

OUTLEADERSHIP



FCB EY

*"No pride for
some of us
without
liberation for
all of us."*

MARSHA P JOHNSON

ALLY  UP

Ally is a Verb.

Todd Sears
with Jane Barry-Moran

ACKNOWLEDGMENTS

Special Thanks

Thank you to Out Leadership's Global Advisory Board members and our 80+ member firms whose ongoing commitment to being corporate allies moves equality forward in their workplaces and communities at large.

OUT LEADERSHIP

Todd Sears	Founder & CEO
Marco Martinot	CFO
Jane Barry-Moran	Manager of Programs & Partnerships
Stephen Smith	Head of Marketing
Justin LaCoursiere	Director, Marketing & Communications
Zite Ezeh	Summer Associate

WINER IDEA GROUP

Carol Winer	Creative Direction + Design
Melinda Marshall	Content Strategist, Managing Editor

FCB

Brandon Cooke	Global Chief Communications Officer
Melanie Mitchem	SVP, Director of Global Communications and PR
Margot Byrne	Global Corporate Communications Senior Associate
Vita Harris	EVP, Chief Strategy Officer
Danni Bayn	Strategic Analytics Director
Eline Goethals	Strategy Director
Andrea Allison	Strategic Analytics Supervisor
Lipsa Mishra	Strategy Analyst

FCB CREATIVE

Avital Pinchevsky	SVP, Executive Creative Director
Bruno Mazzotti	VP, Creative Director
Derah Gordon	VP, Creative Director
Derrick Yousefi	Copywriter
Victoria Rosselli	Art Director
Renato Lima Oliveira	Associate Art Director
Thomas Jack Fleming	Designer
Melissa Moreland	Director, Project Management

DISCLAIMER

Out Leadership has made all efforts to ensure that the information contained within this report is accurate and up to date as of June 20, 2020. This work is provided for educational and informational purposes only, and should not be construed as legal advice. The information is not guaranteed to be correct, complete or current. If you would like to suggest an edit to this ongoing project, please contact info@outleadership.com

Dear Leaders

I'm proud to share this LGBTQ+ ally research, which is groundbreaking in both scope and objective.


AllyUp™ reveals the landscape of corporate allyship in our nation today. Most importantly, however, it maps how organizations can build alliance and inclusion at every level of engagement: among coworkers; across the enterprise; and throughout the larger community. In this first-of-its kind piece, we've endeavored to show not only best practice for companies in valuing their talent, but also how that practice makes the most business sense for the bottom line. When allyship starts at the top—when leaders visibly support and advocate for LGBTQ+ equality in a consistent, collaborative, compounding way—it becomes something everybody does reflexively and proudly.

Historically, allyship is a word that is used to understand the ways that non-marginalized communities stand up for and support the needs and voices of those that are at the margins. This could not be more important and relevant today. What we found in this research is true across all of the conversations around racism, nationalism, xenophobia and more: Allyship is authentic when it is centered on education, action and amplifying the needs and voices of the community it is aimed to support.

We could not have done this important work without our sponsors, FCB Global and EY LLP, organizations that have consistently demonstrated their commitment to upholding and safeguarding LGBTQ+ rights worldwide—the very essence of allyship. Nor could we do any of our work without Out Leadership's member companies (80 and counting!). To each of our member firms: Thank you for your dedication to equity every day and for supporting our vision for LGBTQ+ inclusion and business success.

AllyUp™ is the first in a series of reports derived from a dataset that yielded over 5,000 responses from eleven countries. *AllyUp™* is designed to guide leaders in creating more space for education, advocacy, and activism. While focused on the state of alliance in the United States, it represents a call to action we intend to discuss on a global scale in future installments of this research series. With your help, that call goes out today.

In alliance,



Todd Sears
Founder & CEO

Methodology

This research consists of three surveys: a multi-scale, exploratory survey of over 2,600 respondents from all regions of the United States; a global survey, based on the findings from the first survey, of 5,600 participants from companies in Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, the United Kingdom, and the United States; and a follow-up survey that took place during the COVID-19 pandemic involving 300 U.S.-based participants.

The First survey which consisted of 77 questions, was fielded in May of 2019 and yielded 3,900 observations from 2,643 respondents. Respondents were between the ages of 25 and 69; were employed either part- or full-time at the time of the survey; and worked at a company with a minimum of three employees. Fifty percent of these respondents classified as LGBTQ+, and 50 percent as non-LGBTQ+. LGBTQ+ respondents included those who self-identify as lesbian, gay, bisexual, or asexual, as well as those who identify as transgender, gender-fluid, non-binary, or who self-identified as "other." The survey went into three separate fields: national, regional, and state, utilizing the least-fill sampling method which allows the responses of participants in the national field to count toward the regional or state fields (providing these fields had not met their sampling quota). The national field consisted of 600 participants, while the regional and state fields each had 500 participants per region or state.

The second survey was fielded in November of 2019 in eleven countries, was also exploratory in nature and built on the findings from the first survey, with additional questions addressing allyship within the workplace. This study went into a national field involving 600 U.S. respondents, and a global field of 500 respondents each from Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, and the U.K. for a total of 5,600 respondents. Participant requirements for this survey were the same as those for the first survey. Of the 600 within the U.S. field, 30 percent (300 people) identified as LGBTQ+ and 70 percent (300 people) as non-LGBTQ+. The distribution of LGBTQ+ vs. non-LGBTQ+ participants varied in the global field.

In response to the profound changes that COVID-19 has caused within the workplace, a third study was conducted in April/May 2020 to gauge the impact of working from home on a sample population. Questions on this "snapshot" survey were based on findings from the prior two studies. Of the 300 respondents in this study, 30 percent identified as LGBTQ+ and 70 percent as non-LGBTQ+.

