

All-Index[®] 2022/23

Annual Report

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So you know where to find things.

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Our Mission:
To shift the paradigm
towards inclusion
through transparency,
measurability and
actionable tactics.”

All-In Diversity Project

Introduction

Welcome to the All-Index® Report 2022/23

What's new for 2022/23

This year sees the All-Index® expand its definition and measures of 'diversity' from just gender to diversity in all its forms including, but not limited to, race and ethnicity, sexuality, visible and invisible abilities and age.

In addition to reporting on gender, participants were asked to indicate what other traits and characteristics they measure, and where possible share data relative to cultural heritage, LGBTQAI+, physical/neurological abilities and any other characteristics that they might capture as part of their commitment to diversity, equity and inclusion.

This year also sees a greater emphasis on understanding the impact of gambling and other types of regulation on levels of diversity within the industry across the world.

Having used previous years to help set an industry benchmark and identify current trends, the scope of the All-Index® survey will now also include identifying gaps and future trends and how they might impact on organizations and the industry, both globally and locally.



Finally, and as always, our sincerest thanks to everyone who continues to support us – our Founding Members, our Strategic Partners and Associates, the organizations who signed up and took part in the All-Index®, and everyone who plays their part in helping to make our industry just that little bit more inclusive.



Kelly & Tina

Co-Founders
All-In Diversity Project

Global Gambling Landscape

Reflecting regulatory trends

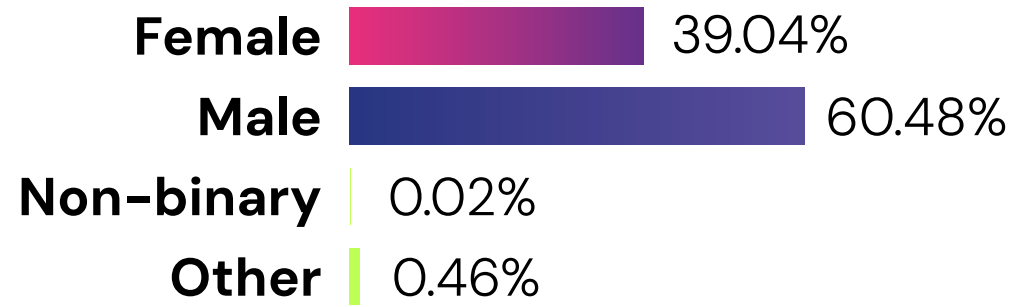
The last 18 months have seen the majority of the world move towards some form of national gambling regulation, resulting in many operators adopting a multi-licence, multi-product, multi-jurisdictional operating model. This is reflected in this year's All-Index® findings.

Over 70% of participants now have at least 2 office locations, whilst over 37% have a footprint in 10 or more locations, Providing a picture of the state and status of gambling activity and attitudes across the world.:

- Changes in the global regulated landscape with the US, Canada and South America all now starting to challenge Europe's historic online gambling dominance. Based on this trend we would expect the UK and US to be the 2 most dominant markets in 2024.



The rise of sports betting together with the impact of COVID meant last year's results showed a drop in the overall number of men to women in the industry and that trend. That trend has continued with the gap between the number of males to females widening further to around 60:40.



As discussed last year this is likely due to a number of contributing factors - Gen Z and their attitude and perception of gambling and the industry, the Great Resignation and link between the rise of sports betting and the drop in numbers of women cannot just be coincidence, and warrants further discussion within the context of the rise in popularity of women's sport.

Undoubtedly, the shift in the ratio of males to females over the last few years is linked to the rise in sports betting, but as operators become more alert to the growth in female sports and sports bettors* as with other female-centric products, they will need to change the profile of their sportsbook teams in order to engage with this new non-male demographic.

★ KEY TAKEAWAY

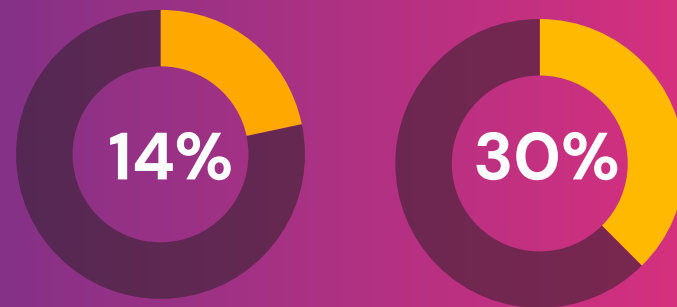
Stereotypical views relating to products and customers continue to influence levels of gender diversity across the industry. Many sportsbooks often associate female accounts with bonus and multi-accounting rather than a genuine account, however, data from a number of organizations (Nielsen, Hot Paper Lantern, GSA, IBIA*) indicates that the profile of sports and esports fans and bettors is changing, and a failure to recognise this will over time result in poor customer engagement and management, and a drop in revenue for the wrong reasons.

