

All-Index[®] 2021/22

Annual Report

Contents

So you know where to find things.



3	Introduction	13	From Policy to Practice
3	Why 2020/2021?	13	Sign of the times
4	Global Trends	14	Shrinking Talent Pools
4	Generation Z	16	Fostering Belonging
5	The 'Great Resignation'	17	Training and Awareness
5	The Menopause	19	Advocacy and Visibility
6	COVID-Impact survey	20	Learning from Industry Leaders
6	Key Findings	23	Participants Scores
8	All-Index® 2021/22		
8	Participants		
9	Hybrid Working		
10	People		
10	Leadership & Global trends		
11	Great Resignation		
12	Trading & Tech		



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

All-In Diversity Project

Designed by Square in the Air.

Introduction

Welcome to the All-Index[®] Report 2021



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.

We have said from the outset that we believe that the betting and gambling industry can change, and this, our third report proves just that.

It also highlights two other things.

- The business case for diversity and inclusion – once again, those topping this year's leaderboard are also some of the best performing organizations in the world.
- The betting and gambling industry is a reflection of society, placing it in the unique position of being able to act as a barometer for emerging global trends and changes in society that are likely to impact the workplace.

Why 2020/2021?

COVID-19 put the world on pause and in doing so forced us to re-think our approach to life, resulting in some of the biggest changes in consumer, employee, and employer behaviours and attitudes in the last 50 years, and accelerated the shift towards digitisation, forcing organizations to make radical changes to the way in which they operate and engage with both consumers and employees.

Whilst the All-Index[®] is intended as an annual survey, conducting a bench-marking exercise during a period of such significant change and transition made no sense.

Instead we took the decision to conduct a pulse-check mid-pandemic, our COVID Impact survey in partnership with Facebook Gaming (now Meta) and a post-pandemic All-Index[®], allowing us to evaluate how COVID has changed the workplace.

Global Trends

All of these global trends are reflected in the results

Generation Z

Also known as 'post-millennials', 'snowflakes' and 'zoomers', and the first generation to fully justify the description 'digital native'.

This group was born around the turn of the century and is expected to account for around **75% of the global workforce by 2030.**

Not only is Gen Z the largest generational group the planet has ever seen, it is also the most ethnically and culturally diverse generation ever – something which is reflected in the core traits and attributes associated with this group.

Early indications suggest that their life decisions (as both consumers and employees) will be driven by how closely an organization's values, policies and practices align with theirs. For a generation that does not accept stereotypes and labels, but instead believes in celebrating difference and individuality, **diversity, equity and inclusion is an expectation** not an aspiration.



Photo Credit GiG – Celebrating the launch of “GiG is Proud” as a dedicated platform to celebrate and share all GiG DEI activities



Photo Credit Sky Betting & Gaming – SBG Kickstart 2021 cohort

Click below for further reading:

[Generation Z](#)

Global Trends

All of these global trends are reflected in the results



The 'Great Resignation'

Also referred to as the 'Big Quit' and 'Great Reshuffle', and considered to be as a direct result of COVID, the lockdown providing an opportunity for individuals to re-evaluate their personal and professional circumstances, and the result being a decision to make fundamental changes, to life, work, and career choices.

Research has suggested that the reasons for leaving vary from a proactive decision to change career and embrace entrepreneurship, to a more reactive response linked to the actions of employers and a sense of feeling unheard or under-valued.

This may be an over-simplification (there being any number of factors that result in an individual choosing to leave employment) however, add in the expectations of Gen Z and we have an emerging common theme that increasingly, individuals want to be visible, be heard, and feel valued. They want to be included and have a sense of belonging.

(The Great Resignation: How employers drove workers to quit – BBC Worklife).

The Menopause

Increasingly, one of the reasons cited for why women are leaving the workplace is the menopause.

Research published to coincide with World Menopause Day suggests that almost a **quarter** of women have left their job due to their symptoms.

Almost **20%** state that ill-health as a result of the menopause resulted in them being denied promotion or a pay rise, and a staggering **13%** that they had faced a disciplinary process as a result of it.