Contents

part 1	The State of Alliance	4
	Out Leadership Allyship Model	5
	Impact on Inclusion	6
	Impact on LGBTQ+ employees	8
	Ally behaviors and characteristics	10
part 2	The Costs of Passivity	12
	To individuals	13
	To companies	16
part 3	A Call for Corporate Action	18
	The business case for <i>AllyUp</i> ™	19
	Road map for action	20
	Winning the Ally Marketplace™	29

ally ^{VERB}
~~noun~~

al-ly

plural allies

To work

along side

~~one that is associated with another as a helper~~: a person or group that provides assistance and support ~~in~~ an ongoing effort, activity, or struggle

collaborator, listener, active accomplice, and advocate

visible and consistent to

The State of Alliance

An up-shift in attitudes,
a down-shift in actions

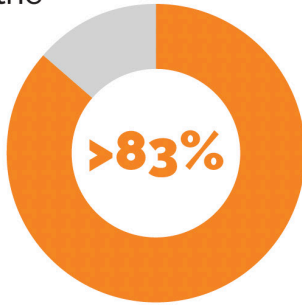
Out Leadership's AllyUp Model

AllyUp is framed around the understanding that the allyship of the individual can drive organizations to improve internal culture and also catalyze systematic change outside the four walls. In the same way, that relationship, between the individual and corporation, can inform, encourage and amplify examples of visible leaders who model authentic, action centered allyship

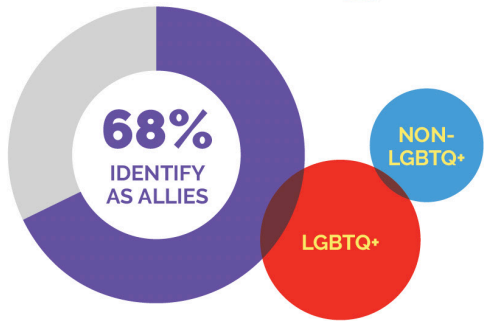
The strands of individual allyship's authenticity, education, and willingness to be an accomplice builds upon the strands of corporate allyship's visible and consistent leadership, investment and active engagement to drive and amplify community and global impact

The State of Alliance

Ally programs have moved the needle on LGBTQ+ inclusion



of Employees support workplace and state protections for LGBTQ+ individuals who are out at work



● Among non-LGBTQ+ respondents, **56%** identify as allies

● Among LGBTQ+ respondents, **79%** identify as allies

Who is Likely to be an Ally?

Among **non-LGBTQ+** respondents gender, age, race, nor religion had influence over who identified as an ally.

Among **LGBTQ+** employees, allyship is influenced by...

- Age: the majority of allies are 25-39
- Occupation:
 - allies are more common among those in the arts, entertainment, and tech sectors
 - allies are less common among health care, government, and transportation workers

Among **all** respondents, allyship is influenced by...

- Education: people with a bachelor's degree or higher are more likely to be allies than less educated workers
- Seniority: people in management are more likely to be allies than people in support roles

When awareness of LGBTQ+ coworkers is greater, attitudes toward them are more positive:

“

The feedback since launching has been incredible, and many allies have reached out to express their genuine appreciation of being offered tools and resources to help educate them on LGBTQ+ topics. We are proud to state that we have had over 150 allies take the first step in registering to be an ally.

Joseph Lewis
Senior Program Manager
Learning & Development Innovation & Operations
Equitable

”

“

Since its inception, our Ally program has been a key contributor to our culture as an organization, enabling courageous conversations with teammates and ensuring global support. Companies all over the world see our self-guided badge system as best practice, and it has driven amazing growth in our program: we currently have over 30,600 members.

Kristian Wedolowski
Operational Excellence Executive
Global Banking & Markets Operations
Bank of America

”

The Costs of Passivity

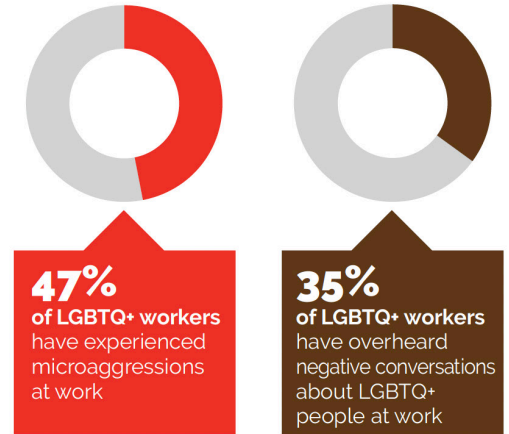
Covering behavior at work saps productivity...



...and drives talent out the door.

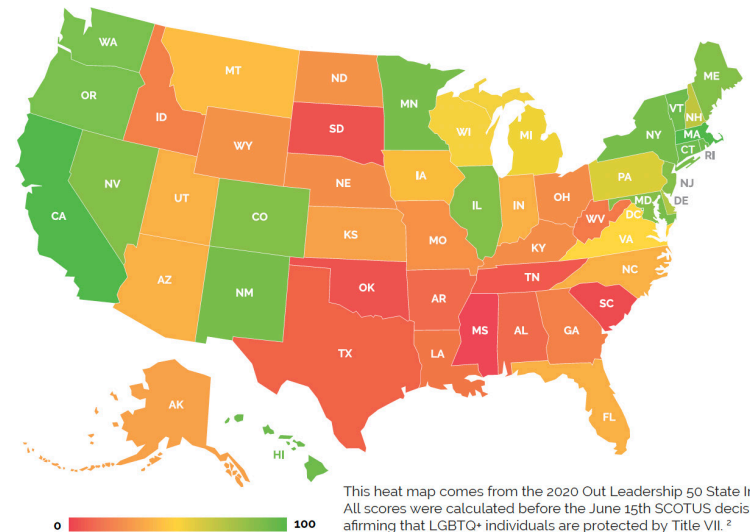


Apathetic attitudes offer no protection from microaggressions, discrimination, harassment, or assault



