

All-Index® 2024/25

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Our Mission:

To shift the paradigm towards inclusion through transparency, measurability and actionable tactics.

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Introduction:

A Brave New World

What's new in 2024? In a word – everything.

The 2024 All-Index® went from being a benchmark for the global gambling 'sector' to global gambling 'ecosystem' – making it the most representative and nuanced report yet.

Whilst operators (B2C) and providers/suppliers (B2B) continued to be the dominant group, this year saw over a quarter (25%) of participants identify as part of the wider stakeholder network such as regulator, charity, recruiter, payment and marketing.

This not only makes the All-Index 2024 the most representative yet, it also allows us to start to unpick the impact of regulators and non-gambling stakeholders on the industry. This shift also posed data analysis challenges.

- Using the analogy of a millionaire entering a room and increasing the average wealth of the whole room, so a non-gambling participant has the potential to shift the overall results for the gambling sector. Equally a multi-national with a tech hub in Asia may score highly for overall diversity but that does not necessarily equate to inclusion if that hub operates in a silo.
- Continuing a trend identified last year, global socio-political influences have continued to have an impact on definitions of, and attitudes to, diversity across Europe, the Americas, Asia, Africa, and now the Middle East.

These regional variations have combined to make the production of this year's report our biggest challenge yet, and have highlighted that the current 'one' All-Index survey will no longer fit 'all' going forward.

2025 will require a re-set for all of us.



Regulation driving change

Gambling regulation

80%

of countries
now have
some form
of regulated
gambling.

Source: [Legalized gambling is exploding globally. What policies can limit its harms? | Harvard Kennedy School](#)

2024 saw the world, including the Middle East, continue to move towards regulation. At time of writing 80% of countries in the world now have some form of regulated gambling.*

This means that over 80% of participants now have at least 2 or more office locations, and of that number around 27% 10+ office locations across the world, including the Middle East.

Office Locations Across The World

Southern Europe & Mediterranean	58%
UK (inc. associated territories)	55%
Western Europe	50%
USA	47%
Eastern Europe	33%
Northern Europe	33%

CIS: 0%, Russia 0%, Middle East 5%, North Africa 3%, West Africa 0%, East Africa 5%, South Africa 19%, Canada 19%, Mexico, Central America and Carribbean 17%, South America 11%, India 14%, China 5%, Asia 17% and Australia and New Zealand 17%.

Gambling Products 2024

Responses indicate that the driver behind slots return to the top is the growing popularity of ‘crash’ games, a genre of slots.

Slots ▲	72.4%
Casino ▼	55%
Sports	50%
Casino: Live Dealer	47%

Poker 33%, esports 24%, lottery 24%, bingo 20%. Financial betting sees an uplift to 13% whilst fantasy drops to 6.9%.

The launch of the General Commercial Gaming Regulatory Authority (GCGRA) in the UAE now means that over 80% of the world now has some form of regulated gambling. The growing acceptance of gambling in Asia, Africa and now the Middle East is a step change that will dynamically and organically level the playing field and drive cultural and demographic change across the whole industry. In practical terms this is likely to see a complete shift from DEI to merit, skills and values-based recruitment to secure the very best talent to remain competitive and relevant.

▲ Key Takeaway

Gambling Regulators & ESG

Initiatives and Actions

2024 saw an increase in the number of participants with a Malta footprint.

Whilst the question was not asked specifically, responses around other organizational initiatives and targets suggest that some of this may be driven by the Malta Gaming Authority (MGA) and the introduction of the **new ESG (Environmental, Social, and Governance) Voluntary Code of Good Practice*** – a landmark initiative aimed at encouraging sustainability and responsible corporate practices within the online gaming sector.

S = Social

The section relating to 'S' includes a number of qualifying initiatives, actions and activities that focus especially on people and practices.

Examples of initiatives include:

- Contributed over €14m to projects focused on safer betting and gaming, sports, diversity, and technology; and
- Launched a new diversity and inclusion ('D&I') strategy.



The long list of qualifying topics includes:

1. Incidents surrounding discrimination and harassment.
2. Fair remuneration for all employees.
4. Gender pay gap.
5. Social dialogue with employees (potentially including collective bargaining).
7. Secure and adaptable working conditions.
9. Employee well-being (including work-life balance).
10. Diversity, inclusion, and equal opportunity (for example, on gender, race, disability).

