

WOMEN IN GAMING AND HOSPITALITY AUSTRALASIA

Industry Benchmarking Survey 2022

Final Report | 20 June 2022



MayvinGlobal



WOMEN IN GAMING
& HOSPITALITY
AUSTRALASIA

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EXECUTIVE SUMMARY

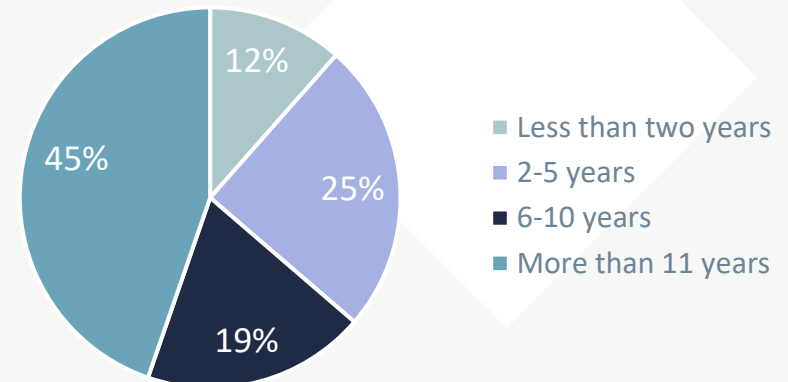
EXECUTIVE SUMMARY

Overview

- 2022 marked the second consecutive year that the Women in Gaming & Hospitality Australasia (WGHA) industry benchmarking survey was conducted.
- The survey was distributed and open throughout February and March 2022, which was similar to the inaugural survey distribution in 2021.
- The objective of the survey was to ascertain changes (or improvements) for women in and entering the sector, using the 2021 survey results as the baseline.
- The overall objective of conducting this research remained on par with 2021, which was to understand the real barriers for women entering the industry and for member companies to compare their own gender equality progress against other organisations and their previous year results.
- There were 1,085 responses (an increase on 2021) from across Australia (68%) and New Zealand (30%). In Australia, the majority representation was from NSW and QLD and the North Island in New Zealand - although there were more from the South Island this survey (14% compared to 6% 2021).

- There was a good gender balance with 71% female respondents and 27% male respondents.
- Similar to the 2021 survey, the majority of respondents have worked in the sector for 11+ years, with a skew towards males (54% compared to 43% female).

How many years have you worked in the Gaming & Hospitality industry?



EXECUTIVE SUMMARY

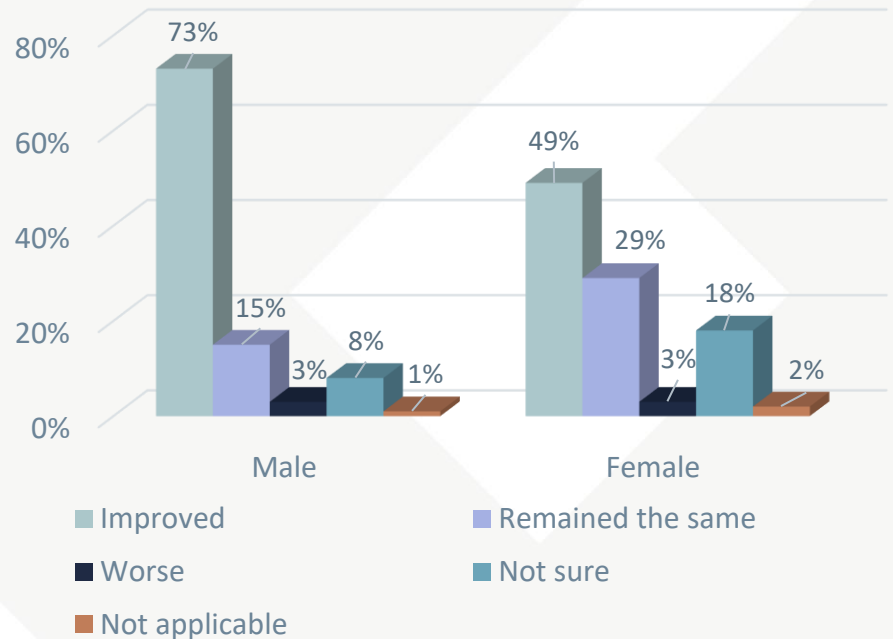
High level observations

There were several findings from the survey that may be considered critical for WGHA when it looks at how it may shape or influence the industry of the future:

- Gaming & Hospitality saw 43% of respondents stating that 'they just fell into the sector', and 55% having considered leaving. Therefore a second consecutive year, where the sector wasn't a clear long term career choice.
- Many organisations continue to do well on providing family friendly options for staff, and this continued to not be highly promoted – both within and outside the sector.
- Equality for all was identified as an issue, not just limited to gender, but also age and cultural background.
- 2022 results demonstrated again that males are either not experiencing or not observing the gender issues that women are facing.

While these themes are of value for member organisations to monitor individually, these are potentially areas that WGHA may consider valuable for how it influences and shapes the future direction of the industry.

To what extent has there been positive change in gender equality in the Gaming & Hospitality industry in the last two – three years?



EXECUTIVE SUMMARY

Key findings

Reasons for entering the industry

- The top four reasons for starting in the industry are the same for males and females, however significantly more women did *not* initially pursue a career in Gaming & Hospitality, and significantly *more* men started in the industry to pursue a career.
- Males also stated that exciting and rewarding work was a factor, where females did not.
- The top four reasons for starting in the industry for all genders were:
 1. it just happened
 2. opportunities to grow career and become a leader
 3. ability to meet lots of different people
 4. exciting and rewarding work.

Career progression

- The main reasons identified for slow career progression were lack of available positions followed by no career support or others being promoted before them.
- More females felt a lack of gender diversity in senior leadership was a barrier to not reaching their desired level.
- These findings were on par with the 2021 survey.

Gender issues in the workplace

- In general women reported higher occurrences observing or experiencing gender issues in the workplace.
- Lack of promotion, lack of flexible arrangements, unfair treatment and gender inequality were all identified as issues which was significantly higher than the responses from men.
- This question highlighted, that in general, male respondents did not see or identify the gender issues in the workplace.
- These findings were on par with the 2021 survey.

EXECUTIVE SUMMARY

Key findings

Reasons for leaving the industry

- Of the 55% who considered leaving their current role for another industry, significantly more were female. Reasons also differed with females more likely to consider leaving due to gender-related issues and lack of flexible arrangements, while males saw higher earning potential in other sectors.
- A large portion of those who had not considered the industry as a career had also considered leaving, with lack of opportunities and higher earning potential in other sectors as key considerations.
- 35% of respondents are feeling that their career level does not fully reflect the level of efforts to date. This is worth watching over time to assess sentiment of the sector.
- These findings were on par with the 2021 survey.

Changes in gender diversity in the industry

- There was significant difference in male and female responses to positive changes in the industry over time. **This would also be interesting to monitor over time to focus on sentiment changes (if any).**
- Significantly more males responded there has been positive change in gender equality in the industry in the last two to three years. That is, 73% males compared to 49% females.
- Generally, the survey for two years consecutively showed that men do not see the gender issues women are facing.

Significantly more males felt there has been positive change in gender equality in the industry in the last two to three years. That is, 73% males said there had been improvement compared to 49% females.

EXECUTIVE SUMMARY

Key findings

When comparing responses between **what** their organisation and the industry **can do** to address gender inequality, ratings in response to questions about "Creating respectful and inclusive cultures, free from harassment, everyday sexism" was significantly higher for industry. Whereas for organisations, "Career development and leadership programs" was rated highest.

Organisation support for equality

Most reported their organisation was doing relatively well with parental leave. Other areas for support could include:

- career development and leadership programs
- merit based career progression and opportunities
- proactively supporting access to training and education
- increasing the visibility and recognition of women
- normalising flexible work.