A recent report 'Breaking Barriers: Assessing Women's Sports, Betting and Integrity Challenges' (Study on women's sports | IBIA and All-in Diversity Project) explores the links between the rise in women's sport, sports betting and integrity on the back of research undertaken previously by a number of agencies showing significant growth in the number of female sports bettors.

Definitions of 'Diversity'

Europe v ROW

Gender



Only **14%** of participants do not record gender data
Over **30%** of participants now include non-binary and 'other'*

* Over time this may need to be expanded further to include other most commonly known and recognised gender categories.

Visible Diversity

Beyond Gender

The introduction of the question relating to other forms of diversity has highlighted a clear difference in the perception and definition of 'diversity' between Europe and the rest of the world.

Race & ethnicity/cultural heritage

59% of participants do not record data relating to race, ethnicity/cultural heritage
41% of participants have some information based on observation

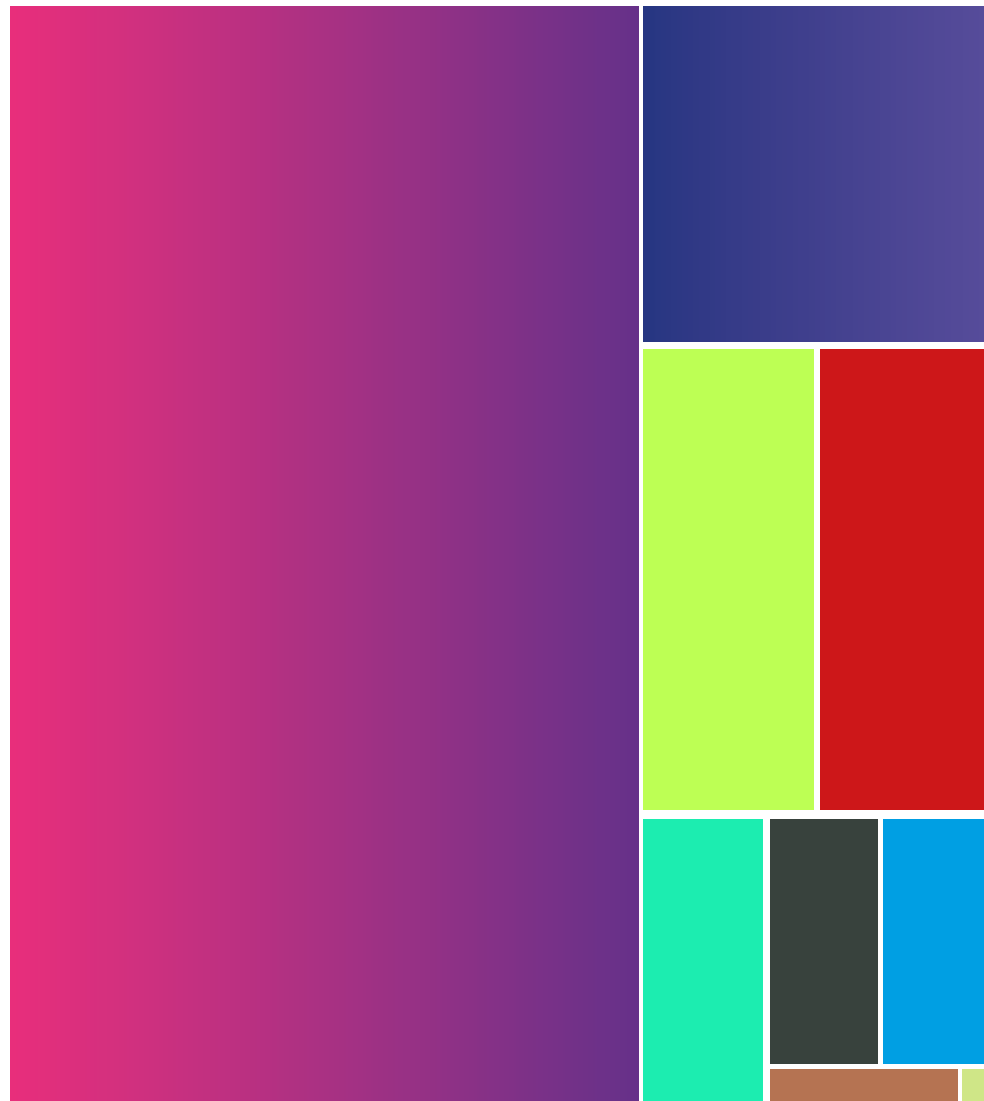
No participant based in mainland Europe indicated that they record data relating to race and ethnicity/cultural heritage