To date 14 operators have been awarded an – 11 at Tier 1 and 3 at the more aspirational Tier 2.



Gender Pay Regulations

Gambling Regulation

↑ **86%**

of respondents track gender demographics

↑ **25%**

measure non-binary (incl. trans and other).

Gender pay gap narrowed by

↑ **20%**

There has been a noticeable increase in the number participants who actively measure gender and gender pay gaps from 2023 to 2024. 50% of respondents now measure gender pay gap – up 8% from 2023.

The number of respondents who state that they also measure gender pay gap seems to align with the number of respondents located in a jurisdiction where gender pay tracking or reporting (based on total number of employees) is a requirement.

33.33% indicated that they had identified a gender pay gap, and that this was at all levels.

66.67% reported that they did not identify a gender pay gap compared to 46% in 2023.

This is an increase of 20% on last year.

Whilst the survey did not specifically ask whether those who did not identify a pay gap had taken steps previously to address any in anticipation of regulation, it was noted that the majority of participants who fell into this group were linked to locations where gender pay gap regulation is in place.

These increases appear to be linked to evolving gender pay laws and regulations, based upon the responses and the geo-location of those respondents:

- By 2025, over 40 states in the US had some form of equal pay regulation.
- The UK has had mandatory gender pay gap reporting for organizations with 250+ employees since 2017, as do many European countries.
- Ireland implemented Gender Pay Gap reporting in 2022 for companies with 250+ employees – from 2025 this will drop to 50+ employees, increasing the number of organizations required to report.
- In 2023 the EU approved the Pay Transparency Directive which will standardise and make gender pay gap reporting compulsory for employers with 100+ employees across Europe from June 2026.



Women at the Top

People and Gender Pay Gaps

43%

of the industry
are women
(vs. 57% male)

The new Gender Pay Transparency regulation in Europe precedes the 'Women on Boards' Directive that aims to introduce transparent recruitment procedures in companies, so that at least 40% of non-executive director posts or 33% of all director posts are occupied by the under-represented sex by the end of June 2026.

The regulations will apply to all listed/public companies, small and medium-sized enterprises with more than 250 employees, turnover of €50m, or balance sheet of €43m, and will have 'dissuasive penalties' for companies that do not comply.

Last year's All-Index® indicated that the number of women in the industry had dropped from 50% to just below 40%. This year's numbers suggest little change in the last 12 months and number of males to females overall remains close to 60:40 (57% men : 43% women).

In terms of the number of women at the top, there has been a shift with the numbers of female Executives rising by almost 3% but numbers of non-Executives dropping by 2%.

Women at Executive level*



At non-executive level*



Whilst the lack of movement appears minimal it should be noted that due to the size of this cohort the addition or removal of 1 individual on either side can have a noticeable impact on overall percentages.



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 how this new regulation will work alongside other laws and regulations relating to gender pay and gender definitions.

▲ Key Takeaway

Challenging gender 'norms'

People and Gender Pay Gaps

The 2024 All-Index indicates that 25% of participants have expanded their gender metrics beyond traditional gender identities:

2023



2024 (99,974 employees in total)



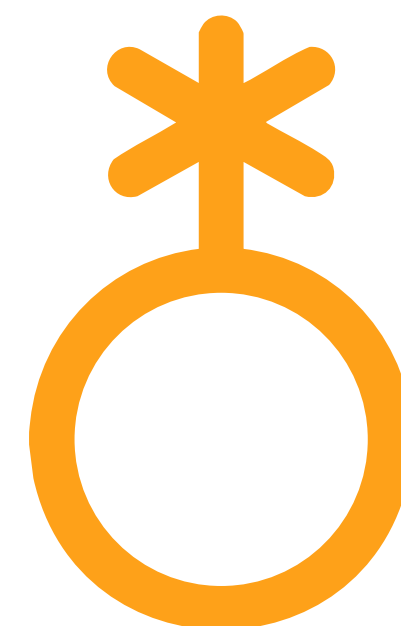
This is reflective of changing global trends and attitudes.