These findings were on par with the 2021 survey.

Industry support for equality

In relation to the industry, most felt the following still needs to be addressed:

- creating respectful and inclusive cultures, free from harassment and everyday sexism
- career development and leadership programs
- normalising flexible work
- increasing the visibility and recognition of women
- addressing the gender pay gap.

These findings were on par with the 2021 survey.

WGHA possible pathways for the industry

The direction for WGHA based on the 2021 and 2022 surveys was relatively similar with three themes evolving:

- Education pathways
- Changing sentiment
- Advocacy for the industry.



BACKGROUND

BACKGROUND

Women in Gaming & Hospitality overview

Women in Gaming & Hospitality Australasia (WGHA) is a not-for-profit organisation with a purpose to achieve gender equity, gender equality and an inclusive industry and promote positive outcomes for women in the Gaming, Gaming related and hospitality industry. It provides a wide range of resources to drive systemic change in the industry.

The organisation operates according to three main pillars:

- Industry – Achieve an inclusive industry, highlight inequality when it's seen.
- Organisation – Challenge organisations to empower and create opportunities for women.
- Individual – Encourage individuals to reach their full potential by supporting their development with education, exposure and networking opportunities.

2022 Survey objective

2022 marked the second consecutive year that a benchmarking survey was conducted.

The objective of the survey was to ascertain changes, or improvements, for women currently working in and entering into the sector, using the 2021 survey results as the baseline.

Sample size

The overall sample size of 1,085 responses was a solid sample size for statical comparisons and slightly more responses than the 2021 survey.



METHODOLOGY

METHODOLOGY

Survey distribution and development was aligned to the previous years' process and included:

1. Review
2. Develop and distribute
3. Monitoring and analysis
4. Report

Stage one: Review

This stage reviewed the survey responses from 2021 and any tweaks or changes previously discussed with the then CEO Helen Galloway. These were incorporated into the 2022 survey. Noting significant changes were not made to ensure like for like analysis was able to be maintained.

Stage two: Develop and distribute

On finalising the 2022 questions, a test survey was distributed to a small sample in January 2022 to iron out any bugs.

The survey was then promoted widely by WGHA commencing from 21 February through to 20 March 2022, with an additional push around International Women's Day.

Five \$100 gift vouchers were again offered as incentive to complete the survey.

Awareness of the survey was through WGHA, personal communication and networks, the WGHA network as well as social media channels. Distribution included:

- WGHA electronic direct mail campaign to WGHA database
- WGHA social media campaign
- Corporate Partners distribution to staff via various channels
- Distribution through Mayvin Global social media networks.

METHODOLOGY

Stage three: Monitoring and analysis

This stage focused on monitoring responses including companies, locations and levels of seniority. The objective was to ensure a dispersion of survey responses across all of Australia and New Zealand as well as from key partners and potential partners.

Analysis of the data took place throughout the period assessing the results and on closure of the survey, final analysis was undertaken. **Selected questions were analysed by gender.**

Once the survey closed, five participants were randomly selected as winners of a \$100 voucher.

There were four located in Australia and one in New Zealand. Each received an e-gift voucher in their local currency.

Stage four: Report

Report preparation included consolidation of the project into a draft report for WGHA. The final report is due for presentation to the WGHA Board on 28 June, 2022.

Where data samples were large enough to ensure anonymity of respondents and with a reasonable sample size, company reports were created for Corporate Partners. Three reports will be created.



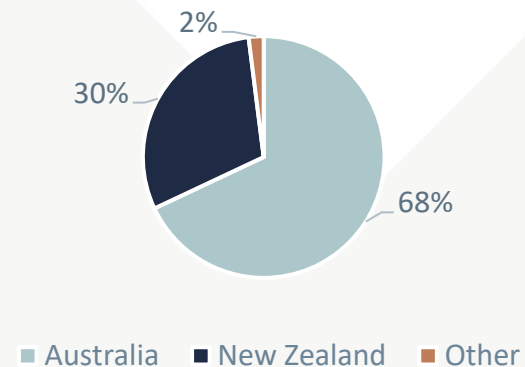
KEY FINDINGS

KEY FINDINGS

Respondent demographics

- Majority of respondents are currently working in Australia (68%) and 30% New Zealand (NZ).
- More respondents were from NZ (30% compared to 23% 2021), and mainly from the North Island (86%), although there were more from the South Island in 2022 compared to the previous survey (14% compared to 6% 2021).
- Australian respondents predominantly live in NSW and QLD. In 2022, there were more responses from SA (10% compared to 5%) and WA (6%, versus 0% in 2021), as well as the ACT and NT.
- 71% identify as female (n=736) and 27% male (n=278), 21 respondents preferred not to say.
- 64% have been in the industry for more than six years, while 37% have been in the industry for five years or less. Significantly, more males worked in the industry for 11+ years (54% males compared to 43% females).
- As in 2021, gaming operations was the largest area of employment (32%) followed by food and beverage 16%, which was higher than 2021 (10%).
- More females reported being in front-line roles – 35% compared to 20% males.
- 76% employed full time and 16% part time. Significantly more males are employed full time (90% compared to 71% female) and more females are part time (19% compared to 5% male).

Respondent location by country



KEY FINDINGS

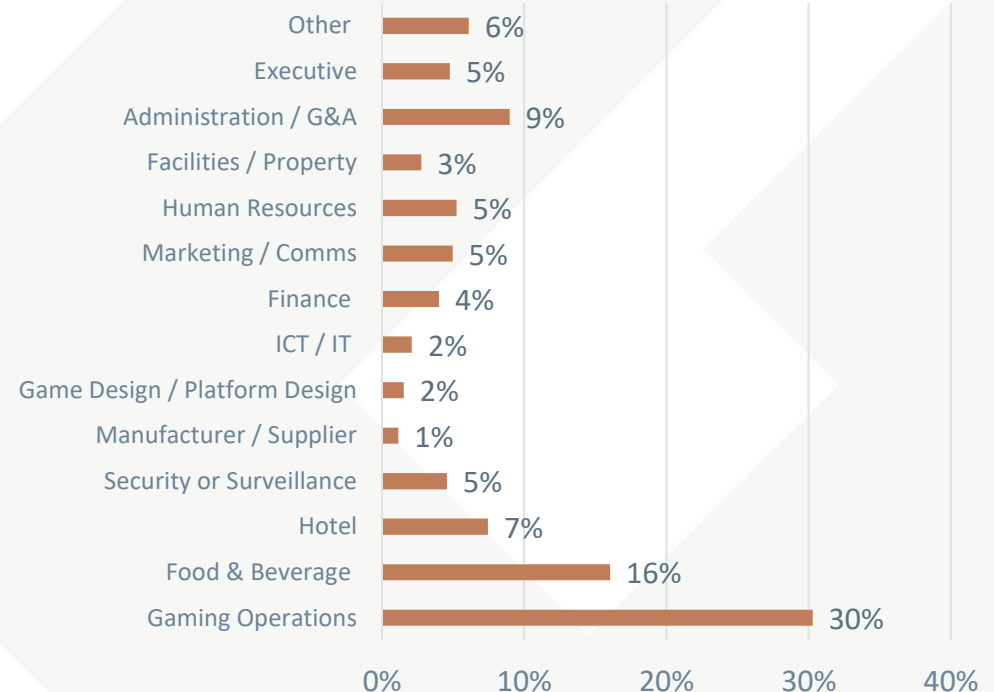
Respondent demographics

Age differences

Compared to 2021 the survey had increased younger respondents (aged 20-29 years). An analysis of this group found they are:

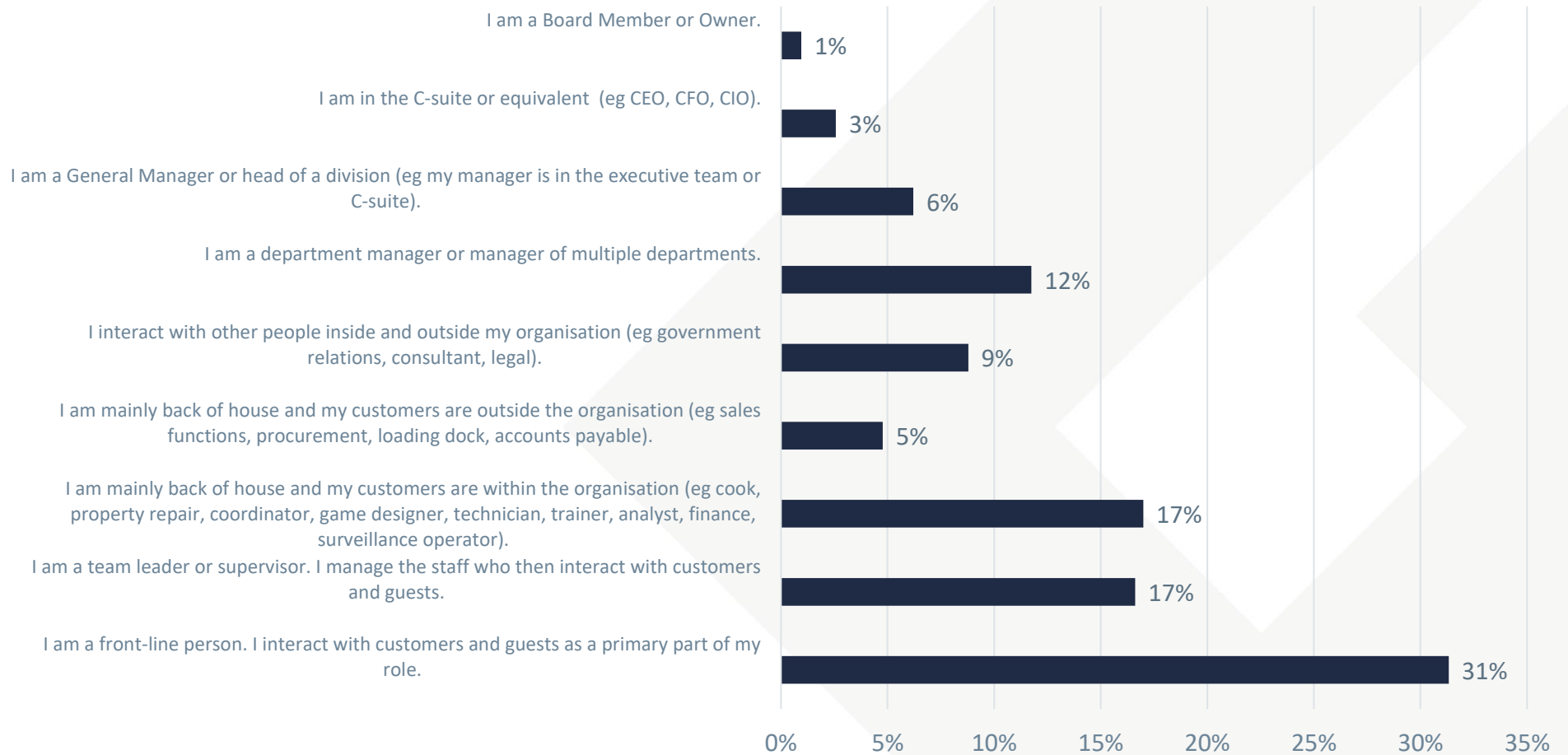
- Significantly more likely to be in the sector for less than two years (25% compared 11% total) or 2-5 years (49% compared to 24% total).
- Working in food and beverage: 32% compared to 16% total.
- More likely to be working as front-line staff: 52% compared to 31% total.
- Less likely to be in full time employment (62% compared to 76% total) and more likely to be part-time (23% / 15%) or casual (14% / 6%).
- Of this age group, 78% are female and 20% male.
- These results were on par with the 2021 survey.

Respondent area of work



KEY FINDINGS

Role classification



KEY FINDINGS

Reasons for entering the industry

The top four reasons for starting in the industry are:

1. did not initially pursue a career in Gaming & Hospitality, it just happened.
2. opportunities to grow career and become a leader.
3. ability to meet lots of different people.
4. exciting and rewarding work.

Significantly less reported that they did not initially pursue a career in gaming and hospitality compared to 2021 and more said the ability to meet more people was a factor.

Significantly more men started in the industry to pursue a career. Males also stated that exciting and rewarding work was a factor, where this was less so for females who were more likely to say they did not initially pursue a career in gaming and hospitality.

See table over page for all responses.



KEY FINDINGS

Reasons for entering the industry

Reasons for starting in the Gaming and Hospitality Industry	2022 (n=1,011)	Male (n=278)	Female (n=736)	2021 (n=922)
Did not initially pursue a career in Gaming & Hospitality, it just happened!	43%	39%	45%	51%
Opportunities to grow career and become a leader	35%	37%	35%	34%
Ability to meet lots of different people	27%	26%	28%	18%
Exciting and rewarding work	26%	33%	24%	29%
Flexibility, work-life balance	23%	21%	23%	20%
Shift-work suited my lifestyle at the time of starting, and I haven't left	21%	17%	23%	16%
On-the-job training and development opportunities	19%	14%	21%	15%
Earning potential and benefits	18%	18%	18%	18%
I was contacted by a recruiter/friend/old boss and asked to apply for a role	15%	19%	14%	17%
Career mobility and the opportunity to work in a variety of locations and countries	14%	17%	13%	14%
The location of the work was close to home /convenient	12%	9%	13%	17%
Inspired by a mentor/role model or others who have the same career	9%	11%	9%	9%

KEY FINDINGS

Career overview and progression

- 56% of respondents stated that their career level is in line with efforts to date. Significantly more males (63%) believe their career level is in line with efforts to date compared with 54% females. Could this be because males are more likely to have chosen a career in the sector, and that more of them have worked in the sector for more than 11 years, and therefore, at the level/s they expected? This is the same gender difference as 2021.
- 30% of respondents are feeling that their career level does not fully reflect level of efforts to date, more so for females.
- 50% believe their efforts and quality of work are similar to those in similar roles. 56% of males and 50% females agreed with this.
- 35% believe they contribute a greater effort and quality than those in a similar role, with 36% of females and 30% males agreeing. In 2021, 44% of females believed they contributed greater effort and quality than those in a similar role, **suggesting that this may have improved in 2022.**

Which of the following best describes your career now?	2022 (n=1,011)	Male (n=278)	Female (n=736)	2021 (n=922)
My career level is in line with my efforts to date	56%	63%	54%	59%
My career level does not fully reflect the level of my efforts to date	30%	25%	32%	29%
I'm not sure I can answer	9%	7%	9%	8%
Prefer not to answer	5%	6%	5%	4%

KEY FINDINGS

Career overview and progression – verbatim comments from women*

Of the 91 comments 71 were from women

“It took a while to get where I am. Although I did not initially set out to be here, in hindsight I should have been here a long time ago for my 23 years in the industry efforts.”

“My responsibilities have grown, but my pay and title never changed.”

“Just because you're able to do something well, does not mean you should have to be locked into that role forever.

Pay equality gap between male and female in this role is also incredibly wide.”

“My career has progressed through a lot of hard work, commitment, self believe and support of family. Also working for a leader that believed that females can achieve as much as a male also helped in a male dominated industry.”

“My career has been disrupted because I expected equity, respect and safety in my workplace. I tried to resolve it and now I am being portrayed as unprofessional and told to resign from the Board. Two men swore at me subjected to ongoing bullying for 3 months. External complaint lodged. No man was asked to resign or labelled unprofessional.”

