COQUAL

LGB

Pride Under Pressure

Charting a Course for Global
LGBTQ+ Workplace Inclusion

A brief guide to precise, thoughtful, and scientifically sound terminology

Establishing a shared vocabulary is vital to the success of LGBTQ+ inclusion. We urge **corporations to stay grounded in scientific reality and continue to acknowledge the existence of nonbinary identities.** Please refer to the report for more.

LGBTQ+

This acronym, short for lesbian, gay, bisexual, transgender, and queer, plus ("+") others, describes individuals and communities across a spectrum of sexual orientations, gender identities, and gender expressions. While the acronym has been a powerful force for inclusion and solidarity, it is important to understand the distinction between **sexual orientation** and **gender identity** contained within LGBTQ+.

Sexual orientation

Sexual orientation refers to emotional, romantic, or sexual feelings toward other people or no people.[1] Terms that people might use to describe their sexual orientation include but are not limited to:[2]

- **Heterosexual** (or **straight**) can describe a person who is attracted to people of the opposite gender.

- **Lesbian** can describe a woman or nonbinary person who is primarily attracted to women.

- **Gay** can describe a person who is primarily attracted to people of the same gender and is sometimes used as an umbrella term for "not straight."

- **Bisexual/pansexual** can describe someone who is attracted to people of multiple gender identities or expressions, including those outside of the male/female binary. Read more in our sources to further understand the distinctions between bi- and pansexuality.[3]

Gender identity

Gender refers to a socially constructed set of norms (including physical attributes, behaviors, and emotions) associated with being a girl, boy, woman, man, or other designation. Gender is related to, but distinct from, biological sex. Gender identity categories can be binary (e.g., man or woman), nonbinary (e.g., genderqueer, genderfluid), and ungendered (e.g., agender, genderless).[4] A person's gender identity—and the way they express their gender—can change over time.

In this report we use the term **transgender and gender diverse (TGD)** to refer to trans identity (whether it is binary or not), nonbinary identity, and ungendered identity. When writing about gender identity, we use TGD in contrast to **cisgender** (abbreviated as "cis").

Introduction

Anti-LGBTQ+ discrimination is a global crisis that demands urgent action from the private sector. Rampant disinformation and divisive, fear-stoking rhetoric aimed at both LGBTQ+ rights and diversity, equity, inclusion, and belonging (DEIB) render surface-level gestures insufficient. Corporations must channel their courage and commit to tangible actions toward what really matters: workplaces where LGBTQ+ professionals—and all professionals—are safe, valued, and able to thrive.

In the years since Coqual released the seminal report *Out in the World: Securing LGBT Rights in the Global Marketplace*, leading organizations have acted where governments fell short, filling in gaps in civil rights and healthcare disparities and creating safe spaces and networks at work.[5] From the United States to Uganda, companies have also fought for change outside of their walls, openly lobbying against anti-LGBTQ+ legislation.[6]

Out in the World concluded with our hope that we were nearing a global "tipping point," a time when LGBTQ+ professionals around the world would feel collectively empowered, and psychologically safe, to be open and proud of their LGBTQ+ identity. Now, nearly 10 years later, while some firms have firmly established themselves as global beacons of LGBTQ+ inclusion, the private sector tipping point has not yet come.

Amidst volatility and vocal opposition, the partnership between LGBTQ+ people and the private sector remains as vital and powerful as ever. We can harness this moment to make our work more sustainable, more strategic, and no longer siloed but embedded into all aspects of business operations. To do this, corporate champions for LGBTQ+ inclusion need direction and fuel. That is what we provide in this report: data takeaways that illustrate systemic and interpersonal challenges with rigorous clarity, plus durable best practices informed by decades of research and consulting. We offer a fresh contribution to the field—Coqual's Navigator—inspired by our 2016 "When in Rome, Embassy, Advocate" framework for MNC market engagement on LGBTQ+ inclusion.
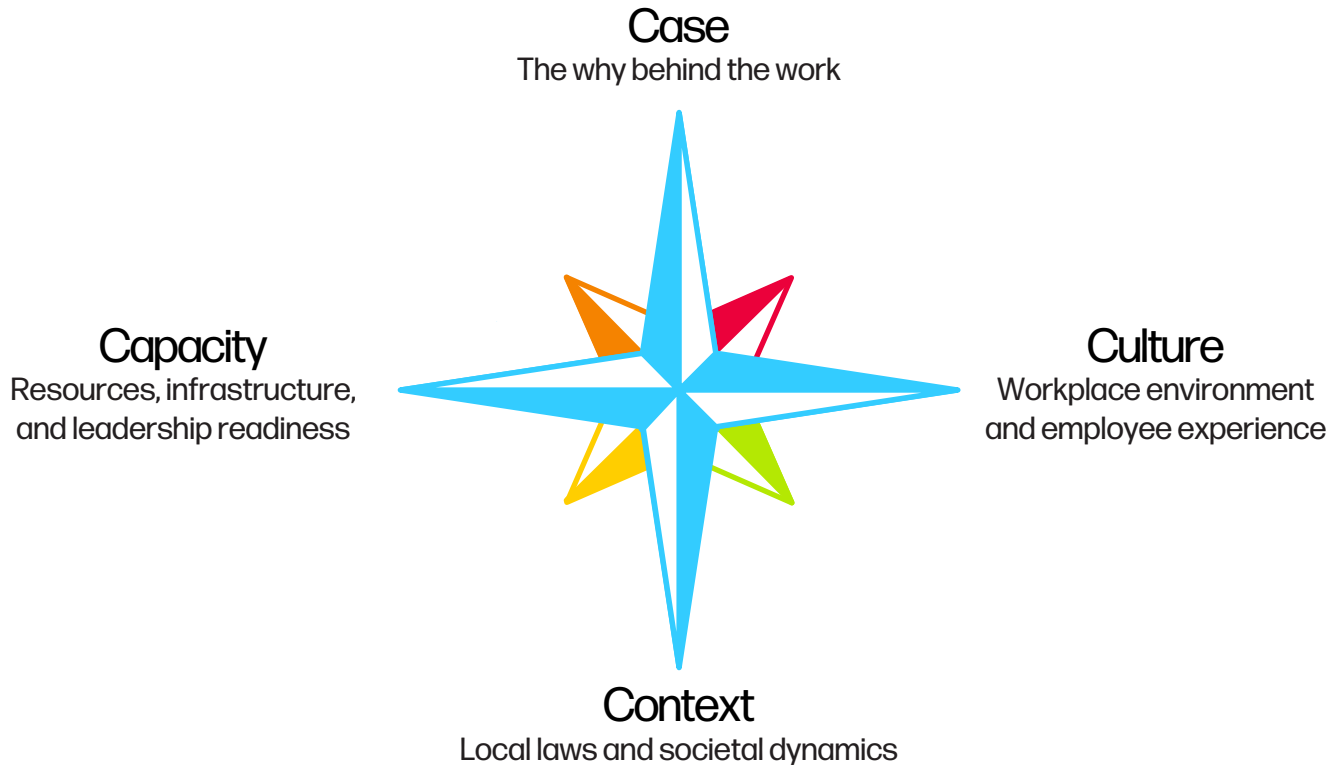
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Many US-government affiliated links that reference diversity, equity, inclusion, and accessibility initiatives no longer function at the time of publication. This extends to sites that reference sexual orientation and gender identity. We have replaced links where possible, but readers may still be met with 404 errors in our endnotes and hyperlinks. In some cases, web pages have been archived through The Internet Archive's Wayback Machine, but this is not always guaranteed.