This is a worrying trend as this is the age group that has traditionally served as role models for those below, as well as the talent pool for senior and board positions, as a result any reduction in numbers is likely to have a negative impact on gender diversity in the workplace.

(<https://benenden.co.uk/menopause-hub/>)

Click below for further reading:

Generation Z

The 'Great Resignation'

The Menopause

COVID-Impact

Key Findings



- Over 85% > of participants identify as 'white'
- Blind spots at the top

In 2021 All-In Diversity Project joined forces with Facebook (Meta) Gaming to look at the impact of COVID on the global gaming industry.

The **first** key finding relates to demographics.

This is a global industry, as shown by the All-Index[®], yet just over **85%** of participants identified as 'white', with just under **10%** identifying as "other" or preferring not to say, followed by Asian (Far East) and Hispanic/Latin at around **3%**.

This lack of diversity is likely to have a negative impact on the industry if the key findings are an indication of a long-term trend.

The **second** key finding relates to blind spots.

Over **50%** of respondents identify as manager/supervisor or above.

LEADERS

12% of leaders thought women, non-binary, LGBTQ and younger people impacted most. **25%** thought older people had been impacted more than others.

MANAGERS

18% of managers thought women had been impacted most. **9%** thought older people had been impacted the most.

No leader/manager thought COVID had any impact on ethnic minorities or disabled groups

Mid-Level executives thought older people were impacted more than younger and disabled people

Junior/entry levels thought the biggest impact was on non-binary, LGBTQ, ethnic minorities and disabled people.

★ TAKEAWAY

The results show that there are blind-spots at the top. This not only helps explain the lack of diversity in the industry but has reputational and operational ramifications when considered in the context of Gen Z and diversity and the Great Resignation and employee inclusion and belonging.

COVID-Impact

Key Findings



- Gen Z have high level expectations as an employee *and* high level expectations of their employer

The **third** key finding relates to the **generation gap**. This is what participants said are their top 3 deciding factors when choosing a job.

LEADERS: Corporate Trends

- 1 • Flexibility & working from home
- 2 • Salary & Benefits
- 3 • Diverse & Inclusive workplace

MANAGERS: Personal Aims

- 1 • Job availability & location
- 2 • Flexibility & working from home
- 3 • Work life balance
 - Career progression

JUNIOR/ENTRY LEVEL: Values Driven

- 1 • Flexibility & working from home
- 2 • Career progression
- 3 • Work life balance
 - **Employer ethics**
 - **Diverse & Inclusive workplace**
 - **Social impact/making a difference**