Participants that do record data relating to race and ethnicity/cultural heritage are based in the UK, US and Australia.

★ KEY TAKEAWAY

As Generation Z continue to make their mark in the workplace, both lawmakers and organizations will need to ensure that their gender equality policies and practices, in attempting to address inequalities between men and women do not inadvertently end up discriminating against those who do not identify as male or female.

Based on the data provided the cultural breakdown is as follows:



- European descent** (for example: Caucasian, white, etc.)
- Asian descent** (for example: China, Korea, Japan, etc.)
- African descent** (for example: African American, Black British, etc.)
- Central/South American descent** (for example: Latino/a, Hispanic, etc.)
- South Asian descent** (for example: Indian sub-continent, Sri Lanka, etc.)
- Inter-sectional/mixed** (for example: a combination of 2 or more of the above)
- Other** (none of the above)
- Indigenous descent** (for example: Native, Tribal, etc.)
- Middle Eastern descent** (for example: Arabic, Levantine, etc.)
- Jewish descent** (for example: originating from historical Israel and Judah, etc.)

Data presented as a Treemap chart

Despite this almost all participants describe themselves as having a diverse workforce suggesting that there are at least 2 distinct definitions of diversity.

In Europe, the definition of diversity seems to be based primarily on gender, compared to the rest of the world where the definition of diversity appears to assume both gender and race and ethnicity/cultural heritage, not just gender.

This is something that is reflected in industry events and conferences, with those that aim to be truly international having a far more diverse range of speakers than those whose target audience is Europe.

★ KEY TAKEAWAYS

There appear to be 2 different definitions of diversity. Europe is mainly gender, whilst the rest of the world is gender and race and ethnicity/cultural heritage. This poses a reputational risk to organizations adopting the European definition and presenting themselves as being diverse or supporting diversity in a global context.

There is also a secondary risk to those organizations based in a European or .com jurisdiction and whose definition of diversity rests primarily on gender but whose revenues are generated from customers and activity outside of Europe who might be accused of at best cultural incompetence and at worst exploitation.

Other characteristics/traits:

When asked to indicate which other characteristics/traits were recorded participants responded as follows:

Age / Generational data*	93.10%
Sexual Orientation (LGBTQAI+)	27.59%
Visible Disability (Physical, audio, visual impairments)	31.03%
Invisible Disability (Dyslexia, non-neurotypical)	27.59%
Religious or spiritual belief	13.79%
Veteran status (Military background)	27.59%

* It is assumed that the main reason for recording age data is regulatory purposes e.g. statutory retirement age, age-specific roles in gambling, etc.

Historically the most common reason for not collecting demographic data was that it was not legal to do so, however, this time only 6% cited this as the reason for not collecting demographic data.

This could be due to the fact that this year's All-Index® is more global than ever before and includes more jurisdictions which do not prohibit the collection of this data, or that more jurisdictions are moving towards gender and pay equality frameworks that require this data to now be captured for regulatory and reporting purposes.

The majority of participants indicated that they would be willing to collect demographic data but were not currently doing so for the following reasons:

- 12.50% Not sure how to
- 6.25% Worried how employees would react if asked
- 6.25% Do not record but could in future
- 25% Do not record but could in future if the employee agrees

The are **3 challenges** to recording demographic data in a meaningful way:

1. **Intersectionality** (e.g. identify with two or more characteristics)
2. **Non-visible characteristics/traits** (e.g. sexuality, neurodiversity)
3. **Bi- and multi-racial/cultural** (e.g. mixed race, ethnicity/cultural heritage)

As individuals increasingly identify with more than one characteristic/trait measuring diversity based upon individual classifications is becoming less reliable as a meaningful measure. e.g. 1 cisgender, bi-sexual, indigenous person would tick 3 boxes but mis-interpreted as 3 people instead of 1.

