



Levelling Up

Impact Report



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Foreword

Despite decades of promises from government, there are still too many places across the country where there are huge gaps in opportunity, where your background and where you are from dictate how well you do in life.

There's no doubt that the issue of social mobility and how to tackle entrenched geographical disparities is complex. There is no one-size-fits-all solution. Policy experts, businesses and local leaders have grappled with it for decades, with limited success. The pandemic highlighted the urgency of the problem – the need to deliver meaningful solutions for those parts of the country which have been left behind and which, as a result, were often the hardest hit.

Some organisations are already working hard to ensure that opportunity is accessible to everyone, particularly those without the privilege and connections that can still make it easier to succeed. The Purpose Coalition is working with many of them – businesses, universities, local authorities and NHS Trusts – to ensure that they make a positive impact on their colleagues, their customers and the communities they serve, particularly as we recover from the effects of Covid.

The Betting & Gaming Council (BGC), now partnering with the Coalition, is already playing a key part in levelling up. The countrywide geographic spread of its members, their presence on most of our

local high streets and the integral links the sector has with the sporting events that are so ingrained in our national life, means that it has the capacity to make a real difference in delivering equality of opportunity.

Betting and gaming companies make a significant economic contribution, not only nationally but regionally, often sustaining well-paid skilled jobs in some of our most disadvantaged areas. The retention of successful companies who choose to locate in the UK means that those jobs have not been lost to overseas markets even as those companies expand across the globe. Crucially, they are leaders in the high tech and digital sectors, helping the UK workforce develop the cutting edge skills base we will need to compete as technological transformation accelerates further in years ahead. They are creating the foundation for high-tech clusters in towns and cities which have often been overlooked by other inward investment projects, like Leeds and Stoke-on-Trent, where Flutter and Bet365 have their headquarters.

Betting and gaming companies stimulate our national and local economies. Casinos attract tourists and visitors who go on to spend substantial amounts in other

venues, particularly in the hospitality sector. Local betting offices generate business and encourage spending in the high street, bringing people into the heart of local towns.

BGC members also play an important social role in the communities they serve, with employees themselves often directly involved with partner charities and other organisations in a wide range of activities to support the people who live there, particularly the most vulnerable.

The Purpose Coalition is proud to be working with the BGC as a group of companies who are taking a proactive and responsible approach to its environment, social and governance (ESG) responsibilities. Contrary to the impression given by those who would radically tighten gambling laws in the UK, BGC members are generally at the forefront of the debate about how to increase protections in an industry that has rapidly evolved with the emergence of new technologies. They are championing an approach which seeks to be responsible both to vulnerable customers who need more protection, but also to the communities and sports who

are sustained by the economic contribution and investment the sector brings.

This report considers the impact that BGC members are making on levelling up in the context of the 14 Levelling Up Goals developed by the Purpose Coalition. These provide a shared framework by which organisations can measure and assess their activities, at different life stages and in key areas.

The BGC is showing real leadership on levelling up, evaluating the contribution of its member companies with a mission to boost their positive impact further.

The example its members set sustaining high tech jobs and the significant tax contribution they make to many local areas is driving levelling up across the country. A key decision point for the future of betting and gaming laws in the UK is fast approaching. The Government's level of success in introducing necessary new regulations to tackle problem gambling without damaging the vital economic and cultural contribution made by BGC companies will rightly be seen as a test of ministers' commitment to level up the country.



Lord Walney
Chair of the Purpose Business Coalition, Former MP for Barrow & Furness

Foreword

The Betting and Gaming Council was founded to bring the regulated industry together, to raise standards and drive big changes, but also to help the industry become more outward looking and proud of the contribution we make to every corner of the U.K.



Michael Dugher
Betting and Gaming
Council CEO



We want to build a world class industry that is better understood, respected, responsible and a fully engaged member of the communities in which we operate - with people at the core of everything we do.

That's why we are proud to work with the Purpose Coalition on the Levelling Up Goals. We are fortunate to champion diverse members, big and small, from global companies to family businesses, across a range of sectors.

This report tells the story of a great British business success story. Here in the UK our members have pioneered the world's largest betting and gaming companies which are at the forefront of entertainment and technology development.

But we are also ambitious for the future. We are committed to supporting U.K. plc for the long term, and you cannot do that until you have measured your progress and identified where you can go further. This report helps us to do that.

Betting and gaming is already a hugely popular leisure activity in Britain. Some 22.5 million adults in the UK, from every conceivable background, each month play the lottery, enjoy a game of bingo or a day at the races, play casino games or have a bet on football and other sports. In the year before the pandemic hit the economy, the regulated betting and gaming industry supported 119,000 jobs, generated £4.5bn in tax and contributed £7.7bn to the economy. Ministers shouldn't do anything that puts any of this at risk in the future.

It's an industry which provides a lifeline for great British sport - £350m into horse racing, £40m into the English Football League and £12.5m into snooker, darts and rugby league.

And much of this incredible work goes on outside of London.

Nearly two thirds of jobs are based outside the capital with nearly 20,000 in the West Midlands alone. Other high employment areas include Yorkshire and Humber, where over 10,000 people are employed, and in the North West and North East, where a combined 16,000 people are employed.

And our members are investing in those workforces while developing bold plans for the future. Between now and 2025, our sector is on track to create a further 15,000 tech jobs, underlining the genuine ambition to deliver opportunity and prosperity wherever our members are based. This comes alongside a pledge to create a total of 5,000 apprenticeships for young people looking to work in the industry.

Our members are supporting Britain's hard-pressed high streets through modern betting shops and much-loved bingo halls. We're supporting the UK's hospitality, tourism and leisure industry through our casinos. And we are a major component of world leading British tech, where our members have founded tech powerhouses in places like Stoke and Leeds.

All of these ventures provide a multitude of opportunities to achieve high skilled, well-paid jobs in retail, hospitality and tech. But one thing is common to every role: everyone in our industry is committed to championing safer gambling. Problem gambling rates in the U.K. are low by international comparisons and we are encouraged by the latest figures from the independent regulator, the Gambling Commission, which found rates of problem gambling have fallen to 0.2 per cent, a drop from 0.6 per cent 18 months ago. There's always more that we can do, but that positive trend is due, in no small part, to the huge efforts of countless staff who are trained to spot concerns and intervene in real time.

We all know that the Covid pandemic has hit our economy for six. The betting and gaming industry is determined to play our part in helping Britain build back better. And the Government's levelling up agenda is central to that. We know talent is everywhere, but sadly opportunity is not. Wasting talent is not just a crying shame for those individuals, it also disadvantages businesses if they miss out on the best.

The Purpose Coalition has given the BGC a framework to help further deliver meaningful and measurable progress,

We are excited to play our part in Levelling Up equality of opportunity, investment and skills - across the nation on behalf of our members and their customers.

Executive Summary

Social mobility has remained stagnant in the UK for years and it is still too often the case that your background and where you are from dictate how well you do in life. The pandemic highlighted how many of these existing inequalities have become entrenched, especially in the most deprived parts of the country.

Tackling those inequalities requires businesses to work together to close the gaps otherwise too many people cannot access the opportunities that will enable them to achieve their true potential.

The Betting and Gaming Council has developed a Levelling Up Impact Report which sets out how its member businesses are participating in the levelling up agenda and how it is having a positive social impact on its employees, its customers and the communities they serve.

This is mapped against the framework of 14 Levelling Up Goals; and while there is a clear social impact demonstrated across many of the Goals, its key achievements are focused on the following:



Goal 3
Positive destinations post 16+



Goal 5
Open recruitment



Goal 8
Good health and wellbeing



Goal 13
Harnessing the energy transition



Goal 14
Achieve equality through diversity and inclusion

Key achievements:

Economic contribution - Goals 3 & 5

In the year before the pandemic, the regulated betting and gaming industry generated £4.5bn in tax and contributed £7.7bn to the economy. It is recovering well and continues to make a significant contribution, retaining successful high skilled and high-tech companies in the UK.

