

nielsen

CANADIAN GAY AND LESBIAN CHAMBER OF COMMERCE

LGBT SME Landscape Research Study



STUDY OBJECTIVES & RESEARCH METHODOLOGY

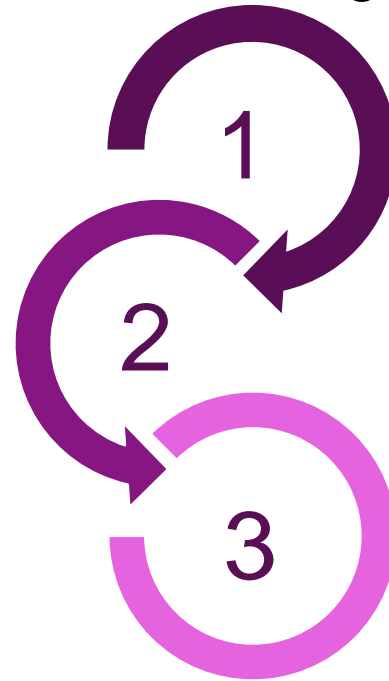
OUR RESEARCH ENDEAVOR

At Nielsen, we take **PRIDE** in the work that we do.

This year marks the 12th anniversary of Nielsen's PRIDE (Promoting Respect in Diverse Environments) Employee Resource Group. For over a decade, PRIDE members have been instrumental in achieving important milestones for our LGBT+ associates and making strides in LGBT+ consumer and business measurement.

As a proud partner Nielsen is pleased to share the cost of this research initiative with CGLCC and it's Corporate members in order to meet the study objectives.

CORE OBJECTIVES



Gain visibility into Canadian **LGBT+ Business landscape**

Gain an understanding of the **outlook and challenges facing LGBT+ Businesses**

Gain an understanding of what the CGLCC and it's Partners can do to **support LGBT+ Businesses**



RESEARCH DESIGN



INTERVIEW METHODOLOGY:

- Quantitative web and mobile-enabled online survey



REGION:

- Canada national



LANGUAGE:

- English and French



FIELDWORK PERIOD:

- April 16 – May 18, 2019



SURVEY LENGTH:

- Average length: 15 ¼ mins



TARGET AUDIENCE / SCREENING:

- Respondent qualifies for the survey with the following criteria:

1. Owner, operator or controller of a business in Canada



2. Company has a Canadian head office

DATA COLLECTION

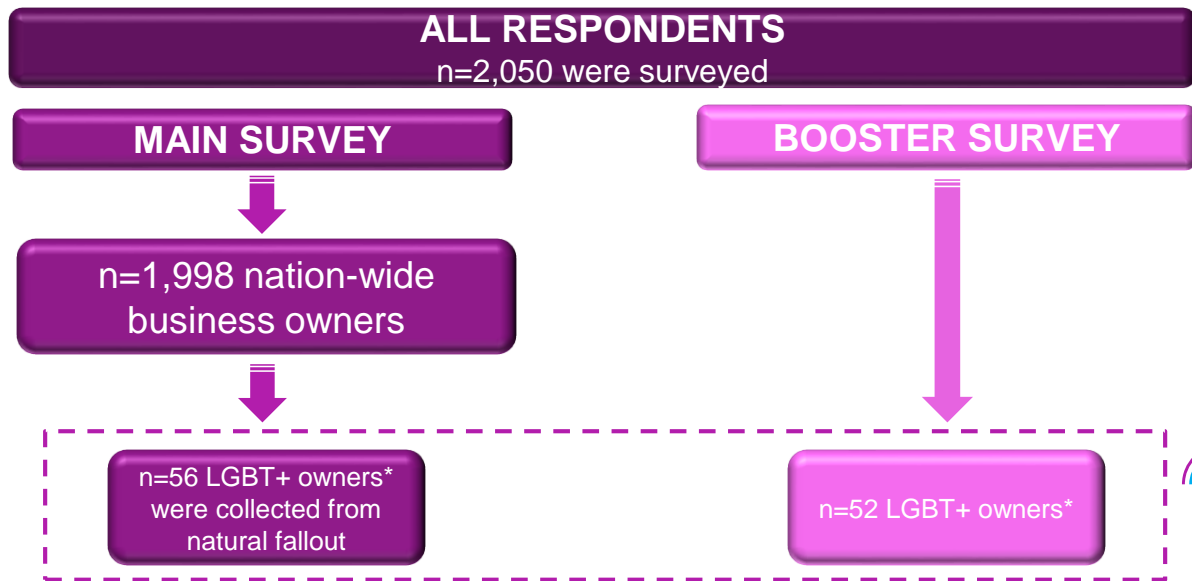
The study consisted two phrases in data collection:

I. Main survey:


- Canadian business owners were interviewed nation-wide by quotas on business size and region to allow for representative view of Canadian business.
- n=1,998 Canadian business owners were surveyed, in which n=56 were LGBT+ owners* from natural fallout.

II. Booster survey:

- An addition of n=52 LGBT+ owners* were interviewed to allow for further analysis.



**A total of n=108
LGBT+ owners*
were interviewed**

 * LGBT-owned business: 51% or more of the business is owned or controlled by persons who identify as LGBT+

ANALYSIS

For the purpose of this presentation, the data has been analyzed in two ways:



CANADA

All respondents in the survey,
representing the Canadian
business owners overall

n=2,050



LGBT+

LGBT+ business owners in which
51% or more of their businesses
are owned or controlled by persons
who identify as LGBT+

n=108

All results are weighted by business size, region and industry section according to the distribution in Canada to allow for a representative view of Canadian businesses.



KEY LEARNINGS

SIZING UP THE LGBT+ BUSINESS LANDSCAPE

NUMBER OF BUSINESSES



APPROX.