Protective and empowering legislation has stalled

The legal and cultural situation for LGBTQ+ people varies widely across the country. This map, based on each state's Business Climate Score, illustrates the states (in green) where LGBTQ+ people are empowered to participate more fully and openly in the economy as well as those (in yellow, orange, and red) where LGBTQ+ people cannot count on protection from discrimination³



This heat map comes from the 2020 Out Leadership 50 State Index. All scores were calculated before the June 15th SCOTUS decision affirming that LGBTQ+ individuals are protected by Title VII.²

The Costs of Passivity

Companies that are perceived as anti-LGBTQ+ risk revenues, reputation, and future market share



Two women, holding hands, share a single strand of pasta. That image graced the hundreds of boxes of spaghetti no. 5 that went out to winners of Barilla's 2018 World Pasta Championship.³

It's an arresting graphic, visually. But what makes it stunning is the about-face that it represents for the world's largest pasta maker, who in the span of five years transformed itself from the pariah of the LGBTQ+ community to its corporate poster child.

Barilla's race to restore its reputation began in late 2013—almost as soon as Chairman Guido Barilla told thousands of Italians, on the nation's most popular radio show, that he would never do a commercial with a homosexual family "because we don't agree with them." If gay customers didn't like that, Barilla added, they could go buy another brand of pasta.⁴

Calls for a boycott by celebrities like Chrissy Teigen ensured that many customers, gay and straight, did precisely that. Sales took a slight dip. But as CEO Claudio Colzani explained to Bloomberg Businessweek, the real concern wasn't revenues, but reputation: "I was concerned about the market share, but I was much more worried about people perceiving Barilla as an out-of-date brand."⁵

In 2014, after Barilla fell 21 spots on the Reputation Institute's annual corporate ranking, Colzani embarked on a massive campaign to resurrect the brand's image. He appointed a chief diversity and inclusion officer and formed an external advisory board.⁶ He revamped "Share The Table," marketing that positions pasta as the centerpiece of the family dinner, to feature families other than the traditional one Guido Barilla had insisted was emblematic of the brand (Table Advocates included Vicki Reich, an LGBTQ+ parent).⁷ So concerted was his campaign that Italian illustrator Olimpia Zagnoli stopped boycotting and started collaborating with the brand in 2017 to produce its limited-edition box design. "It turns out while I was protesting in my kitchen, Barilla made significant progress, radically redefining its code of ethics and adjusting its internal policies," she told itsnicethat.com.⁸

Today, Barilla's reputation is outstanding. Human Rights Campaign has bestowed a perfect score on Barilla since 2014; in 2017, the advocacy group honored the company with its Corporate Equality Award.¹⁰

YouTube AD-POCALYPSE, AVERTED

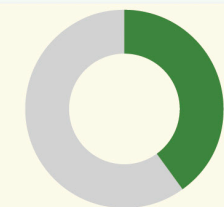
After two years of enduring YouTuber Steven Crowder's racist and homophobic slurs, Vox.com journalist Carlos Maza, host of "Strikethrough," had had enough. On May 31, 2019, he tweeted to his 28,400 followers some examples of the conservative pundit's attacks, blaming YouTube for failing to enforce its own policies prohibiting cyberbullying.¹⁰

Within days, YouTube took notice. "Thanks again for taking the time to share all of this information... We take allegations of harassment very seriously," TeamYouTube tweeted to Maza June 4, 2019.¹¹ Indeed, by August 2019, the world's largest video platform had revisited its content policies, reprogrammed its content-vetting algorithms, and demonetized thousands of channels, including Crowder's, that featured "borderline" content.¹²

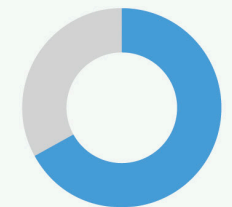
Because here's what YouTube recognized, in the viral response triggered by Maza's tweet: if YouTube failed to rein in hate speech, its advertisers might well suspend their spend—what was termed "ad-pocalypse" in March 2017 when hundreds of the world's leading brands simultaneously boycotted the platform.¹³ Companies like Verizon, Pepsi, Walmart, and Johnson & Johnson pulled their ads because they had discovered them popping up on white supremacists' and religious radicals' channels (assigned by ad-placing algorithms that attempt to match messages to viewers). The cost of ad-pocalypse? Analysts estimate \$750 million for the first one alone.¹⁴ And that figure doesn't include damage to the YouTube brand, which is difficult to estimate (though acknowledged by CEO Susan Wojcicki in an apology to the LGBTQ+ community).¹⁵

With its new policies and procedures, YouTube hopes to bolster its reputation and forestall future revenue bleeds. "These [inflammatory] videos will have less engagement and be harder to find," wrote Goodle General Counsel Kent Walker. "We think this strikes the right balance between free expression and access to information without promoting extremely offensive viewpoints."¹⁶

The percent of shoppers willing to make that change since the 2019 Witeck Survey increased by one third²⁹



40%
of shoppers change brands depending on a brand's position on LGBTQ+ inclusion



67%
factor LGBTQ+ friendliness into their shopping decisions

A Call for Corporate Action

AllyUp™ to win the Ally Marketplace™

There's never been a better time to **ALLYUP**™

While the workplace we return after the COVID 19 pandemic will be forever different than the workplace we left in March 2020, our data reveals some startlingly positive developments among employees working from home. Perhaps because the pandemic has isolated us in ways we never before experienced, our appetite for inclusion is at an all-time high—as is our expectation of it. Our 2020 survey data shows that 96% of employees expect the workplace they return to be at least as equitable/inclusive if not more so than when they left it. Fully 65 percent of non-LGBTQ+ respondents and 63 percent of LGBTQ+ respondents surveyed in 2019 felt their workplace was affirming, safe environment most of or all of the time, which says a lot about the primacy of this post-pandemic opportunity. Exclusion persists in the American workplace. And it's a problem, as we've seen, that companies simply cannot afford in terms of retaining or building both a workforce and a customer base.