Going forward a more holistic approach might be to look at the degree to which characteristics/traits are present in a group with results presented as a Treemap chart showing the dominant and less dominant characteristics/traits within a group of people – example shown on page 7.

★ **KEY TAKEAWAYS**

A combination of cultural blending and non-visible characteristics/traits means that it is not possible to measure diversity by observation without introducing bias and margins of error. The only reliable method is to ask individuals to self-identify, but understanding that where individuals have the option to 'prefer not to say' or opt-out this too could result in a distorted picture.

EU 'Women on Boards' Directive

Cost of Compliance

In 2022, The Council of Europe approved a new law to improve gender balance on company boards.

The so-called 'Women on Boards' Directive will be in place by July 2026 and requires member states to set up national bodies to implement the new regulations and ensure that:

- **40%** of non-executive directors or **33%** of all director posts should go to the under-represented sex
- Dissuasive penalties for companies that do not comply with the rules
- All listed/public companies, small and medium-sized enterprises with more than **250 employees, turnover of €50m**, or balance sheet of **€43m**

July 2026 feels a long way away, however, organizations should start to put steps in place to ensure that they are ready to meet the new laws.

This year's All-Index® indicates that the number of women in industry is dropping – now just dipped below **40%**

28% women = Executive level*
36% women = Non-exec level*

*This is based upon information provided by all participants – if we look at organizations based only in the EU this number is lower.

Only **42%** of participants measure Gender Pay Gap within their organization (i.e. the difference in pay between a man and a woman doing exactly the same job); and of this **42%, 46% (almost 50%)** reported a pay gap (i.e. a man and woman doing exactly the same job do not get paid the same).

