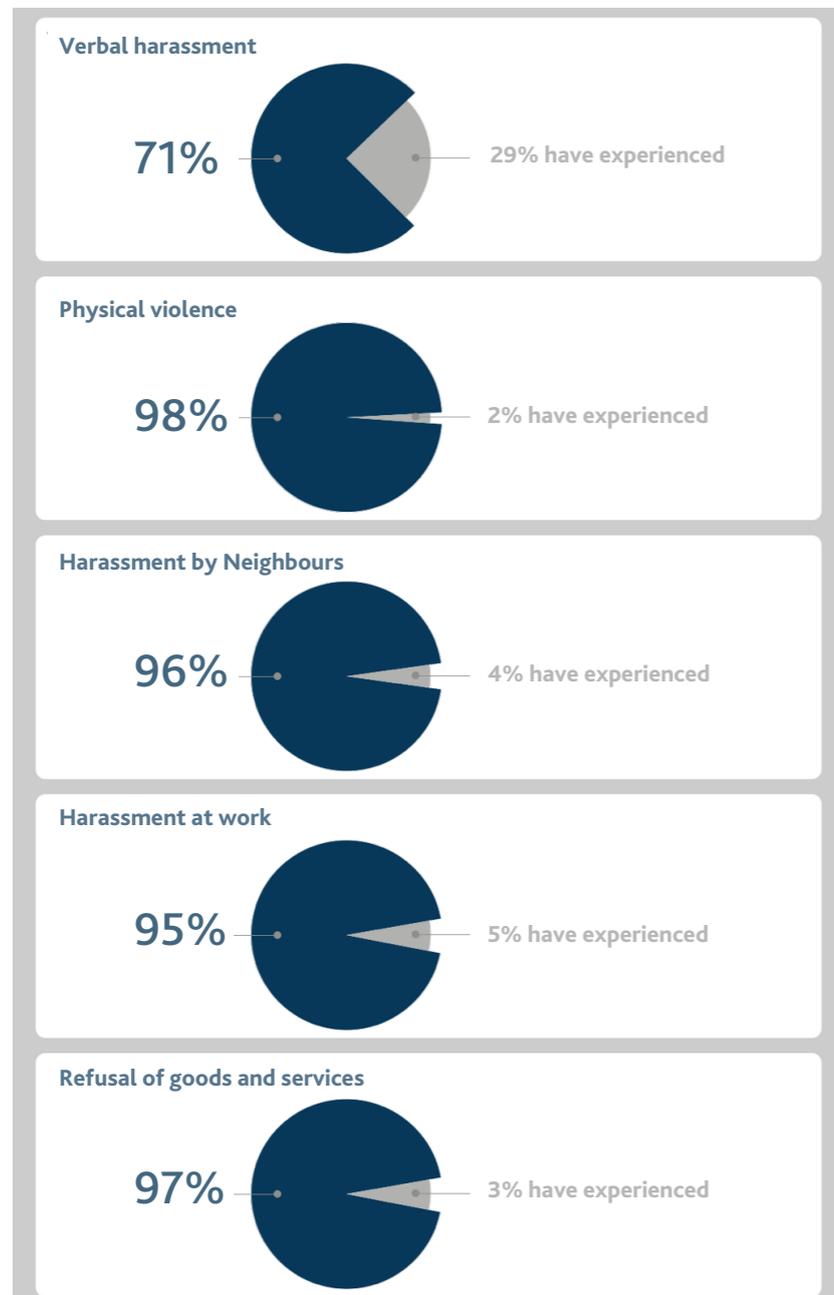
LGBT2020 - JP - 2013



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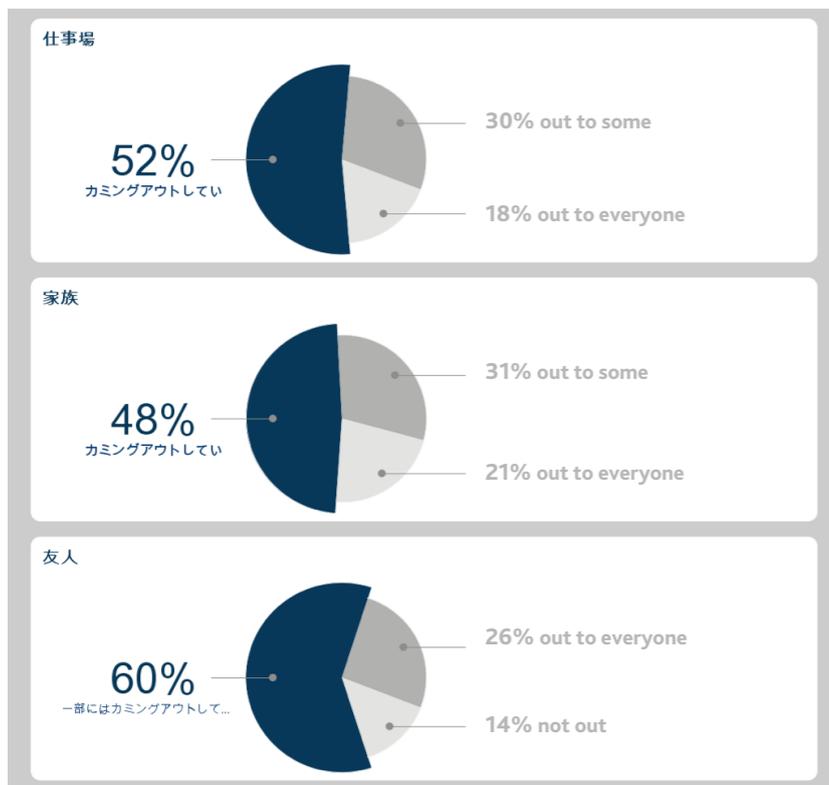
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LGBT visibility and workplace issues