Being an ally is not who you are, but what you do.

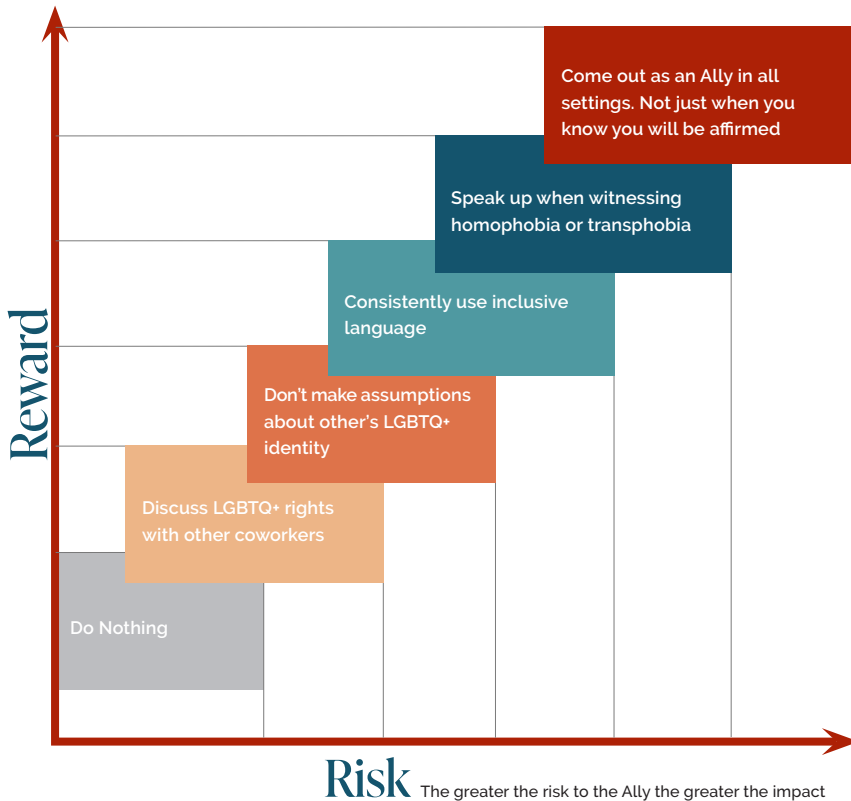
The research makes clear that "ally" isn't yet the verb it needs to become in our companies and in our larger communities. To create the changes needed, we see action at three levels: Individuals must educate and engage coworkers and be willing to take the risks that active allyship implies. Companies must "activate" both allies and LGBTQ+ individuals to create inclusivity within their walls, and to serve as an example of inclusivity beyond their walls. And business leaders must commit to being seen and heard as LGBTQ+ advocates on a consistent, collaborative, and compounding basis in order to promote equitable practices in the larger community.

How to go about this important work? Drawing on this robust research as well as the growing body of work that Out Leadership has penned or collaborated on, we've created a road map that will deliver greater equality for all, both in and outside the workplace.

What Individuals Can Do



The OUT Leadership Risk-Reward Matrix
In response to discrimination against a coworker...




Individuals MUST...

 AllyUp™ for each other.

History shows us that subsets of the LGBTQ+ community suffer oppression within the community (i.e. bi-phobia, transphobia). Indeed, while allyship seeks to advance inclusion of all people from marginalized communities, we know racism and exclusion to be as virulent within the LGBTQ+ community as outside it. But few LGBTQ+ individuals wish to acknowledge this intolerance. As a study by Stonewall UK noted, "The prevalence of racist attitudes within gay sub-culture is often pushed under the carpet." So, while *AllyUp™* focuses on mobilizing the allied power of straight and cisgender individuals within corporate entities, it is vital to acknowledge and inspire the work that still needs to be done within the LGBTQ+ community.

 Look within before insisting that others change.

The straight and cis-gender community must likewise examine their own implicit biases. If you have looked twice when you've seen two men walking down the street holding hands... or have laughed at a joke at the expense of the LGBTQ+ population... or have used heterosexual pronouns before learning the gender identity of someone's partner... then you—like all of us—have some internal programming to overcome. Reflection on and acknowledgement of implicit bias is the first step on the journey to impactful allyship.

 Be consistent in your support.

Consistent action is what defines allyship. Allyship isn't simply making an appearance at a pride event once a year; it isn't having a pride flag at your desk in June. Allies show up consistently at LGBTQ+ events so others know they can be depended upon to speak up for their colleagues even when it's not politically expedient to do so and intervene when they witness injustice in the workplace—whether it takes the form of inappropriate comments or physical harassment.

