

Engagement Survey Results 2021

Emerging Leaders in iGaming & Gambling



Berwick Partners
an Odgers Berndtson company

Our survey and participants

In March 2021, Berwick Partners surveyed 250 emerging leaders in the iGaming and Gambling sector to understand how effective they perceive their current employer to be, in three key areas:

1. Internal Communications
2. Inclusivity
3. Coaching & Development

Effective communication, inclusion and people development strategies are critical in creating and maintaining employee engagement which, in turn, promotes better performance, employee retention and well-being.

The emerging leaders surveyed are all earning a base salary of between £60,000 and £150,000, and sit within one of the following functions:

1. Commercial/Sales
2. Marketing
3. Product
4. Finance
5. HR
6. IT/Technology
7. Operations

There were a series of statements provided, to which respondents had five responses available: Strongly Agree, Agree, Unsure/Neutral, Disagree, Strong Disagree.

Results have been analysed in their totality, as well as in relation to function and salary level.

Executive summary

Respondents completed the survey in March 2021, one year into the COVID-19 pandemic. It would be remiss not to assume that this has had a significant impact on the results; however the nature of this impact differs. As shown in the diagram below, satisfaction-levels relating to coaching & development were the lowest of all three parts of the survey. Both inclusivity and internal communications scored relatively highly in comparison.

Throughout the course of the last year, we have seen senior leadership teams increase their focus on, and commitment to, robust and effective diversity & inclusion strategies. We have also seen new and innovative communication methods introduced across businesses, in order to maintain engagement during a period of remote-working. The increased focus on both D&I and remote-communications has undoubtedly had a positive impact on the opinions collected in the survey. However, for those businesses with a partly offline, land-based business model, the last year has revolved around crisis-management, restructuring and other cost-saving initiatives. This has had negative impact on the level of coaching and development investment and thus on the opinions collected in the survey.

It is also important to note the part that salary has played in the results. Across all three parts of the survey, opinions and viewpoints were more negative amongst respondents earning between £60,000 and £100,000. This suggests lower levels of engagement across that community and is problematic with regards to effective succession planning, as retention rates could be negatively impacted.

Berwick Partners look forward to carrying out the Pulse Survey of emerging leaders in the gambling sector again in 2022. To discuss anything in this report, please contact Kathryn Gill. Contact details can be found on page 15.



| Part one:
Coaching
& Development



Overview: Coaching & Development

Overall, the general opinion of emerging leaders on the coaching & development opportunities available to them is relatively negative. This is exacerbated by salary level; respondents earning a lower base-salary appear particularly disengaged regarding their coaching and development.



What you need to know:

- Those working within Product roles are most satisfied with the coaching & development opportunities available to them, with those working in HR following closely.
- Those working in Operations are least satisfied with the coaching & development opportunities available to them.
- Positively, **74%** of all respondents feel they have the opportunity to create cross-functional project teams which is a proven way of increasing engagement and broadening skillsets, as well as allowing the business to benefit from innovative ideas created through diversity of thought.
- There have been very few HR-led development conversations over the course of the last six months.
- In addition, the majority of respondents feel there has also been a lack of development conversations with their line manager.

“My company place a high priority on developing people at my level”

- 50% of those with a salary of £130k-150k agreed or strongly agreed with this.
- 33% of those with a salary of £100k-130k agreed or strongly agreed with this.
- 15% of those with a salary of £80-100k agreed or strongly agreed with this.
- 10% of those with a salary of £60-80k agreed or strongly agreed with this.

This infers a direct correlation between salary and a respondent's opinion on whether their company prioritises their development. It is important to note that these results are poor across all salary levels and, whilst the pandemic may have influenced this, it is indicative of current sentiment and will not correct itself without positive action.

The company proactively look to promote to the board from within”

- 33% of all respondents agree, 31% are unsure and 36% disagreed.
- 18% of those earning a salary between £60,000 and £100,000 agreed.
- Whereas 60% of those earning a salary between £130,000 and £150,000 agreed.

It's important to highlight that this question is not asking whether internal board promotions are made, but if respondents feel internal candidates are fairly considered. It can be assumed that those earning between £130,000 and £150,000 are closer to board promotion and therefore have a very accurate view.

However, perception of emerging leaders earning below £130,000 is of critical importance; if they don't believe their company proactively looks to promote to the board from within, there is a risk they will move elsewhere in search of longer-term progression.

“I have the opportunity to create cross-functional project teams”

- 74% of all respondents agreed or strongly agreed with this.



“I am supported by my line manager and they are interested in my development”

- 51% of all respondents agree, 38% are unsure and 11% disagreed.
- 30% of those earning a salary between £60,000 and £100,000 agreed.