There is a clear positive impact on regional economies and the sector playing a major role in delivering opportunity to some of the country's most disadvantaged communities, particularly in its work to provide positive destinations to young people and on open and fair recruitment. Nearly two thirds of jobs are based outside London, with nearly 20,000 employed in the West Midlands and over 10,000 in Yorkshire and Humber. The headquarters of two major companies in Leeds and Stoke, for example, illustrate how successful and innovative businesses can bring opportunity to less privileged areas.

Highly skilled jobs - Goals 3, 5 and 14

The increase in online betting and gaming is creating jobs in the areas they are most needed. The sector is developing a skilled workforce that meets the needs of the twenty first century, in tech, but also in retail and hospitality.

In addition to the 119,000 jobs it currently supports, the BGC's announcement of 5,000 new apprenticeships, a further 15,000 tech jobs in the next five years and a commitment of £20m for training and developing their staff signals its intent to attract and retain the best talent while meeting the needs of the industry. Its commitment to make its workforce as diverse and inclusive as possible ensures that opportunity is available to all, regardless of background.

Risk mitigation - Goal 8

The BGC and its members work extensively to inform, advise and educate those who place a bet, highlighting its intent to ensure that gambling is enjoyable and safe. The recently launched Take Time to Think Campaign is a key example of this.

Its efforts to understand and deliver an effective response to problem gambling will further inform its work on good health and wellbeing for its employees, its customers and the communities it serves. Awareness of the issue and a transparency in discussing solutions is key to making good progress and problem gambling rates are falling, according to the latest figures from the Gambling Commission.

Community and high streets - Goal 5, 8 and 13

The betting and gaming industry has always been a key presence on high streets across the country, with 89% of betting shop customers combining their trip with a visit to another local business. It also contributes to the social fabric of the community, with many employees volunteering and fundraising for local events that support national and local charities.

Many of their initiatives are linked to sporting bodies and organisations and the industry is a lifeline for British sport, whether that be horse racing, football, darts, snooker or rugby league. The work that it is also developing on sustainability, particularly on reaching net zero and harnessing the energy transition, promotes a top-down approach that encourages everyone in the industry to play their part.

Future ambitions

As a new regulatory regime approaches, the BGC and its members can extend its role in levelling up through the economic and social contribution it makes. The deep roots it has developed in the communities it serves and its willingness to evaluate its impact will enable it to develop the opportunities it provides through:

- **Further analysis of its members' community impact to assess the impact of its economic and social investment.**
- **Participation in growing the regional skills bases required for high-tech, digital jobs, particularly outside London.**
- **Extension of its commitment to accelerating change through measurement, particularly through socio-economic tracking.**

Introduction

The Betting and Gaming Council (BGC) was established in 2019 in response to a growing need for the UK betting and gaming industry to combine its resources in order to raise standards and share learnings on safer gambling and regulatory compliance. Its members sign up to its strict code of conduct and commit resources and funding to work with it to improve standards and drive voluntary reform for the benefit of both the industry and customers.

The economic contribution of the betting and gaming industry

Betting and gaming is a key part of the UK's very successful leisure and entertainment industry. As the single industry body, the Betting and Gaming Council (BGC) represents over 90 per cent of retail betting shops, online betting and gaming operators, casinos and bingo operators.

The latest analysis commissioned by the Betting and Gaming Council shows that the sector makes a highly significant contribution to the national economy, with a strong concentration in areas in particular need of levelling up¹.

In 2019 the BGC's members directly employed 61,000 people. These jobs contribute to a huge network of UK-based high tech roles. Twenty-two thousand jobs are based in the North of England and Scotland and 15,000 are based in London. A further 58,000 jobs are generated by their supply chains. Nearly one fifth (19 per cent) of those employed in the industry are under 25 and more than half (51 per cent) are under 35, far higher proportions than the wider economy. Some 11,600 people are employed in Britain's 120 casinos.

From the high street to hospitality and from tech to tourism, in 2019 BGC members directly contributed £3.2bn in tax to the Exchequer, accounting for 0.4 per cent of all Treasury revenues. When taxes paid through the supply chain are added, this rises to £4.5bn. Casinos alone pay £600m in tax to the Treasury. They contributed £7.7bn to UK gross value added (GVA), with casinos contributing £1.2bn. It is significant for the national economy that these successful companies have been retained

in the UK rather than lost to the overseas market. For example, a single BGC member, Flutter, contributed £17.4m to GVA in the year from April 2021 to April 2022.

The cities of Leeds and Stoke-on-Trent are examples of specific communities which have benefited significantly from the presence of BGC members. Leeds is home to the head office of two remote betting and gaming operators which employed around 2,280 staff in 2019. There were also about 100 LBOs and three casinos in the area that together contributed a further 800 jobs directly, and 370 jobs through the supply chain and via induced demand. These jobs represented around 1% of employment in Leeds. BGC members' direct contribution to the local economy is estimated at £240m per annum. There are two remote betting and gaming operator head offices in Stoke, employing around 4,000 staff in 2019. A further 175 staff were directly employed in the 33 LBOs, and 230 employed in the two local casinos, with an additional 170 jobs supported through the supply chain and induced demand. Total employment in Stoke was estimated to be around 115,000 in 2019, constituting around 4% of total employment in the area. BGC members' direct contribution to the local economy is estimated at £390m per annum.

Despite the disruption caused by the pandemic to the industry, the regional economic contribution made by BGC members remains robust.

The table on the next page shows more recent levels in March 2022. These figures do not include the offices and headquarters of digital businesses, so overall percentages are likely to be much higher, but still clearly indicate the difference that the presence that BGC members can make to the economic prosperity of a region. The areas which are home to operators' headquarters in Leeds and Stoke - Yorkshire & Humber and the West Midlands - make up over a quarter (27%) of BGC members' total staff. These regions combined also contribute - £485,239,000, 35% of BGC members total tax contribution. The North East and North West together contribute £12,080,000, 18.7% of the total business rates paid across all areas.

Betting shops also provide a much-needed boost to the high street, with a study by ESA Retail finding that 89 per cent of betting shop customers combine their trip to the bookies with visits to other local businesses.

There is a deep and long-standing relationship between betting and horseracing but also with other sports, including football, rugby league, darts and snooker. Members make significant financial contributions and horseracing and sport are, in turn, crucial for betting and gaming, given the high proportion of betting activity that is dependent on the outcome of sporting events. Horseracing benefits by £350m through sponsorship, media rights and betting levy payments. BGC members contribute at least £40m a year to the English Football League and its clubs, more than £10m to darts and snooker and over £2.5m for rugby league. As sector sponsorship has increased, so have prize monies, supporting the careers of sportsmen and women and crucially the development of these sports at lower levels.

As in many sectors, the impact of Covid-19 was felt sharply by the betting and gaming industry. The restrictions imposed on its operations as a result of lockdown and social distancing measures, the impact on sporting events and the wider economic downturn all affected the industry's performance.

There were significant falls in Gross Gaming Yield (GGY) for retail operators, while the pandemic also acted as a deterrent to growth for remote operators. Total BGC member GGY fell in 2020, driven by significant falls in GGY for all casinos (including high end) and LBOs from £3.9b in 2019 to £1.9b in 2020. The retail footprint of the sector continued to contract, with 374 LBOs closing in 2020 to date and six casinos announcing they would not reopen following the relaxation of the first lockdown. BGC members' economic contribution was therefore expected to fall by 19% to £6.2bn in 2020, from £7.7bn in 2019.