> "We are not yet liberated as a queer community in corporate spaces. There's still quite a long way to go."
>
> — Gay professional in South Africa

Coqual's Navigator: A new tool for dynamic action on global workplace inclusion

Case
The why behind the work

Capacity
Resources, infrastructure, and leadership readiness

Culture
Workplace environment and employee experience

Context
Local laws and societal dynamics

Together, we can support LGBTQ+ inclusion everywhere around the world.
But companies and their leaders can get stuck in the symbolic, slowed down by risk management, waylaid by competing priorities, and lost trying to bridge global strategy with regional and office-level realities. Coqual's Navigator is a diagnostic tool to help MNCs find their way, guiding practitioners towards specific, strategic, and sustainable interventions for LGBTQ+ inclusion (and beyond). Our cardinal directions are Capacity, Context, and Culture, with Case as True North.

True North: Case

Case is **the why behind the work.** Companies today can make many Cases for LGBTQ+ inclusion, often (but not always or only) tied to dollars and cents. As DEIB faces intense scrutiny, a clear Case makes any DEIB intervention more durable, creating a strategic purpose for a range of stakeholders to rally around.

Case wayfinding: Practitioners can lock on to their Case by considering different imperatives, from mission, vision, and values alignment to the economics of inclusion.

Cardinal direction: Capacity

Capacity refers to a company's **resources, infrastructure, and leadership readiness**. Capacity insights help talent teams scale their impact and, ideally, preempt burnout.

Capacity wayfinding: Oriented to our other three cardinal directions, practitioners can grow Capacity at the global, regional, and office level through internal and external collaboration.

Cardinal direction: Context

Context refers to **local laws and societal norms.** Context insights ensure legal compliance, allow companies to craft programs and policies that translate (literally and figuratively) to employees around the world, and help companies flag human rights hotspots in a fast-moving LGBTQ+ rights landscape.

Context wayfinding: Oriented to our other three cardinal directions, practitioners can track Context with a regionally focused research database.

In the report, find Coqual's LGBTQ+ inclusion legal assessment as well as in-depth legal briefs for each of the 5 countries featured in this research in partnership with the New York University Meltzer Center for Diversity, Inclusion, and Belonging and fellows from the NYU School of Law.

Cardinal direction: Culture

Culture refers to **workplace environment and employee experience**. Regional and office-level Culture insights help companies prioritize Capacity, tackle the right issues, and intentionally craft policies and programs to include those who need them most.

Culture wayfinding: Oriented to our other three cardinal directions, practitioners can assess Culture at the office level using mixed-methods audits.

Whichever the Case (or cases), whether Capacity is abundant or scarce, whether Context is hostile or inclusive, and no matter what Culture challenges come up, Coqual's Navigator empowers practitioners to cut through complexity, gain clarity, and move fast toward meaningful outcomes.

In the report, in addition to wayfinding guidance, we offer actions companies can take on the Culture challenges revealed by our research.

Global Trends in LGBTQ+ Workplace Experiences

Takeaway

The global LGBTQ+ community is massive and multiplies when counting loved ones.

Around 1 in 10 people around the world—and nearly 1 in 5 members of Gen Z—are LGBTQ+, meaning they identify their sexual orientation as something other than heterosexual and/or they identify their gender as something other than cisgender.[7]

These numbers underscore the fact that LGBTQ+ inclusion is not a niche issue for corporations to address—it affects millions of employees around the world, and cuts across all segments of identity and society. Loved ones of LGBTQ+ people—parents, partners, siblings, and beyond—are also impacted by anti-LGBTQ+ discrimination. They benefit by proxy from and can actively champion LGBTQ+ inclusion efforts.

Takeaway

Anti-LGBTQ+ hate harms employees and the bottom line.

In all of our markets, hate crimes against LGBTQ+ people persist, and cultural attitudes toward a range of LGBTQ+ rights remain mixed.[8] Against this backdrop of violence and exclusion, many LGBTQ+ professionals seek out safer communities and employers for themselves and their families. Still, LGBTQ+ people face discrimination in and outside of the workplace, which impacts their well-being and ability to flourish in their careers.

Large portions of the LGBTQ+ workforce report that anti-LGBTQ+ discrimination has greatly harmed their mental health, physical health, relationships with coworkers, ability to be productive at work, ability to be authentic at work, and sense of safety traveling to and from work.