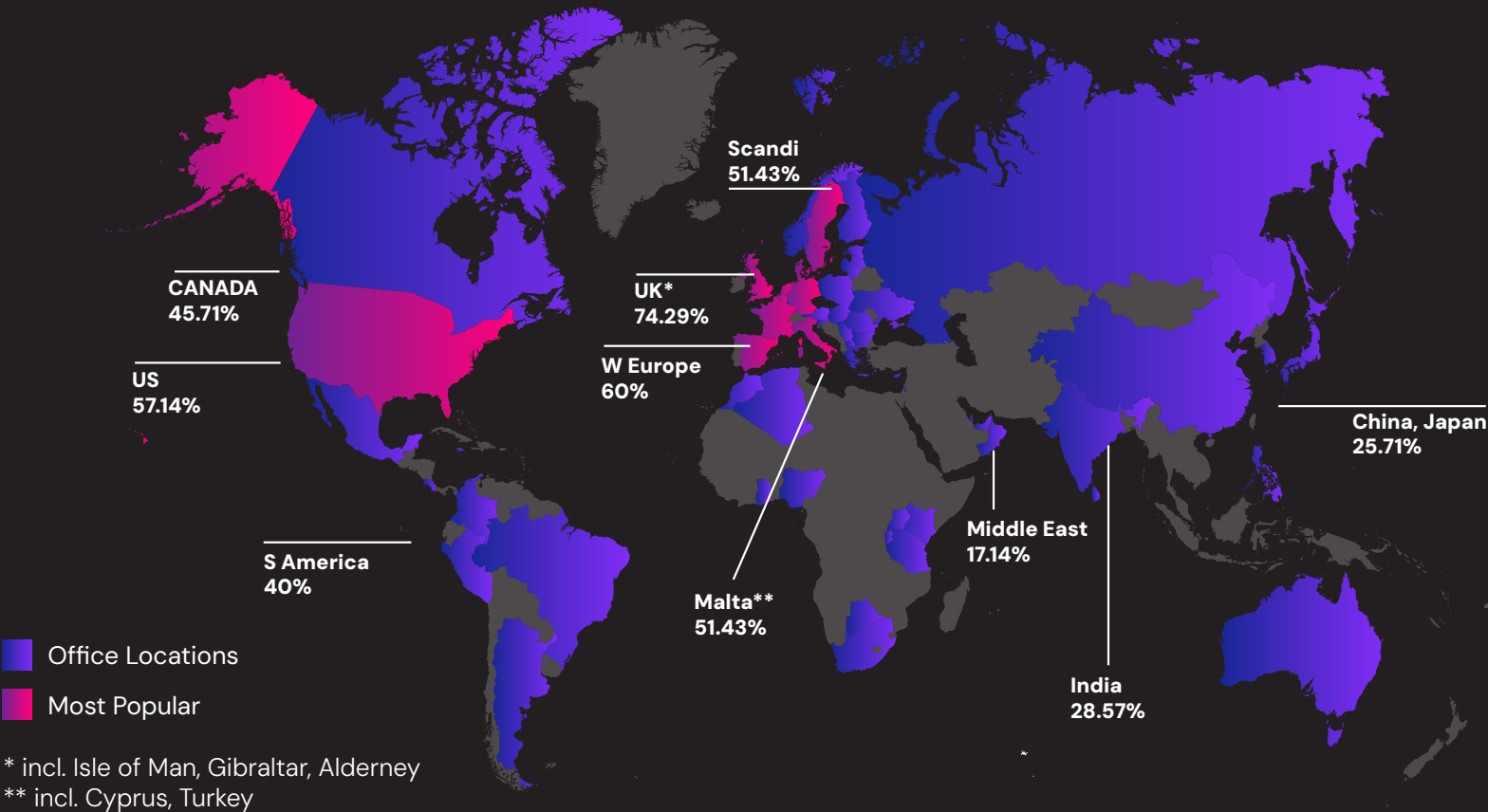
★ KEY TAKEAWAYS

Organizations in the EU should start planning for 2026 now to avoid the risk of appointing 'good enough' v the best by identifying and developing talent to increase the talent pool of candidates in the future and start to embed transparent merit-based recruitment processes now. Start looking at the cost of compliance and non-compliance – the cost of addressing pay gaps (pay freezes v over-inflation pay increase and retrospective claims from employees citing historic discrimination)

All-Index® 2022/23

Participants

All-Index® 2022/23 saw a solid number of organizations taking part from around the globe.



32 organizations across 21 jurisdictions

22% were operators

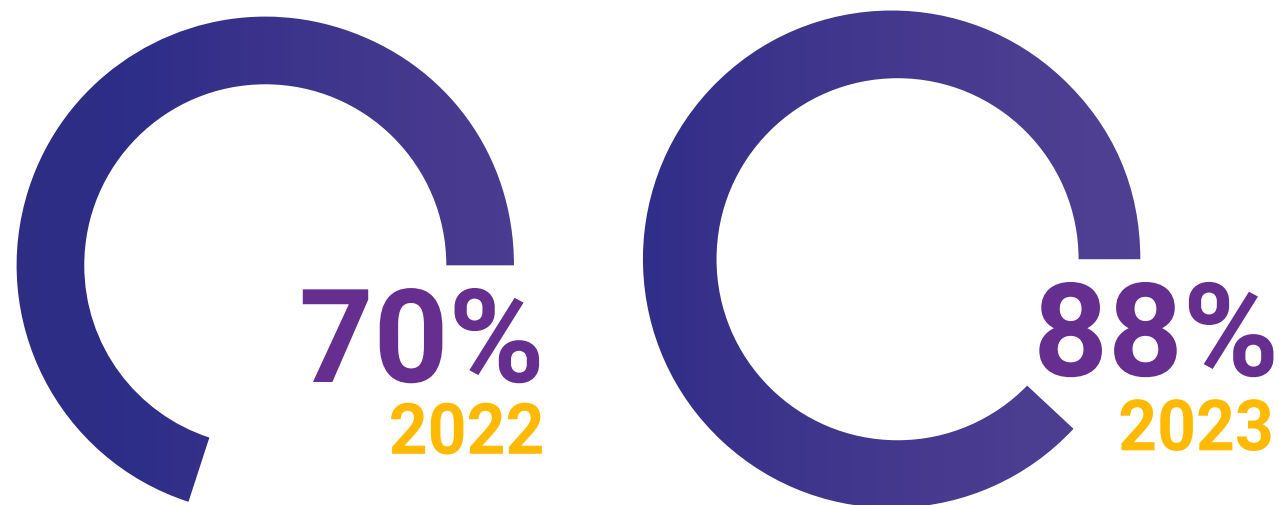
37.5% were suppliers

41.0% identified as Large/Publicly traded companies with over 250+ employees

Over 80,000 employees in total

People

Hybrid Working: Now solidified as the preferred environment for work



In the last All-Index®, **over 70%** of organizations indicated that they would offer hybrid (a blend of office and remote) working. In 2023, **almost 88%** of respondents now offer a combination of physical office and remote working for their staff.