“I’ve been very fortunate to have been offered plenty of opportunities throughout my career.”

*Grammatical errors have not been corrected

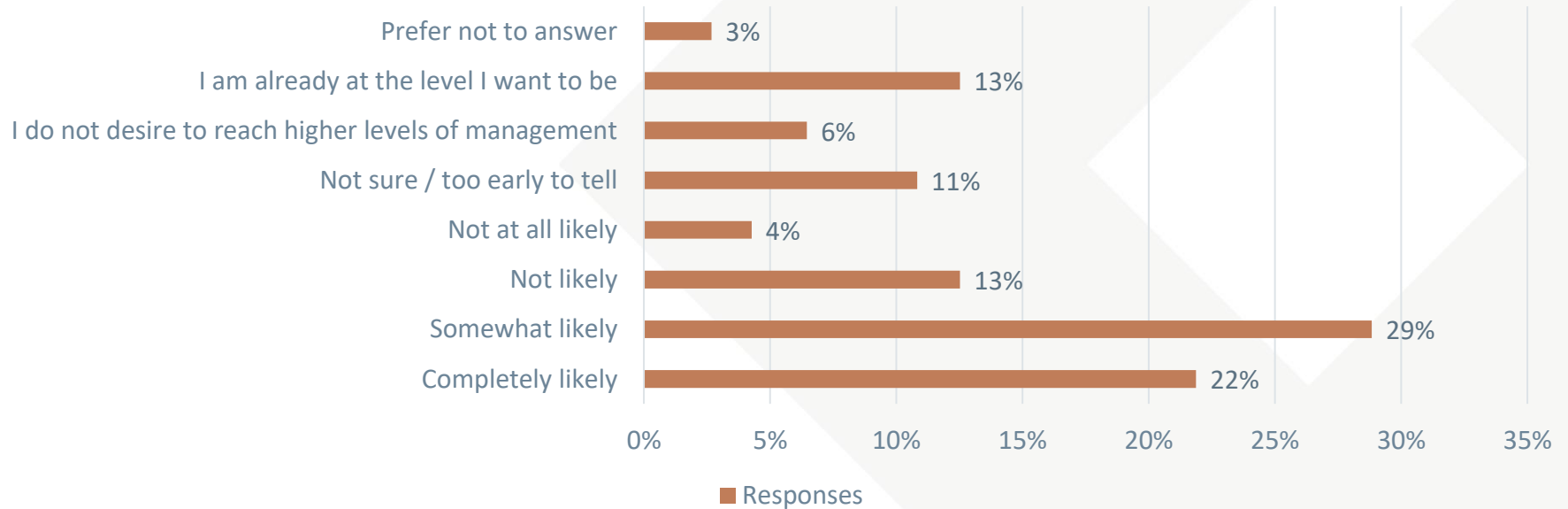
KEY FINDINGS

Career overview and progression

As in 2021 almost half the respondents felt they were completely likely / likely to reach their desired level. 17% felt they were not likely.

Significantly more males (30%) felt they were completely likely to reach their desired level compared to 19% of females.

Significantly more of those in sector for less than two years believe their efforts and quality of work are similar to others in similar roles, whereas those in sector 6-10 years think their efforts are greater than those in similar roles.



KEY FINDINGS

Barriers to career progression

Of the 268 respondents, no senior positions available in the foreseeable future was the main reason, followed by no career support. There were differences in gender:

- More females afraid to apply for senior roles, had negative impact due to leave, boss not interested in career progression and lack of gender diversity in senior leadership.
- More males reported no senior positions available in the foreseeable future.

Overall, more reported a reason as unfair treatment in 2022 compared with 2021. And significantly less in 2022 felt no senior positions available (29%) compared with 2021 (40%).

See table over page for all responses and significant variations.



KEY FINDINGS

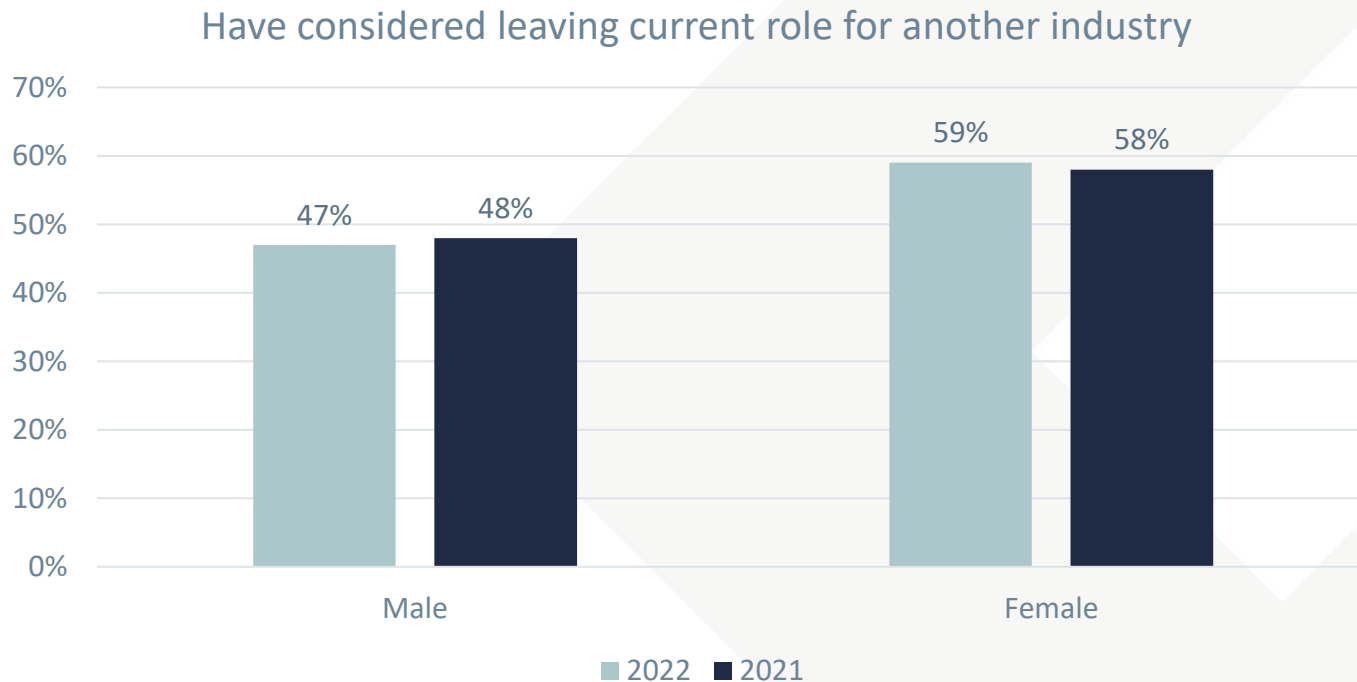
Barriers to career progression

	2022 (n=268)	Male (n=52)	Female (n=206)	2021 (n=271)
Other staff at the same level as me, are promoted before me	22%	23%	22%	21%
No career support (eg on-the-job training or development opportunities)	25%	27%	25%	21%
I am afraid to apply for more senior roles	11%	6%	12%	7%
I have not applied for any roles at higher levels	20%	21%	19%	17%
My boss doesn't like me	7%	10%	7%	6%
My boss doesn't see that I have the potential /capabilities	14%	13%	14%	13%
No senior positions are available in the foreseeable future	29%	37%	28%	40%
I'm not given the opportunity to act in higher roles	16%	17%	16%	17%
Impacts of COVID-19	21%	21%	21%	16%
I have not had a career progression discussion with my boss/supervisor	21%	17%	22%	18%
My boss/supervisor is not interested in my career progression	18%	12%	19%	16%
I took parental leave /other leave which has had a negative impact	6%	0%	8%	6%
Lack of gender diversity in senior leadership	15%	8%	16%	15%
Everyday behaviour that excludes people based on their gender	9%	10%	9%	7%
Unfair treatment	12%	6%	13%	6%

KEY FINDINGS

Considerations for leaving the industry

55% of the total sample have considered leaving the industry, with females significantly more likely to have considered this across both 2022 and 2021 surveys. The breakdown of males versus females that considered leaving the industry is illustrated below.