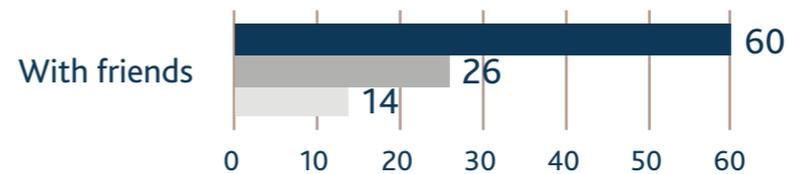
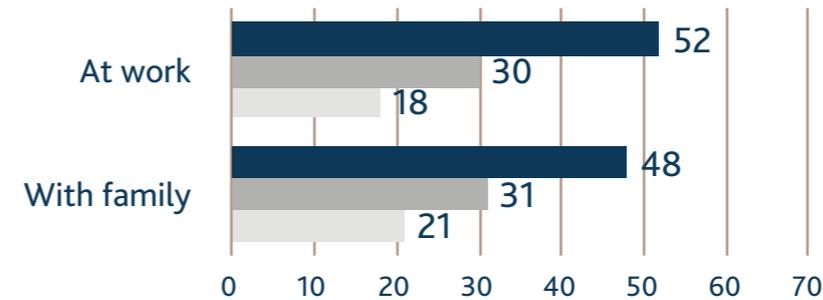
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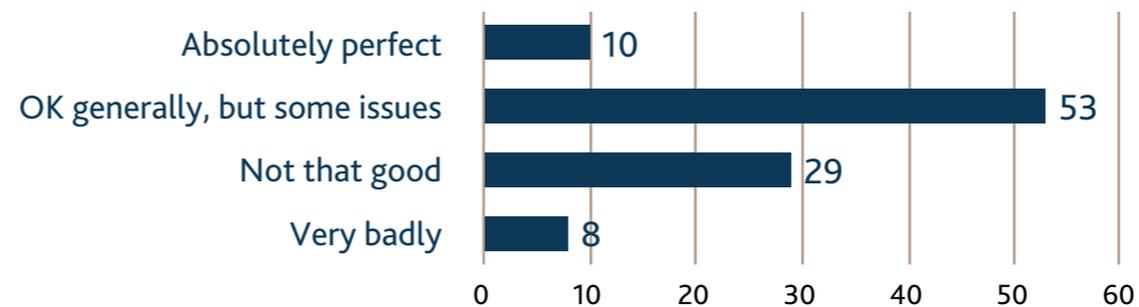
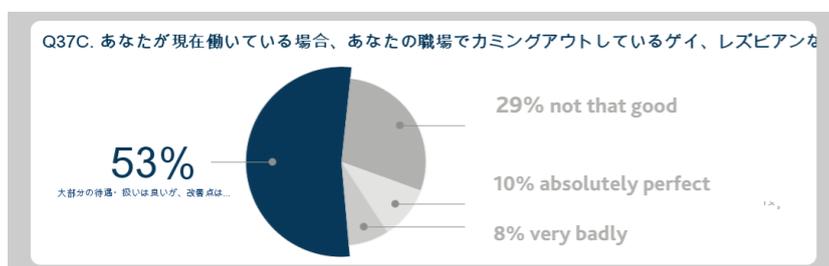


