

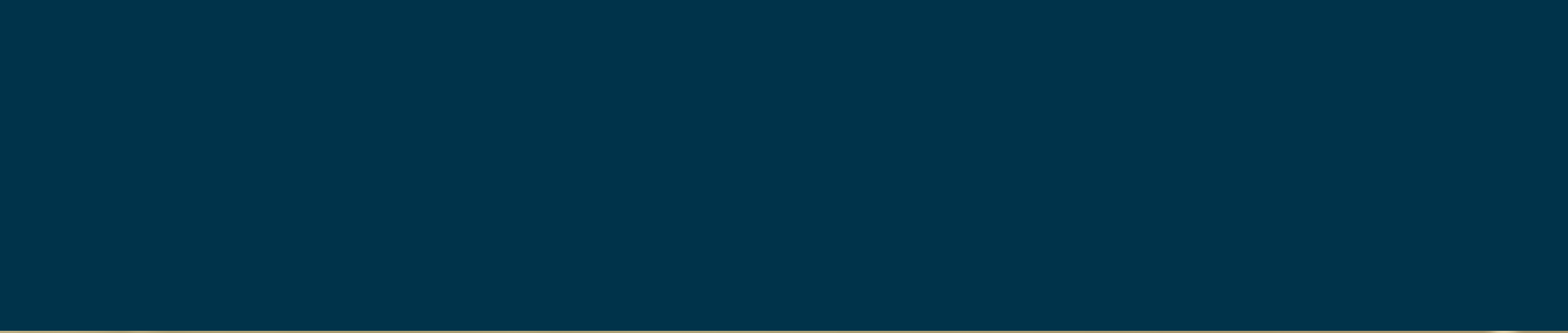
THE 21<sup>ST</sup> ANNUAL

# Casino Gaming Executive Satisfaction Survey



## *The Results*





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# Casino Gaming Executive Satisfaction Survey

*The Results*

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## WELCOME TO THE RESULTS OF THE 2021 SURVEY

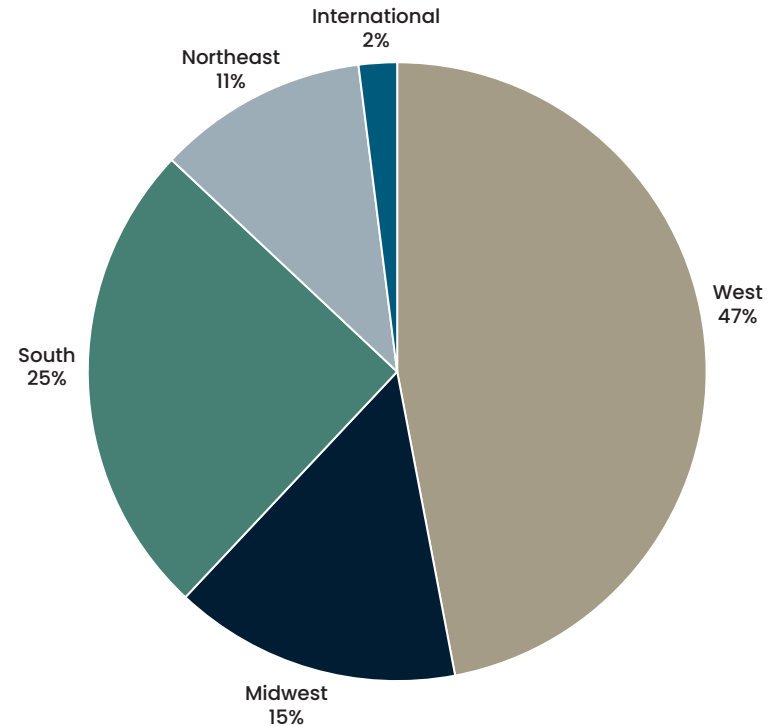
The 21st Annual Casino Gaming Executive Satisfaction Survey, sponsored and produced by Bristol Associates, Inc. and Spectrum Gaming Group, is designed to help the gaming industry attract, retain, and motivate its executive talent. The analysis conveys how the attitudes and preferences of casino gaming professionals have changed since the pre-pandemic era and how they relate to overall market conditions.

Questions newly added to the Survey are related to the Great Resignation, work-at-home preferences, and safety levels regarding COVID-19.

The authors of this report are Benjamin Farber, Erika Castro, and Jessa Farber of Bristol Associates, Inc. and Jeremy Pollock of Spectrum Gaming Group.



*Ratio Of Respondents By Region*



# METHODOLOGY

Over a span of six weeks from September 2021 through October 2021, the 21st Annual Casino Gaming Executive Satisfaction Survey received a total of 1,419 unique online responses. The Survey officially closed on October 18, 2021.