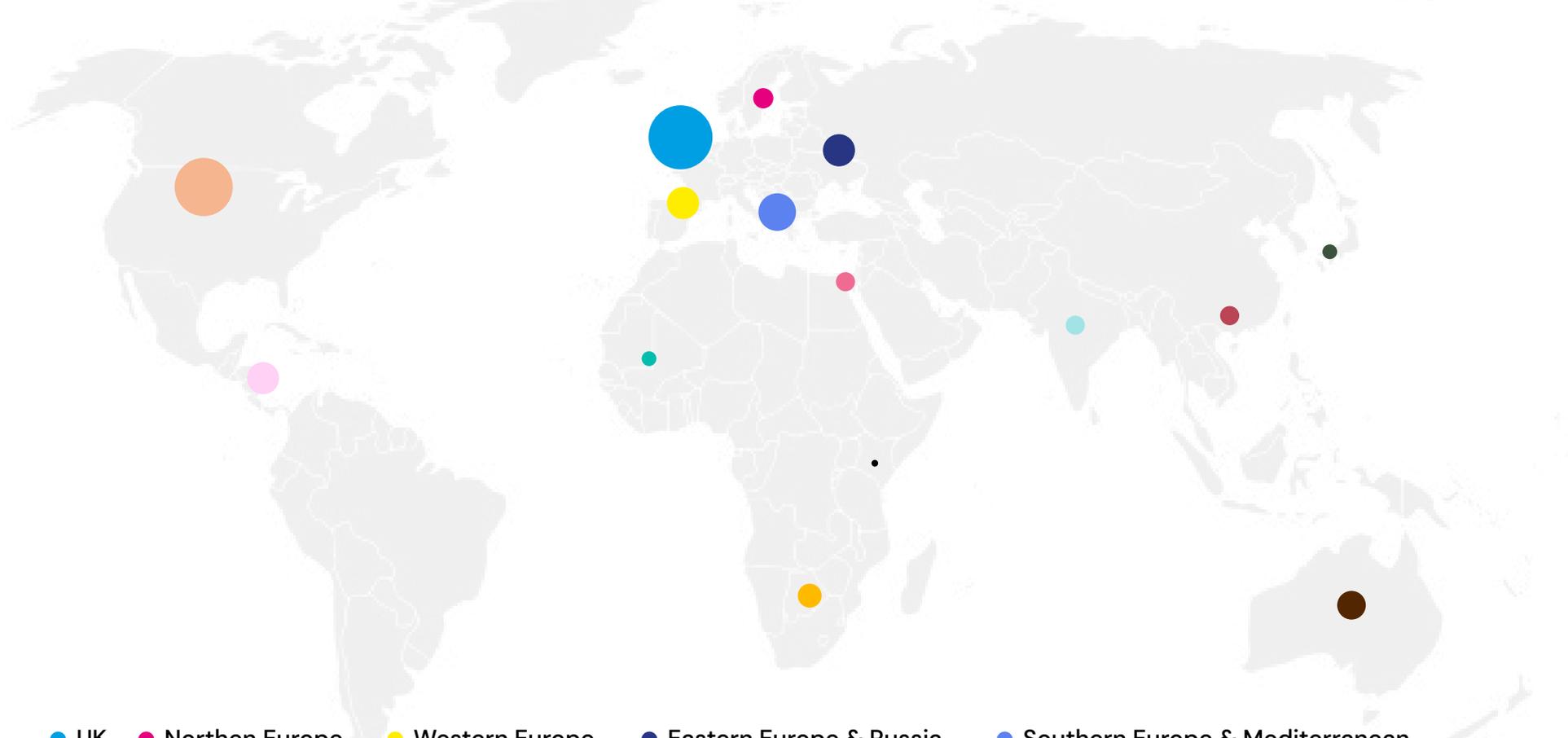
This is the clearest evidence yet of Generation Z in the workplace – their high level expectations as an employee and their expectations of their employer.

All-Index Participants

Looking at the participants taking part in the All-Index[®] 2020/21



All-Index 2020/21[®] saw a record number of organizations taking part.



- UK
- Northern Europe
- Western Europe
- Eastern Europe & Russia
- Southern Europe & Mediterranean
- Middle East & North Africa
- West Africa
- East Africa
- South Africa
- North America
- Australia & New Zealand
- Central/South America & Caribbean
- Indian Subcontinent & Sri Lanka
- China, Japan & Korea
- Asia Pacific

- 40 organizations across 16 jurisdictions.
- 31% were operators, 29% suppliers
- 41.5% identified as Large/PLC with over 250+ employees
- Over 140,000 employees in total

Product breakdown:

- Regulatory changes across the world, and US in particular, mean that sports-betting now sits alongside slots as the most popular product vertical at 75.76%, followed by table games at 66.67%.

We anticipate the gap widening in the future as customer demographics and attitudes to gaming and gambling continue to shift.

Hybrid Working

The new normal post pandemic



Over 70% of organizations indicated that they now offer hybrid (blend of office and remote) working

This year's participants include a mix of organizations, some of which operate physical premises e.g. land based casinos or sportsbooks who are not able to offer remote working to all employees.

Long term this could result in a two-tier system based upon those who can versus those who cannot work remotely which in turn raises new questions around opportunity, equality, equity and inclusion.

For example: could a role that supports remote working become seen as a step-up/aspirational; could organizations be required to find ways of ensuring that employees who were not able to access the benefits of remote working (e.g. reduction in travel expenses or better work-life balance due to not commuting as often) were compensated in other ways?