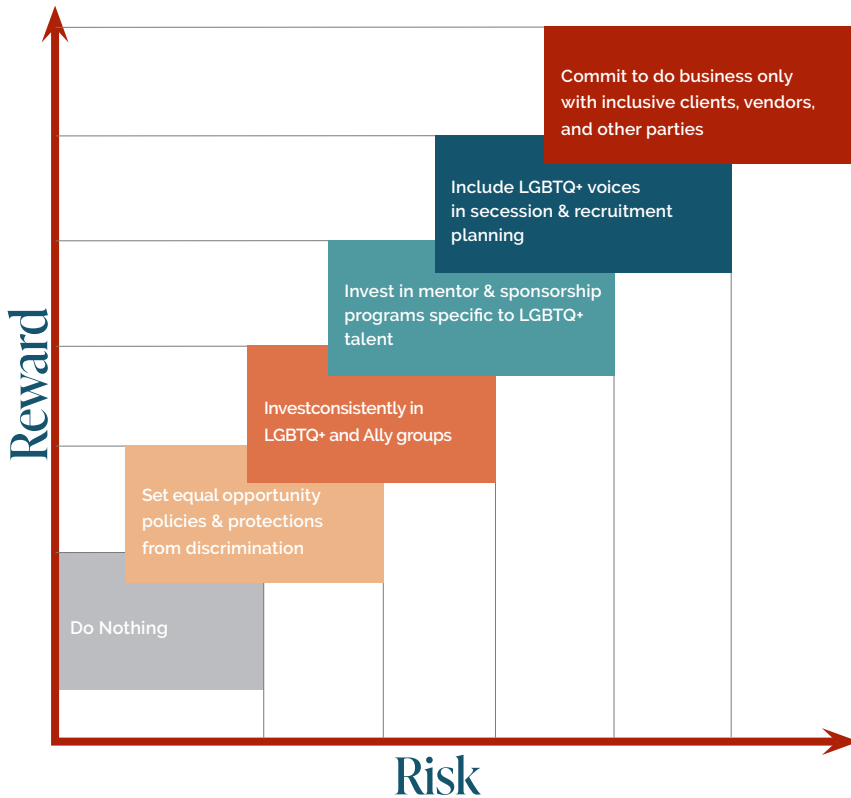
 Get educated.

Straight and cisgender peers must actively seek opportunities to expand their knowledge, update their language, and heighten their awareness of LGBTQ+ issues. Education doesn't happen simply because an organization offers it; it's up to individuals to avail themselves of the resources, programs, or training they need to intervene with confidence and knowledge.

What Companies Can Do



The OUT Leadership Risk-Reward Matrix
To activate Allyship across the enterprise...



The greater the risk to the company the greater the impact on individuals and organizational culture



Companies MUST...

Equip employees with the education and training they need to embrace risk.

Allies aren't born; they are built. We should not expect anyone to know how to intervene when a coworker is being harassed or demeaned, nor how to speak out on that person's behalf. Taking risks—and that's what intervention entails—isn't easy even when you're clear that action is required. There is a distinct difference, after all, between an ally and an accomplice, whose actions, as defined in the context of white privilege, are meant "to directly challenge institutionalized racism, colonization, and White supremacy by blocking or impeding racist people, policies, and structures." Ally programs must not merely inform, but also train individuals to be action-centered and risk-embracing.

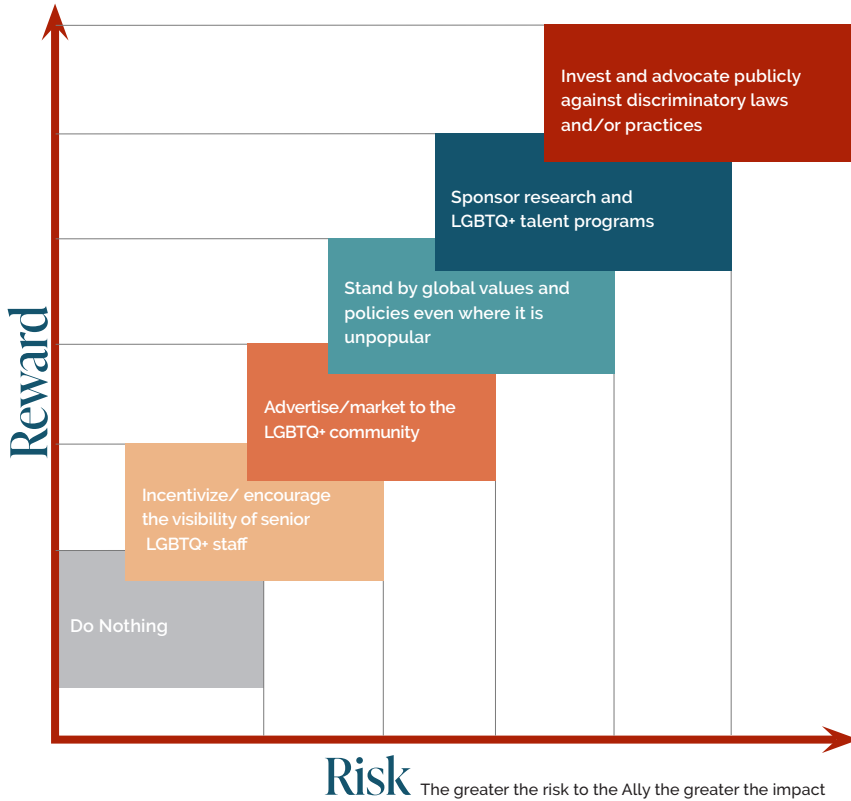
Encourage and incentivize management to model active allyship.

Employees need education, and opportunities to engage with and advocate for the LGBTQ+ community. But most of all, they need exposure to managers and leaders who have the courage to walk their talk. Being proactive, rather than reactive, entails risk. Leaders mitigate that risk when they show their followers they will not stand by silently when a colleague is the target of discrimination.

What Business Leaders Can Do



The OUT Leadership Risk-Reward Matrix
To activate Allyship across the enterprise...



Business Leaders MUST...

Take every opportunity to be heard, as well as seen, as a proactive ally and advocate.

Allyship will achieve equality for all when leaders model active support not just to their workforce, but also to the larger community. Leaders must speak up not just at an enterprise-wide town hall, but in the town as well; must not only protest discriminatory practices at the state level, but also join together with other business leaders to leverage concerted economic clout. Leaders who take these actions telegraph to the workforce, the community, and the legislature that equality concerns us all.

So why don't more CEOs model such actions? They perceive too much risk, and too little reward, in being highly visible public advocates.