The Survey consisted of 38 multiple choice questions, four sets of questions with a 5-point Likert scale, seven optional open-ended questions, and two numeric scale questions. The average completion time was 10 minutes. The Survey promotion relied on proprietary databases, a press release, Bristol Newsletter, Spectrum Gaming Newsletter, Gaming & Leisure Monthly announcements, and social media including LinkedIn, Facebook, and Twitter.

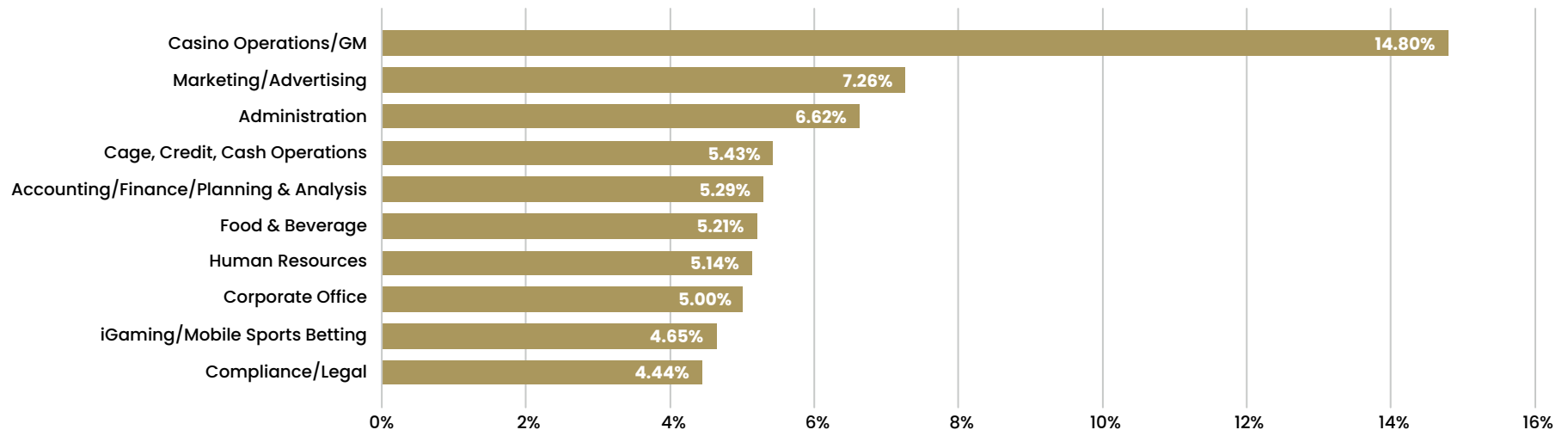
The Survey represents a sampling of casino gaming industry

professionals; 2% of this year’s edition live and work internationally, while the rest live and work throughout North America. The respondents are diverse in geography, responsibilities, years of experience, and other meaningful criteria.

The Survey is designed to ensure that the individuals who participated had experience working in the casino industry within the last five years and that no duplicates were recorded.

The Survey is not scientific and simply measures the views of those who elect to respond. Changes in the qualities of respondents from year to year could be among the factors leading to swings in any measure.

## Breakdown Of Respondents By Department (Top 10)



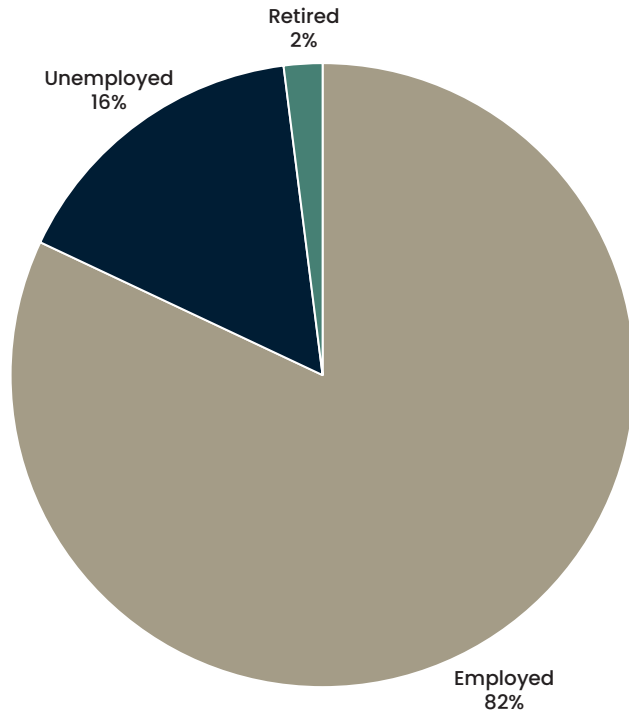
Remaining order of departments: Hospitality (Rooms and/or Non-gaming), Slots, Database, Player Development, Table Games, Surveillance, Information Technology, Engineering/Facilities, Entertainment, Security, Other, Construction/Design, Sales, Purchasing, Sportsbook (On-site), Internal Audit, Tribal Administration