KEY FINDINGS

Reasons for leaving the industry

- The main reason given for leaving the industry was higher earning potential in another industry, which was the same as 2021.
- The main gender differences were that females were more likely to cite lack of flexible working arrangements and lack of gender diversity in senior leadership, whereas males were more likely to report lack of promotional opportunities and pathways.

	2022 (n=546)	Male (n=124)	Female (n=409)	2021 (n=502)
Lack of opportunities for promotion and/or no pathway to promotion	35%	37%	35%	36%
More opportunity to progress in another profession of industry	30%	35%	29%	32%
No career support (eg on-the-job training or development opportunities)	16%	16%	16%	21%
Uncertainty in the industry due to COVID-19	29%	27%	30%	24%
Higher earning potential in other industry	42%	46%	41%	37%
Lack of gender diversity in senior leadership	13%	6%	15%	16%
Demanding workloads	27%	25%	28%	26%
Lack of job security	12%	6%	13%	12%
Society or family pressure about working in the Gaming & Hospitality industry	10%	11%	10%	13%
Everyday behaviour that excludes people based on their gender	7%	2%	9%	10%
Unfair treatment	12%	10%	13%	15%
Company lacks commitment to addressing gender equity	5%	2%	6%	8%
Lack of role models in the industry	11%	7%	12%	12%
Lack of flexible arrangements	16%	10%	18%	14%
Reputation of industry	12%	6%	13%	n/a

KEY FINDINGS

Observation and experience related to gender issues in the workplace

Generally, results were the same for 2021 with lack of recognition of work and demanding workloads the highest.

There were some highly significant differences in gender responses, with females more likely to report:

- lack of gender diversity in senior leadership
- lack of recognition of work, or minimising contribution
- no career support
- lack of flexible arrangements
- sexual harassment.

Males were more likely to say that they have not experienced or observed any of these – 31% compared to 23% female.

See table over page for all responses and significant variations.



KEY FINDINGS

Observation and experience related to gender issues in the workplace

	2022 (n=967)	Male (n=262)	Females (n=679)	2021 (n=891)
Lack of opportunities for promotion and/or no pathway to leadership	26%	26%	27%	27%
Lack of gender diversity in senior leadership	18%	8%	22%	20%
Company lacks commitment to addressing gender equity (including pay differences and promotion opportunities)	10%	7%	11%	10%
Lack of role models in the organisation	16%	12%	18%	21%
Exclusion from career progression opportunities	11%	9%	11%	14%
No career support (e.g., on-the-job training or development opportunities)	17%	11%	19%	17%
Lack of flexible arrangements / poor work life balance	23%	18%	25%	22%
Demanding workloads	32%	29%	34%	38%
Sexual harassment	10%	5%	12%	n/a
Lack of job security	11%	10%	12%	14%
Society or family pressure about working in the Gaming & Hospitality industry / for this organisation	13%	8%	14%	14%
Everyday behaviour that excludes people based on their gender	10%	6%	11%	9%
Lack of recognition of your work, or minimising your contribution	35%	27%	38%	33%
Unfair treatment	17%	13%	19%	16%
I have not experienced or observed any of these	25%	31%	23%	26%

KEY FINDINGS

Organisational efforts supporting women

In terms of what their organisation currently does to support women to enter, stay and develop, males were more likely than females to believe that the organisation was doing more to support women across all options provided.

	2022 (n=915)	Male (n=246)	Female (n=645)	2021 (n=838)
Does not tolerate gender based harassment and/or sexual harassment	58%	63%	47%	n/a
Family friendly policies such as parental leave	55%	41%	37%	55%
Creating respectful and inclusive cultures, free from harassment and everyday sexism	52%	38%	24%	53%
Increasing the visibility and recognition of women in the organisation/industry	45%	56%	55%	44%
Normalising flexible work	38%	41%	29%	43%
Career development and leadership programs	38%	60%	39%	36%
Visible sponsorship of women in Gaming & Hospitality from senior leaders	37%	51%	32%	35%
Addressing gender bias in recruitment and promotion	33%	64%	56%	30%
Supporting carers' to better balance work and caring	32%	51%	33%	29%
Proactively supports access to training and education	32%	43%	28%	33%
Merit based career progression and opportunities	28%	39%	24%	28%
Addressing the gender pay gap	28%	39%	30%	25%

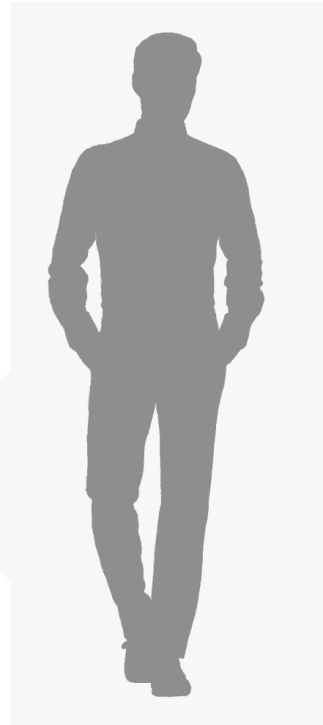
KEY FINDINGS

Organisational efforts supporting women - verbatim comments from men*

“More than 65% of our work force are female. Not too many show any eagerness to pursue careers in our industry BUT the door is open for discussion.”

“Everyone is equal.”

“Makes no sense because women to men ratio in my department is already multiples higher than men.”



“I don't think we have gender bias, several examples I know of form my claim. No gender pay gap here.”

“There is no pay gap except possibly at senior management level or above.”

“If anything, they over compensate and regularly put incapable or unsuitable staff in management roles based on their gender or ethnicity.”

“The gender pay gap is a myth.”

*Grammatical errors have not been corrected

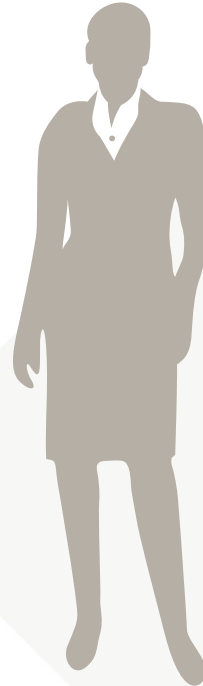
KEY FINDINGS

Organisational efforts supporting women - verbatim comments from women*

“These are tenuous ticks, the flexible work still comes with a LOT of restrictions/structure; parental leave is the bare minimum, i.e., no paid leave for the father/secondary parent. I’m not aware of our company doing any of the other options listed.”

“The company pays lip service to fairness. On paper they look great. The reality is different though the favouritism is based on more than gender.”

“There is a definite division between corporate roles and operational roles. Corporate has flexible options, career progression, support while operational roles tend to be left behind.”



“My organisation does all of these things in name but never in practice. It’s the most insidious thing about it, on paper we are great, in reality we are far behind.”