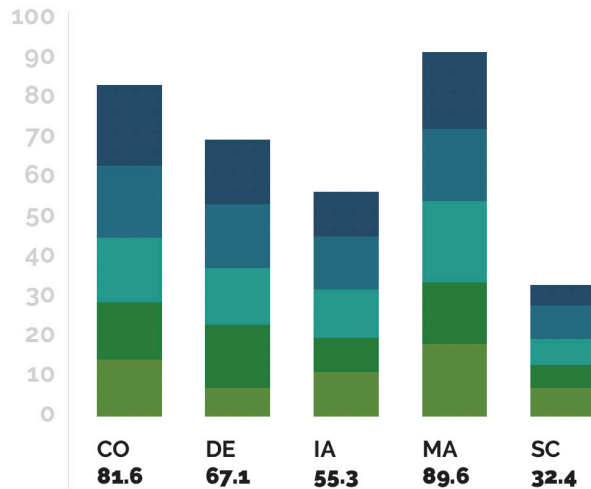
In our collaborative research with the Center for Talent Innovation, a research non-profit based in New York, we found that the number-one action that leaders believed would show their allyship was to attend their Pride network's cocktail hour. In contrast, our own research affirms, what LGBTQ+ individuals identify as the most powerful intervention is for leaders to show up and speak out on behalf of LGBTQ+ equality at events throughout the year—not just within the company but in settings outside it as well. That's the essence of Allying Up: consistent, collaborative action that compounds over time.

Is such action risky? Absolutely. We who have come out to friends and family and colleagues know just how much courage it takes to identify ourselves to those who might spurn or punish us for it; we can well understand how a cis-gender leader might shrink from identifying as an LGBTQ+ ally. Yet we also know, because we've seen it among our members, that risk compounds reward: leaders who make sure LGBTQ+ individuals are seen and valued unleash a ripple effect that secures workforce loyalty, attracts top talent, and wins new customers. Doing the right thing for people does the best thing for the bottom line.

A Call for Corporate Action

Region compounds risk—but amplifies reward

When a business leader in Boston uses a rainbow-flag coffee mug, it is, of course, meaningful to individuals in that setting. But, given the favorable Business Climate in Massachusetts, it is not a very impactful one. In contrast, a leader in South Carolina who sports that same mug is taking a much larger risk, given the unfavorable Business Climate in South Carolina. Yet by doing so, she sends a powerful signal to the LGBTQ+ employees of her company.



- Legal and Nondiscrimination Protections
- Youth and Family Support
- Political and Religious Attitudes
- Health Access and Safety
- Work Environment and Employment

This data comes from the 2020 Out Leadership 50 State Index. All scores were calculated before the June 15th SCOTUS decision affirming that LGBTQ+ individuals are protected by Title VII.

Business Statement for Transgender Equality

PUBLISHED NOVEMBER 2018

Drafted by Out Leadership, this letter denounces laws that attempt to strip transgender, gender non-binary, and gender-fluid individuals of their rights and/or identity. Convened by Out Leadership, the 200+ companies signing the statement represent some 4.8 million employees; generate a collective annual revenue of more than \$2.4 trillion; and draw from a broad range of industries, including financial services, consumer products, and technology.

We, the undersigned businesses, stand with the millions of people in America who identify as transgender or gender non-binary, or who are intersex, and call for all such people to be treated with the respect and dignity everyone deserves.

We oppose any administrative and legislative efforts to erase transgender protections through reinterpretation of existing laws and regulations. We also fundamentally oppose any policy or regulation that violates the privacy rights of those that identify as transgender or gender non-binary, or who are intersex.

In the last two decades, dozens of federal courts have affirmed the rights and identities of the transgender people. Cognizant of growing medical and scientific consensus, courts have recognized that policies that force people into a binary gender definition determined by birth anatomy, fail to reflect the complex realities of gender identity and human biology.

Recognizing that diversity and inclusion are good for business, and that discrimination imposes enormous productivity costs (and exerts undue burdens), hundreds of companies, including the undersigned, have continued to expand inclusion for transgender people across corporate America. Currently more than 80 percent of the Fortune 500 have clear gender identity protections; two-thirds have transgender-inclusive healthcare coverage; hundreds have LGBTQ+ and Allies business resource groups and internal training efforts.

Transgender, gender non-binary, and intersex people are our beloved family members and friends, and our valued team members. What harms them harms our companies.

We call for respect and transparency in policy-making, and for equality under the law for transgender, gender non-binary, and intersex people.

A Call for Corporate Action

THE POWER OF CORPORATE ALLIANCE: OVERTURNING HB 2

North Carolina's HB 142 didn't garner headlines when it became law in March 2017, repealing much of HB 2. North Carolina's notorious "bathroom law" that insisted people use public bathrooms according to the gender on their birth certificate. But its passage testifies to the remarkable power of allied private interests to shape public policy. HB 142 shows that business leaders not only hold a crucial stake in LGBT+ equality: they also wield a mallet mighty enough to drive it.

The dismantling of HB 2—which also prohibited municipalities from enacting nondiscrimination laws—is a case study in corporate activism. No sooner had Governor Pat McCrory signed it into law on March 23, 2016 than some 200 CEOs—including the state's largest employers—signed a petition urging him to repeal it. "House Bill 2, which has overturned protections for LGBT people and sanctioned discrimination across North Carolina, is...bad for our employees and bad for business," they wrote.¹⁷ Drafted on Human Rights Campaign and Equality North Carolina letterhead, the petition visibly telegraphed leaders' alignment with LGBT+ organizations and interests.¹⁸

McCrory, a conservative Republican, defended the law, going so far as to file a suit in April 2016 with the federal government to declare HB 2 as non-discriminatory.¹⁹ Unappealed, the business community began pulling out of the state. PayPal and CoStar canceled plans to expand their operations in Charlotte, a move estimated to cost 1,100 jobs; Deutsche Bank did the same in Raleigh, annihilating 250 jobs. Adidas decided to build its first shoe factory not in High Point, but Atlanta, Georgia; Voxpro expanded not in Raleigh but in Athens, Georgia. The pull-out by PayPal alone cost North Carolina an estimated \$200 million in gross domestic product annually, according to an analysis by the state's Commerce Department.²⁰