> ❝ My [sexuality] has always driven where I chose to live. It would be naïve of me to say that my sexuality has not driven every step in my career.❞
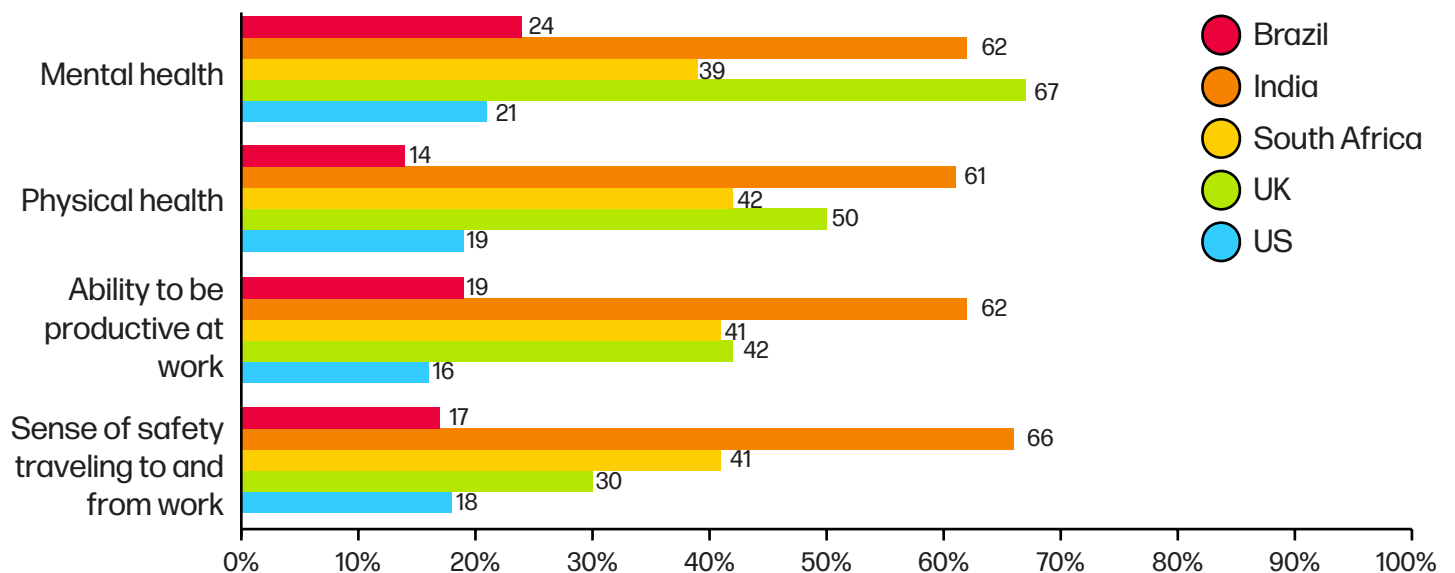
— **Genderfluid pansexual professional in the US**

> ❝ Knowing my rights, knowing how much [my organization] is protecting and trying to safeguard rights for LGBTQ+ people, that has definitely instilled a sense of security. I'm not afraid of being who I am.❞

— **Gay professional in India**

LGBTQ+ professionals who say discrimination against the LGBTQ+ community has negatively impacted their...

% responding very/extremely

Mental health
- Brazil: 24
- India: 62
- South Africa: 39
- UK: 67
- US: 21

Physical health
- Brazil: 14
- India: 61
- South Africa: 42
- UK: 50
- US: 19

Ability to be productive at work
- Brazil: 19
- India: 62
- South Africa: 41
- UK: 42
- US: 16

Sense of safety traveling to and from work
- Brazil: 17
- India: 66
- South Africa: 41
- UK: 30
- US: 18

Legend:
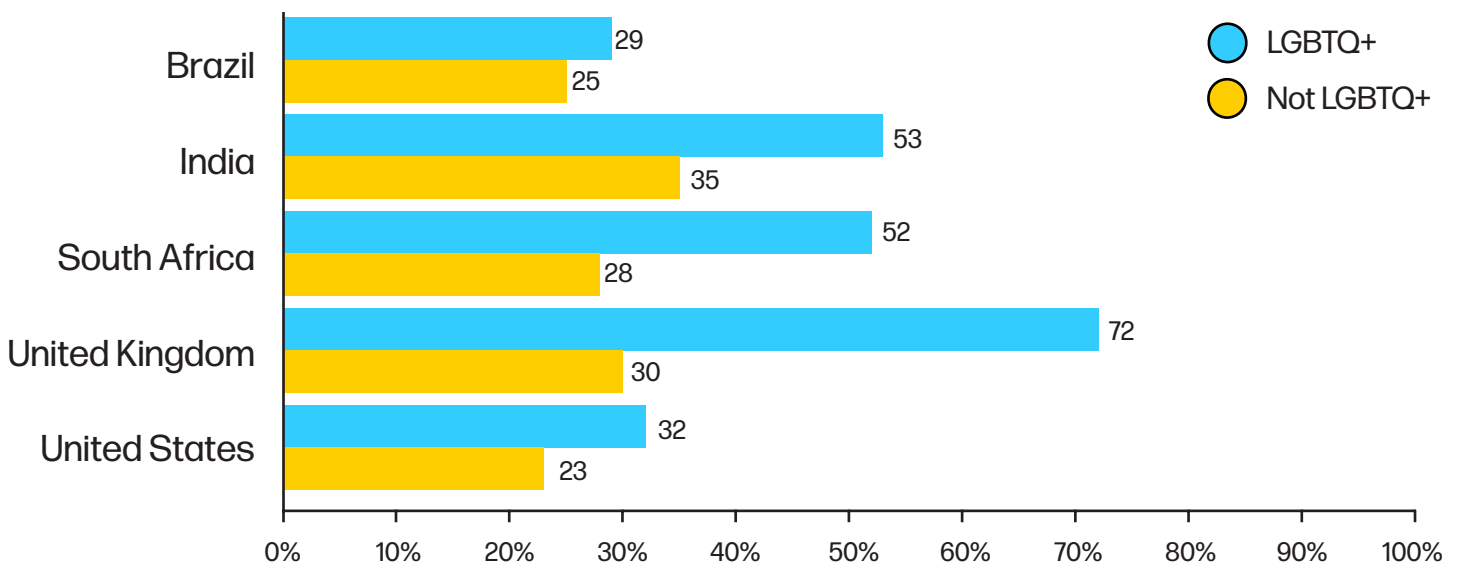- Brazil
- India
- South Africa
- UK
- US

Our data indicates that employers have an attrition problem on their hands: in all markets but Brazil, LGBTQ+ professionals are at a significantly higher risk of turnover* than their non-LGBTQ+ peers. In the UK, for example, LGBTQ+ professionals are nearly double the attrition risk of their straight peers. LGBTQ+ professionals are searching for employers who care about and are working to protect their safety, well-being, and dignity—and they will urge their friends, family, and professional networks to do the same.

Insight to action

- Engage in proactive crisis management for LGBTQ+ safety
- Signal your values as clearly as you can, as publicly as you can
- Strategically advocate for LGBTQ+ rights around the world

Read the report for in-depth guidance on these interventions.