★ TAKEAWAY

Hybrid is becoming the new norm.

(blend of office and remote working)

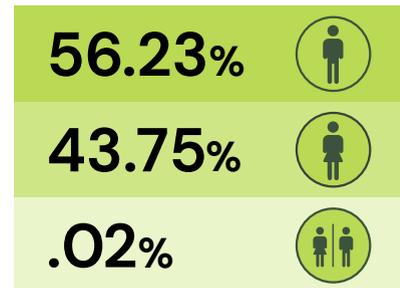
However organizations need to be careful that this does not become an 'us and them' situation or create new inequalities between those roles that support remote working and those that do not.

People

Looking at the leadership and global trends



● MALE ● FEMALE



We are closer than ever before to hitting 30% female representation at Executive Board level.

This year's All-Index[®] reported the biggest gap between male and female to date. What used to be close to 50:50 has now shifted to over **56%** male compared to **43%** female.

The number of individuals identifying as non-binary, whilst still very low, is now significant enough to register a measurable value.

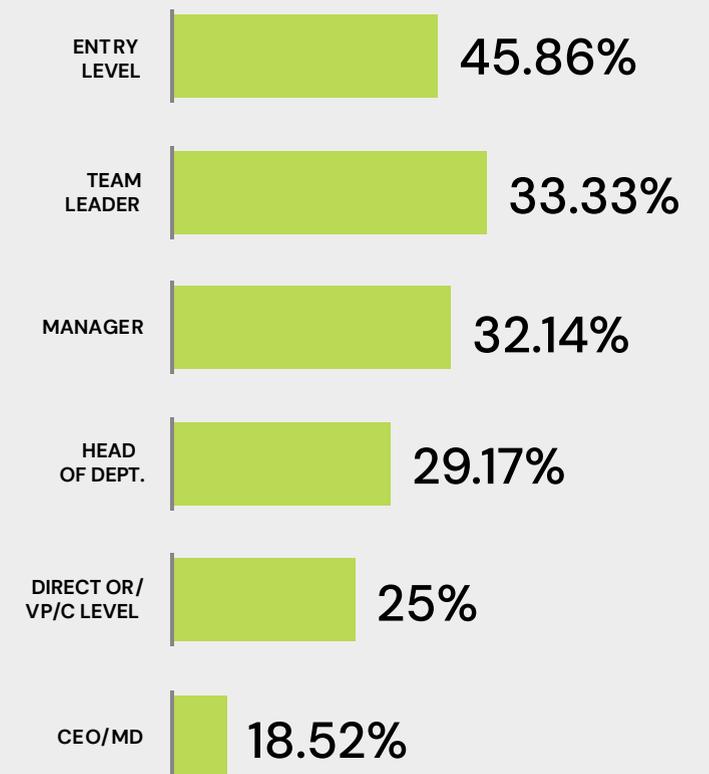
There are also a number of other global trends in relation to Gen Z and women leaving the workplace reflected in the latest All-Index[®] report.

Whilst there has been a drop in the number of women entering the industry in the period, the number of women at the top in Board positions has continued to rise. This is an almost **10%** increase (**9.5%**) in female board members across respondents - just short of the 30% mark .

If the All-Index[®] is a benchmark for the industry in the case of non-executive roles we have already surpassed this milestone, with females now occupying 32% of these positions.

This is in keeping with the US average of **30%** of all non-execs on the **S&P** being female, but falls significantly short of the UK average where women now occupy 51% of non-exec board roles.

% of Women by role/seniority



Great Resignation

Women resigning at higher rates than men



Women are at the forefront of the Great Resignation leaving their jobs at a faster rate than men

One in 3 women have considered downshifting their career or leaving the workforce entirely this year, McKinsey & Company and LeanIn.org's 2021 report found. This is down from last year's figure of 1 in 4.