“My manager has spoken with me about my career growth plans in the last 6 months”

- 27% of those earning a salary between £60,000 and £100,000 agreed.
- 50% of those earning a salary between £100,000 and £130,000 agreed.
- 60% of those earning a salary between £130,000 and £150,000 agreed.

“HR has spoken with me about my career growth plans in the last 6 months”

- 20% of all respondents agree
- 21% are unsure
- 59% disagreed.



| Part two:
Internal
Communications



Overview: Internal Communications



Overall, the emerging leaders surveyed feel positive about the level and quality of internal communications they receive from their business.

What you need to know:

- As per coaching & development, there is a correlation between level of positivity and satisfaction, with salary level; respondents earning a lower base-salary feel slightly less positive about the Internal Communications at their business.
- Respondents of all salary levels feel that they are informed of company-wide changes quickly and effectively; something many cited as being extremely important to them.
- As mentioned, the most concerning part of the Internal Communications results is that only **30%** of those earning between £60,000 and £100,000 feel that the company vision is translated into strategies that are motivating to them, or that they understand their role in achieving it. This suggests that 70% of high-potential individuals in the sector, are unclear on their purpose and are lacking motivation; something that will have a detrimental effect on engagement, retention and succession planning.
- According to the survey results, the HR function is least satisfied with the internal communications they receive from their business.
- And those working in Operations are most satisfied with the internal communications they receive from their business. A number of respondents specifically mentioned that they felt their business had always 'gone the extra mile' when it came to communicating with them, citing that this is to negate the risks that come with the remote-nature of their role i.e. those working

“The board communicates a clear vision of the company’s future success to me”

- 69% of all respondents agree.
- 45% of those earning a salary between £60,000 and £100,000 agreed.
- 65% of those earning a salary between £100,000 and £130,000 agreed.
- 80% of those earning a salary between £130,000 and £150,000 agreed.

“The vision is translated into strategies that are motivating to me and I understand my role in achieving it”

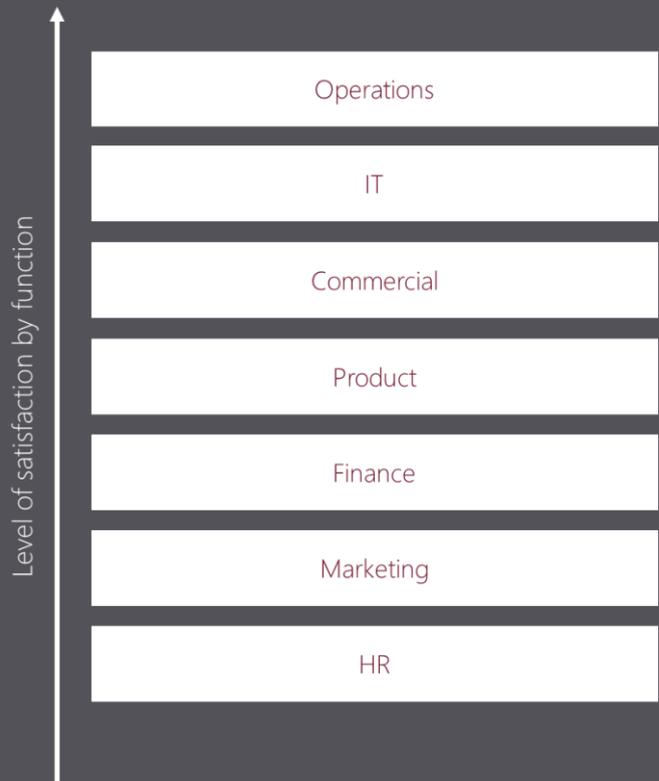
- 68% of all respondents agreed, with 3% of all respondents disagreeing and 29% being unsure.
- 30% of those earning a salary between £60,000 and £100,000 agreed.

“I am informed of company-wide changes quickly and effectively”

- 79% of all respondents agree, with this increasing to 88% amongst respondents earning a salary between £130,000 and £150,000.

“I have an input into the company strategy in some shape or form”

- 77% of all respondents agree.
- This increases from 44% of those earning below £100,000 to 80% of those earning between £130,000 and £150,000.



| Part three: Inclusivity



Overview: Inclusivity

Overall, the general opinion of emerging leaders on the levels of inclusivity within their business is relatively positive. However, this was largely dependant on salary; those earning lower base salaries feel considerably less positive.