1 OUT OF EVERY **40**

CANADIAN BUSINESSES ARE

LGBT+ MAJORITY

OWNED OR OPERATED

ACCOUNTING FOR

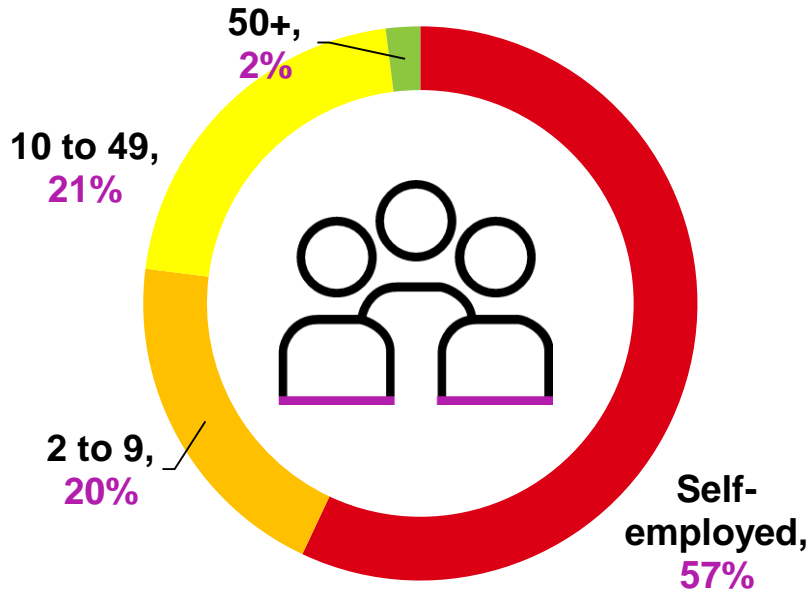


BUSINESSES ACROSS CANADA

SIZING UP THE LGBT+ BUSINESS LANDSCAPE

NUMBER OF EMPLOYEES

DISTRIBUTION OF EMPLOYEES



THE AVERAGE
MAJORITY OWNED OR
OPERATED LGBT+
BUSINESS EMPLOYS

16
WORKERS

REPRESENTING APPROX.



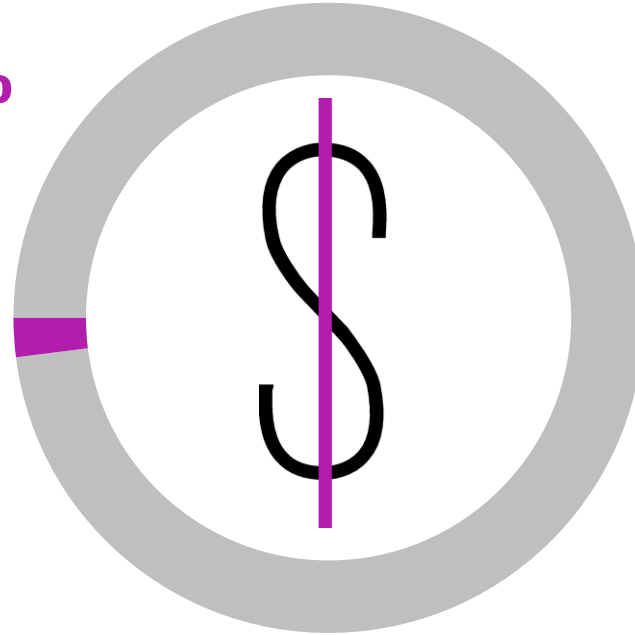
435K
FULL AND PART TIME
CANADIAN JOB
OPPORTUNITIES

SIZING UP THE LGBT+ BUSINESS LANDSCAPE n

GROSS REVENUE

LGBT+ BUSINESSES
GENERATE ABOUT **1%**
OF GROSS
CORPORATE REVENUE
IN CANADA, WHICH
REPRESENTS

**\$22
BILLION**

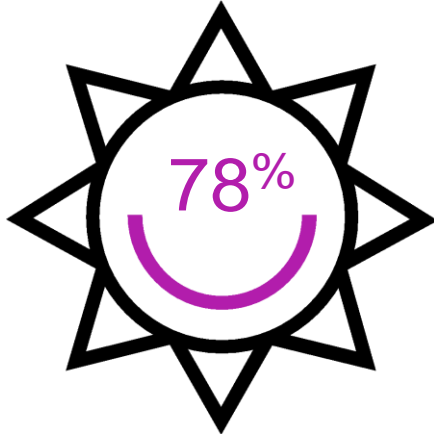


LGBT+ BUSINESS OWNERS REMAIN ENTHUSIASTIC & HAPPY DESPITE CHALLENGES

HAPPINESS



ENTHUSIASM



CHALLENGES EXPERIENCED

46%

On at least one occasion I have purposely **hidden the fact** that my company has LGBT+ ownership

33%

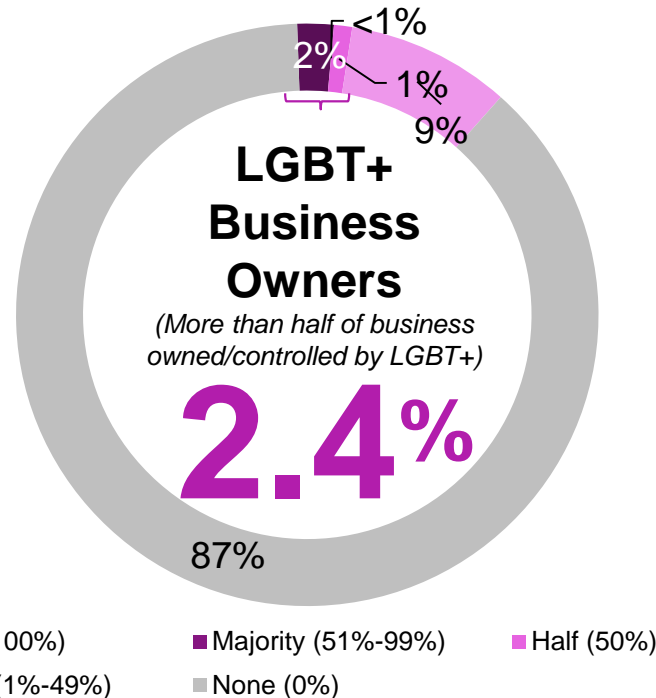
Self-identification as having LGBT+ ownership has resulted in the **loss of opportunities** for my company