- Menopausal women are the fastest growing demographic in the workforce
- The average age for a woman to go through menopause is 51. It can be earlier than this, naturally or due to surgery, or illness. And symptoms may start years before menopause, during the perimenopause phase
- According to the Faculty of Occupational Medicine (FOM), nearly 8 out of 10 of menopausal women are in work
- 3 out of 4 women experience symptoms, 1 in 4 could experience serious symptoms
- One in three of the workforce will soon be over 50

★ TAKEAWAY

To be able to attract the very best new talent, organizations must ensure that their values, ethics and workplace practices align with those of Gen Z.

★ TAKEAWAY

Women are leaving the workplace in unprecedented numbers for a number of reasons including, but not limited to, the Great Resignation, the menopause and post-COVID pivoting, and for this industry at least, the number of women coming in has dropped below 50%. The logical impact of this over time will be a lack of role models and mentors and a reduced pool of talent for senior executive and board roles.

Trading & Tech

Roles relating to finance, legal and compliance and hospitality

The majority of roles continue to be balanced with a less than 5% variable in numbers between male and female.

Female domination:

HR continues to be dominated by women with 70% of employees working in this area identified as female.

Male domination:

Whilst both trading and tech roles continue to be dominated by males the latest results suggest that the industry's efforts towards greater gender balance in these areas is starting to have an impact.

Trading

There has been a significant increase in the number of women linked to 'trading' roles with 290 out of 1804 traders identified as non-male. This is a total of 16% – a 7% increase on the 9% reported in the last All-Index®.

Tech

The latest figures show that over one fifth of tech employees working in the industry are women. This year's report has registered those identifying as female occupy 2627 out of 11920 (22%).

This could be for a number of reasons including international trends which sit outside of, but have an impact on the industry. Rise in women's sport and female sports-bettors resulting in sportsbook operators to re-aligning their existing sports and trading teams to address the challenges of new betting markets and a new generation of sport-bettors.

The last Nielsen report suggested that 84% of sports fans (51% male / 49% female) are interested in watching women's sports. FIFA's own figures indicate that the last Women's World Cup in 2019 saw audience figures exceed 1 billion, with just over 82million watching the final (compared with around 120million for Superbowl 2022). Research conducted by a number of agencies including the AGA, Hot Paper Lantern and GWS suggests the number of female sports-bettors in the US to be anywhere between 33 to over 50%.

★ TAKEAWAY

Women's sport is growing at a faster rate than men's – cue an increase in female sports betting markets and female sports-bettors.

Based on current trends it is highly likely that the Women's World Cup 2023 will be a bigger event for sportsbooks than Superbowl and that betting on women's sports and female sports-bettors will be the new normal.

From Policy to Practice

Sign of the times

The impact of COVID has seen organizations having to take a pragmatic approach to their policies and practices.

The number of organizations offering Company paid sick leave has dropped from **95.83%** (2019) to **84.38%**, whilst the number of organizations with a policy on flexible working has increased from **75%** to **84.38%**.

The number of organizations with a policy on carers and support with childcare have also dropped from **58%** and **41%**, pre-COVID, to **34%** and **18%**.

Other noticeable shifts seem to be a reflection of changing views and attitudes in society, with **80%** of organizations confirming they now apply parental policies to same sex couples.

PAID SICK LEAVE



FLEXIBLE WORKING



CHILDCARE SUPPORT



PATERNITY LEAVE



MATERNITY LEAVE



SHARED LEAVE



★ TAKEAWAY

Organizations must understand the need to ensure that their internal people policies remain relevant and reflective of changing attitudes and practices in society to be able to attract and retain employees.

Whilst there is a positive approach to parenting, a failure to have policies that support carers is likely to impact on the numbers of women entering and having to leave the workplace, as well as making organizations less attractive to talent from all demographic groups.

Shrinking Talent Pools

Looking at recruitment methods across the industry

The most popular recruitment method for both men and women continues to be internal promotion and development, allowing organizations the flexibility to implement career development and succession plans that support their strategic goals.

This strategy is based upon recruiting and then developing talent potential and works well provided an organization is able to attract candidates who can then be developed.