In July 2016, with no repeal in sight, corporate allies stepped up their game. More than 200 companies signed an amicus brief headed to the U.S. Supreme Court with a trio of discrimination cases testing the protective powers of existing federal civil rights laws.²¹ Then the NBA, which had planned its 2017 All-Star Game to be held in Charlotte, pulled out of the deal, a move that cost the city an estimated \$100 million in lost revenues.²²

Distaste for HB 2 culminated September 26, 2016 with a petition signed by investors representing \$2.1 trillion in assets under management.²³ Organized by Trillium Asset Management, Croatan Institute, and the New York City Comptroller, the 53 signatories—from asset managers and public pension fund managers to foundations—called for a full repeal, invoking the desire of their underlying investors to divest from companies that tolerated discriminatory practices.²⁴ Despite the pressure, in December the Republican-controlled General Assembly rejected a repeal of HB 2. In mid-March 2017, when state house Democrats failed to force a vote that would get the law repealed, opponents of it all but gave up hope.²⁵

But two weeks later, business exerted its ultimate leverage: the NCAA, which was finalizing its multi-year schedule of events, threatened to boycott North Carolina cities as event hosts through 2022.²⁶ The General Assembly bowed, passing a "compromise" bill that repealed HB 2's bathroom clause. It retained the stricture prohibiting municipalities from passing their own antidiscrimination laws—but stipulated the prohibition sunset in December 2020.

"States and countries can either have modern economies driven by knowledge industries like technology, financial services, and pharmaceuticals, or they can discriminate against LGBT people," said Todd Sears, Founder and CEO of Out Leadership. "North Carolina can't have it both ways."

They Ally Marketplace™

\$37 trillion

ALLY PURCHASING POWER

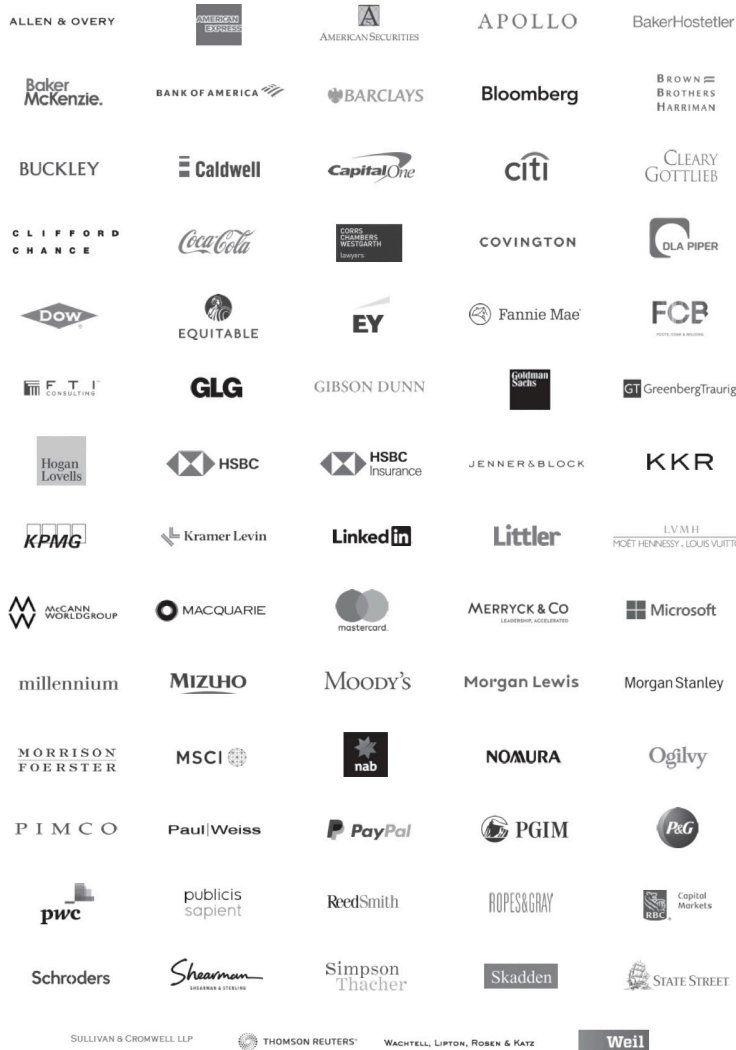
\$3.7 trillion²⁷

LGBTQ+ PURCHASING POWER

Winning the Ally Marketplace™

Business leaders are looking at an extraordinary opportunity. If they can convert LGBTQ+ tolerance into LGBTQ+ advocacy—if they can *AllyUp*™—they can burnish their brand, attract (and keep) top talent, and grow market share among not just LGBTQ+ consumers, but those who identify as their allies.²⁸

Out Leadership Members



Join Out Leadership and these 80+ member firms in supporting LGBTQ+ equality. For more information email info@outleadership.com