28%

My company has **faced discrimination** in the past because of LGBT+ ownership

LGBT+ SME LANDSCAPE

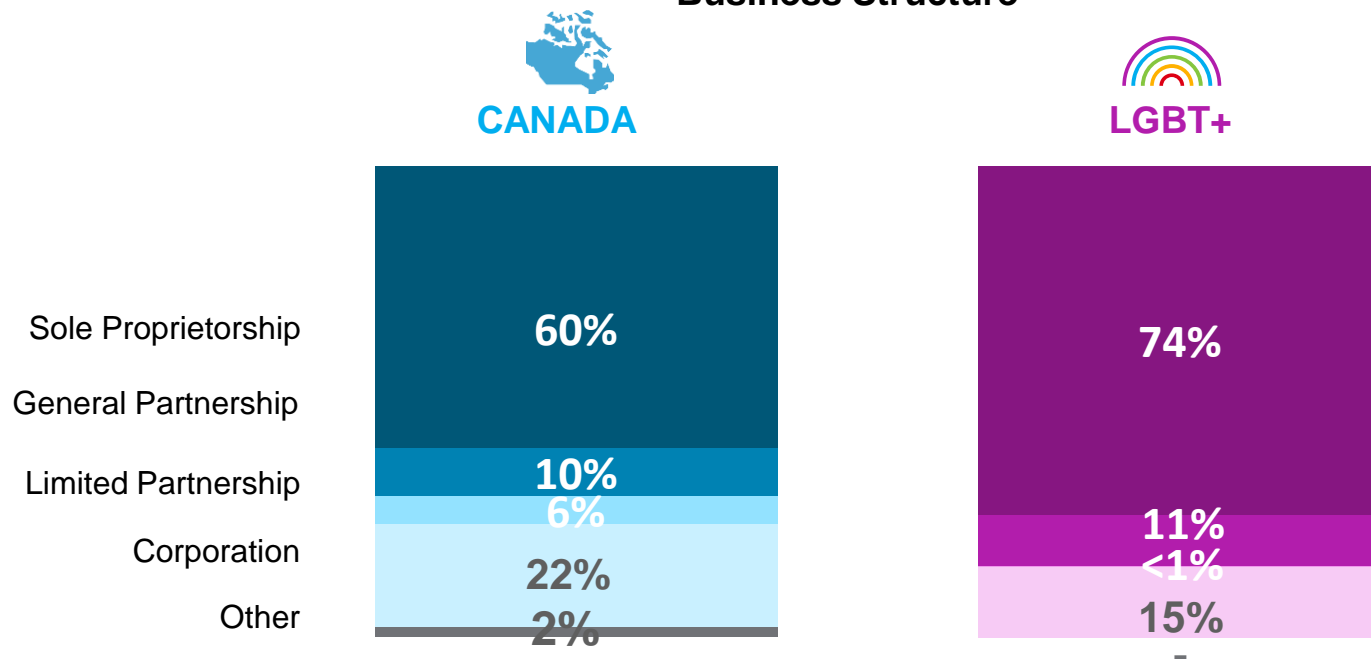
APPROXIMATELY ONE IN FORTY CANADIAN BUSINESSES CONTAIN >50% LGBT+ OWNERSHIP



A5. What percentage of your business, if any, is owned or controlled by anyone in the following diversity groups?
Base: All respondents, n=2,050

OF THOSE BUSINESSES THAT ARE +50% OWNED BY LGBT+, 74% ARE SOLE PROPRIETORS

Business Structure



A3. Which type of business structure does your company have?
 Base: All respondents, n=2,050, LGBT+, n=108

MOST RESPONDENTS HAVE A UNIVERSITY EDUCATION

EDUCATION ATTAINMENT



INDEX

	CANADA	LGBT+	INDEX
High school	16%	11%	69
College	31%	22%	72
University	38%	55%	145
Post grad	14%	12%	83

Z2. What is the highest level of schooling that you have completed?

Base: All respondents n=2,050, LGBT+ n=108

~1-IN-6 (17%) LGBT+ BUSINESSES ARE IN RETAIL, FOLLOWED BY 16% IN HEALTH CARE, AND 14% IN PROFESSIONAL SERVICES



Industry Sector



12%	Construction
12%	Retail trade
12%	Professional, scientific and technical services

10%	Health care and social assistance
7%	Other for profit services
7%	Accommodation and food services

17%	Retail trade
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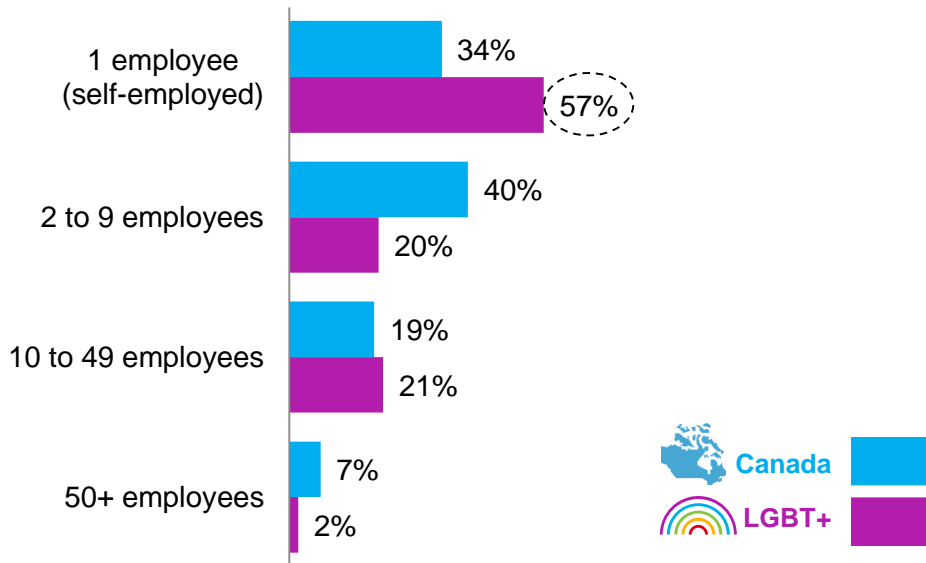
16%	Health care and social assistance
14%	Professional, scientific and technical services
11%	Accommodation and food services
7%	Transportation and warehousing
7%	Information and cultural industries

A6. Using the North American Industry Classification System (NAICS) titles and definitions below, please indicate your company's main area of activity?
Base: All respondents, n=2,050, LGBT+, n=108