BGC Member Contribution by Area - March 2022

Area	Total LBOs	Total Casinos	Head Offices	Employees	Total Tax	Total Business Rates
East Midlands	388	9		2557	£74,414,000	£3,880,000
East of England	521	6		3005	£81,925,000	£5,210,000
London	1238	23		10521	£154,754,331	£12,384,331
North East	333	5		2093	£59,601,000	£3,330,000
North West	875	19		5584	£160,153,000	£8,750,000
Scotland	736	10		4373	£121,106,000	£7,360,000
South East	687	11		4345	£124,095,000	£6,870,000
South West	375	6		2320	£65,565,000	£3,750,000
Wales	269	4		1655	£46,645,000	£2,690,000
West Midlands	516	16	2	7844	£285,588,000	£5,160,000
Yorkshire & The Humber	521	12	2	5808	£199,651,000	£5,210,000



Gambling in the UK

Gambling has changed significantly in the last 15 years, with advances in technology offering opportunities to gamble online nearly anywhere and at any time.

20% of TV and radio advertising have safer gambling messages as well as introducing age restrictions on social media advertisements



The Gambling Act 2005 is the basis for almost all regulation of gambling in Great Britain. In December 2020 the Government, led by the Department for Digital, Culture, Media and Sport, launched a major and wide-ranging review to consider whether the regulatory framework that currently exists is effective and fit for the digital age or whether further protections are needed.

As well as consulting with the industry, it has engaged with government, the Gambling Commission, the health and charitable sector, those with lived experience of gambling harm and a range of other stakeholders. It looked particularly at online protections for players and products; advertising, sponsorship and branding; the Gambling Commission's powers and resources; consumer redress; age limits and verification; and land-based gambling.

The BGC fully supported the review as an opportunity to drive further changes on safer gambling and commissioned PwC to carry out an objective, evidence-based review of unlicensed gambling activity

in the UK². It looked particularly at the number of unlicensed operators, the accessibility and ability for UK consumers to create an account with those unlicensed sites, their awareness and spend with them, customers' motivation for using them and how the situation had changed since a similar survey was carried out in 2018/19.

The BGC called for the review to be as wide-ranging and evidence-led as possible in order to achieve the right balance - one which meets the needs of an estimated 30 million people who enjoy placing a bet in the UK while also protecting the vulnerable.

Concerns have been raised that a blanket approach to reducing gambling, or an over-regulated approach, could force the vast majority of those who currently bet safely onto the black market. This has already started to happen with the number of British people using unlicensed sites doubling in just two years, from 220,000 to 460,000, with amounts staked rising to billions of pounds.

Other European countries are already seeing the results of further regulation in their countries. For example, Norway introduced a state monopoly for all gaming alongside restrictions on stakes, affordability checks and advertising. There is now a black market which accounts for over 66 per cent of all money staked and black market sites' revenues have more than tripled since 2010. Similarly in France, black market gaming now accounts for 57 per cent of all money staked and revenues for black market sites have almost doubled since 2015.

In the UK, as a strict condition of their licence, operators in the regulated industry adhere to high standards including strict ID and age verification checks, no betting on a credit card - except for National Lottery gambling products - and participation in self-exclusion schemes. Regulated operators also offer important safer gambling tools like setting deposit limits and time-outs. BGC members have increased funding for research, education and treatment into problem gambling

and have also committed to ensuring that at least 20% of TV and radio advertising are safer gambling messages as well as introducing age restrictions on social media advertisements.

According to a recent report from the Gambling Commission, rates of problem gambling have dropped from 0.6 per cent to 0.3 per cent of the adult population

This suggests that the safer gambling measures which have been introduced recently in the regulated sector have helped the decline in the rate of problem gambling. These have included the requirement in 2014 for remote betting and gaming operators to have licences from the Gambling Commission to serve UK consumers, the reduction in 2019 in the maximum permitted stake on fixed odds betting terminals and the change in law in 2020 when it became illegal to use credit cards to fund remote and non-remote betting and gaming activities in the UK.

The role of the Betting and Gaming Council

The BGC's mission has been to champion the betting and gaming industry and to set world class standards in safer gambling that ensure an enjoyable, fair and safe betting and gaming experience for all its customers. It also aims to build public and institutional trust in the industry. It provides a forum to facilitate collaboration, share best practice, drive and champion standards and create a single voice for the industry. That purpose is backed by its core values of putting the customer at the heart of everything it does, acting with integrity and transparency and working positively with all its stakeholders.

The BGC has made five key policy commitments to promote safer gambling which have resulted in a number of successful initiatives:

- Safeguarding young people
- Increasing support for the treatment of gambling harm
- Strengthening and expanding codes of practice for advertising and marketing
- Protecting and empowering its customers
- Creating a culture of safer gambling

The BGC's partnership with the Purpose Coalition represents the latest step in its ongoing, long-term commitment to build an industry that is respected as a valuable and responsible member of the communities where it operates. Safer gambling is at the heart of its work, informing the way it engages with customers as well as its charity and sports partners.

There are still huge gaps in opportunity in the UK and many of the existing inequalities have been exacerbated by the pandemic, particularly in those areas which were already furthest away from a level playing field. Reducing those requires businesses, universities and third sector organisations to work together to remove the barriers that exist and close the gaps which result in too many people not achieving their true potential. The Government confirmed its commitment with the publication of a White Paper in February 2022 which details the practical steps it will take to level up the country. It has set twelve medium-term missions as the policy objectives to be achieved by 2030 through cross-government, cross-society efforts. They range from skills training to pride in place.

The BGC announced its support for the Government's agenda by pledging to spend £20m on training and development for staff across the UK each year. BGC members also pledged to create an additional 5,000 apprenticeships for young people in the industry between now and 2025. The betting and gaming sector will also generate 15,000 tech jobs in the next 15 years. Many of these will be outside London, in areas that were often worst hit by the pandemic, as they continue to invest in an extensive network of highly skilled high-tech sector jobs across the country. This commitment to jobs and skills will supplement the economic contribution they make through tax and business rates to their levelling up role in every region.

The industry has a strong track record of financial and practical support for health, education, sports and community projects, often with a physical presence on the high street. Many of those working in it already engage in their communities, volunteering their time or raising money for local causes, often with the support of their employers. This work continued throughout the pandemic when its value was recognised even more as part of a national effort to help those who needed it most.

The Journey to the Levelling Up Goals

In 2015, as Secretary of State for International Development, Justine Greening led the UK delegation to the United Nations (UN). Alongside 184 international partners, she helped to establish the UN's Sustainable Development Goals (SDGs). In 2017, the General Assembly adopted a UN resolution which identified specific targets for each goal, along with indicators which could be used to measure progress towards each target. These 17 interlinked, global goals were designed to be 'a blueprint to achieve a better and more sustainable future for all'. They marked a shift from the Millennium Development Goals (MDGs) which had been established at the Millennium Summit of the UN in 2000.

In contrast to the MDGs, the SDGs were nationally owned, country-led and targeted wealthy, developed nations as well as developing countries. They emphasised the interdependent environment, social and economic aspects of development by centralising the role of sustainability. As Secretary of State, Justine recognised how useful a common set of accessible but ambitious objectives could be in galvanising action to achieve change.

Over the last two years, the pandemic has exacerbated many of the problems relating to social inequality in the UK. The recovery is an opportunity to address these issues and level up but that requires updated and specific goals in order to outline, inspire and measure progress. The Purpose Coalition, a group of policymakers, businesses, universities and other organisations, aims to improve social mobility in the UK and responded to this challenge with the launch of its own Levelling Up Goals in February 2021.

These new Goals build on the foundations laid by the UN's SDGs by outlining 14 clear goals, drawing on expertise provided by academia and business which has been applied to the unique challenges facing the UK in levelling up. They focus on key life stages and on the main issues that need to be resolved to create a level playing field for all in this country.

The Levelling Up Goals are intended to be the architecture through which the urgent ambition to level up the UK can actually be achieved.

The impact of the work carried out to do this can, and should, be measurable.

The Purpose Coalition, in partnership with Purpose Coalition universities, businesses and the Office for National Statistics (ONS), is developing sub-goals for each of the 14 goals, with quantifiable targets and measurements against which progress can be charted. This will create a more transparent and measurable framework with which to monitor and subsequently address the problems of social mobility and inequality that have been entrenched in this country for many years. The Levelling Up Goals are designed to assess the outcomes of an organisation's CSR strategies and measures. Many are doing outstanding work and making important contributions to society but are still measuring this via inputs - a measure that focuses on financial costs rather than the real impact to human lives.