What you need to know:

- **35%** of those earning between £60,000 and £100,000 feel that all people have the opportunity to succeed in their business. It is important to note that this does not necessarily reflect how they feel about their own opportunities to succeed, but their perception of the opportunities available to all.
- In addition, **45%** of this cohort do not believe their board is prepared to effectively manage a culturally diverse workforce and given that CEO led/backed D&I initiatives are the most effective, there is an opportunity to increase inclusivity by rolling out such initiatives, from 'the top'.
- According to the survey results, those in Commercial roles are most satisfied with the levels of inclusivity at their business.
- And those working in Marketing and HR are least satisfied with the levels of inclusivity at their business.



“All people have the opportunity to succeed here”

- 77% of all respondents agree however, only 35% of those earning a salary between £60,000 and £100,000 agree.

“I feel I belong here”

- 74% of respondents earning a salary above £100,000 agree.
- 54% of respondents earning a salary below £100,000 agree.

“Our board is prepared to effectively manage a culturally diverse workforce”

- 67% of all respondents agree, 15% are unsure and 18% disagree.
- 45% of those earning below £100,000 disagree.

“The senior leadership team value diversity of thought and encourage everyone to share their opinions”

- 35% of those earning a salary between £60,000 and £100,000 agree or strongly agree.
- 74% of those earning a salary above £100,000 agree or strongly agree.

“Everyone’s opinions are listened to and actioned when appropriate”

- 20% of all respondents disagree; 1 in 5 people feeling ‘unheard’.
- 45% of those earning below £100,000 agree
- 80% of those earning above £130,000 agree.



About Us

We find leaders who will help to transform your business

Berwick Partners is an agile, proactive executive search and recruitment firm, with offices throughout the UK, as well as in Europe, the US and Asia Pacific. We are part of the Odgers Berndtson Group.

At Berwick Partners, we are experts in handling tough assignments, identifying those who can bring genuine competitive advantage to our clients.

Whilst Odgers Berndtson focus on appointing C-Suite and NED roles, our specialism lies within appointing at emerging leadership level; high performers who are currently operating in a management capacity but have not yet progressed to Executive Board level. This is our sole focus. We understand what is required of talent at this level and have worked with countless clients on building this 'layer' within their business

We have experienced sector and function specialists

We have deep sector and function knowledge across industries and regional economies. Our Consultants use this unique insight to help you find senior leaders with the right blend of skills, experience and cultural fit to drive your organisation forward.

We identify the best talent

Working from our offices throughout the UK, as well as in Europe, the US and Asia Pacific, Berwick Partners provides exceptional coverage. Our rigorous approach to search and assessment ensures that we identify exceptional talent, and persuade the best candidates to consider your opportunity.

We find leaders who will help to transform your business

We are regularly mandated on the 'hard to fill' assignments where there is a real need to identify key talent to support the sector in its transformation. A business is only as good as its employees and in a highly competitive environment, hiring and retaining top talent is a vital role in which we excel.

We lead with our insights

We are uniquely placed to understand trends and insights from across a diverse range of sectors to help you stay competitive. We customise our solutions to meet your needs and help you be prepared for the future.

Global Gaming Practice

Whilst our Practice expertise lies in Gaming, our company-wide expertise spans across broader technology and retail sectors, allowing for innovative thinking when it comes to finding leaders who will help transform your business.

Our services:

- Search
- Market mapping and benchmarking
- Professional assessment
- Project & volume recruitment

Our Team



Kathryn Gill

Consultant

Please contact Kathryn to discuss this report.

Kathryn is a Consultant in our Global Gaming Practice, within Berwick Partners. Working from the UK, she specialises in appointing emerging and senior leaders in the sector. Kathryn is passionate about diversity of thought and solving complex talent challenges through cross-pollination of industries where suitable.

T: 0161 498 3416 M: +44 7817 137 545

E: kathryn.gill@berwickpartners.co.uk



Andrew Bulloss

Partner

Andrew is a Partner and the practice head within Odgers Berndtson responsible for promoting our firm's global capabilities within these markets internationally. He specialises in executive search for organisations recruiting directors, senior executive, C-level and non-executive directors in the international gaming and gambling industries.

T: 020 7529 3953 M: +44 7793 529 580

E: andrew.bulloss@odgersberndtson.com

UK Offices

England

London
20 Cannon Street
London EC4M 6XD
0207 529 6340

Birmingham
9 Brindleyplace
Birmingham B1 2HS
0121 654 5955

Manchester
82 King Street
Manchester M2 4WQ
0161 498 3420

Leeds
10 South Parade
Leeds LS1 5QS
0113 386 8540

International Offices

Amsterdam

Atlanta

Chicago

Dallas

Dubai

New York

Singapore

Washington DC