

Out to Succeed in Europe Survey 2018

Creating an environment in which LGBT+ talent can thrive

October 2018



LGBT+ inclusion is a valuable brand differentiator, performance enhancer and talent draw. Are European businesses capitalising on the benefits by creating an environment in which LGBT+ talent can bring their true selves to work and fulfil their career potential?

In 2018, PwC and [Out Leadership](#) surveyed more than 300 openly LGBT+ employees from around the world, who have been identified by their employers as high performers or people with leadership potential¹.

This regional overview outlines the views of 50 European participants. For comparison, we also include perspectives from the 111 American and 89 Asian participants.

Key findings

Progress on inclusion is being made. More than 90% of the European high potential LGBT+ employees in our survey (94%) would recommend their place of work to an LGBT+ friend, compared to 94% in the US and 88% in Asia.

Resulting business benefits are coming through. More than 90% of European participants (92%) believe that having an openly supportive focus on LGBT+ issues has provided their organisation with wider access to the best talent, compared to 83% in the US and 80% in Asia. Four in five believe it has improved their organisation's place in the market, compared to 84% in the US and 80% in Asia.

Yet our survey also reveals areas where support for LGBT+ talent is still falling short in many organisations:



Covering is more prevalent in Europe than the US

Only 44% of participants were out during the interview and application process, a significantly lower proportion than in the US (60%), but higher than in Asia (34%).

Although the gap between the median age for coming out to family and friends and then at work is three years for both European and US participants, Americans come out at work earlier (median age 23 compared to 24 in Europe). In Asia the gap is four years (21 to 25).

Two in five European participants have avoided mentioning their life outside work compared to 33% of participants in the US and 43% in Asia. Nearly a quarter of Europeans (24%) have changed their personal appearance, form of speaking or mannerisms, compared to 17% of US participants and 18% of those in Asia.

If LGBT+ employees don't feel they can bring their whole selves to work, or that they won't be able to realise their full potential within their current organisation, they'll vote with their feet by looking for opportunities elsewhere.

They'll also tell their friends and family that this isn't a business that's living up to its promises on inclusion, which could have a detrimental impact on the brand.

Findings highlight aspiration gap

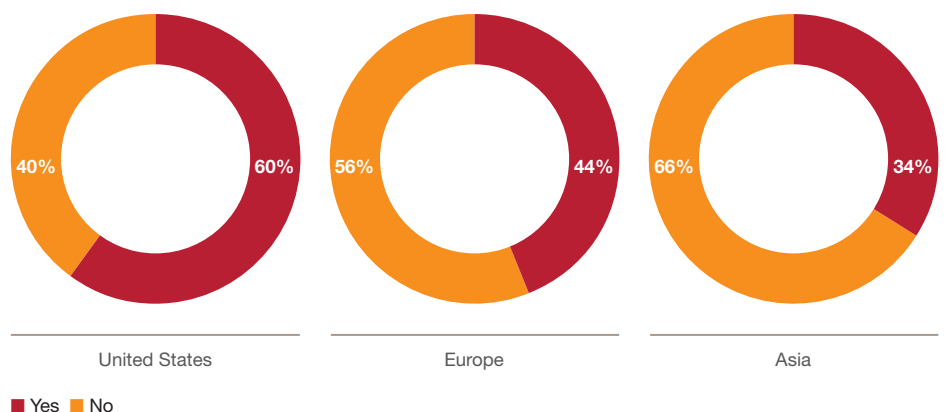
Career progression is the number one priority for the European LGBT+ talent in our survey. And 92% see LGBT+ specific training and development programmes as important in making them want to work for an organisation. Yet, only 40% report that their organisation takes steps to create a pathway to senior management for LGBT+ people, a much lower proportion than in the US (50%), but roughly equal to the percentage in Asia (39%). Two in five European participants believe that their organisation isn't doing enough to encourage LGBT+ diversity in the workplace, compared to 35% in the US and 60% in Asia.

If there is a significant disconnect between LGBT+ talent aspiration and experience in businesses that are keen to promote inclusion, the gaps in less committed companies are likely to be even greater.

Only 44% of European participants were out during the interview and application process, a significantly lower proportion than the US (60%), but higher than Asia (34%).

Exhibit 1: Out when interviewed

Were you out during your interview and application process?