Professionals who are at high risk of turnover*

Brazil — LGBTQ+ 29, Not LGBTQ+ 25
India — LGBTQ+ 53, Not LGBTQ+ 35
South Africa — LGBTQ+ 52, Not LGBTQ+ 28
United Kingdom — LGBTQ+ 72, Not LGBTQ+ 30
United States — LGBTQ+ 32, Not LGBTQ+ 23

LGBTQ+
Not LGBTQ+

*We measured turnover risk using a four-item composite backed up by external academic literature. The measure gauges feelings like wanting to leave your company within a year, actively looking for another job, and being willing to take another role elsewhere for similar or lesser compensation.
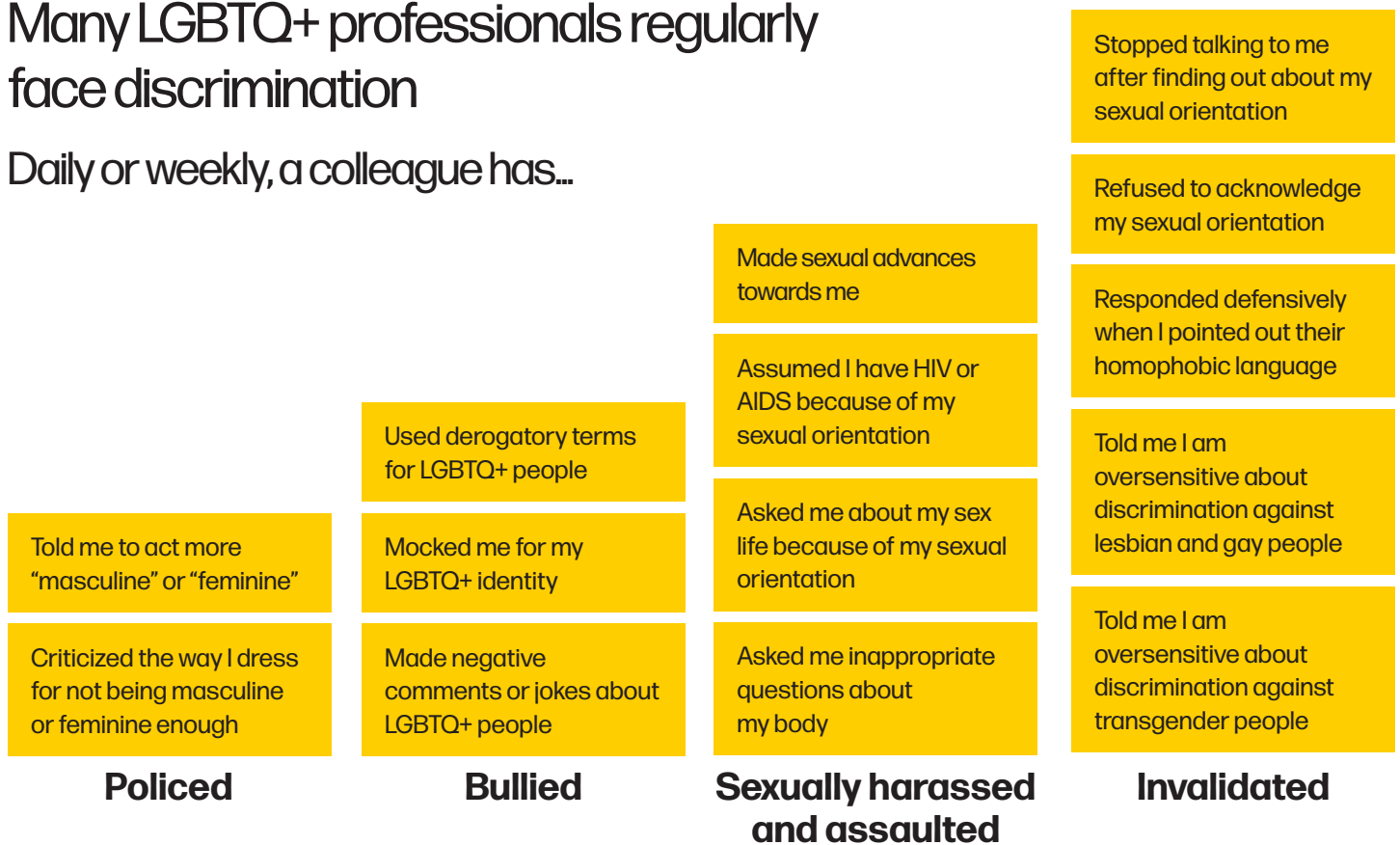
Anti-LGBTQ+ discrimination shows up at work in daily assaults, insults, and indignities.

Anti-LGBTQ+ discrimination is commonplace at work around the world. Daily and weekly, LGBTQ+ professionals are sexually harassed and assaulted, bullied, policed, and invalidated. They field invasive and inappropriate questions and hear harmful stereotypes and misinformation about their community. Disturbingly, our data shows that when LGBTQ+ professionals speak up about these violations, colleagues get defensive and accuse LGBTQ+ professionals of being oversensitive.

Many LGBTQ+ professionals regularly face discrimination

Daily or weekly, a colleague has...

Policed	Bullied	Sexually harassed and assaulted	Invalidated
			Stopped talking to me after finding out about my sexual orientation
			Refused to acknowledge my sexual orientation
		Made sexual advances towards me	Responded defensively when I pointed out their homophobic language
		Assumed I have HIV or AIDS because of my sexual orientation	
	Used derogatory terms for LGBTQ+ people		Told me I am oversensitive about discrimination against lesbian and gay people
Told me to act more "masculine" or "feminine"	Mocked me for my LGBTQ+ identity	Asked me about my sex life because of my sexual orientation	
Criticized the way I dress for not being masculine or feminine enough	Made negative comments or jokes about LGBTQ+ people	Asked me inappropriate questions about my body	Told me I am oversensitive about discrimination against transgender people

*See our appendix on page TK for a breakdown of these rates by country.

LGBTQ+ professionals are sexually harassed and assaulted

"When I first got [to my current company], there were these two female colleagues that would sexualize me and make comments like, 'You've got such a great physique,' 'You've got such a great butt.' And as I would turn around, I would feel a spank on my behind. I was so dumbfounded the first time, I let it slide. But when they both did it for the second time, I had to say: 'If this continues to happen, I will take it to HR.' The sexualization still went on. I just decided to let the water flow under the bridge and get over it."

— Gay male professional in South Africa

LGBTQ+ professionals are bullied

"[One coworker] would drop the word 'f-g' with total casualness. He knew I was gay and just didn't care. I have had times where my boss's boss basically refused in a meeting room, for a Zoom, to sit on a sofa next to me. He told me to get out a chair and go sit next to my manager, who also identifies as gay. He didn't want to sit next to either of us."

— Gay professional in the US

LGBTQ+ professionals are policed and invalidated

"We had someone in my wider department [who] looks assigned female at birth, and dresses quite queer. They shaved their head, and they got such negative feedback for doing that. If a man had shaved his head, he would not have been given that feedback, which is like misogyny, homophobia, transphobia all in one."