Crucially, these Goals are a shared framework. The wider Purpose Coalition believes that, with a common understanding and objectives, there can be action that drives change on the ground. Individual organisations, including universities, businesses, policy-makers, communities and NGOs, can work together, with the shared Goals as a unifying and motivating foundation for progress. As the problems which cause social inequality in the UK are interlinked, the response should also be collaborative.

The Purpose Coalition has encouraged businesses and universities to share their own best practice with other organisations so they are not only demonstrating their own commitment but creating a shift towards purpose-led organisations. Amongst others, it is working with bp, Amazon, Adecco, UK Power Networks, Staffordshire University, the University of York as well as a number of local authorities and NHS Trusts. The Goals are key to facilitating an extension of this cooperative exchange of information which can be used to deliver equality of opportunity.

Assessment of the BGC's activities mapped against the Levelling Up Goals

The BGC's activity has been benchmarked against the Levelling Up Goals, assessing where it is contributing towards them.

As organisations with a broad spectrum of activity in many communities, BGC members are making a positive contribution to all the relevant Levelling Up Goals. The analysis below focuses on the particular goals where companies are uniquely placed to have the most positive impact.

At the Purpose Coalition, we advise organisations to focus on the particular areas where they can deliver the most impact in line with their purpose and strengths, and on how that expertise can be targeted towards specific gaps where they are relevant to the organisation. This is how social impact becomes real for people and communities and how it also becomes sustainable over the long term, in contrast to outdated 'tick box' approaches that can see organisations failing to deliver by spreading themselves too thinly.



Goal 3 Positive destinations post 16+

Every young person and adult should have the choice of a high-quality route into education, employment, or training. Increasing awareness of the choices that are available allows organisations to harness the talent that is available post-16 and enables people to fulfil their potential, whether that is in academic education or vocational training. It is key to levelling up those communities which are furthest away from a level playing field and to supporting those individuals who are most disadvantaged.

People need advice and information about the career opportunities that exist and how best to take advantage of them. Knowing what sort of careers are out there can set schoolwork in context and help a person understand the steps they need to take to get to the one that is right for them.

In July 2020, the UK Government announced its Plan for Jobs, aimed at protecting, supporting and creating jobs. Its new Kickstart Scheme was targeted

at young people aged 16-24 on Universal Credit. The BGC launched its own Plan for Jobs in September 2021, with a pledge to create 5,000 new apprenticeships across the betting and gaming industry by 2025. It will also generate 15,000 tech jobs in the next 5 years. Most of these will be outside London, delivering opportunities to those parts of the country where, traditionally, they have been scarce.

One BGC member, Flutter, a global sports betting, gaming and entertainment provider with over 18 million customers worldwide has launched a self-funded version of the Government's Kickstart scheme. It has created 13 new roles across the business in marketing, finance, people, trading, tech and design, for young people aged 18-25 at risk of long term unemployment. By engaging with charities and community organisations, the scheme has provided career opportunities for a whole new talent pool, including some of the most underrepresented groups.



Goal 5 Open recruitment

Careers should be open to anyone who has the potential to do the job, regardless of their background or where they are from. Organisations who use transparent and accessible recruitment practices are able to mine the talent that is available in every community, driving local economies, as well as the national economy. That is particularly important in less advantaged communities, where an improvement in the social determinants that are known to undermine quality of life – the social, economic and environmental conditions in which people live – is so dependent on reliable and rewarding employment.

Many of today's job opportunities simply did not exist a couple of years ago.

The work experience, support and mentoring which organisations can provide plays a huge role in demystifying the jobs market, particularly in light of the huge changes that have taken place in the way we work.

People need to see people who look and sound like them in the roles they aspire to. Their own experience of work, or that of their family and friends, may be limited - if it exists at all - and they need to be able to see people who look and sound like them in the roles they aspire to.

With 19 per cent of its employees under 25, compared to a figure of 11 per cent nationally, and 51 per cent under 35, compared to 35 per cent nationally, BGC members are a young and dynamic workforce. The work that they are doing to inform and attract new applicants, from its apprenticeship ambitions outlined under Goal 3 to providing the right advice and experience to potential new recruits means that BGC members are meeting the challenge of Goal 5 Open recruitment.

Crucially much of its recruitment takes place in areas of the country where communities have often felt left behind and where there are too few opportunities.

In 2019 BGC members employed 119,000 people across the country. 61,000 were in direct employment, 44,000 in indirect jobs and 14,000 in induced jobs. Employment in the North was estimated at 17,000, with GVA totalling £850m. Similarly in the Midlands and Wales, there were 12,000 in employment and the region contributes £600m in GVA.

The economic contribution of BGC members to different regions of the UK is also influenced by the distribution of head offices and non-remote betting and gaming venues across the country. There are two cities outside London where major remote betting and gaming operators have head offices – Leeds and Stoke-on-Trent.

Leeds is home to the head office of two remote betting and gaming operators. It was estimated that in 2019 these employed around 2,280 staff. In addition, there were approximately 100 LBOs and three casinos, contributing a further 800 jobs directly and 370 jobs through the supply chain and via induced demand. These jobs represented around 1% of employment in Leeds.

There are two remote betting and gaming operator head offices based in Stoke-On-Trent, employing around 4,000 staff in 2019 with a further 175 staff directly employed in the 33 LBOs and 230 in the two local casinos. An additional 170 jobs were supported through the supply chain and induced demand. Total employment was estimated to be about 115,000, constituting around 4% of total employment in the area.

More recent figures have shown that, despite the effects of the pandemic, the contribution that BGC members continue to make remains strong, particularly in the regions which have head offices in them but also in less advantaged areas like the north.

Equally important is the nature of the jobs on offer across the country. Many are in the high-tech sector, developing and maintaining the growing number of online betting and gaming platforms. They are highly skilled jobs, providing staff with



Goal 8 Good health and wellbeing

Ensuring good mental and physical health to boost overall wellbeing at all ages is crucial in allowing people to fulfil their potential. It lies at the heart of levelling up. Poor health is often a result of, and exacerbated by, poverty, as well as lack of employment, low education take-up, poor housing conditions and social isolation. The pandemic has shone a stark light on the health inequalities that still exist in the UK and the impact they have on an individual's ability to access opportunity.

The BGC and its members recognise the cycle of disadvantage in individuals, families and communities that poor physical and mental health engenders. Their presence in every high street, particularly in the most disadvantaged areas, and their links with a wide range of sports allows them to connect with many more people. As a result, they are able to deliver education, information and support where it is needed most. Much of this help is driven by employees themselves, who understand the challenges of their individual communities. The support also acknowledges the economic and social repercussions of problems associated with gambling and the lack of access to opportunities that result.



Supporting the community

Entain launched its Global Foundation in September 2019. It is committed to donating £100 million over the next five years, focusing on responsible gambling, education and treatment, men's health with a particular focus on mental health, and community projects.

Sky Bet, British based gambling company with headquarters in Leeds, have raised over £100,000 for their charity partner Macmillan Cancer Support since 2020, with colleagues working together to raise money through charity quiz nights, Macmillan coffee mornings, the Yorkshire 3 peaks challenges, cycling sportive, the great charity auction, the London marathon and a fundraising ball in November.

Right to Play has been **PokerStars'**, an online poker cardroom, global charity partner since 2014, bringing together staff and customers to help raise over £2.5 million. Right to Play uses sport and play to help protect, educate and empower children to rise above adversity.