★ KEY TAKEAWAYS

Whilst many organizations have now embraced some form of remote/hybrid working there is no established 'new normal' as yet. Experimentation around 4-day weeks, and the recent drive of employers looking to bring employees back into the office, combined with the need to source cost-effective talent suggests that there will be no particular or prescribed model in the future. This becomes even more the case when considering the impact of AI in the future as large language models and generative AI continue to evolve and provide employers with a low-cost and faster alternative to human coders, analysts and, in time, customer-facing personnel.

Leadership

Looking at the leadership and global trends

This year, we revised our data collection to include more information about executive and non-executive boards including race/ethnicity, age and other protected characteristics.

Executive Board



Non-Exec Board



This has dropped from 32% women and 68% men last year, reflecting a global corporate trend*.

- US average: 36% (Down from 39% in 2022)
- UK average: 39% representation of females (FTSE 250)

*https://www.ey.com/en_uk/news/2022/11/alarmed-lack-of-women-in-executive-roles-despite-ftse-350-improving-boardroom-gender-diversity

Ethnicity

European descent (Caucasian, white, etc.)	21%
African descent (African American, Black British, etc.)	11%
South Asian descent (Indian sub-continent, Sri Lanka, etc.)	8%
Asian descent (China, Korea, Japan, etc.)	11%
Central/South American descent (Latino/a, Hispanic, etc.)	8%
Indigenous descent (Native, Tribal, etc.)	7%
Jewish descent (originating from historical Israel and Judah, etc.)	8%
Middle Eastern descent (Arabic, Levantine, etc.)	8%
Inter-sectional/mixed (A combination of 2 or more of the above)	7%
Other (none of the above)	10%