— Nonbinary, queer professional in the UK

Insight to action
- Scale a global speak-up culture
- Understand and combat misinformation and disinformation
- Be intentional and inclusive with gendered language

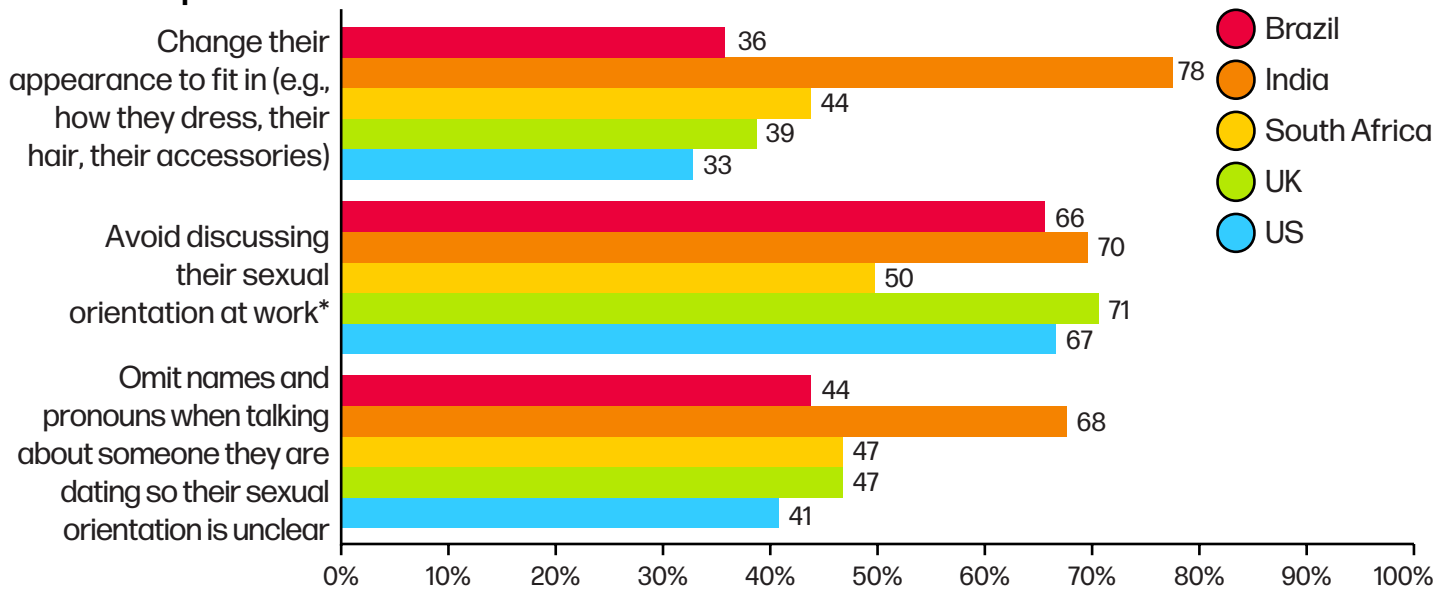Read the report for in-depth guidance on these interventions.

Workplaces still send the message that you must be straight to succeed—and out leaders are outliers.

In all aspects of life—in their homes, schools, jobs, public spaces, and beyond—LGBTQ+ people face different demands, often simultaneous and overlapping, to conform to heterosexual, cisgender norms of identity and expression.

As a result, many LGBTQ+ professionals take steps to conceal or downplay their LGBTQ+ identity. As we explained in our 2016 research, covering can take many forms, and LGBTQ+ people use different strategies to avoid stigmas and stereotypes attached to their identity. Many LGBTQ+ professionals, change their appearance—how they dress, accessorize, style their hair, etc.—to fit in. From just over two in five in the US up to nearly seven in ten in India, LGBTQ+ employees omit names and pronouns when talking about a romantic partner to obscure their sexual orientation. Still more avoid discussing their sexual orientation at all.

LGBTQ+ professionals who:

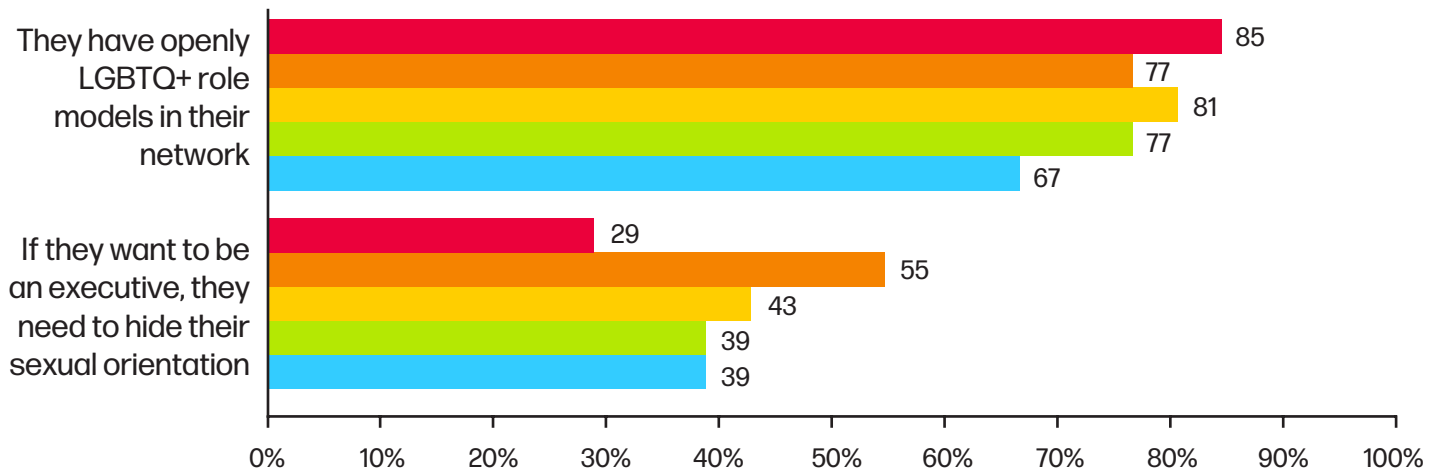|	Brazil	India	South Africa	UK	US
Change their appearance to fit in (e.g., how they dress, their hair, their accessories)	36	78	44	39	33
Avoid discussing their sexual orientation at work*	66	70	50	71	67
Omit names and pronouns when talking about someone they are dating so their sexual orientation is unclear	44	68	47	47	41

*This item was only asked of LGB+ respondents.