In a 2023 global survey conducted by Ipsos, 3% of respondents from 30 countries identified themselves as transgender, non-binary/non-conforming/gender-fluid, or in another way. [This is up from the 1% reported by the World Economic Forum in 2021.](#)

Research in the US suggests that between [5% to 7% of Gen Z adults \(those born after 1995\) identified as non-binary.*](#)

As this trend continues, countries will need to amend existing gender and gender pay laws and regulations to ensure that they remain relevant and reflect both societal changes and other national and international laws and regulations.

It will also require organisations to reconsider how they measure gender across global locations and across borders, especially where there is a conflict between countries, states or provinces around legal definitions and recognition of sex and/or gender.



17

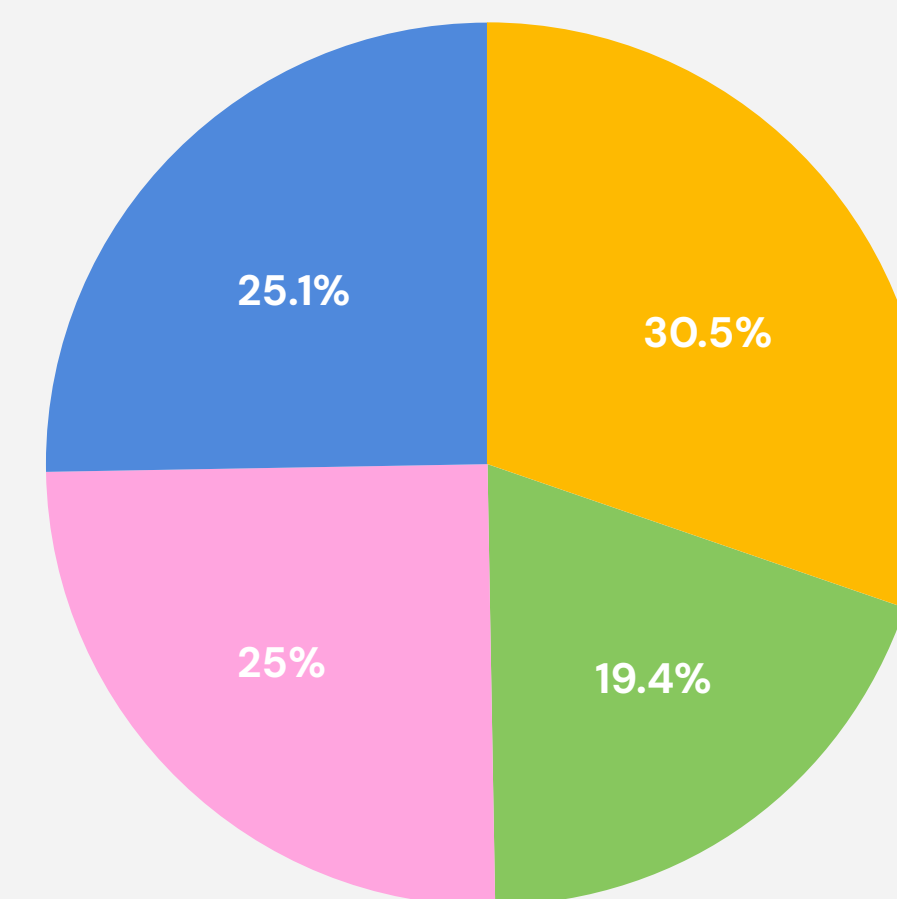
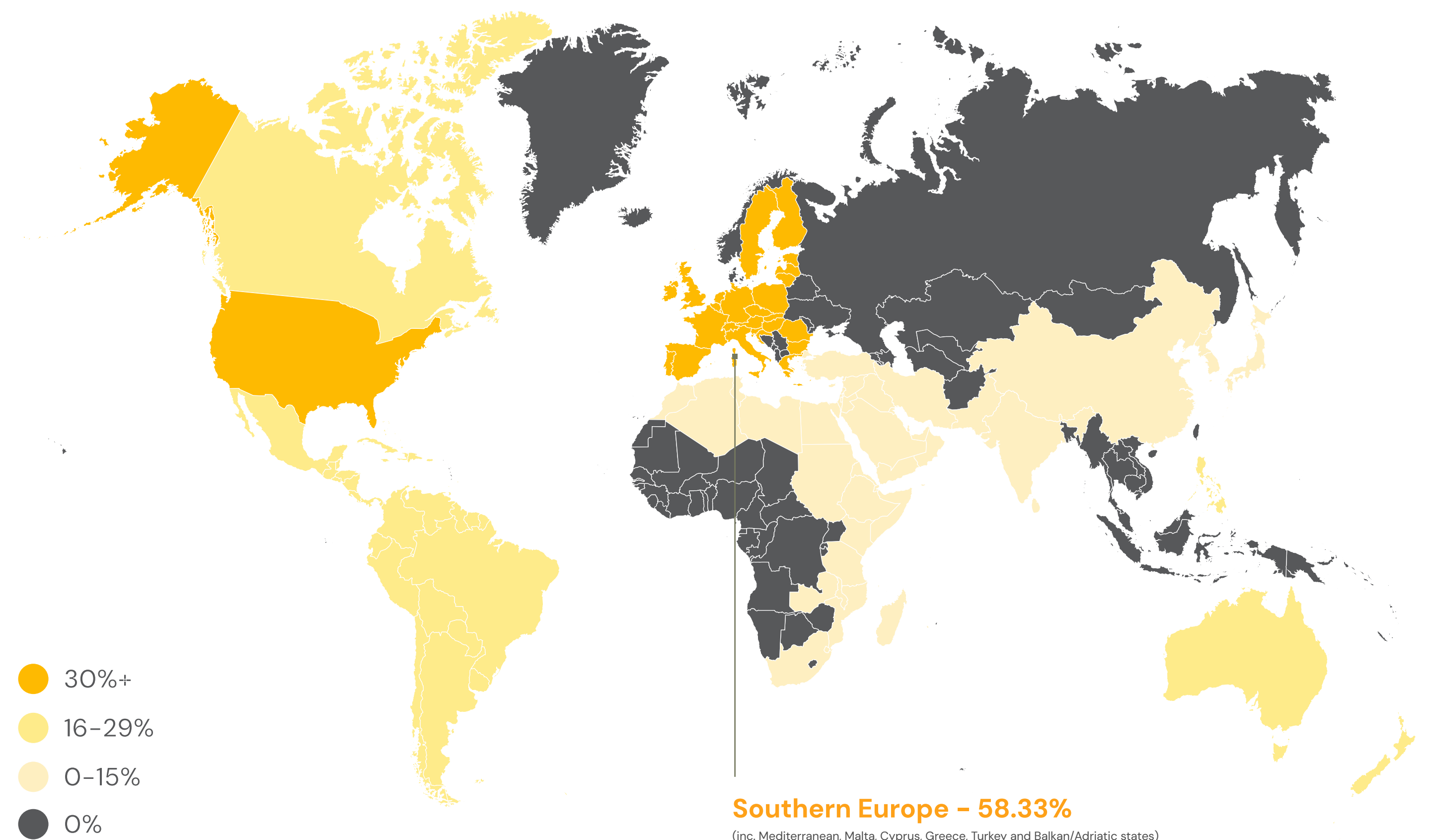
countries now legally recognise non-binary and third gender identification.