Non-Executive Race and Ethnicity/Cultural Heritage

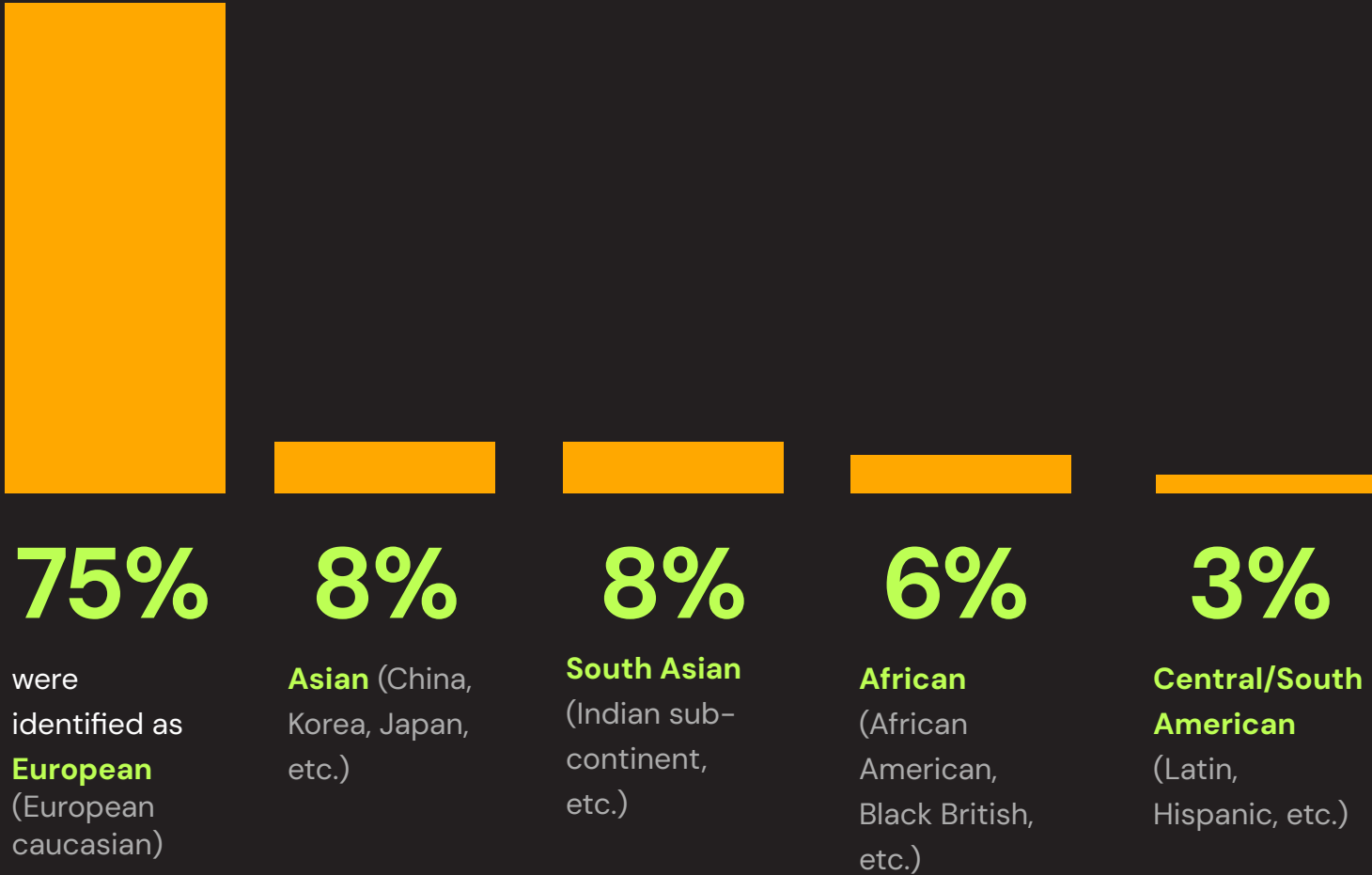


21 of the 32 organizations (72%) participating do not record the ethnicity of their Non-Executive board.

This is in contrast to the UK FTSE 250 where over 60% of businesses have at least one non-executive board member who is not white, due to organizations adopting the recommendations of the Parker Review (<https://parkerreview.co.uk/>).

In the US, the S&P boasts 22% representation from under-represented racial and ethnic groups:
<https://fortune.com/2023/04/19/mpw-summit-accenture-boardroom-diversity/>
https://www.ey.com/en_uk/news/2023/03/parker-review-announces-new-targets-to-improve-ethnic-diversity-of-ftse-350-company-boards

Of those that do record this information:



Gender Gap

Number of Employees

Total number of employees identified

80,936

Male employees

60.5%

Non-binary

0.5%

Female employees

39%

Other

0.5%

This year's All-Index® reported the biggest gap between male and female to date, with women dipping below 40% for the first time.

***10/32 (31%)** companies reported having non-binary employees. This is an increase from **21%** last year.

★ KEY TAKEAWAYS

The industry needs to take steps to create opportunities for career progression by ensuring talent is identified and developed now, in order to meet the new regulation due to come into force in the future.

Numbers of women by role/seniority

The impact of the Great Resignation and the rise of sports betting has led to a noticeable drop in the numbers of women at the manager level and above.

	% total female population	% total population
Entry level/new starter up to Team Leader or Supervisor	75.29%	28.84%
Team Leader or Supervisor	10.35%	3.96%
Manager (oversees Team Leader or Supervisor)	6.23%	2.39%
Head of Department (oversees Manager)	2.35%	0.90%
Director/VP/Partner or 'C'-level (oversees Manager and/or Head of Dept.)	1.12%	0.43%
CEO or MD	0.04%	0.02%
Other (freelancer, contractor, consultant, etc.)	4.63%	1.77%

This poses short and long term risks for the industry, not only reputationally, but in the case of the 'Women on Boards' directive and other gender equality laws will leave organizations at risk of non-compliance due to the demand for qualified skills and experience in the next few years being greater than supply.

Practice and Policy

A rethink post-pandemic

Last year we saw paid sick leave drop and flexible working increase. This year paid sick leave is back up to **96%** of all businesses and flexible working is now aligned with remote working, having **92%** of all participants offering.

Other noticeable shifts seem to be a reflection of changing views and attitudes in society.