The role model conundrum: I see it, but I can't be it

Across the world, we find most LGBTQ+ professionals have role models in their network who are openly LGBTQ+. This is terrific news, and a rare sign of improvement from our 2016 research. Yet, as we have detailed, many LGBTQ+ professionals hide or downplay their identity. We also find that, across markets, LGBTQ+ professionals—from about three in ten in Brazil to more than half in India—believe that if they want to be an executive, they need to hide their sexual orientation.

LGBTQ+ professionals who say:

Brazil **India** **South Africa** **UK** **US**

They have openly LGBTQ+ role models in their network
- Brazil: 85
- India: 77
- South Africa: 81
- UK: 77
- US: 67

If they want to be an executive, they need to hide their sexual orientation
- Brazil: 29
- India: 55
- South Africa: 43
- UK: 39
- US: 39

(x-axis: 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%)

Insight to action
- Evolve sponsorship strategy by embedding fairness
- Invest in inclusive affinity groups

Read the report for in-depth guidance on these interventions.

> " As a trans person and a transfeminine person, seeing a gay man in a senior leadership position is great. However, it doesn't feel like a kind of representation for me or where I could go. "
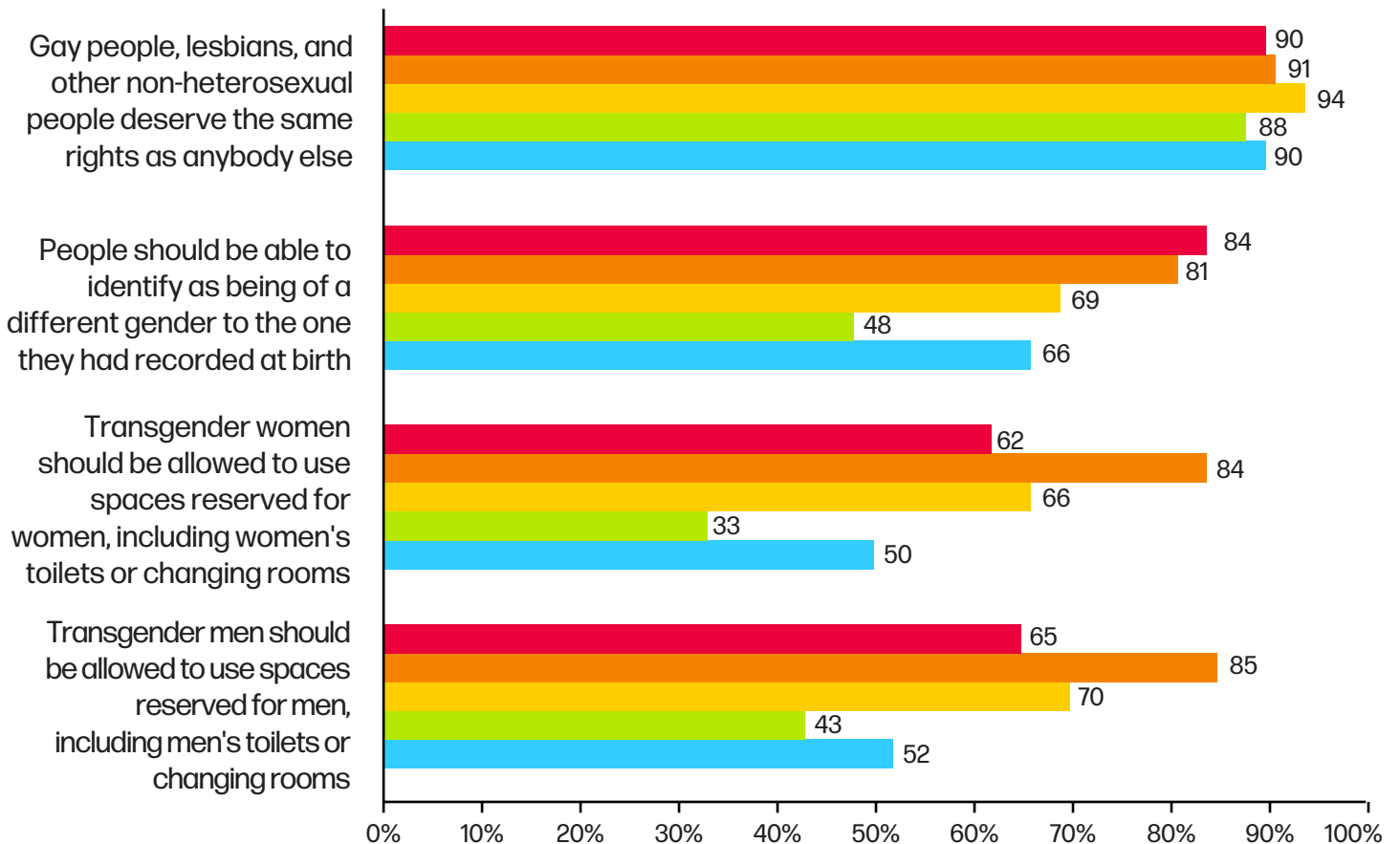>
> — Trans professional in the UK

Takeaway

Transgender and gender-diverse professionals deserve dedicated attention.

Transphobia is the front line of LGBTQ+ discrimination, even in the most progressive regions. In the workplace, and within LGBTQ+ advocacy broadly, LGB is often prioritized over TGD. The experiences and needs of transgender professionals, nonbinary professionals, and all those who exist outside of the gender binary overlap and are also distinct—and too often misunderstood, sidelined, or dismissed. Basic understanding about the differences between sexual orientation and gender identity still lags.

While a majority of non-LGBTQ+ professionals believe in the idea of equality, far fewer stand behind trans inclusion

Non-LGBTQ+ professionals who say: ● Brazil ● India ● South Africa ● UK ● US

Gay people, lesbians, and other non-heterosexual people deserve the same rights as anybody else
- Brazil: 90
- India: 91
- South Africa: 94
- UK: 88
- US: 90

People should be able to identify as being of a different gender to the one they had recorded at birth
- Brazil: 84
- India: 81
- South Africa: 69
- UK: 48
- US: 66

Transgender women should be allowed to use spaces reserved for women, including women's toilets or changing rooms
- Brazil: 62
- India: 84
- South Africa: 66
- UK: 33
- US: 50

Transgender men should be allowed to use spaces reserved for men, including men's toilets or changing rooms
- Brazil: 65
- India: 85
- South Africa: 70
- UK: 43
- US: 52

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Anti-trans attitudes show up in our data in the uneven attitudes toward different segments of the LGBTQ+ community. In all five countries we surveyed, professionals who are not LGBTQ+ overwhelmingly agree that people deserve equal rights on the basis of sexual orientation, in other words they believe in *LGB* rights. Fewer believe in nonbinary identity, or the basic right of people to identify their gender as something other than what they were assigned at birth. They often believe in restricting certain basic rights at work: Many non-LGBTQ+ professionals do not believe trans individuals should have access to toilets or changing rooms that match their gender identity.