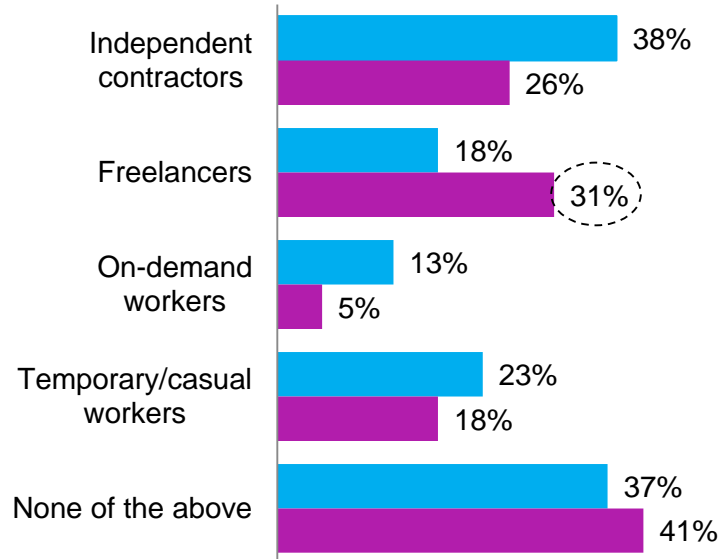
UNLIKE TOTAL CANADA, LGBT+ BUSINESSES ARE PREDOMINATELY SELF-EMPLOYED

Among the other types of labour used in market, freelancers rank highest for LGBT+ businesses

Business size










Other types of labour utilized



A7. How many full-time and part time employees (including yourself) does your company have on its payroll in Canada?
 A7A. Beyond workers employed on a full-time or part-time basis, do you use other of these types of labour?
 Base: All respondents, n=2,050, LGBT+, n=108

WHEN IT COMES TO EMPLOYMENT, LGBT+ BUSINESSES OVER-INDEX ON MANY DIVERSITY GROUPS INCLUDING WOMEN, DISABLED, & ABORIGINAL

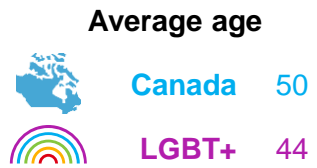
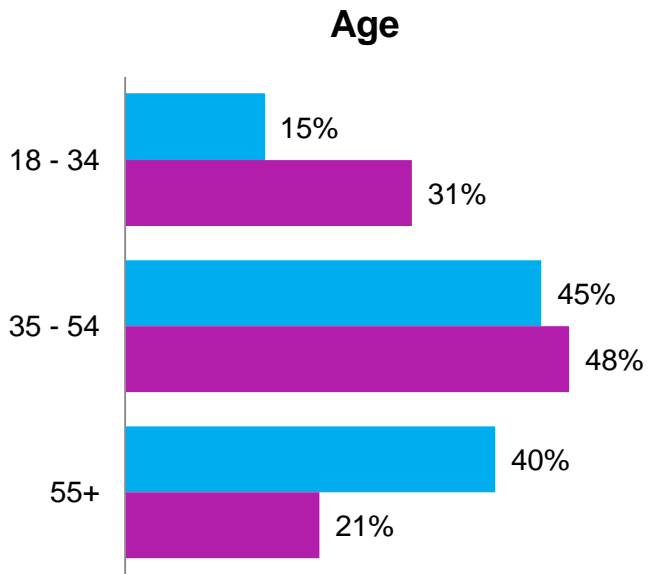
		 CANADA	 LGBT+	INDEX
	Women	41%	44%	109
	Visible Minorities	14%	10%	69
	LGBT+	5%	78%	1,449
	Disabled	6%	15%	261
	Aboriginal	5%	9%	163

A7B. What percentage of your employees belong to the following diversity groups? If precise figures are not available, please provide your best estimates.