Unfortunately this may no longer be the case for this industry as the table shows.

2021	Female	Male	Total	% Female
Entry	30,500	36,000	66,500	45.86%
Supervisor	6000	12000	18000	33.33%
Manager	1800	3800	5600	32.14%
Head of	700	1700	2400	29.17%
Director	300	900	1200	25%
MD/CEO	5	22	27	18.52%

2019	Female	Male	Total	% Female
Entry	38,257	36,000	79,273	48.26%
Supervisor	454	867	1321	34.37%
Manager	3312	5145	8457	39.16%
Head of	394	1134	1528	25.79%
Director	110	367	477	23.06%
MD/CEO	4	22	26	15.38%



Photo Credit Light & Wonder
- International Women's Day #breakthebias

Whilst the number of females at senior levels have increased, the numbers of females entering or at lower levels has decreased ([click to see Global Trends - Great Resignation](#)).

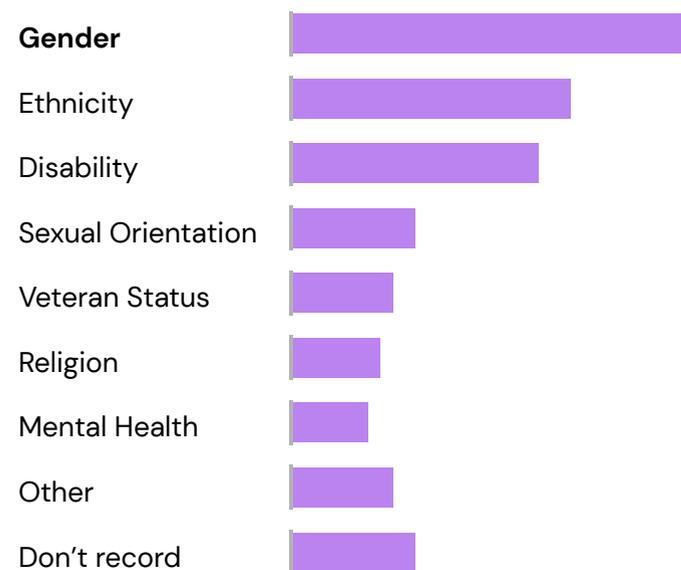
The biggest drop is in the key area of manager - the area in the middle that provides role models for those below and serves as the talent pool for the roles above.

Shrinking Talent Pools

Looking at recruitment methods across the industry



Given that one of the reasons for the Great Resignation is a lack of feeling valued, measuring those attributes which engender a sense of value and belonging become even more important.



Of the organizations that participated:

- 40% collect gender pay data
- Only 1 participant collects ethnicity pay gap data
- 47% collect demographic data on ethnicity but only 1 measures this against pay

The reasons for why 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.

This is particularly relevant within the context of more and more employees making use of employer review sites such as Glassdoor to verify and validate a would-be employer's credentials, and stated brand values.

★ TAKEAWAY

Gen Z are not looking for more pay, but they are looking for equal pay.

Early research into Gen Z suggests that over 50% would be willing to take a pay-cut to work for an organization that mirrors their values.

Organizations that cannot measure pay gaps can avoid them by ensuring that each and every role has a job description with fixed salary and benefits that are applied to all candidates at all times.

Organizations that are not able to measure demographics should look at other ways of evaluating levels of diversity such as through observation or employee surveys.

Fostering Belonging

Looking at recruitment methods across the industry

There appears to have been a shift in focus since the last All-Index from policy statements to practical measures as organizations start to understand that just having a workplace policy will not remove prejudice in the workplace.



Photo Credit Sky Betting & Gaming – The International Mixed Ability Sports Tournament in Cork

Whilst the number of organizations with a high-level policy stating their commitment to equality has gone up the real step change is in the policies that support practices to help identify and address issues.

Those offering an anti-bullying or grievance policy have dropped from **91% and 95% (2019) to 87% and 75%**.

Similarly, those offering a policy on mental health and well-being has dropped from **60% (2019) to 40%**, and those with a D&I policy from **80% (2019) to 56%**.