" The focus too often shifts to trans bodies. You don't have to understand another person's body to understand them. What's underneath someone's clothes will not help you to know that person, or help that person, or support that person. "

— Saurav Verma, Former Program Manager, Nazariya QFRG, India

Spotlight on the UK and US

In the US and the UK, anti-trans attitudes have proliferated in public life, leading to an increase in violence and a pullback on legal protection. The UK, a socially progressive beacon, is backsliding on LGBTQ+ acceptance, with the focus on anti-trans hate reaching a fever pitch. Nearly 5,000 anti-trans hate crimes were reported in 2023, the highest number since 2012.[9] In the US in 2024, according to the Trans Legislation Tracker, 674 anti-trans bills were tracked across 43 states, and 50 were passed. As of writing, in just the first quarter of 2025, 715 are active. These bills target access to education, employment, basic legal recognition, and beyond. This legislation becomes even more dangerous after the passage of an executive order in January 2025, erasing recognition of TGD identity at the federal level.
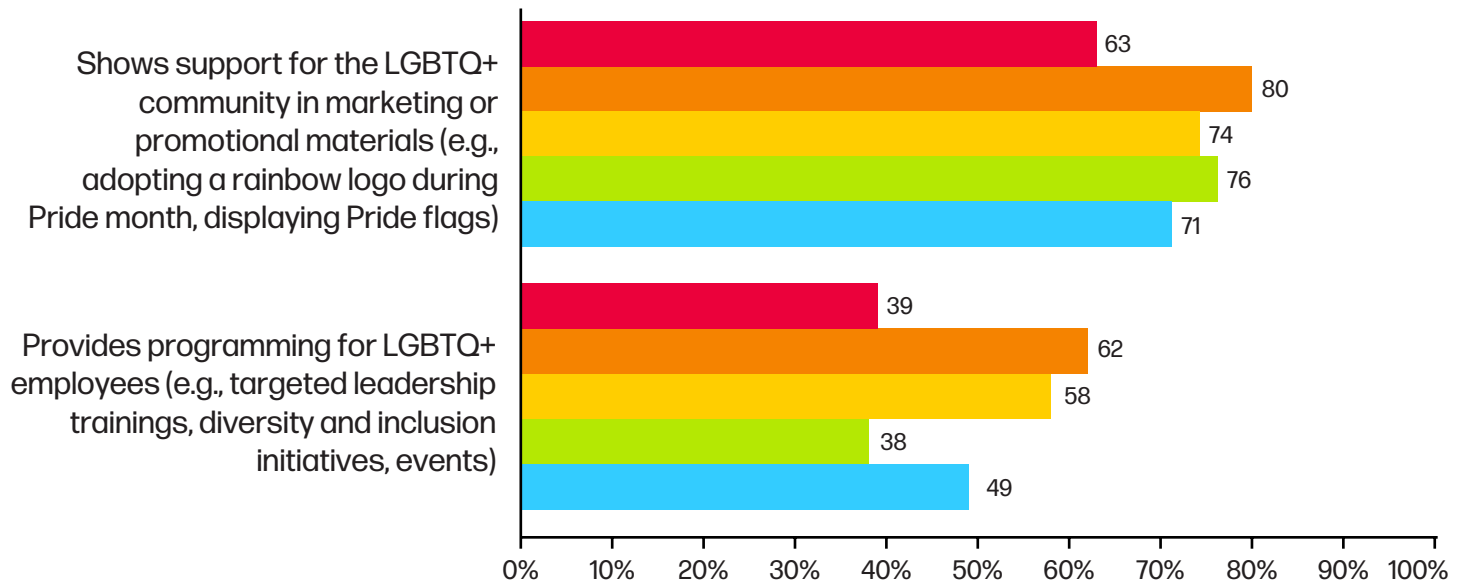
Rainbow branding outpaces real support.

In all five markets we studied, far more professionals work at a company that shows surface-level support for the LGBTQ+ community than one that offers dedicated programming for LGBTQ+ talent. In our Brazil, UK, and US samples, less than half of all professionals work at a company that offers any kind of programming geared toward LGBTQ+ employees. Our data suggests that for some companies, LGBTQ+-focused efforts begin and end with rainbow logos and flags—a trend that some have called "rainbow washing."

Whether on an employee lanyard, an ad campaign, or a consumer product, rainbows are still powerful symbols of solidarity and can be a simple first step for companies new to DEIB. In the US and UK, as attacks against DEIB have led some companies to pull back on explicit, public-facing support for the LGBTQ+ community, rainbows hold renewed weight.[10] But companies must progress towards congruence between their actions externally and internally. Rainbow branding without corresponding culture work and structural change can breed disillusionment and fear, undermine trust, and fuel skepticism among employees and stakeholders.

Surface-level support is prevalent, but programmatic commitment lags behind

Professionals whose company does the following:

Legend: ● Brazil ● India ● South Africa ● UK ● US

Shows support for the LGBTQ+ community in marketing or promotional materials (e.g., adopting a rainbow logo during Pride month, displaying Pride flags)
- Brazil: 63
- India: 80
- South Africa: 74
- UK: 76
- US: 71

Provides programming for LGBTQ+ employees (e.g., targeted leadership trainings, diversity and inclusion initiatives, events)
- Brazil: 39
- India: 62
- South Africa: 58
- UK: 38
- US: 49
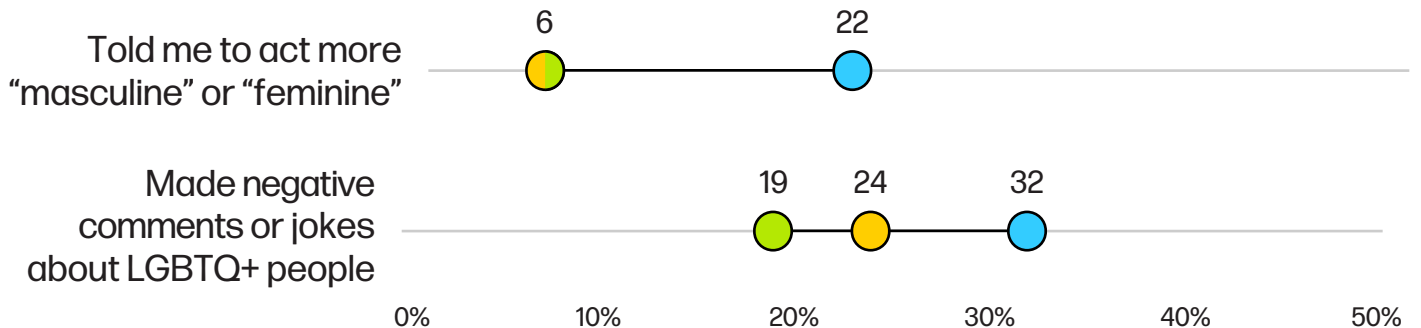
Intersectionality is integral to inclusion.