■ Yes ■ No

Source: PwC/OutNext Out to Succeed Survey

Most employers could do much more to advance LGBT+ equality

All of the European participants in our survey believe that it's important that their company is visibly engaged in LGBT+ equality, and leverages its reach to advance LGBT+ rights. Yet less than a quarter describe their employers as advocates for LGBT+ equality, lower than in Asia (33%) and in the US (45%) – see Exhibit 2.

European businesses are failing to capitalise on the full benefits of LGBT+ inclusion

Most of the European participants in our survey work for companies that are active promoters of LGBT+ inclusion. They should therefore be in the best position to benefit. Yet barely a third of European participants (34%) believe that their company leverages LGBT+ inclusion for business advantage. In the US and Asia, this is a higher, but still surprisingly low 41% and 37% respectively.

Fostering true inclusion

Drawing on the survey findings, we believe there are five key priorities that organisations should adopt to promote real equality and realise the full business benefits of LGBT+ inclusion:

1. Set the right tone from the top and engage with CEOs
2. Create clear pathways for career progression
3. Stand up and advocate for LGBT+ equality
4. Build and empower LGBT+ ally networks
5. Create inclusive communications

Exhibit 2: Standing up for LGBT+ rights

From your perspective, which of the three corporate models of engagement most appropriately describes your company's engagement in LGBT+ equality? (Select one only)?

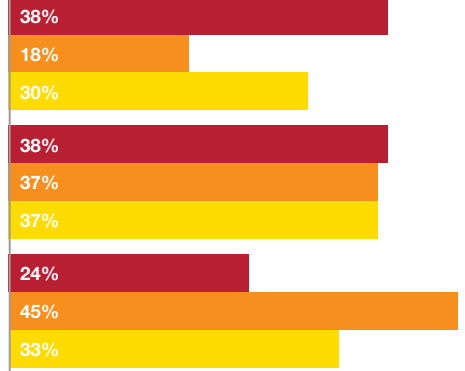
'When in Rome' (in which companies adhere to the norms and local laws of the jurisdiction)

'Embassy' (in which companies enforce pro-LGBT policies in the workplace but do not implement them outside their walls)

'Advocate' (in which companies seek to effect change in cultural attitudes outside the workplace)

■ Europe ■ US ■ Asia

Source: PwC/OutNext Out to Succeed Survey



Cutting across these five recommendations is the need to ensure that LGBT+ talent feels valued and supported, rather than just tolerated. This includes active advocacy of LGBT+ rights inside and outside the organisation (where lawful to do so). It also includes focused workplace support that would enable LGBT+ talent to bring their whole selves to work and realise their full potential. The aim isn't to provide favourable treatment for LGBT+ talent; rather it is to offer guidance, inspiration and visible role models, while clearing away the lingering biases – overt, covert and unconscious – that hold them back.

By offering the best possible working environment and career opportunities for LGBT+ talent, businesses can gain an important edge. And by promoting inclusion within the markets they operate, they can exert what we see as one of the most powerful influences to change society.



Contacts

Jon Terry

PwC UK
+44 7720 555 397
jon.p.terry@uk.pwc.com

Justine Brown

PwC UK
+44 7710 169938
justine.brown@pwc.com

Lucinda Miller

PwC UK
+44 7808 105725
lucinda.miller@pwc.com

Todd Sears

Out Leadership
+1 917 636 7971
todd.sears@outleadership.com

Paul Wendel

Out Leadership
+1 917 636 7974
paul.wendel@outleadership.com

Dave Hughes

Out Leadership
+1 917 336 7989
dave.hughes@outleadership.com

To find out more, please see

[Out to Succeed: Realising the full potential of LGBT+ talent.](#)



www.pwc.com/people

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 158 countries with more than 236,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at www.pwc.com.

This publication has been prepared for general guidance on matters of interest only, and does not constitute professional advice. You should not act upon the information contained in this publication without obtaining specific professional advice. No representation or warranty (express or implied) is given as to the accuracy or completeness of the information contained in this publication, and, to the extent permitted by law, PwC does not accept or assume any liability, responsibility or duty of care for any consequences of you or anyone else acting, or refraining to act, in reliance on the information contained in this publication or for any decision based on it.

© 2018 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details. Return on Equality (R) is a registered trademark of Out Leadership