Flutter launched a new partnership with Missing People charity on Father's Day this year to raise awareness of the important work the charity is doing to help reunite families and friends with their missing loved ones. As well as a donation, the partnership will include a number of campaigns and activations throughout the year across all of the UK&I facing brands, with **PokerStars** releasing a video at their Mega Stack series at the Hippodrome in London, featuring missing people and their families. This builds on licensed betting shop and online operator, **Paddy Power's** 'Missing Fans' campaign in 2020 which utilised their partnership with Motherwell FC and included filling a stand at their stadium with 1,190 silhouettes of missing people at a time when fans were missing from stadiums due to the pandemic.

Flutter's Cash4Clubs has also partnered with Made by Sport to launch the #ClubsinCrisis Fund, supporting community sports clubs across the UK. The Fund has awarded grants totalling more than £4million to over 1800 community clubs, with 63% going to the smallest and most difficult to reach clubs. It distributed over £1.79 million in its first three months. Grants have been made to clubs that develop life and employability skills, build stronger communities and improve mental health.

By focusing on supporting clubs that use sport for social outcomes, rather than sporting excellence, the fund is the first of its kind on a national scale. Research has found that for every £1 invested in sport for good, an average of £6 is returned in social value, meaning that the fund generated more than £24 million in social impacts.

Gamesys, an online software development and gaming business, has contributed over £3.6 million to the The Gamesys Foundation since its launch in February 2020. The Foundation has made donations to charities that support mental health and social isolation, including Women's Aid, and from 2020-21 has donated over £1 million. It continues to support them via their 'Deserve to be Heard' campaign. The Foundation has also made available up to £100,000 for Gamesys employees to support initiatives linked to mental well-being, with grants of up to £2,000 for each employee or initiative.

Alzheimer's Research UK received a major industry donation following the death of Dame Barbara Windsor. The beloved television and film star appeared in several TV adverts for Jackpotjoy, starring as their 'Queen of Bingo.' Jackpotjoy's owners **Gamesys** donated £83,000 to the charity to support its research.

In 2021, **William Hill** worked towards becoming a dementia-friendly organisation in partnership with Alzheimer's Society. Dementia Friends is a training module provided by Alzheimer's Society that is designed to help change the way people think, act and talk about living with dementia. Over 3,000 William Hill employees have completed the training, furthering the company's commitment to becoming a more dementia-friendly organisation.

Online gaming operator, **Kindred**, allows staff to use so-called 'sustainability days' to contribute to their local community. Although that was difficult during the pandemic, by 2023 Kindred expects to increase the number of employees who use their sustainability days by 50% from 2019. To encourage them to do so, it launched a trial of a new corporate social responsibility platform called Givur. It connects employees with initiatives focused on contributing to local communities, including those aimed at alleviating loneliness among the elderly, better physical health and wellbeing and supporting women's crisis charities.

Kindred has also made significant investments in mental health initiatives, including Team Talk, a project run by Derby County Community Trust in partnership with Kindred, to provide social connections and meaningful activities for socially isolated men. Team Talk projects have also been set up in Glasgow and Middlesbrough and Kindred Group's investment in these programmes - worth £140,000 per year - has allowed the organising football clubs to open more centres supporting men's mental health.

Kindred also supports the work of #GoRacingGreen, a scheme to make racing accessible to those who might otherwise find attending a race too overwhelming. Racecourses at which Kindred brand Unibet are a sponsor undergo mental health awareness and Dementia Friends training prior to race sponsorship and #GoRacingGreen is provided with a designated "quiet space" and special racecourse stable visits are arranged so that those with 'invisible' illnesses know they can visit on the day. One in three Unibet adverts are also donated to #GoRacingGreen to help promote key messages.

The **William Hill** Foundation partnered with the Scottish Football Association to help deliver essential services around mental wellbeing to players and coaches across Scotland, through a 'Support Within Sport' initiative. Over 200 players, coaches and managers have made use of the service to date, with research showing that following 3-6 months of clinical support, individuals demonstrated significantly reduced symptoms of anxiety and depressive illness. The 'Support Within Sport' programme also provides a bespoke training course in mental health to coaches. Over 3,500 coaches around the globe have completed the course which provides tools and guidance to help recognise signs of mental health problems, develop skills in listening and sign-post people to help if required. The Foundation also worked with the SFA to deliver a Mental Health and Wellbeing League to communities across Scotland, and to encourage people to keep fit and healthy. This sponsorship of the SFA Mental Health and Wellbeing League is an important part of the programme, providing an opportunity for people who might be suffering from mental health issues to participate in regular physical activity.

The **William Hill** Foundation also worked with Rugby League Cares to provide specialised mental wellbeing sessions to William Hill colleagues.

Expert speakers from the sport have delivered mental health fitness workshops to colleagues to support their wellbeing

As well as supporting employees to give their time, skills and expertise to charities and community organisations, Playtech has been working to strengthen wellbeing programming and support for its employees, raising awareness and breaking down stigmas about mental health, with safer gambling also a key priority. It is working in partnership with MIND BWW and BetKnowMore UK to deliver the 'Know your Mind' programme for Playtech employees in the UK. The objective is to promote healthy online living by equipping employees, team leaders and mental health champions with the information and capabilities to identify, escalate and intervene with those at risk or affected by gambling related harm and mental health. The company has also announced a five year £5 million commitment to promote healthy online lives, digital well-being and reduce gambling related harm.

Playtech is supporting a number of programmes including one that brings together an alliance of experts, led by YGAM, to address gaps in knowledge to enable healthcare professionals in primary care networks to engage, identify harms and signpost patients to the appropriate support available, and another that delivers specialist evidence led training on gambling related harms and digital behavioural addictions to healthcare professionals in London. Playtech is also supporting a multi-year research programme led by the Responsible Gambling Council of Canada to strengthen existing and generate new and practical insights to raise standards and improve practices around digital wellbeing, safer gambling, and mental health. In July 2021, Playtech became the first recipient of GamCare's newly developed Safer Gambling Standard. It assesses the measures businesses have put in place to protect customers from experiencing gambling related harms and recognises those companies that put customer protection at the forefront of their operation.

GamCare have set up the first national young people's support service, offering information, advice and support



Supporting education and research

The BGC and its members run a wide range of initiatives which inform and educate on the harms associated with gambling. They also fund an extensive programme of research which continues to look at problem gambling and the ways it might be successfully treated.

Currently, GambleAware asks all betting and gaming operators in Britain to donate a minimum of 0.1% of their Gross Gambling Yield (GGY) annually direct to GambleAware to help fund gambling research, education and treatment. Between 1 April and 30 September 2021, industry contributions reached £10.6 million, with the largest donations from BGC members **bet365**, a British online gambling company, **Entain**, a FTSE 100 company and one of the world's largest sports betting and gaming groups, and **William Hill**, a global online gambling company based in London. In March 2021, **Flutter** also donated £8 million to the charity.

Preventing underage gambling and protecting young people is a core commitment for BGC. In May 2020, BGC members announced a £10 million partnership with YGAM and GamCare to provide a national education and support programme over four years. The Young People's Gambling Harm Prevention Programme is the largest of its kind and aims to deliver evidence-led education, training and support to young people across England, Wales and Northern Ireland, as well as collaborating with other organisations supporting young people across Scotland.

In 2020, YGAM trained 2,906 practitioners (up from its original target of 2,592) and provided vital educational sessions on the harms associated with gambling and gaming to 184,700 young people (up from a target of 170,300). In addition, GamCare trained 4,185 professionals who work with young people and delivered educational workshops directly to 3,947 young people. By August 2021, YGAM and GamCare had reached an impressive 500,000 young people this year alone and were on course to reach one million young people overall. GamCare has also set up the first national young people's support service, offering information, advice and support tailored specifically to the needs of young people impacted by their own gambling or that of a loved one.

Entain works with a range of organisations and experts to better understand and address gambling related harm. In 2019, it committed to a five-year \$5 million collaboration with Harvard Medical School Faculty, a ground breaking partnership which aims to challenge some of the toughest areas and questions in research around addiction. The Group has also appointed world renowned academic Dr Mark Griffiths, Distinguished Professor of Behavioural Addiction and Psychology at Nottingham Trent University, to advise on the triggers for problems with online play and addiction. This work supports the ongoing development of Entain's ARC programme which uses proprietary technology to further enhance player protection through additional checks as well as improved monitoring and interventions.