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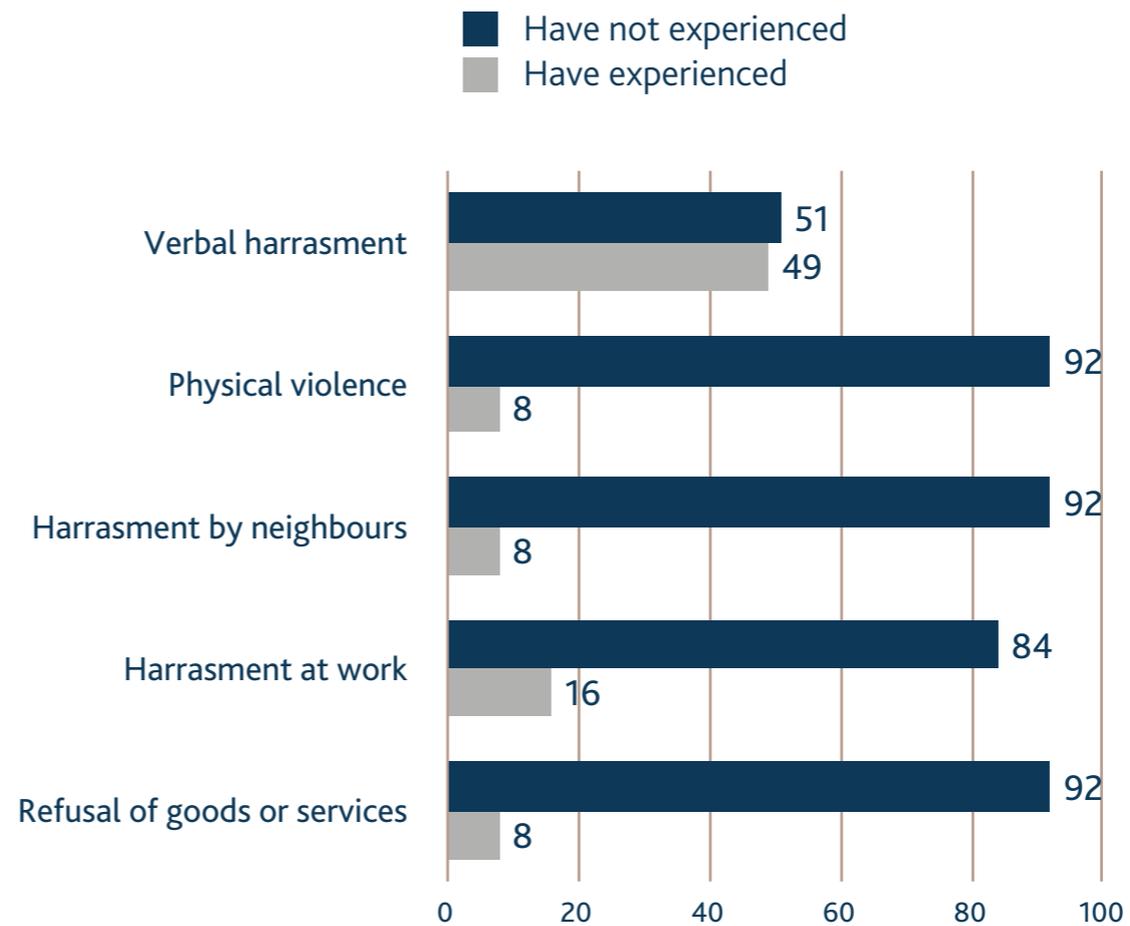
LGBT2020 - AU - 2013