Base: All respondents n=2,050, LGBT+ n=108

LGBT+ RESPONDENTS SKEW YOUNGER

AGE & YEARS IN CANADA

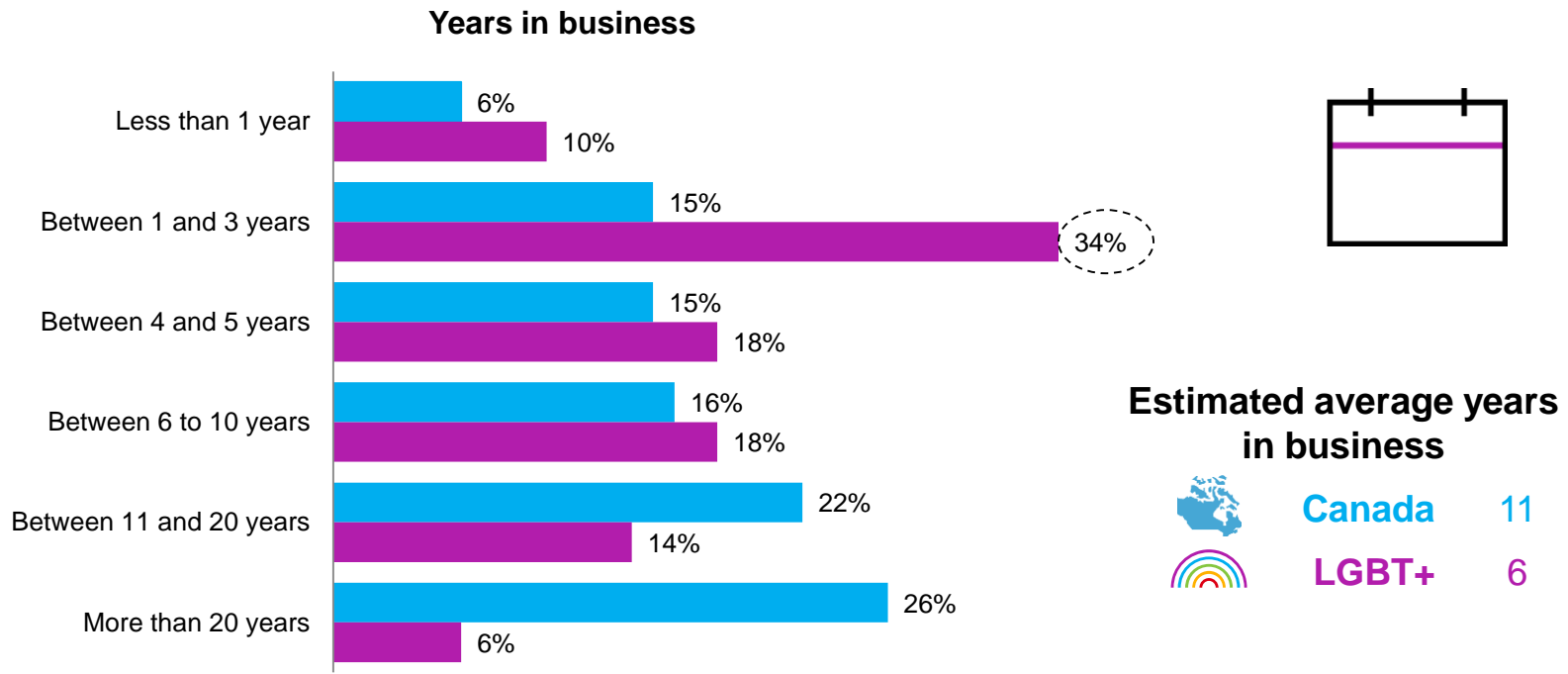


Were you born...

	 In Canada	 Outside of Canada
In Canada	84%	84%
Outside of Canada	16%	16%
Canadian Citizen/PR	*	99%
Years in Canada (Avg.)	*	29 yrs

Z1. Please indicate your year of birth. Z3. Were you born...? Base: All respondents, n=2,050, LGBT+ business owners, n=108
 Z4. How many years have you resided in Canada? Z5. Are you a Canadian citizen or a Permanent Resident of Canada?
 Base: Those born outside of Canada, n=331 *Results are not reported due to small sample size LGBT+ n=14

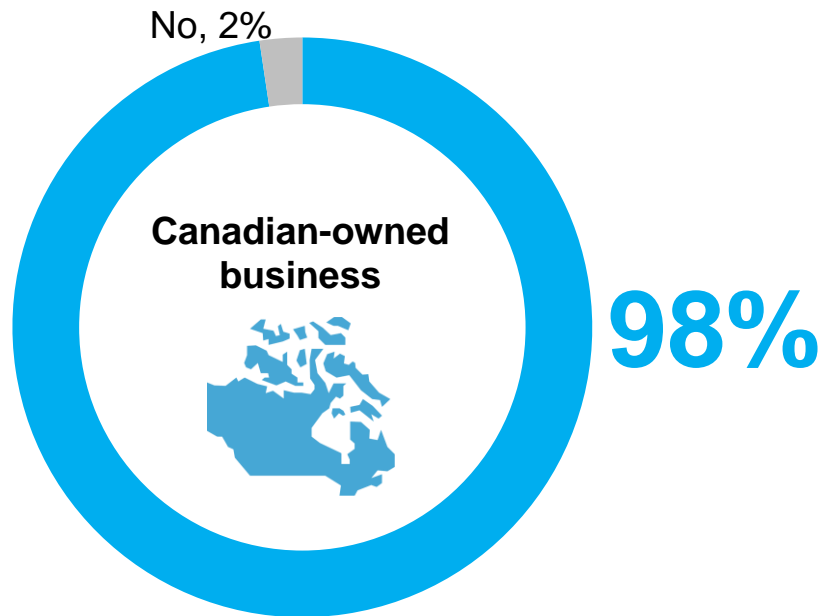
COMPARED TO TOTAL CANADA, LGBT+ BUSINESSES ARE YOUNG: MOSTLY BETWEEN 1-3 YEARS IN AGE



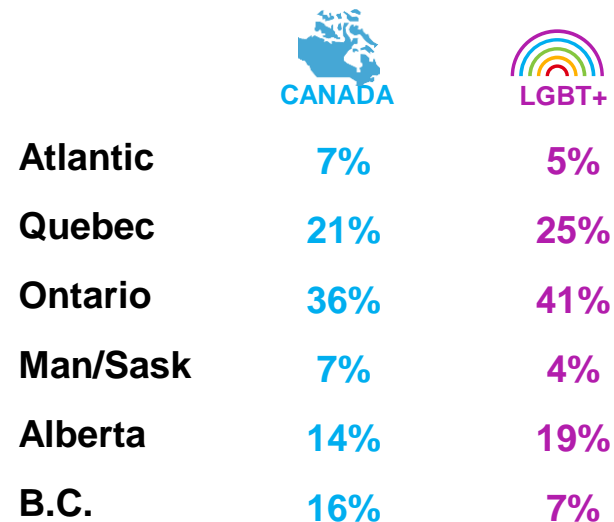
A8. For how many years has your company been in business?
 Base: All respondents, n=2,050, LGBT+, n=108

OVER 60% OF HEAD OFFICES CONCENTRATED IN ONTARIO & QUEBEC

Is your business majority Canadian-owned?



In which province or territory is your company's Canadian head office located?