Entain's partnership with EPIC Risk Management, a leading provider of advice, training and expertise in minimising and preventing harm, has also informed this work.

Flutter has launched a "Triple Step" approach to affordability, a risk based framework which uses real time data to monitor player activity and behaviours to ensure that gambling remains safe and enjoyable. This latest step builds on the proactive measures already live across their platforms. Flutter believes that affordability should be considered together with a range of individual factors, but crucially by taking a risk based approach, which balances the protection of the most vulnerable from potential harm without disproportionately impinging on the personal freedom of the vast majority.

Kindred Group, an online gambling operator, has become the first to report its share of revenue derived from high-risk players showing signs of harmful gambling. The company, which owns 32Red and Unibet, aims to generate zero revenue from harmful gambling by 2023. Kindred will provide regular updates on its progress together with a measurement of the effectiveness of the group's sustainability work. In the third quarter of 2021, Kindred's share of revenue from harmful gambling decreased to 3.3%.

Playtech, a gambling software development company, has unified its safer gambling and compliance technology, tools, services and research in a new business unit called Playtech Protect. This includes BetBuddy, its AI-driven safer gambling application and its continued research and innovation into sustainable Product and Game Design. As part of Playtech's continued work on safer game design, it co-led UK Gambling Commission and BGC efforts to develop the industry's first code of conduct on safer game design to help raise consumer protection standards across the industry.

In 2019, Playtech began working with several of its licencees to trial and evaluate product labelling for online slots. Playtech is also undertaking data-driven research to build an empirical evidence base examining the relationships between game features, player behaviours and at-risk play. Alongside its own technology

and expertise, Playtech is also leveraging partnerships with external experts including with City, University of London's Research Centre for Machine Learning. Through a five-year partnership, Playtech is exploring the use of AI to improve anti-money laundering detection. As part of its research, the company is exploring and developing new techniques that can explain how harm models are constructed and make decisions.

Adopting a socially responsible approach to advertising and marketing is core to the work of BGC members who have taken the lead on promoting responsible advertising, before and during the pandemic. During the first lockdown, they announced the voluntary removal of all gaming product advertising on TV and radio. Existing TV and radio advertising slots were replaced by safer gambling messages, donated to charities or removed from broadcast. Since then, 20% of all member adverts on TV and radio have been safer gambling messages.

More recently, BGC members have agreed to new rules designed to further prevent under-18s from viewing betting ads online.

Working in partnership with the Gambling Commission, they have also agreed to a strict new code of conduct tightening the rules on how VIP schemes are operated.

Individual operators have also taken steps to promote responsible gambling. At the beginning of 2020, **888**, a multinational online gambling company, launched an offline and online advertising campaign in the UK to help raise awareness of potentially problematic gambling. With the slogan "Too much is too much", the advertising campaign went live on TV, in national press and on social media platforms. The campaign was developed following research and consultation with customers. More recently, online operator **Gamesys** voluntarily suspended adverts across its brands for the duration of the 2021 lockdown. The suspension was applied to TV and radio adverts and existing sponsorship deals to promote brands Jackpotjoy, Virgin Games and Heart Bingo. The company introduced a similar voluntary ban on adverts in March 2020, the first operator to do so.



Goal 13 Harnessing the energy transition

People and planet are two sides of the same coin. The transition to net zero is a unique opportunity to create new careers and new roles in the communities where they can make the most difference. Sustainability and the energy transition will become an increasingly fundamental part of the debate on levelling up. Investment in the green economy is already bringing new opportunities to areas across the country and it is crucial that these are accessible to everyone.

The climate emergency has made sustainability a business critical priority for all BGC members and they have been reviewing their processes to ensure that they are addressing the challenges the world is facing.

Flutter Entertainment has focused its efforts on ensuring its corporate real estate is environmentally efficient, especially during the refurbishment of its Dublin, Sofia and London offices, and throughout the construction of its new base in Leeds. The complex has been built to the WELL building standard, which aims to make the working environment healthier and has also achieved a BREEAM Excellent rating. The new building is designed with sustainability in mind including solar panels on the roof to provide renewable energy, electricity supplied by a green tariff, six electric car charging points and over 100 bike storage racks in the car, monitoring of electricity usage to allow examples of extreme usage to be identified and addressed, zero waste going to landfill.

Employees at Flutter have also been inspired to set up 'Green committees' to look at ways to minimise their own environmental impact.

Initiatives have included removing single use plastic, providing designated recycling stations, encouraging car share schemes and green travel initiatives such as electric bikes. Flutter also helps to offset its carbon emissions by funding a biogas project in Vietnam. This Gold Standard

certified project enables families to use waste to generate clean, sustainable energy, not only reducing emissions but also improving health.

William Hill has committed to become a carbon neutral business. In October 2020, the company switched to 100% Renewable Energy Guarantees of Origin electricity in the UK to significantly reduce its carbon footprint. Over the three-year life of the contract, it will save 61,500 tonnes of CO₂, the equivalent of 38,000 cars in the UK. In addition, William Hill began a full rollout of Smart Metering across its retail estate in 2021. So far, over 800 meters have been installed across the country, with the rollout scheduled to be completed in 2022.

Having achieved its target of reducing greenhouse gas emissions by 15% between 2018-2021, **Entain** has now made a commitment to dramatically accelerate this process, becoming carbon net zero by no later than 2035, 15 years ahead of the target set by the Paris Agreement. It has partnered with Brynk, an environmental project which facilitates tree planting and forest protection across the globe, to plant one million trees. The project also supports local communities since Brynk partners with villages to hire and train local people to plant new, local tree species and protect their new local forests.

Entain has so far funded the planning of 610,000 trees across Kenya and Madagascar. In November 2021, it set out its social contribution to global communities, publishing a full Social Impact Report which also breaks down how the Group has so far allocated funds to ESG initiatives.

Playtech has set a target to reduce its carbon footprint by 40% by 2025 against a 2018 baseline and is committed to reviewing its GHG targets annually. The company has established an internal environmental fund to support carbon reduction initiatives and aims to deliver on its target through efficiency programmes, a reduction of energy usage and a move

towards renewable energy alongside initiatives to address other environmental impacts such as waste and water. Playtech is also committed to implementing the recommendations of the Task Force on Climate-related Financial Disclosures.

Gamesys has become an official signatory of the UN Global Compact, the principle based framework for business that drives best practice in human rights, labour, environment and anti-corruption. The company has achieved carbon neutral certification from the Carbon Trust, meeting a commitment announced in its Environment, Energy & Climate Change Policy agreed in 2020. Going forward, its climate change priority is to move electricity supplies to renewable sources wherever

practicable, with a goal of achieving a 50% reduction in gross operational greenhouse gas emissions by 2023.

In 2020, **Kindred** reported a 52% reduction in Co₂ emissions per employee, in part due to a reduction in air travel and greater use of video conferencing during the pandemic. For activities where Kindred cannot reduce its carbon footprint, it has chosen to offset emissions through a verified third party and through projects that meet the requirements of the Verified Carbon Standard. During 2020, its entire carbon footprint was offset, technically achieving carbon neutrality. By 2023, Kindred's ambition is to procure 100 per cent of its electricity from renewable sources of energy where it can.



Gamesys has become an official signatory of the UN Global Compact



Goal 14 Achieve equality through diversity and inclusion

Diversity matters. The UK is a diverse country and organisations should reflect the communities they serve. Research shows that more diverse companies make better decisions because they have a wider perspective and can avoid groupthink. That extends beyond gender and ethnicity to sexuality, disability and other challenges that can lead to disadvantage. Diversity should also extend across every level of an organisation, particularly in more senior roles.

As an industry, the BGC and its members work hard to inspire and empower its employees, giving them the tools and confidence to develop in the workplace and in their local communities.