“They have only just started to address some of these issues, so I wouldn’t say they actually support women. Most executive level managers are men, they say they will eventually have equal gender pay by a certain day when in actual fact they could literally just do it right now irrespective of the state of the economic business (maybe don’t hire so many people/men do to the same job)”

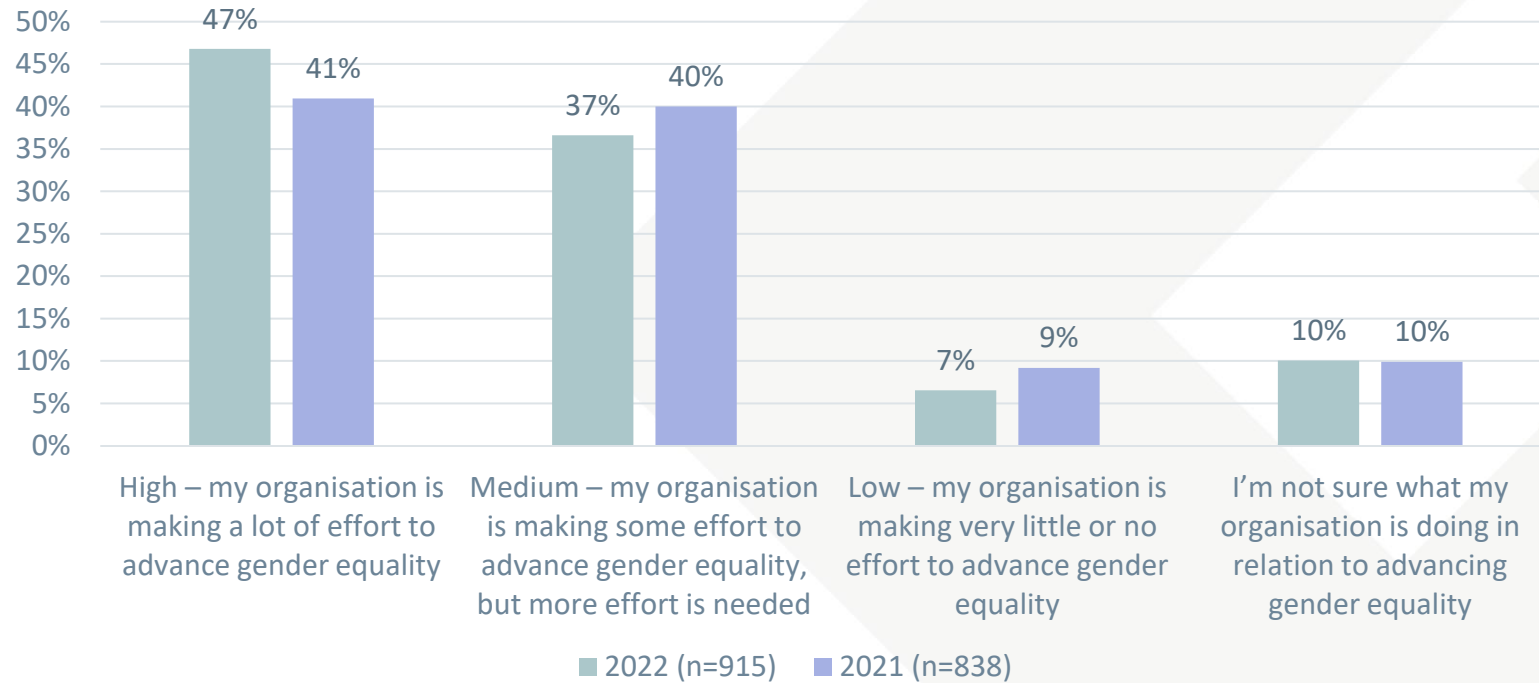
*Grammatical errors have not been corrected

KEY FINDINGS

Organisational efforts to advance gender equality and support women

47% rated their organisation's efforts as high (compared with 41% in 2021) and 37% medium (40% 2021).

Organisation's efforts to advance gender equality

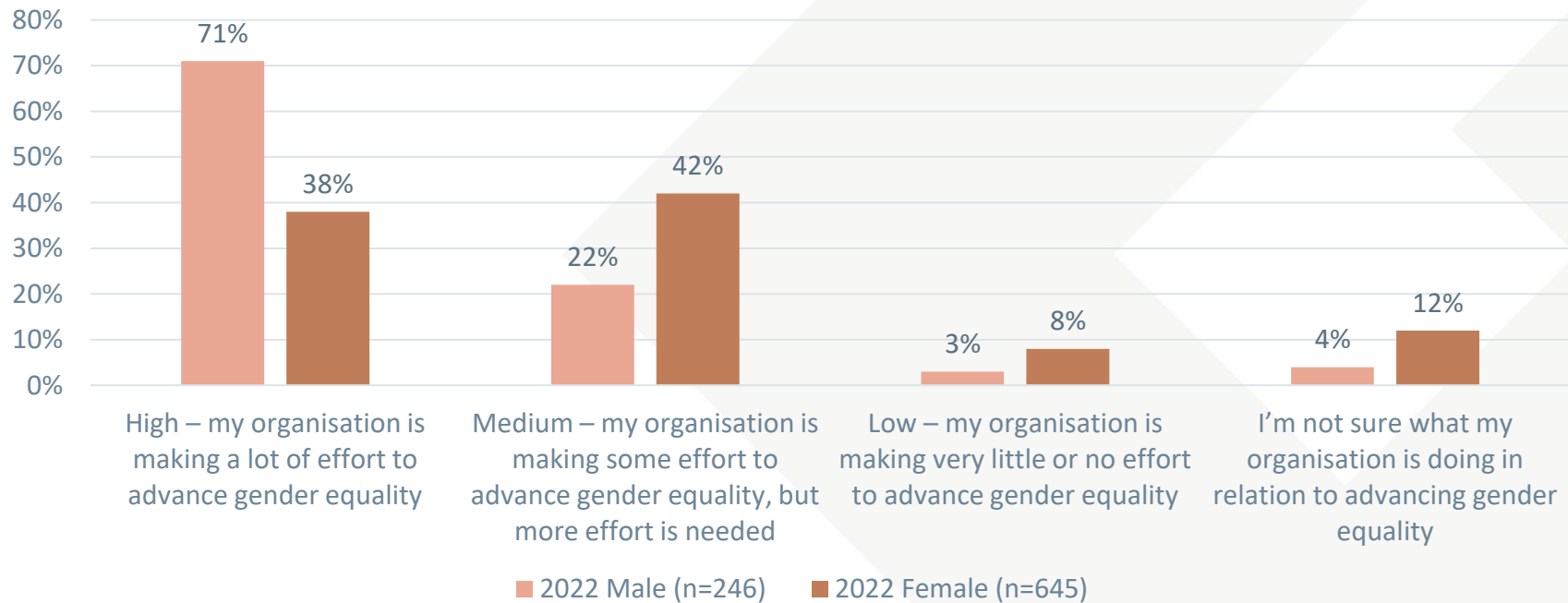


KEY FINDINGS

Organisational efforts to advance gender equality and support women

Males were significantly more likely to select high (71% compared to 38%) and females more likely to select medium (22% compared to 42% female) - these are highly significant differences.

Organisation's efforts to advance gender equality



KEY FINDINGS

What organisations can do differently to advance gender equality

There were highly significant differences between males and females, with females *less* likely to agree with:

- does not tolerate gender based harassment and/or sexual harassment
- creating respectful and inclusive cultures, free from harassment and everyday sexism
- normalising flexible work
- career development and leadership programs
- visible sponsorship of women in Gaming & Hospitality from senior leaders
- addressing gender bias in recruitment and promotion
- supporting carers to better balance work and caring
- proactively supports access to training and education
- addressing the gender pay gap.

For those new to sector, they were less likely to select organisational gender-based initiatives, apart from recruitment and progression. A potential reason is they are yet to be exposed? However, this may be worth WGHA considering in the future and watching trends that emerge (if any).

Those in the sector for more than 11 years felt that visible sponsorship of women in Gaming & Hospitality from senior leaders was something their organisation was doing differently.

Interestingly, two consecutive years of industry benchmarking revealed that significant differences exist for men and women when looking at how their organisation responds to advancing gender equality.

KEY FINDINGS

Industry: sentiment regarding positive changes to gender equality

Respondents felt that the industry could:

- create respectful and inclusive cultures free from harassment and everyday sexism (49%)
- normalise flexible work (45%)
- increase visibility and recognition of women (45%)
- career development and leadership programs (45%).