Latest research suggests that in 2023 3% of the global population identifies as non-binary. This growing trend will require policy makers to reconsider legal definitions of sex and gender and organizations to ensure their operating policies and practices, including how they track employee demographics, remain compliant with the increasingly varied laws across the different locations that they operate in.

▲ Key Takeaway

Geographic Territories

36 organizations across 23 jurisdictions



Operators (B2C) Operators and Suppliers (B2C/B2B)
Suppliers (B2B) Neither

25% of participants represented the wider betting and gambling eco-system including regulators, recruiters, responsible gambling organizations and service providers such as payment and marketing.

For the first time we are now able to start looking at how different actors within the ecosystem impact and influence levels of inclusion across the industry, globally and locally.

Consolidation & Regulation



22%

start-ups
with up to 50
employees

36%

SME with up to
250 employees

33% Private, 3% Publicly listed

41%

Large companies with
over 250 employees

16% Private, 25% Publicly listed

The breakdown is suggestive of a number of things:

- 1 **Diverse and inclusive cultures matter more to start-ups and SME private (challenger brands) the most.**

This seems to mirror latest research about values driven Gen Z (those born after 1995, and now becoming a dominant force in the global workplace) who are more likely to be associated with innovative start-ups.

Cost conscious challenger brand SMEs looking to attract talent whilst managing the costs of a growing workforce in challenging times, adopt a more inclusive approach that lets them cast their recruitment net wider and outside of established talent pools resulting in a more diverse workforce.

- 2 **41% of large companies with 250+ is consistent with 2023.**



People, Gender & Ethnicity

Ethnicity



The number of participants who measure ethnicity has increased, but their profile remains similar to last year i.e. organizations based in UK, US, and RoW, with the majority of European participants focusing only on gender.

European descent: = 54.30%
African: = 15.19%
South Asian: = 1.36%
Asian: = 6.68%
Central/South American: = 7.97%
Indigenous: = 0.55%
Jewish: = 0.01%
Middle Eastern: = 0.08%
Inter-sectional/mixed: = 2.82%
Other: = 11.04%



Hybrid Working

Majority of organizations now offer remote/hybrid working



The difference between 2023 and 2024 seems to be linked to the shift in profile of participants and may be as a result of:

- More start-ups with younger demographics unlikely to be focused on age as yet together with aging populations living longer and working for longer suggests that age (mandatory retirement age) is now less of a consideration
- More jurisdictions including those where some characteristics or traits are less likely to be acknowledged due to local laws and customs
- More non-US participants many of whom do not measure veteran status

Other Characteristics/Traits:

	2023	2024
Age / Generational data*	93%	86%
Sexual Orientation (LGBTQAI+)	27%	20%
Visible Disability (Physical, audio, visual impairments)	31%	23%
Invisible Disability (Dyslexia, non-neurotypical)	28%	20%
Religious or spiritual belief	14%	10%
Veteran status (Military background)	28%	20%



Larger organizations typically measure the most characteristics/traits, and it will be interesting to see how this aligns based on the following challenges:

- Consistency of measure across different jurisdictions such as pension age; and
- Shifting socio-political environment which may impact on what can be measured and why in the future.

SMEs appear to focus only on the information that is required by law or regulation or is relevant or applicable to their location such as gender or LGBTQAI+ e.g. organizations in Malta are more likely to focus on LGBTQ+ due to the country's long association with Pride

The decrease in the number of participants measuring age, invisible disability and religion may be due to a combination of the factors already described, but may also be driven by the fact that this data is more difficult to capture without the need for intrusive questions e.g. gender/age can be obtained for legal reasons (e.g. health insurance, pension), and ethnicity can be measured by observation to some extent, but things like religion and invisible disabilities less so.

▲ Key Takeaway

Roles & Responsibilities



Department	Female%	Male%
Executive Board	30.94%	69.06%
Non-Executive Board	33.93%	66.07%
Data (Analytics, Insight, Strategy)	24.47%	75.53%
Design and Creative	31.80%	68.20%
Marketing	46.85%	53.15%
Media (PR and media relations)	68.18%	31.82%
Sales and Business Development	39.35%	60.65%
Product Development & Innovation	28.13%	71.87%
Trading and Markets	18.00%	82.00%
Finance, Accounting & Budgetary Control	54.96%	45.04%
Operations	37.33%	62.67%
Human Resources	74.11%	25.89%
Technical & engineering	25.93%	74.07%
Legal & Regulatory Compliance	59.69%	40.31%
Hospitality	50.50%	49.50%
Other	45.86%	54.14%

With the exception of marketing and hospitality where numbers are close to level, and finance where women now dominate, there has been only minimal fluctuation in gender- role stereotype since the first All-Index 6 years ago.

Level	Female%	Male%
Entry level up to Team Leader or Supervisor	45.36%	54.64%
Team Leader or Supervisor	34.53%	65.47%
Manager (oversees Team Leader or Supervisor)	30.29%	69.71%
Head of Department (oversees Manager)	31.13%	68.87%
Director/VP/Partner or 'C'-level	23.23%	76.77%
CEO or MD	24.49%	75.51%
Other (freelancer, contractor, consultant, etc.)	49.66%	50.34%

As highlighted last year, organizations in the EU need 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 in 2026.

Elsewhere, as technology such as AI starts to become more prevalent in many areas of operations, including marketing/CRM/ CMS and back-office functions, a lack of females in some roles and functions runs the risk of applications being commercially biased or focusing only on some segments of the actual and potential customer base.