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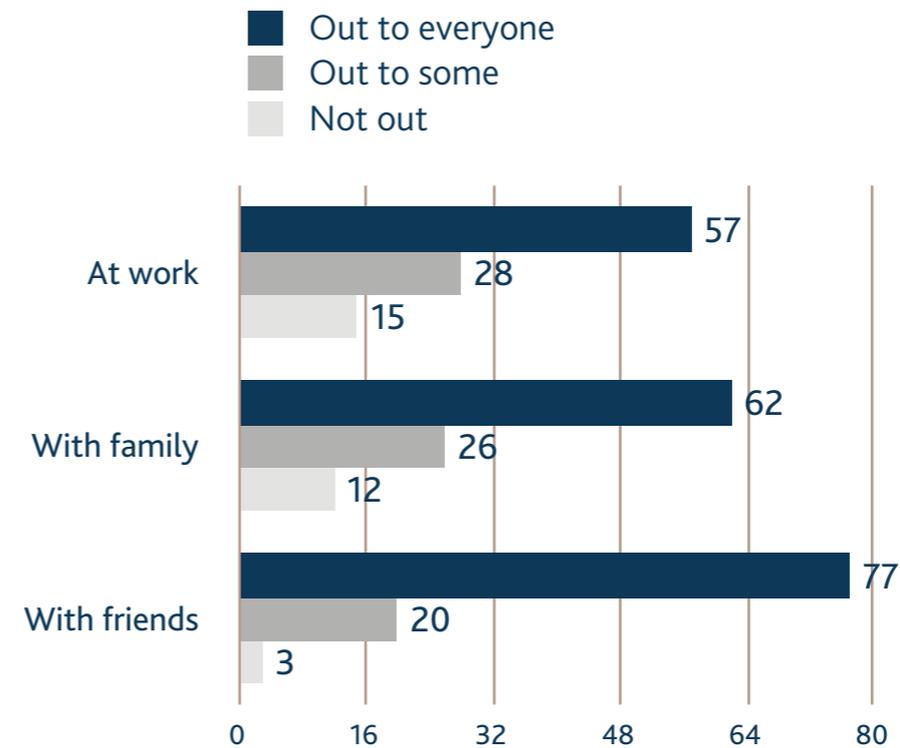
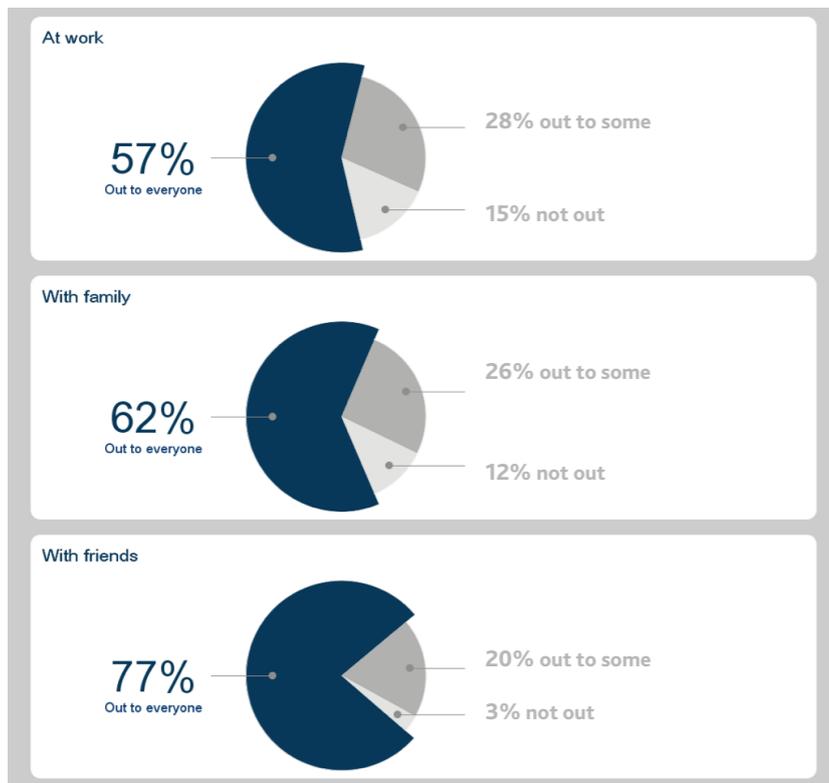
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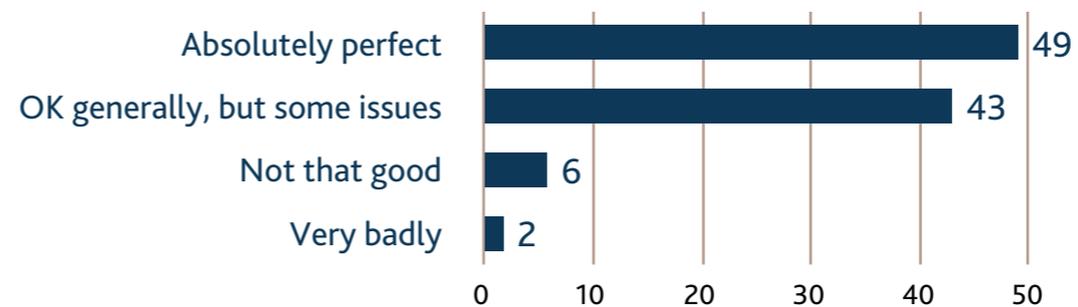
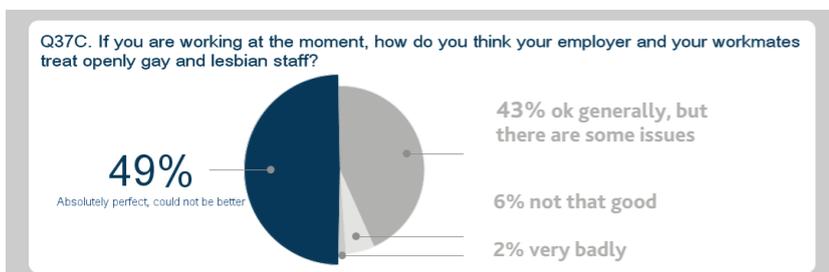
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Out Now. Leadership.