These are consistent with 2021 findings.

In the 2022 sample, significantly more females wanted the industry to:

- normalise flexible work (48% compared to 36% males)
- address the gender pay gap (45% compared to 30% males)
- career development and leadership programs (48% compared to 37% males).

These results are highly statistically significant.

There was slightly less interest in career development for those new to the sector (less than 2 years and 2-5 years). Those in sector less than 2 years felt there was more to be done on addressing gender bias in recruitment and progression.

KEY FINDINGS

Industry: sentiment regarding positive changes to gender equality

What industry can do	2022 (n=885)	Male (n=235)	Female (n=626)
Creating respectful and inclusive cultures, free from harassment and everyday sexism	49%	53%	49%
Normalising flexible work	45%	36%	48%
Increasing the visibility and recognition of women in the organisation/industry	45%	46%	46%
Career development and leadership programs	45%	37%	48%
Supporting carers to better balance work and caring	43%	44%	43%
Addressing the gender pay gap	40%	30%	45%
More positive messaging about the gaming and hospitality industry in the community	39%	46%	47%
Family-friendly policies such as parental leave	38%	38%	38%
Merit based career progression and opportunities	36%	38%	35%
Addressing gender bias in recruitment and promotion	34%	33%	34%
Visible sponsorship of women in Gaming & Hospitality from senior leaders	32%	46%	46%
Better access to training and education	31%	31%	30%

KEY FINDINGS

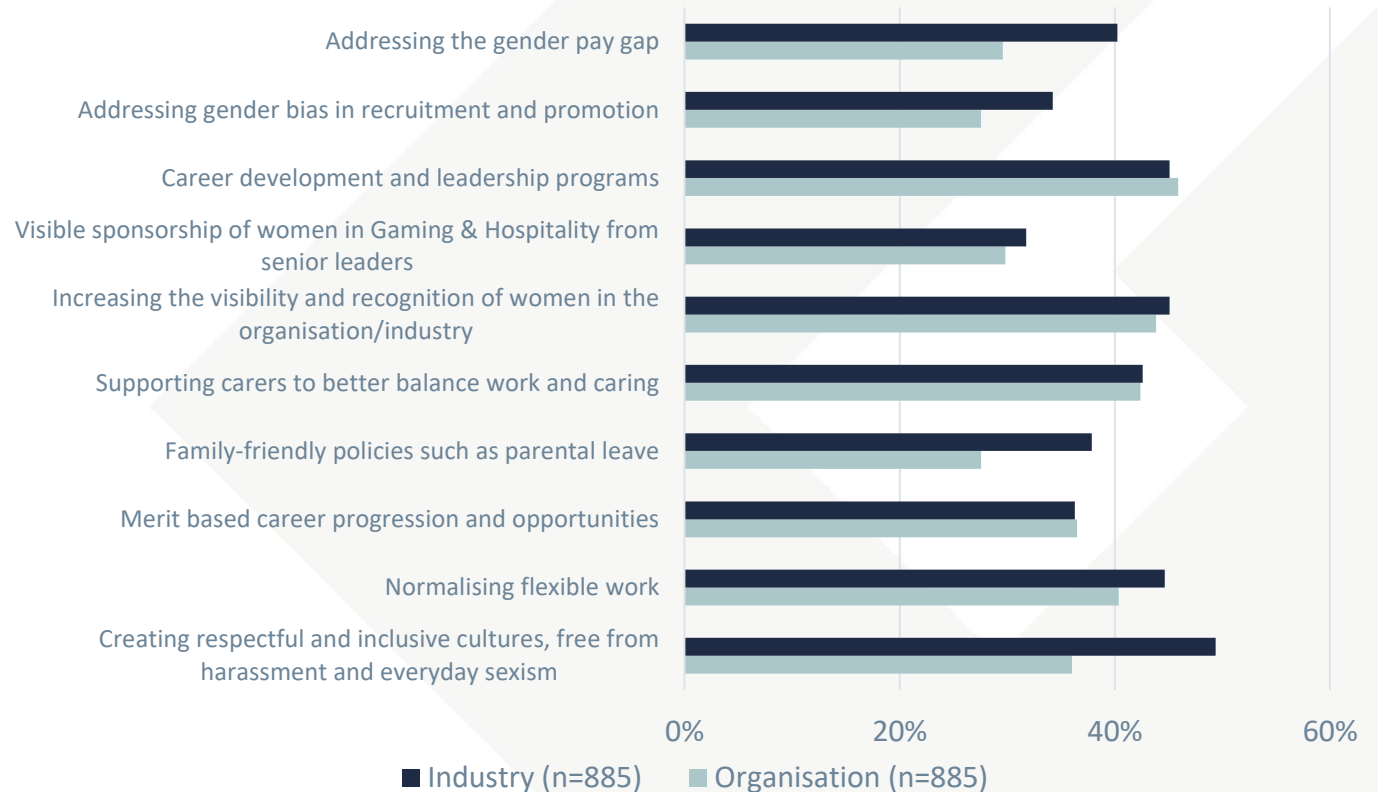
Comparing industry and organisational approaches to gender inequality

The difference between responses for industry and organisations was:

1. creating respectful and inclusive cultures, free from harassment and sexism (49% industry / 36% organisation)
2. addressing the gender pay gap (40% industry / 30% organisation)
3. addressing gender bias in recruitment and promotion (34% industry / 28% organisation).

These were similar variations as in the 2021 survey.

Organisation vs Industry



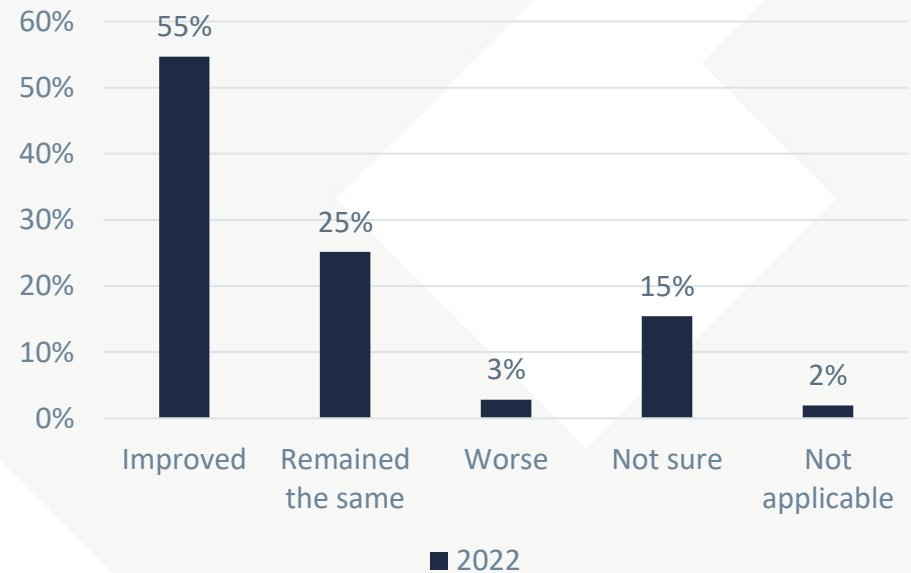
KEY FINDINGS

Extent of positive change in the industry in the past 2-3 years

55% believe there has been positive change and 25% remained the same:

- Significantly more males think this has improved (73%) than females (49%).
- More respondents in 2022 believed that this has improved (55%) compared with 2021 (46%).
- Those new to the sector more were likely to be unsure about the extent of positive change, also less of them felt it had improved.

	2022 (n=887)	Male (n=238)	Female (n=628)	2021 (n=823)
Improved	55%	73%	49%	46%
Remained the same	25%	15%	29%	28%
Worse	3%	3%	3%	2%
Not sure	15%	8%	18%	20%
Not applicable	2%	1%	2%	3%



KEY FINDING

What would they like to see done in the next 12 months?