Organizations offering

Maternity leave

100% (2019) ↓ **88%** (2023)

Paternity leave

95% (2019) ↓ **88%** (2023)

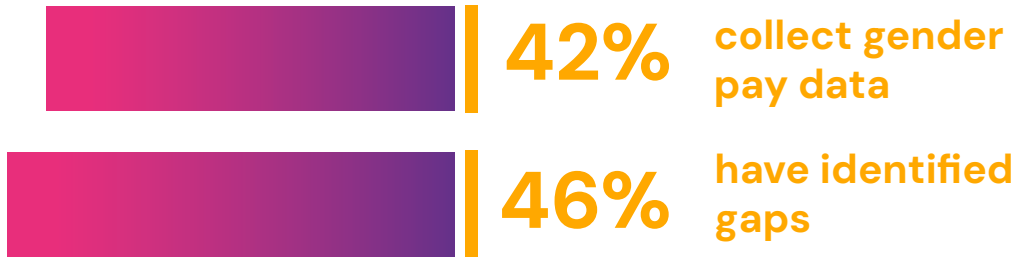
Shared parental

58% (2019) ↑ **85%** (2023)

With **84%** (up from **80%**) of organizations confirming they apply parental policies to same-sex couples.

Pay Gaps

Of the organizations that participated:



Most respondents indicated that there are pay gaps at most or all levels.

None of the participants collect data on ethnicity pay gaps (down from just **1 last year**) despite **20 (62%)** companies indicating that they record ethnicity across their workforce

The reasons organizations do not always capture this data vary. In some cases, it is because it is not legal for them to do so, but an inability to ensure that employees feel valued, recognised and rewarded could impact on their ability to recruit or retain talent.

Fostering Belonging

The trend of shifting from policy to practice continues with organizations really starting to focus on safeguarding:

The shift towards ESG is also reflected in this year's results, with DEI being a core aspect of the 'social' governance element.

- ↑ Anti Bullying now at 100%
- ↑ Mental health back up to 69% from 40% (2021)
- ↑ DEI up to 73% from 40%

By itself this should be a cause for concern, but when considered within the context of training it paints a slightly different picture, because whilst the number of organizations with policies has gone down, the number of organizations offering training has gone up.

Advocacy and Visibility

When it comes to advocating and promoting DEI goals, businesses have realized the value in being seen and heard. Almost all businesses accept that senior leaders' representation matters. This year, the majority of businesses (80%) indicated that it's EVERYONE's job to actively promote equity, diversity and inclusion.

ANSWER CHOICES	RESPONSES
Communicated an organisation-wide message on diversity and inclusion	80% 20
Communicated a strong message on gender equality	80% 20
Had meetings with women's, minority, LGBT or other employee network or staff group	52% 13
Reviewed and/or approved an equality, diversity and inclusion strategy	60% 15
Reviewed and/or approved equality monitoring reports and actions	44% 11
Spoken at an INTERNAL events(s) about diversity, equality and inclusion	64% 16
Spoken at an EXTERNAL event(s) about diversity, equality and inclusion	56% 14
Been seen as a visible role model for women, LGBT, ethnic, disability or other minority group	68% 17
Other (please specify)	0% 0

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For further information contact info@allindiversityproject.com

PAS 1948:2023

Diversity, equity and inclusion
in the workplace – Code of practice



All-in Diversity project is proud to announce the publication of the new BSI International standard PAS 1948:2023 Diversity, equity & inclusion in the workplace – a code of practice.

The standard is intended to help organizations implement a DEI framework that works for them. Areas covered include understanding and implementing concepts such as “diversity of thought”, “dimensions of diversity”, “intercultural competence” and “cognitive diversity”. It also covers practical measures, including around recruitment and retention DEI, along with incorporating the principle of “inclusive by design” into services, technology, and business models and processes. It also looks at how organizations can address behaviour which is inconsistent with DEI principles, as well as how to engage and support underrepresented social and cultural groups, for example via peer networks.

Other areas of focus include:

- Identifying appropriate DEI learning and development needs.
- Creating inclusive brands, customer engagement and workplace culture.
- Incorporating DEI principles into an organization’s internal policies, practices and processes.
- Establishing the organizational benefits of creating and maintaining an effective culture of DEI setting achievable targets and objectives, and measuring progress.

To get your FREE copy of the standard visit:

<https://www.bsigroup.com/en-GB/standards/pas-19482023/>