Endnotes

- Sylvia Ann Hewlett and Kenji Yoshino, "Out in the World: Securing LGBT Rights in the Global Marketplace." Center for Talent Innovation, 2016.
- Out Leadership, State LGBT+ Business Climate Index (New York: Out Leadership, 2019), 14.
- Jessa Powers, "Lesbian-Themed Barilla Pasta Box Art Counters Its Homophobic Past." The Advocate, November 9, 2018. Accessed June 16, 2020 at <https://www.advocate.com/business/2018/11/09/lesbian-themed-barilla-pasta-box-art-counters-its-homophobic-past>
- Thomas Buckley, "Barilla Pasta's Turnaround From Homophobia to National Pride." Bloomberg Businessweek, May 7, 2019. Accessed June 16, 2020 at <https://www.bloomberg.com/news/features/2019-05-07/barilla-pasta-s-turnaround-from-homophobia-to-national-pride>
- Buckley, "Barilla Pasta's Turnaround."
- Buckley, "Barilla Pasta's Turnaround."
- "Share The Table Advocates." Share The Table, Barilla, accessed June 16, 2020 at <http://www.sharethetable.com/meetadvocates/>
- Lucy Bourton, "Olimpia Zagnoli discusses her work with Barilla, a brand she previously boycotted." It's Nice That, October 29, 2018. Accessed June 16, 2020 at <https://www.itnicethat.com/articles/olimpia-zagnoli-barilla-illustration-291018>
- "Barilla to Receive HRC Corporate Equality Award." Windy City Times, October 30, 2017. Accessed June 16, 2020 at <http://www.windycitymediagroup.com/lgbt/barilla-to-receive-hrc-corporate-equality-award/60871.html>
- Spencer Baculi, "YouTube Updates Policies In Response To Conflict Between Vox Journalist Carlos Maza and Conservative Commentator Steven Crowder." Bounding Into Comics, June 6, 2019. Accessed June 16, 2020 at <https://boundingintocomics.com/2019/06/06/youtube-updates-policies-in-response-to-conflict-between-vox-journalist-carlos-maza-and-conservative-commentator-steven-crowder/>
- Baculi, "YouTube Updates Policies."
- Elizabeth Lopatto, "Bowing to pressure, YouTube will reconsider its harassment policies." The Verge, June 6, 2019. Accessed June 16, 2020 at <https://www.theverge.com/2019/6/6/18654604/youtube-policy-change-harassment-maza-crowder>
- Olivia Solon, "Google's bad week: YouTube loses millions as advertising row reaches US." The Guardian, March 25, 2017. Accessed June 16, 2020 at <https://www.theguardian.com/technology/2017/mar/25/google-youtube-advertising-extremist-content-att-verizon>
- Julien Rath, "Analysts predict the YouTube advertiser boycott will cost Google \$750 million." Business Insider, March 27, 2017. Accessed June 16, 2020 at <https://www.businessinsider.com/analyst-predicts-the-youtube-ad-boycott-will-cost-google-750-million-2017-3>
- Andrew Wallenstein, "YouTube CEO Apologizes Over Handling of Homophobic Content." Variety, June 10, 2019. Accessed June 16, 2020 at <https://variety.com/2019/digital/news/youtube-ceo-apologizes-over-handling-of-homophobic-content-1203238994/#article-comments>.
- Kent Walker, "Four steps we're taking today to fight terrorism online." The Keyword, Google, June 18, 2017. Accessed June 16, 2020 at <https://www.blog.google/topics/google-europe/four-steps-were-taking-today-fight-online-terror/>
- Jeff Taylor, "NC Orgs Plan for Action as a Ban on Nondiscrimination Ordinances is Set to Expire." NewNowNext, March 2, 2020. Accessed June 16, 2020 at <http://www.newnownext.com/north-carolina-lgbtq-rights-post-hb142/03/2020/>
- A copy of the letter can be found at [https://assets2.hrc.org/files/assets/resources/NC_CEO_Letter_\(3\).pdf](https://assets2.hrc.org/files/assets/resources/NC_CEO_Letter_(3).pdf)
- The Observer editorial board, "McCrory's familiar, disturbing defense of discrimination." The Charlotte Observer, May 9, 2016. Accessed June 16, 2020 at <https://www.charlotteobserver.com/opinion/editorials/article76601387.html>
- Emery P. Dalesio and Jonathan Drew, "AP Exclusive: Price tag of North Carolina's LGBT law: \$3.76B." AP News, March 27, 2017. Accessed June 16, 2020 at <https://apnews.com/f452980f3e-4a01bb68bcb2721f0f8>
- Sarah McBride, "More than 200 Major Businesses File Landmark Amicus Brief in Support of LGBTQ Workers." Human Rights Campaign, July 2, 2019. Accessed at <https://www.hrc.org/blog/over-200-businesses-file-amicus-brief-in-support-of-lgbtq-workers>
- Michael Gordon, Mark S. Price and Katie Peralta, "Understanding HB2: North Carolina's newest law solidifies state's role in defining discrimination." The Charlotte Observer, March 26, 2016. Accessed June 16, 2020 at <https://www.charlotteobserver.com/news/politics-government/article68401147.html>
- "Investors Worth \$2.1 Trillion Call for Full Repeal of North Carolina's House Bill 2." Out Leadership, September 26, 2016. Accessed June 16, 2020 at <https://outleadership.com/insights/investors-worth-2-1-trillion-call-for-full-repeal-of-north-carolina-house-bill-2/>
- Gordon et al, "Understanding HB2."
- Sam Levine, "North Carolina Repeals HB2, But It Doesn't Seem To Be Much Of A Repeat At All." HuffPost, March 31, 2017. Accessed June 16, 2020 at https://www.huffpost.com/entry/north-carolina-hb2-repeal_n_58dd005be4b05eae031d72a3
- "Investors Worth \$2.1 Trillion Call for Full Repeal." Out Leadership.
- "Estimated LGBT Purchasing Power: LGBT-GDP." LGBT Capital, August 2015. Accessed June 16, 2020 at http://www.lgbt-capital.com/docs/Estimated_LGBT-GDP_%28table%29_-_July_2015.pdf
- Given that each LGBTQ+ person has between five and fifteen allies, we estimate the Ally Marketplace™ to be at least 10x the size of LGBTQ+ marketplace.
- IMRE: Witeck Communications, Inc. "Toyota LGBT Audience Research" September 2015

OUTLEADERSHIP



OutLeadership.com

+1.917.336.0604

info@outleadership.com

636 11th Avenue,

New York NY 10036

Certified



Corporation