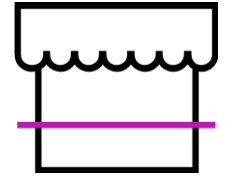
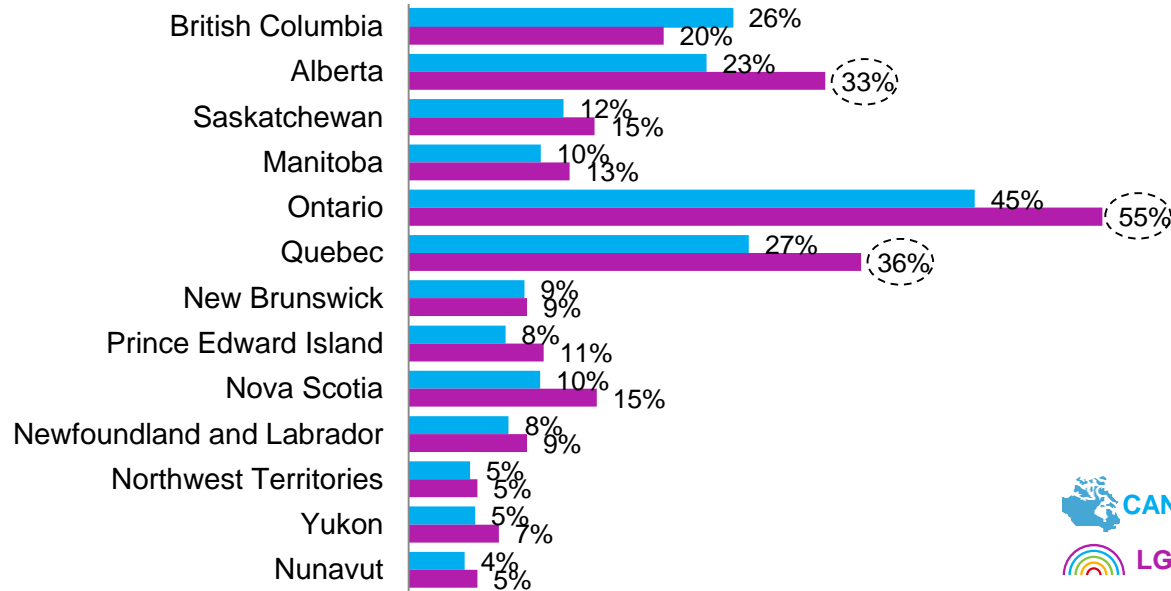
A4. Is your business majority Canadian-owned?

A2. In which province or territory is your company's Canadian head office located?

Base: All respondents, n=2,050

LGBT+ BUSINESSES SERVE MORE MARKETS ACROSS CANADA THAN THE AVERAGE CANADIAN BUSINESS

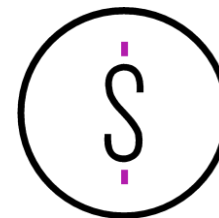
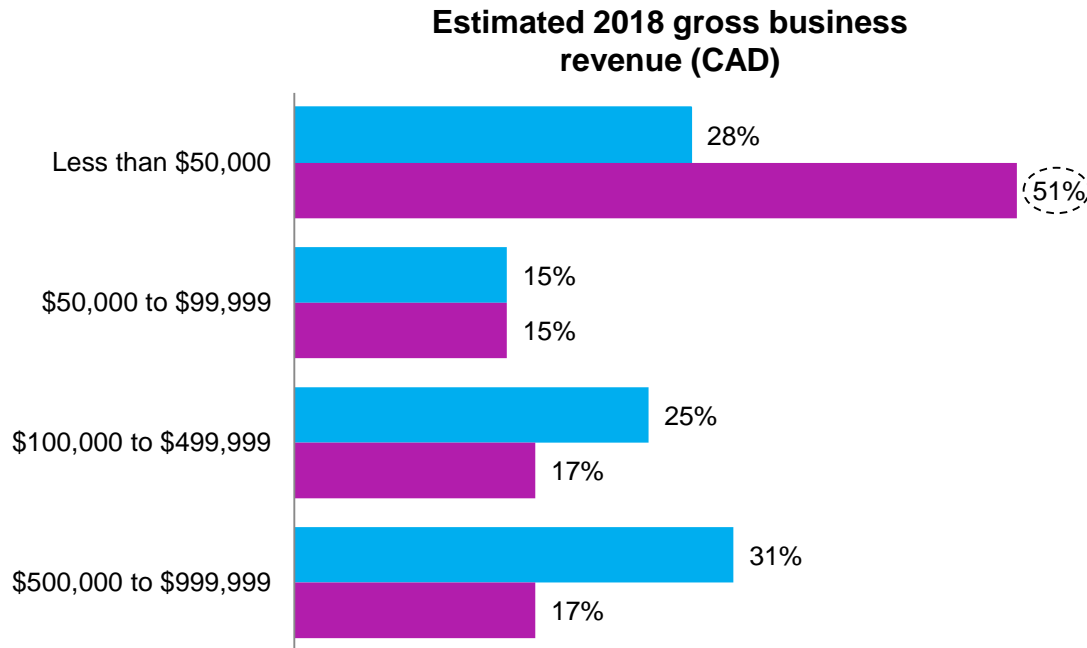
Domestic markets currently providing goods and services



A10. In which of the following geographic areas/markets is your business currently providing goods or services?

Base: All respondents, n=2,050, LGBT+, n=108

MORE THAN HALF OF THE LGBT+ BUSINESSES HAVE REVENUE BELOW \$50K



Estimated 2018 gross business revenue

 **Canada** \$3.7million

 **LGBT+** \$796K

A9. For calendar year 2018, please estimate the gross business revenue before taxes. If precise figures are not available, provide your best estimate in Canadian dollars.
 A9B. Of the figures below, which one best describes your gross business revenue before taxes for the 2018 calendar year.
 Base: All respondents, n=2,050 LGBT+, n=108

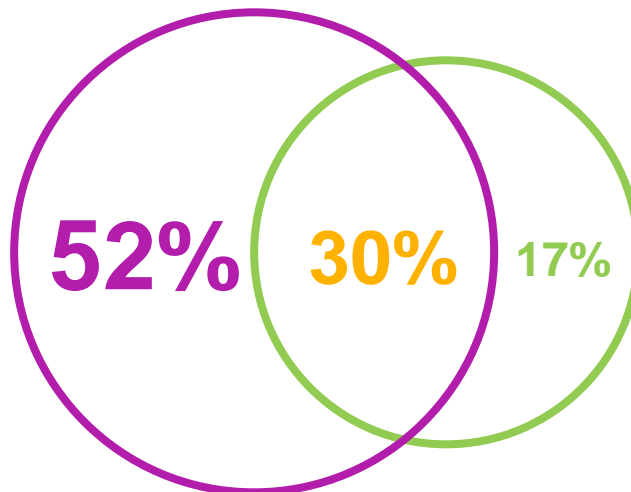
MAJORITY OF LGBT+ BUSINESS OWNERS RECOGNIZED THEMSELVES IN TERMS OF SEXUALITY VS. GENDER ONLY LABELING



Please indicate how you would identify yourself

Sexuality

- Asexual
- Bisexual
- Gay
- Lesbian
- Two-Spirit
- Queer



Gender

- Female
- Male
- Non-Binary
- Transgender

Prefer not to say: 1%

Z8B. And finally, please indicate how you would identify yourself. Select all that apply.