By itself this could 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.

Policies recorded:

- ↓ Anti-bullying and harassment **87%**
- ↑ Whistle-blowing **81%**
- ↑ Equal opportunities **78%**
- ↑ Anti-discrimination **78%**
- ↓ Greivance procedure **75%**
- ↓ Diversity and inclusion **56%**
- ↓ Mental health and well-being **40%**
- ↑ Right to dignity at work **34%**
- ↑ Other **16%**

● In Favour ● Out of Favour

Training and Awareness

Looking at recruitment methods across the industry



The number of organizations offering 'bias training' has dipped suggesting that organizations now accept that this carries very little value unless it is part of a wider set of measures, tools and practices designed to help raise awareness and provide support.

This shift towards more training and awareness for all, may also explain the dip in traditional employee support/group activities.

BIASED TRAINING



OTHER TRAINING



DEALING WITH DISCRIMINATION



REPORT DISCRIMINATION



STEREOTYPING/BEHAVIOUR



DEALING WITH BULLYING



Photo Credit Penn National Gaming – Beats and Eats event

The latest report (2020/21) in comparison to 2019 has seen organizations reduce support activities for some under-represented groups and increase it for others:

- ↓ Women down 12%
- ↓ Mental Health down 30%
- ↑ Minority Ethnic Groups up 33%
- ↑ Disabilities up 22%

1 organization provides LGBTQ+ terminology and advocacy training for employees

Training and Awareness

Looking at recruitment methods across the industry



Photo Credit IGT - DIG Volunteerism: Diversity and inclusion group members are encouraged to take a Day Off for Volunteerism

1. Policies developing over time

Natural progression and evolution of starting with a policy that is then developed over time into a cohesive framework of training, awareness and operating practices.

2. Becoming more diverse

As organizations start to become more diverse and inclusive the numbers of under-represented groups and need to provide additional support falls away.

3. Increased intersectionality

Where an individual identifies with more than one group e.g. a minority ethnic woman, or sight-impaired individual who identifies as gay, makes it easier to focus on inclusivity for all rather than supporting on smaller groups.

★ TAKEAWAY

Having a policy is not enough – without effective practices it is just a statement of intent.

An effective policy needs to be supported with a framework of training and awareness, and operating practices and procedures that recognise diversity and foster inclusivity and belonging.

Advocacy and Visibility

Looking at the participants taking part in the All-Index® 2021/22

When it comes to advocating and promoting DEI goals, businesses have realized the value to being seen and heard. Almost all businesses accept that senior leaders' representation matters.

The most popular methods of promoting an organization's commitment to DEI remain: an organization-wide message together with an internal event promoting DEI (73%), however a big step change is the increase in organizations doing the following:

Having an active strategy **up 10%**



Monitoring reports/actions **up 12%**



Being present at external events **up 20%**



Having visible role models **up 10%**



Photo Credit Penn National Gaming
- HBCU Endowment to Norfolk State

The majority of organizations do not yet have an active policy of engaging with under-represented suppliers however, 3 confirmed that they do, and 6 indicated that they are working on it (either formally or informally).

We recognise that each organization is different and that like diversity itself 'one solution or initiative does not fit all'. Whilst the principles are the same the practices will differ.

Learning from Industry Leaders

Celebrating good initiatives from participants



In this final section we'd like to share just some of the incredibly effective (yet often very simple) initiatives implemented by those who participated in the All-Index[®] starting with the organization sitting at the top of the leaderboard Sky Betting & Gaming.



“Inclusive Design Accessibility is often the forgotten characteristic of inclusion...”

When building a new Head Office in Leeds, we knew this was a brilliant opportunity to ensure our physical working environment put accessibility and inclusion first.

As well as gaining feedback from our employees in focus groups, we engaged with the **Centre for Accessible Environments** to audit our office space to ensure we were catering for the needs of our current and future employees. Our new office space features a faith room, mothering room, medical room, hearing loops, gender neutral toilets, 20% sit stand desks and quiet zones on every floor.