Out Now is the global LGBT marketing specialist. For two decades our clients have reaped the results of our Next Level Thinking to take their campaigns and strategies to market-leadership positions. Out Now constantly delivers what's next in LGBT marketing to our clients.

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



Out Now works hard for clients. Our campaigns win awards, and more importantly — we get results for clients like Lufthansa, IBM, Toyota, Berlin Tourismus & Kongress, Merck Sharp & Dohme, Time Inc. Magazines, Doubleday Books, Lloyds TSB, Barclays and Citibank. **Get in touch with Out Now to discuss how we can take your LGBT marketing to the next level.**



More information? Visit www.OutNowConsulting.com



LGBT2020 research data

Better insights

World's largest LGBT market research ever

21 countries

12 languages

Your key to global leading-edge insights on your product.

A screenshot of the Out Now Global website. The page features the Out Now Global logo at the top left, with navigation links for 'About us', 'Services', 'Portfolio', 'Market Reports', and 'Latest updates'. Below the logo is a banner with the text 'About us.' and a photo of four diverse people. The main content area is titled 'LGBT2020' and includes a welcome message, a call to action to get started, and a list of countries with links to their respective study pages. The countries listed are Argentina, Australia, Austria, Brazil, Canada (English and French), Chile, Ecuador, Estonia (coming soon), and France.