It recognises that a more diverse workforce with a culture where everyone feels they can be themselves is the right thing to do. It also makes good business sense, making use of all the talent that exists in a community.

In 2018, **Entain** launched 'Everyone's in the Game', a three year international diversity and inclusion strategy. Since then, the number of women at senior manager level has increased by 33%. The Group has also introduced a new mentoring programme, return to work initiatives and measures to encourage more women into digital and technology roles. It is a founding member of the All-in Diversity Project, an industry driven initiative that benchmarks diversity, equality and inclusion for the global betting and gaming sector. In 2020, it topped the All-index list, the industry benchmark on diversity and inclusion practices.

In March 2021, the Entain Foundation pledged \$250,000 to support young women interested in careers in science, technology, engineering and mathematics. The Foundation made the donation to Girls Who Code which works to close the gender gap in technology.

In November 2021, the Group unveiled EnTrain, a new multi-million-pound global initiative to increase access to technology

and improve diversity. The goal is to positively impact the lives of over one million people around the world, either directly or through their families and dependents, by 2030. The initiative focuses on four key pillars: training, scholarships, apprenticeships and partnerships with other technology organisations.

In 2020, Flutter brand **Sky Betting & Gaming** launched its Inclusion Pledge which was developed by both leadership and the wider workforce. The Pledge sets out the leadership team's commitment to inclusion and the role the wider team can play in achieving a more diverse and inclusive workplace.

In October 2020, Flutter held a successful global diversity awareness month, involving a programme of events aimed at raising awareness of mental health, celebrating Black History and encouraging inclusion. It included a remote seminar with Dr Maki Mandela, the daughter of Nelson Mandela, on the fight against injustice which was the most widely attended event in Flutter history, with more than 1,700 colleagues tuning in.

BGC members celebrate and promote LGBTQ+ diversity at home and abroad. Flutter Entertainment appointed its first Group Director of Inclusion and Diversity, a role which aims to ensure that everyone at Flutter shares a strong sense of belonging in a truly inclusive environment.

The company's **Paddy Power** brand is also a longstanding official partner of Brighton and Hove Pride, the UK's largest, where it has campaigned to promote diversity in professional football and tackle homophobia in the sport.

Entain also has a strong track record of supporting Pride events globally. Entain brand manager Frankie Payas has helped organise a Pride event in the small Spanish town of Manilva for several years and, with the support of his team, has raised thousands of pounds for charities supporting vulnerable and less fortunate families.

Online operator **Gamesys** has created several employee-led networks, including Gamesys League of Women (GLoW), to promote gender inclusivity, to recognise the diversity of women and create support in the form of a network that allows women to flourish and develop as both individuals and professionals. GLoW is one of four vibrant company-sponsored internal and employee-led networks that support Gamesys' commitment to diversity and inclusion. Its other networks include Pride, which represents the LGBTQ+ community; Parents Network, a space for working mums and dads; and BAME, a voice for Black, Asian and minority ethnic employees. These networks give Gamesys employees a channel to provide input into policy making, as well as supporting information exchange, education, and community events. In September 2021, Gamesys won the Diverse and Inclusive Team of the Year and Community Engagement Awards at the Women in Gaming Diversity Awards which recognise individuals and organisations for their outstanding commitment to enhancing equality, diversity and inclusion

In November 2020, **William Hill** was ranked among the top 150 companies in Europe for diversity, ranked 150 out of 850 companies. The Financial Times annual Diversity Leaders survey of 100,000 employees assesses their perception of companies' inclusiveness or efforts to promote various aspects of diversity. These include gender balance, openness to all forms of sexual orientation, race and ethnicity, disability and age. William Hill is the highest ranked betting and gaming company on the list.

The UK's largest independent bookmaker, **JenningsBet**, displayed messages of support for Global Pride in every one of its shops in England. While many live Pride events were cancelled in 2021, events were again held online, including Chester Pride, supported by bingo operator Mecca Bingo, part of The Rank Group.



Online operator **Kindred Group** teamed up with Relax Gaming to create LGBTQ+ avatars to celebrate Pride. The idea emerged from one of Kindred's LGBTQ+ Network meetings with staff and enabled LGBTQ+ customers to proudly identify as such. This year's WorldPride event was held in two cities, Malmo and Copenhagen. At the opening weekend of WorldPride, two of Sweden's most successful football teams clashed in the 15th round of Allsvenskan, the Swedish top league sponsored by Kindred brand Unibet. To show their support for the event and the LGBTQ+ community, players took to the pitch in specially designed jerseys, incorporating the rainbow flag colours.

Kindred partnered with Women in Racing in 2020 to raise awareness of some of the challenges working mothers face within the horseracing industry. In December 2021, Kindred announced its continued financial support for the organisation into 2022. The funding will enable Women in Racing to implement a range of measures to ensure that the horseracing industry is able to better support its participants in planning and raising a family, and thereby contributing to a sustainable development of the industry.

888 offers its employees across all global sites a full spectrum of opportunities for personal development and career growth.

To encourage this, the Group has continued to focus on internal mobility, career development and diversity.

In 2020, 10% of the Group's employees were promoted or made an internal transfer to a different role. Furthermore, by the end of 2020, 40% of its employees were women, and two of the six places on the 888 Board are held by women.

Analysis

This assessment of the work of the Betting and Gaming Council and its members highlights the unsung but often profound role the sector plays in levelling up.

Betting and gaming companies make a highly significant economic contribution to diverse communities and the BGC is taking a proactive and considered approach to difficult questions on how to strengthen wellbeing measures for its customers while protecting the jobs and revenue that is delivering levelling up to key areas.

BGC members have worked overtime to protect jobs and community support while the industry was ravaged during pandemic lockdown measures. The sector now faces a fresh challenge of persuading the government to modernise its regulatory framework in a way that allows its positive economic impact to continue despite tighter restrictions to protect vulnerable consumers. As the nation enters a period of real pressure on public finances and threats to local economies, the future contribution of BGC members to levelling up will be largest if the government is able to strike the right balance - increasing wellbeing measures in a way that keeps betting and gaming companies providing the jobs and community investment vital to our national mission to level up the UK.

Economic contribution

Although its land-based operations were badly dented by the pandemic, the betting and gaming industry has recovered well and continues to make a significant contribution to the economy, retaining successful companies in the UK which provide desperately needed tax revenues to help fund our national priorities and highly skilled jobs in diverse communities away from big cities. This often overlooked positive impact on high streets and sports was highlighted when it was temporarily stopped during lockdown restrictions, which forced betting shops, bingo halls and casinos to close. There were no visitors to spend their money in the local area, whether that was in high streets across the country or in the hotels and restaurants of the capital. Iconic sporting events were cancelled and the effect was not only felt emotionally but also economically, with huge losses for the towns and cities that should have hosted them.

The work the BGC and its members are doing on providing positive destinations for young people post-16 and on open recruitment is crucial as we recover from the pandemic, particularly in those areas which were hardest hit. It signalled its firm intent to support the levelling up agenda with the announcement of new apprenticeships and the commitment of an annual spend of £20m on staff training and development. The opportunity to acquire high tech skills for a new digital, greener economy will prove game-changing for those that participate.

The reach of the BGC and its members is nationwide but much of its strength lies in the economic contribution it is making regionally, playing a major role in delivering equality of opportunity, especially to some of the most disadvantaged communities. The number of people now employed in Leeds and Stoke for example, and the knock-on economic benefits to those cities in terms of employees spending money and supporting smaller businesses, illustrates the impact that successful businesses can have in regenerating less privileged areas. The importance of its work is not just evident in the jobs it creates however, it also contributes significant GVA to those areas where it operates - a place-based positive but also a boost to the national economy.

Highly skilled jobs

A new, high-tech, greener economy will demand new, green, high-tech jobs. The increase in online betting and gaming is a huge opportunity to create jobs in the areas where they are most needed, protecting the most disadvantaged by developing a skilled workforce that meets the needs of a twenty-first century economy. These will add to an already extensive network of UK-based high-tech roles that the BGC's members can offer.