Base: LGBT+ n=108

BUSINESS OUTLOOK, CHALLENGES & PROCESSES

BUSINESS OUTLOOK, CHALLENGES & PROCESSES

- Close to half (49%) of the LGBT+ owners indicate extremely enthusiastic about their businesses, higher than the overall level (37%).

Extremely/very

How enthusiastic are you about your business?



Not at all Not very Somewhat Very Extremely



Not at all Not very Somewhat Very Extremely

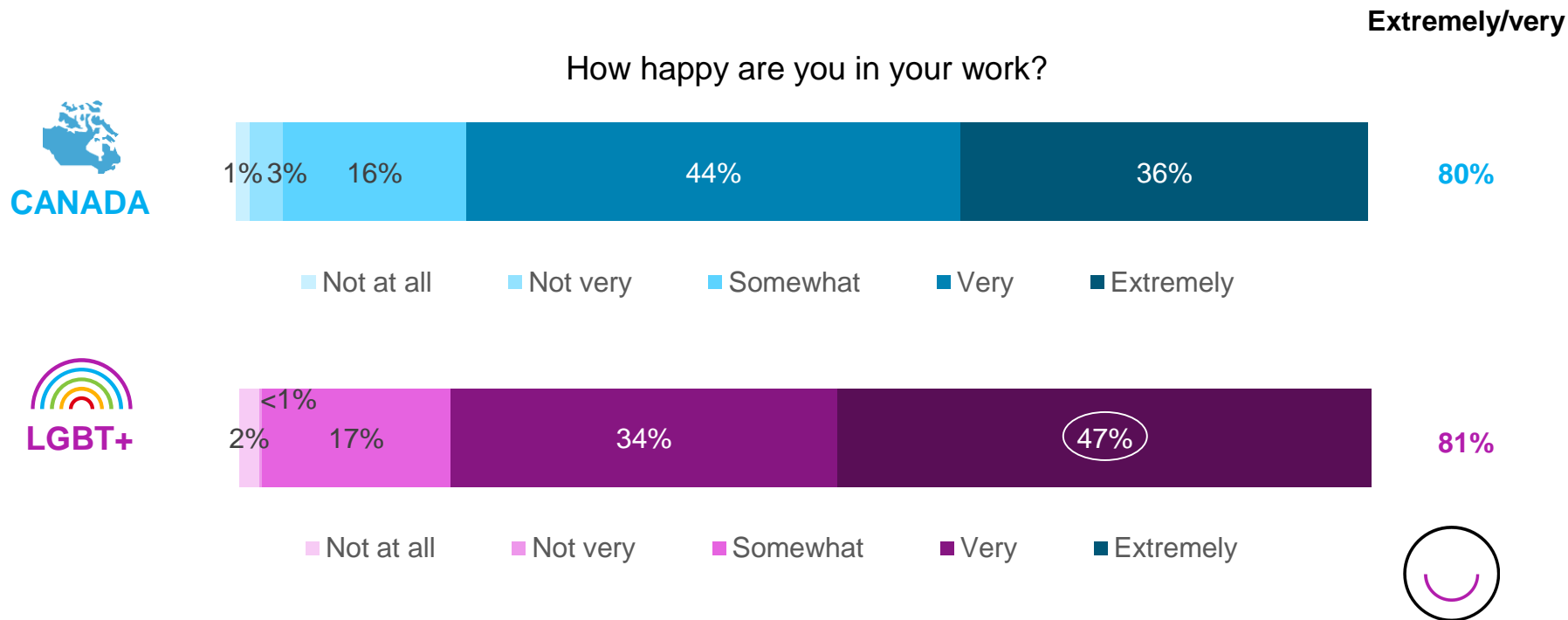


B0. Next thinking about you and your relationship with your business....

Base: All respondents, n=2,050, LGBT+, n=108

BUSINESS OUTLOOK, CHALLENGES & PROCESSES

- Close to half (47%) of the LGBT+ owners indicate extremely happy in their work, higher than the overall level (36%).



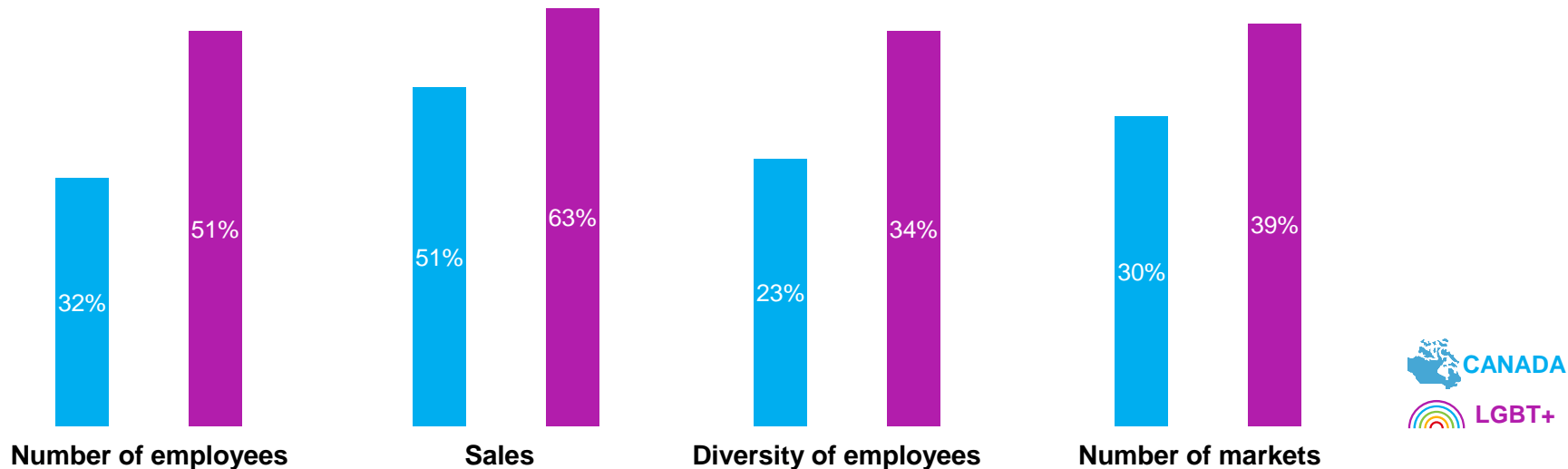
B0. Next thinking about you and your relationship with your business....