As much as our physical environment is important, it's instrumental the way we work is accessible too. All of our company-wide webinars utilise subtitles as well as our e-learning and video content and our Brand & Creative team follow accessibility guidelines when creating employee content to consider visual impairments and neurodiversity needs.”

Learning from Industry Leaders

Celebrating good initiatives from participants



“At Kindred, we recognise the importance of having a diverse workforce and celebrating different backgrounds...”

The **Culture Calendar** has allowed us to highlight celebrations and mark dates that are important to our colleagues and friends such as Diwali, Pride, International Women’s Day, Black History Month, Mental Health Week and Disability History Month.

The Culture Calendar has continued to grow...requests have come from employees wishing to mark events that are important to them.... We have had employees from all levels – including our executive team – share their very personal stories to raise awareness, remove stigma and ultimately help each other.”



“Because of WIN with IGT’s innovation and influence, IGT has introduced a range of women-centric programs, resources, and opportunities including shipping breastmilk while traveling for business as a fully approved expense.

In 2021, under a grassroots effort by the members of WIN, IGT published a Parents’ Guide, a comprehensive roadmap for current and future parents.

The guide provides navigation on the processes, policies, and steps involved with childbirth, adoption, gestational carriers, surrogacy, foster parenting, fertility, and more. The guide also details the expanded Bereavement Leave that includes all parents involved in the loss of a child or pregnancy, including all genders and partnership statuses.”

Learning from Industry Leaders

Celebrating good initiatives from participants



“Penn National Gaming has focused on our Team Members, communities, and guests...”

We continued our focus on the importance of education by promoting equity in post-secondary education for the dependents of our Team Members. As an organization, we committed \$1 million towards our **Diversity Scholarship Program**.

In 2021, we awarded 58 students \$1million in scholarships and are eager to see the growth of the program in 2022. In addition, we dedicated more than \$4 million to fund a new Science, Technology, Engineering and Mathematics Scholarship Program in partnership with Historically Black Colleges and Universities in states in which we operate.

As an organization diversity and inclusion is a vast reaching focus, and during this trying time we knew we wanted to help promote the importance of veterans and First Responders within our communities and properties. We developed **Hiring Our Heroes** to help service members transition by providing them with a 12-week fellowship at our properties. In addition, we contributed to the Jarett Yoder Foundation to aid in restoring their shelter for homeless veterans, and we are part of the **Partnership for Youth Success** assisting soldiers to gain employment when they transition to civilians.

Finally, we launched the myheroes program, which is focused on recognizing our Team Members who served and providing a recognition program for guests and first responders.”



“One of our developers takes a day a month, paid for by the company, to spend time encouraging girls to learn to code.”

G Games actively works to recruit a higher proportion of female developers and work with several universities including the University of Hertford in the UK and Bilbao in Spain.

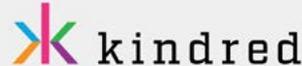
We also deliberately look to recruit people without a traditional qualification – making sure that a degree is not a requirement for people to work with us.

As part of supporting those who feel the need to develop formal qualifications, however, we offer people paid for time to study – several members of staff have taken on MAs, for example.”

Participants Scores

Full leaderboard available online using the button on the right



1		85
2		79
3		78
4	 	73

"At Sky Betting and Gaming, better is just the beginning.

Inclusion work is never done.

As an organisation we will always experience the symptoms of society's wider challenges however with a strong strategy, laid on authentic values demonstrated by our Leadership Team, we're making the changes in our organisation that we'd want to see in the wider world."

The All-Index[®] scores companies on their answers on a scale of 0-100. Some questions are weighted while others do not earn a score but rather provide context for further analysis.

The total points achieved in the 2021 All-Index[®] ranged from a low of 0 to a high of 85.

12 companies scored 50 points or above.

Click below for further reading:

[2021/22 Leaderboard](#)

All-Index[®] 2021/22

Annual Report

For further information contact info@allindiversityproject.com

Full participant scorings available [here](#)