One of the Government's 12 levelling up missions in the White Paper is to increase the number of people successfully completing high-quality training skills training in every area of the UK up until 2030. The work that the BGC and its members are doing on Goal 3: Positive destinations post-16 and on Goal 5: Open recruitment will see it creating new jobs in a range of sectors, not only in tech but in finance and HR for example. It signalled its firm intent to support the levelling up agenda with the announcement of 5000 new apprenticeships and the generation of 15,00 tech jobs in the next five years.

BGC members also understand how vital it is to maintain the skills of their existing workforce and the £20m they have committed to training and development will help to ensure that their employees have the right skills to meet the changing needs of the industry.

That genuine commitment will also help to attract and retain the best talent, providing motivated and engaged staff.

The BGC's commitment to meeting Goal 14: Achieve equality through diversity and inclusion means that it can successfully make the most of all the talent that is available to it, providing opportunity to people regardless of background. The success it is having in increasing the numbers of women working in the sector shows that the industry is flexible and accommodating, allowing all to succeed. These will help its employees to achieve a better work/life balance while also ensuring that employers can take advantage of all the talent in the community and develop a more productive and committed workforce.

Risk mitigation

Often the publicity surrounding the betting and gaming industry focuses on problem gambling and the unquestionable harm that some people have experienced as a result. What often goes unnoticed is the work that the BGC and its members assiduously carry out to tackle the issue so that all gamblers, but particularly the most vulnerable, can continue to enjoy a bet and being at a venue or event where betting takes place.

The BGC is leading the industry to increase safeguards further but warns that over-regulation would drive many towards the black market, as has already been evidenced in other European countries where new regulatory frameworks have been introduced. This would mean less protection for vulnerable customers, less revenue through taxation and fewer jobs being provided in communities in need of levelling up.

The extensive steps the BGC and its members have taken to inform, advise and educate those who place a bet, online or in person, and the support it offers to those who experience problems as a result of their gambling, demonstrate its intent to ensure that gambling is enjoyable and safe. Its work to understand and deliver an effective response to problem gambling for individuals and families affected, as well as for its staff, will further inform its work on Goal 8: Good health and wellbeing.

Awareness of the issue and a transparency in discussing solutions is key in being able to make progress on providing help for those affected and encouraging safer gambling.

The funding it invests in a huge range of research programmes shows that it understands that it cannot rest on its laurels but must continue to examine every option to address the harm that gambling causes some people and, in the best case scenario, prevent it completely. The use of unlicensed sites will put that progress at risk. It will also expose the most vulnerable to further harm, damaging their life opportunities.

The BGC and its members understand that poor health and wellbeing, particularly mental health, is both a cause and symptom of economic and social distress.

It also understands the importance of extending this work to its colleagues and has put in place a range of initiatives that help them achieve their potential. Poor health and wellbeing is likely to be an increasing feature in our communities in the face of rising food and energy prices. Poor mental and physical health are inextricably linked in a cycle of disadvantage and it is likely that the challenges that less privileged families will face will also impact on the work of the BGC.

Community and high streets

One of the Government's 12 levelling up missions is a pride in place - people's satisfaction with their town centre and their engagement in their local culture and community. The BGC and its members understand the importance of contributing to the communities in which they operate and much of the work it is doing on all the Goals referenced relates back to its support for the local area.

The betting and gambling sector has always been a highly visible presence on high streets across the country and is integral to the public face a town presents. What is less well-known is the huge contribution it makes to the life of the communities it serves. With 89% of betting shop customers combining their trip with a visit to another local business, it undoubtedly generates income for the local economy. That has become even more important following the pandemic where many already struggling high streets and town centres lost many of their familiar shops.

Running alongside that is the contribution the sector makes to the social and emotional fabric of the places it operates. The knowledge and experience of BGC members means that they understand where help is needed and who is best to provide the expertise that can deliver it. Many employees give up their time to fundraise and volunteer themselves, often with the support of their employers. Many of the community projects detailed in this report - the health, education, sports and community initiatives - are run with sporting bodies and those links characterise the BGC's work. These initiatives represent the town or city and are also defined by it.



89% of betting shop customers combine their trip with a visit to another local business

The work that the BGC and its members are developing on sustainability, particularly on reaching net zero and which meets Goal 13: Harnessing the energy transition, is delivering opportunity into its communities. Its biggest companies are leading by example and that approach is filtering down to its smaller members so that everyone has a role to play in developing a response to tackling their environmental impact. Involving staff is an effective way to increase real engagement as evidenced by new projects like Flutter's new base in Leeds.

Finally, two further elements of the BGC's work are noteworthy. The first is the sense of partnership which runs through everything it does - with its members most obviously, working with them to raise standards across the board, but also in its collaboration with national and local charities, with sporting groups and with grass roots organisations. This is particularly clear in the work it is doing to

meet Goal 8. It draws on the community's knowledge and the community's spirit to help change people's lives for the better.

Secondly, the BGC's willingness to measure and evaluate the impact of the steps it is taking to meet its objectives demonstrates that it is intentional in its ambition to assess the effectiveness of what it is doing transparently and rigorously and to share that knowledge with others who might benefit.

With its significant economic and social reach, there is huge potential for the betting and gaming industry to play an important part in shaping the future and delivering opportunity to some of our most disadvantaged communities. This impact report has detailed some of the work it is already doing as a purpose-led organisation to close the gaps. Its aspiration to do even better means that, as the country recovers from the pandemic and seeks to address the challenges of the cost of living crisis, it can make a real difference in those communities where it operates.

Future Ambitions

Throughout this analysis, we found reasons for the Betting and Gaming Council to be proud of the contribution its members make to levelling up the UK and were impressed by the deep roots many companies have formed within communities at the sharp end of the geographical disparities that hold back the nation from reaching its full potential.

In this formative period for the industry as a new regulatory regime approaches, these recommendations are designed to help the BGC engage key stakeholders with confidence in the economic and social contribution it makes, and provide fresh ideas to deepen its impact further in the years ahead.

1 As it works with the government to increase protections for vulnerable customers without destroying jobs in the sector and driving UK-based companies overseas, we suggest the BGC commissions more analysis of its members' community impact. In particular, it may be valuable for the industry and policymakers to understand and map more thoroughly its economic and social investment against the Government's Indices of Multiple Deprivation or Social Mobility Index, showing in greater detail where jobs, sports and community investment, and local business rates contributions are making a vital contribution in areas that are in greatest need.

2 The BGC could explore how to get its members more actively involved in growing the regional skills bases needed for the high-tech digital jobs that it sustains outside London. A push for BGC members to help grow the high-tech skills talent base in diverse areas could build on pioneering local initiatives like Bet365's partnership with Stoke City Council to sponsor maths teachers, increasing its members' contribution in a critically-needed area while respecting appropriate educational safeguards.

3 We have also been struck by the strong commitment of BGC members to social mobility, often supporting staff to get the training and confidence they need and offering the opportunities to progress rapidly from entry level jobs.

BGC's commitment to accelerating change through measurement and analysis could extend to deeper tracking of the socio-economic background of its employees, potential recruits and wider network of employers. This would help BGC and the wider Coalition's understanding of what action is needed to improve socio-economic diversity.

Through the Social Mobility Pledge, we have worked closely with the Social

Mobility Commission and others to shape four key questions to provide the data needed to develop an informed strategy for improving overall social mobility.

BGC could commit to working towards asking these four key questions over the next 12 months and share the results as part of the Equality of Opportunity Coalition:

- **What was the occupation of your main household earner when you were aged 14?**
- **Which type of school did you attend for the most time between the ages of 11 and 16?**
- **If you finished school after 1980, were you eligible for free school meals at any point during your school years?**
- **Did either of your parents attend university and gain a degree (e.g. BA/BSc or equivalent) by the time you were 18?**