There were 510 responses to the question about what their organisation and/or WGHA should focus on in the next 12 months. These were analysed and grouped into the following summaries:

320 respondents related to something the industry as a whole could do, such as gender equality, equal pay, addressing the gender pay gap, better working conditions, etc.

110 respondents related to educational programs, training courses and mentoring:

- *Educate both male and female staff on what is acceptable behaviour. Empower both genders to step up and say no to inappropriate behaviour. [Male respondent]*
- *Education in schools - primary and secondary - about the sector being full of opportunities for both genders to achieve senior leadership roles. [Female respondent]*
- *More opportunities for women to upskill into leadership. More male representation on gender issues and advocating for pay equity. [Female respondent]*

KEY FINDINGS

What would they like to see done in the next 12 months?

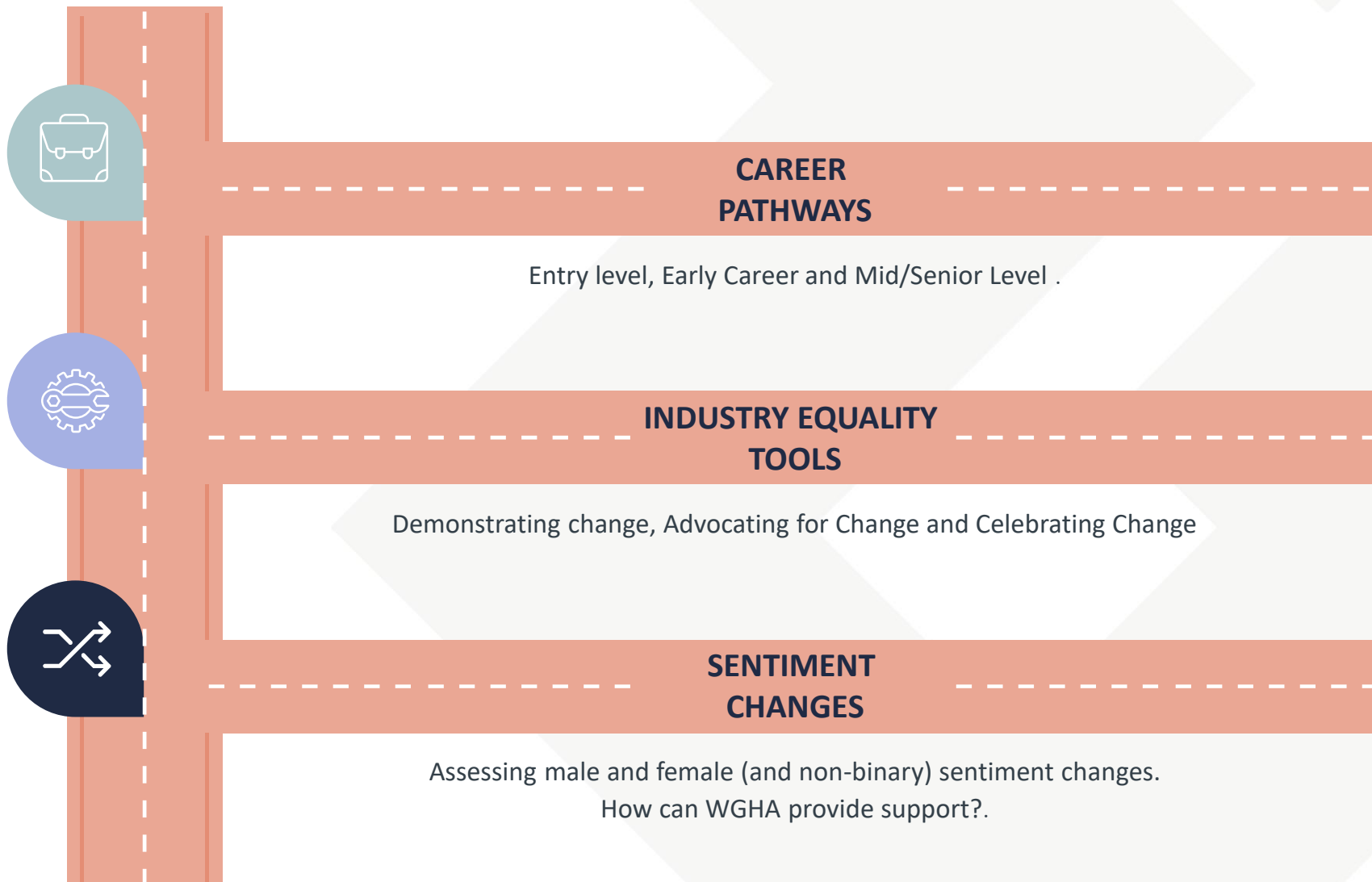
80 respondents related to advocacy and celebration / promotion of success stories. While only a small percentage these were evenly split between males and females, with many insightful comments:

- *Promoting gender equality by having influential leaders share their stories. [Male respondent]*
- *Highlighting the exceptional women managers already in the industry. [Male respondent]*
- *Mentorship programs with executive women, executive training and exposure for women to be on boards/executive committees. [Male respondent]*
- *I would like to see more promotion about how great the industry is for young women to pursue careers, and for mothers who are looking for a great fun, friendly workplace that suits family life. [Female respondent]*
- *Perhaps the WGHA could be reconfigured to represent LGBTIQ+ employees as well. I would like to see my workplace be more LGBTIQ+ inclusive in their hiring and provision of facilities. [Female respondent]*



WGHA POSSIBLE PATHWAYS

WGHA POSSIBLE PATHWAYS





VERBATIM COMMENTS FROM SURVEYS

RESPONDENT GENERAL COMMENTS

Eliminate the culture of sexual harassment, bravado and jobs for the boys.

I personally think having female leaders in the more senior roles plays a bit part in attracting women to a company in the industry.

More proactive messaging around the career opportunities for women - it's not just a place for men to step to the top.

If the image of 'Gaming' wasn't so male dominated, it would encourage more women

To know that our opinion is important. it would be great if my boss pulled me aside and said, 'Look, I want to hear you in these meetings. I want you to remember that the perspective that you have, as a woman, is very important to us"

Genuine flexibility that can accommodate acting responsibilities, elimination of everyday sexism and education/development opportunity that accelerate pathways to leadership.

The support of women in business starts at the top and if it is a priority for the most senior leaders it will be for all.

More visibility of Women in senior leadership positions. The industry looks like one big boys club.

Invest in training for the women in the organisation who have already proved they have great potential, but need some assistance to take that next step.

*Grammatical errors have not been corrected

RESPONDENT GENERAL COMMENTS

Continue to grow the male ally piece and to support the change in culture, showing that gender equity benefits everyone.

More partners who are genuinely committed to making space for women rather than just ticking a box by having a policy about gender equity.

Companies recognising that greater diversity at all levels from Board through senior management is extremely positive. Opening up pathways and not just using 'gender equality' as window dressing but actively promoting and living the mantra.

Time, training and succession planning for the senior positions. It's my belief that this industry is heavily weighted towards older men being the key demographic of the industry's workforce. It's no secret that this industry was founded on a 'boys club' mentality and until the new wave of Managers and Directors take their place that have a more inclusive mindset, it will remain this way.

Promoting stories of how women have followed non-traditional paths to G&H leadership roles (bust the myth that you have to come from the industry to progress).

Moving gender equality beyond a tick box exercise.

Genuine flexibility that can accommodate acting responsibilities, elimination of everyday sexism and education/development opportunity that accelerate pathways to leadership.

Ensure that all levels of management are armed with the necessary tools to drive diversity and inclusion.

Female leaders support other female leaders to shift dial .

*Grammatical errors have not been corrected

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