Intersectionality is not an add-on; it is the foundation of cultures of inclusion and belonging. But LGBTQ+ movements around the world have long struggled to incorporate intersectionality into their activism, further marginalizing women, non-White LGBTQ+ folks, and transgender people. LGBTQ+ professionals may be vulnerable to sexist or racist attitudes from within queer communities—and they may face heightened homophobia from within their racial/ethnic communities.[11] These complex dynamics are often rendered invisible in the modern queer movement and must be addressed intentionally moving forward.[12] Here, we offer a small sample of the profound gaps we uncovered at the intersections of LGBTQ+ professional experiences.

In Brazil...

Nearly one in three TGD professionals frequently hear negative comments or jokes about LGBTQ+ people at work. More than one in five TGD professionals are frequently told to act more masculine or feminine.

LGBTQ+ professionals who say: Daily or weekly, a colleague has...

◯ TGD   ◯ Cis-LGB+   ◯ Cis-hetero

Told me to act more "masculine" or "feminine"
- 6 (Cis-LGB+)
- 22 (TGD)

Made negative comments or jokes about LGBTQ+ people
- 19 (Cis-hetero)
- 24 (Cis-LGB+)
- 32 (TGD)

0%   10%   20%   30%   40%   50%

In India…

More than six in ten LGBTQ+ women plan to leave their current company within a year, compared to about four in ten LGBTQ+ men.
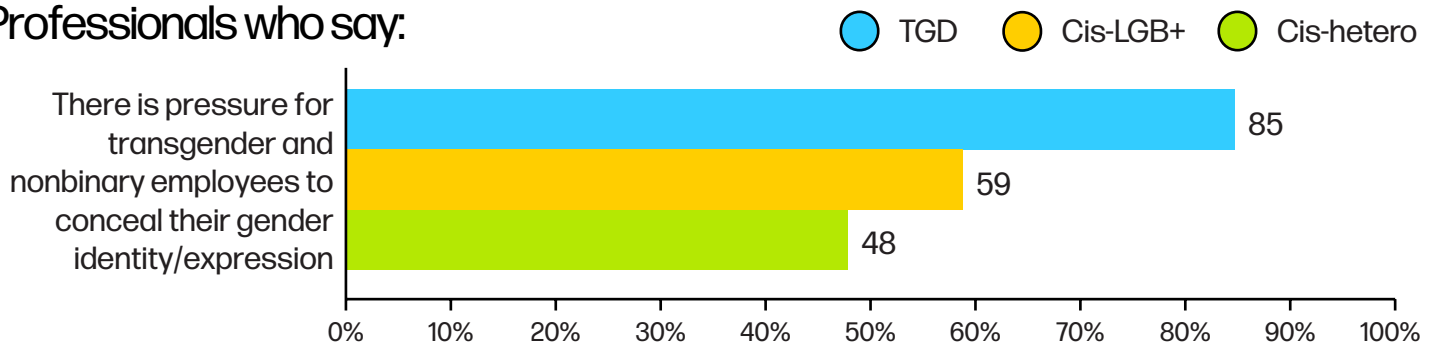
LGBTQ+ professionals who say they plan to leave their current company within a year

Men	41%
Women	61%

In South Africa…

Fully 85% of TGD professionals say there is pressure at their company for TGD employees to conceal their gender identity. One in five (21%) say colleagues frequently tell them they make others uncomfortable because of their TGD identity.

Professionals who say:

● TGD   ● Cis-LGB+   ● Cis-hetero

There is pressure for transgender and nonbinary employees to conceal their gender identity/expression
- TGD: 85
- Cis-LGB+: 59
- Cis-hetero: 48

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

21%
of TGD professionals say: daily or weekly, a colleague has told me I made someone at work uncomfortable because of my transgender or nonbinary identity

In the United Kingdom...

At dramatic and significantly higher rates than White LGBTQ+ professionals, non-White LGBTQ+ professionals report that anti-LGBTQ+ discrimination seriously harms their mental health, physical health, ability to be productive at work, relationships with coworkers, and sense of safety commuting.

Discrimination against the LGBTQ+ community has harmed non-White LGBTQ+ professionals significantly more than White LGBTQ+ professionals on the following fronts:

- Relationships with coworkers
- Mental health
- Physical health
- Ability to be productive at work
- Ability to be authentic at work
- Sense of safety traveling to and from work

In the United States...

LGBTQ+ professionals living in urban areas are more than twice as likely as peers living in non-urban areas to have access to LGBTQ+ inclusive ERGs or BRGs.

LGBTQ+ professionals whose companies have employee resource groups or business resource groups for LGBTQ+ employees

Non-urban: 31   Urban: 67

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%
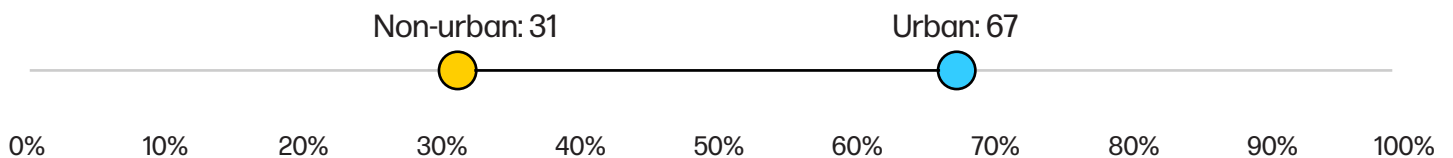
Endnotes

1. "LGBTIQ Terminology," National Institutes of Health Office of Equity, Diversity, and Inclusion, accessed January 5, 2025, https://www.edi.nih.gov/people/sep/lgbti/safezone/terminology.

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3. "Bisexual vs. Pansexual," Sussex Rainbow Counseling, accessed January 8, 2025, https://www.sussexrainbowcounselling.com/post/bisexual-vs-pansexual; Julia Shaw, Bi: The Hidden Culture, History, and Science of Bisexuality (Harry N. Abrams, 2022).

4. "Understanding Gender," Reimagine Gender, accessed July 4, 2023, https://www.reimagine-gender.org/understanding-gender.

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