▲ Key Takeaway

Policy & Practice

All organizations reported having at least 1 of the following policies relating to workplace practices.

The rise in remote working, flexible working and care policies is an indication of changing employee expectations and societal needs and attitudes.

Operational Practices

Company paid sick leave down from 96%	92%
Maternity leave	88%
Paternity leave	88%
Private healthcare	85%
Remote working	84%
Flexible working	81%
Adoption leave	77%
Shared parental leave down from 85%	70%
Childcare, eldercare or other family care	34%
Career break (Sabbatical) arrangements	34%
Support for childcare e.g. nursery vouchers or a creche	15%

Conduct & Behaviour

Anti-bullying and harassment policy down from 100%	88%
Whistle-blowing policy	80%
Grievance policy/procedure	80%
Diversity & Inclusion policy up from 73%	80%
Anti-discrimination policy	80%
Equal opportunities policy	77%
Mental health and well-being	70%
Right to dignity at work	50%

Action

Dealing with harassment, bullying and dignity at work	86%
How to report discrimination, bullying and harassment	86%
Dealing with discrimination	82%
Organisational policy and legislation – diversity and inclusion	73%
Conscious and unconscious bias	64%
Challenging inappropriate behaviour	55%
Language, stereotypes and intercultural competence	50%
Leading managing and/or engaging with diverse groups	45%

New this year:

- Menopause Policy
- Gender Transition Guidelines
- Total Temporary Disability
- Sexual Harassment
- Terminology and Advocacy

Making an Impact

85%

Whilst communication is still important, organizations have shifted from a position of **saying** to **doing** with 85% now citing visible role model as the single most popular action to supporting inclusivity.

64% said it was everyone's responsibility to promote an inclusive environment where everyone feels welcome and valued

8 things organizations do to attract and retain talent and level the playing field:

Transparent and consistent criteria for evaluating candidates	75%
Clear and consistently applied criteria for reviews	71%
Inclusion of a statement around valuing diversity in job packs	71%
Reviews of job descriptions for visual or textual bias	62%
Training on bias/discrimination for those involved in hiring	58%
Diverse representation on interview panels	58%
Explicitly request diverse candidates when using search firms	37%
Third-party review of performance to ensure fairness	25%

Once hired top performing organizations reinforced inclusivity through senior leadership messages and information on employee resource groups and networks during the induction process.



The second significant shift is an increase in organizations monitoring to understand and evaluate impact and progress.

	2023	2024
Communicated an organisation-wide message on D&I	80%	71%
Communicated a strong message on gender equality	80%	57%
Had meetings with women's, minority, LGBT or other employee network or staff group	52%	52%
Reviewed/approved an DE&I strategy	60%	66%
Reviewed/approved equality monitoring reports and actions	44%	57%
Spoken at an INTERNAL events(s) about DE&I	64%	61%
Spoken at an EXTERNAL event(s) about DE&I	56%	52%
Been seen as a visible role model for women, LGBT, ethnic, disability or other minority group	68%	85%

Actions speak louder than words. Organizations now consider visible role models as the most important driver above communication. This needs to go hand in hand with monitoring to understand and evaluate impact and progress.

▲ Key Takeaway

Participant Scores

Pos.	Company Name	Score	2023
1	PENN Entertainment	86	-
2	Entain plc	84	5
3	International Game Technology, PLC	82	3
4	Aristocrat Technologies	77	1
5	Allwyn UK	75	-
6	Sports Information Services Ltd	71	7
7	Bally's Corporation	67	-
8	Betsson Group	62	2
9	Mass Gaming	59	-
10	UK Tote Group	57	-
11	-	55	3
12	-	52	-
13	-	49	-

14	-	43	-
15	-	40	-
16	-	39	-
17	-	36	10
=	-	36	-
19	-	35	-
=	-	35	-
20	-	29	-
21	-	26	-
22	-	18	9
23	-	16	-
24	-	15	-
25	-	13	-
26	-	11	-
27	-	2	-
28	-	1	-
29	-	0	-
=	-	0	-
=	-	0	-
=	-	0	-
=	-	0	-
=	-	0	-

Thank you

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