Base: All respondents, n=2,050, LGBT+, n=108

BUSINESS OUTLOOK, CHALLENGES & PROCESSES

- LGBT+ are more likely to indicate expect to increase number of employees, sales, diversity of employees and number of markets in the next few years compared to overall Canada.

Expect to increase in the next few years















B1. Now thinking ahead to the next few years, how you expect each of the following categories to change – if at all – for your company.

Base: All respondents, n=2,050, LGBT+ n=108

BUSINESS OUTLOOK, CHALLENGES & PROCESSES

- LGBT+ businesses are more likely to have a mandate to purchase goods and services or ensure they are hiring from diversity groups compared to the overall level.

 CANADA	 Aboriginals	 Visible Minorities	 LGBT+ community	 Disabilities	 Women
Yes – We have a mandate to purchase goods and services	8%	7%	8%	7%	10%
Yes – We have a hiring mandate	11%	13%	10%	11%	16%
Yes – [NET]	17%	18%	15%	15%	23%

 LGBT+	 Aboriginals	 Visible Minorities	 LGBT+ community	 Disabilities	 Women
Yes – We have a mandate to purchase goods and services	18%	16%	27%	17%	24%
Yes – We have a hiring mandate	12%	13%	19%	17%	21%
Yes [NET]	20%	18%	35%	22%	31%

B3. And thinking about your company's procurement and staffing processes, does your company have a mandate to either purchase goods & services or ensure you are hiring from any of the following?

Base: All respondent, n=2,050, LGBT+, n=108

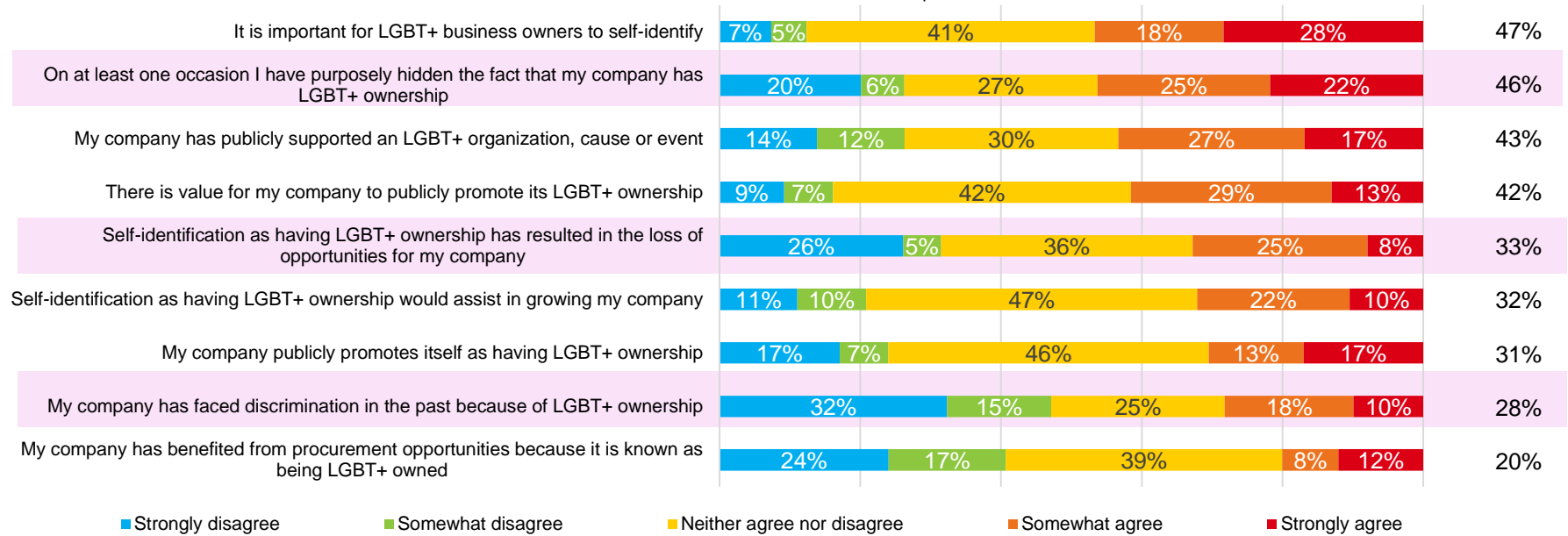
BUSINESS OUTLOOK, CHALLENGES & PROCESSES

- Close to half (46%) indicate that there was at least one occasion they have purposely hidden the fact that their company has LGBT+ ownership.
- One-third (33%) indicate self-identification as having LGBT+ ownership has resulted in the loss of opportunities for their company, 28% indicate their company has faced discrimination in the past because of LGBT+ ownership.



Indicate the level of agreement
Business with more than half LGBT+ ownership, n=108

**Strongly/
somewhat agree**



D7. Based on your previous responses you indicated that your company is [insert] owned and operated by LGBT+ individual(s). Please indicate your level of agreement with the following statement.
Base: LGBT+, n=108

EXPRESS LGBT+ BUSINESS CHALLENGES REINFORCES CGLCC'S MANDATE TO CONNECT, SUPPORT AND GROW CANADA'S LGBT+ BUSINESS COMMUNITY

“ Losing business or not being taken seriously because of being visibly LGBT+. Educating the public, dismantling patriarchal sexual orientation and gender identity power structures, supporting LGTB+ business owners and workers with sponsorship. ”

“ I would like it if there were more LGBT+ specific networking events because I feel I can make small talk far better with my own community and make those connections. When I attend general networking events, I feel disconnected as they are almost always talking about heteronormative lifestyles. ”

The background of the entire image is a vibrant purple color with a complex, wavy, and undulating texture that resembles liquid or fabric. The waves are layered and create a sense of depth and movement. In the center of this background, the word "nielsen" is written in a clean, white, lowercase serif font. Below the text, there is a horizontal line of eight white dots, each centered under a letter of the word "nielsen".

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