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Industry presentations

We take your message with us to the best events globally.



Do better

Since 2007

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Meet the number one concern of LGBT travellers.





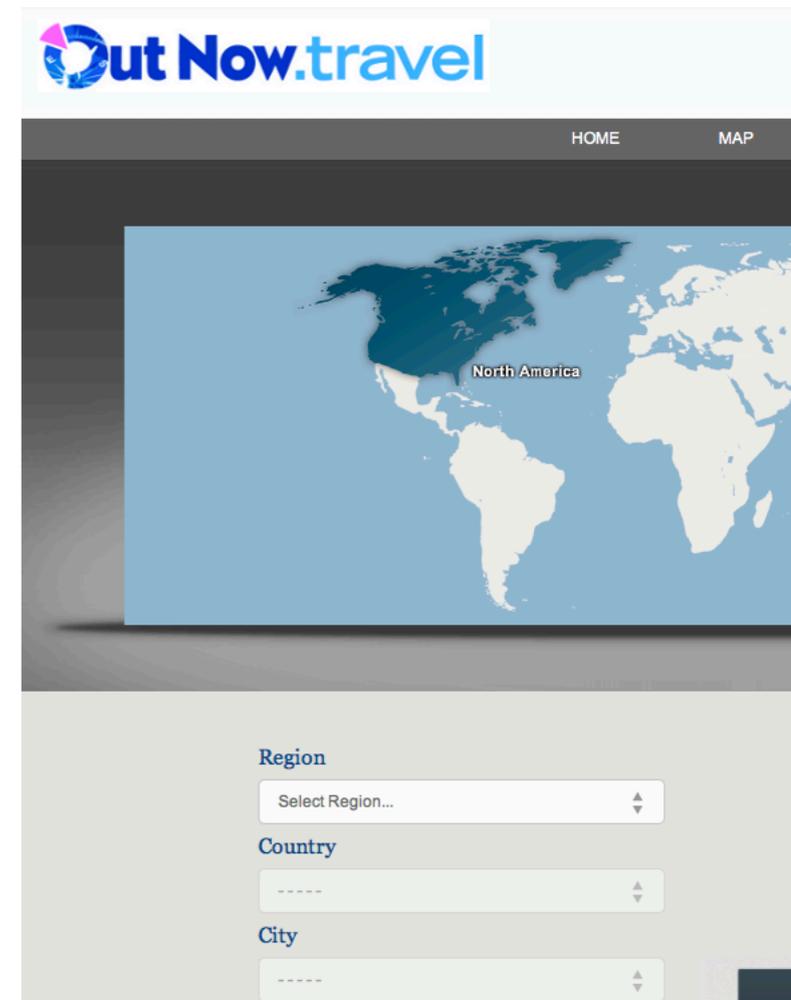
Credibility

Listings consumers can believe in

Certified OutNow.travel listings

Only site backed by power of ONBC training

Meet the number one concern of LGBT travellers.





Better LGBT

Train

Educate

Network

Update

The world's best businesses connect with ONBC.



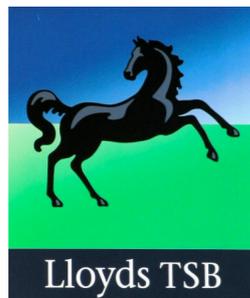
Some of Out Now's clients



Switzerland.
get natural.



VIENNA
NOW OR NEVER



flanders



Visit Manchester



NICE
COTE
d'AZUR

The logo features the word "Out Now" in a large, bold, blue sans-serif font. The letter "O" in "Out" is a thick blue ring with a pink wedge-shaped segment missing from its top-left. Below "Out Now", the word "GLOBAL" is written in a smaller, blue, all-caps sans-serif font, with each letter spaced out.

Out Now
GLOBAL