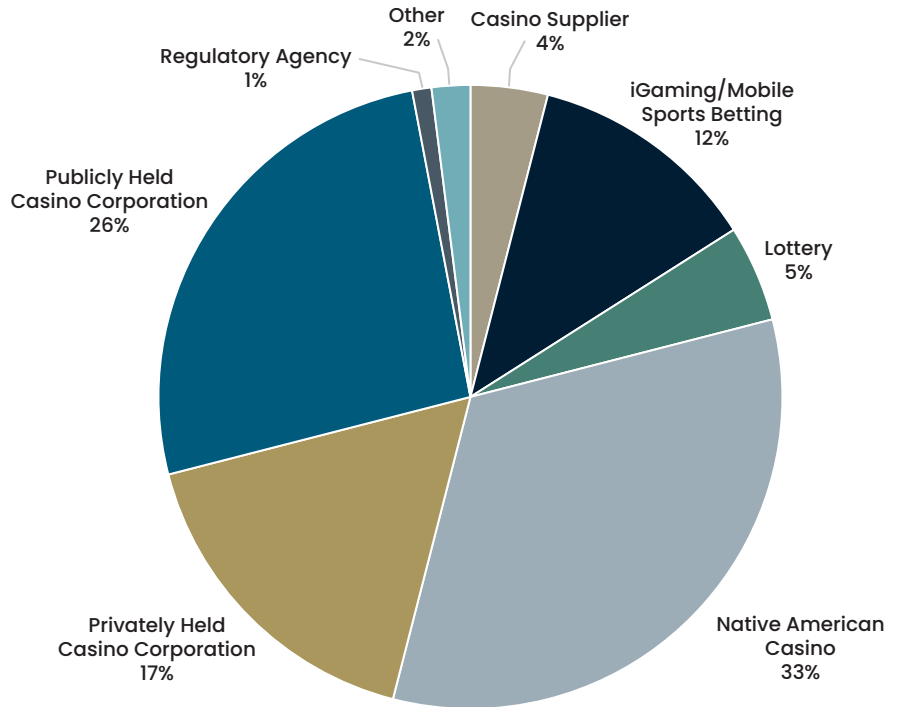
## DEMOGRAPHICS

The following demographics provide further insight on employment status, owning/managing organizations, years of experience, and job levels of the 2021 Survey respondents.

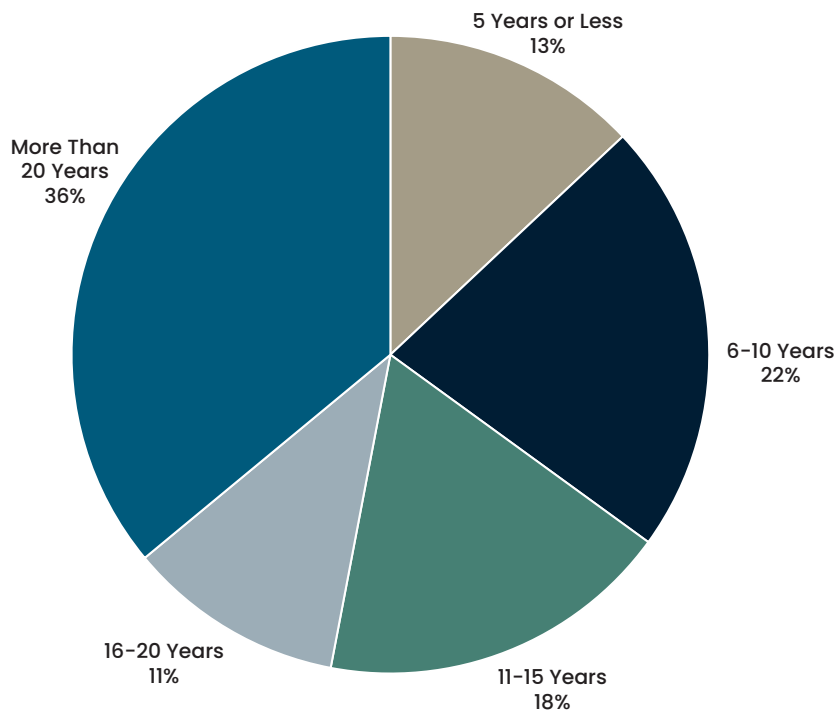
*Employment Status*



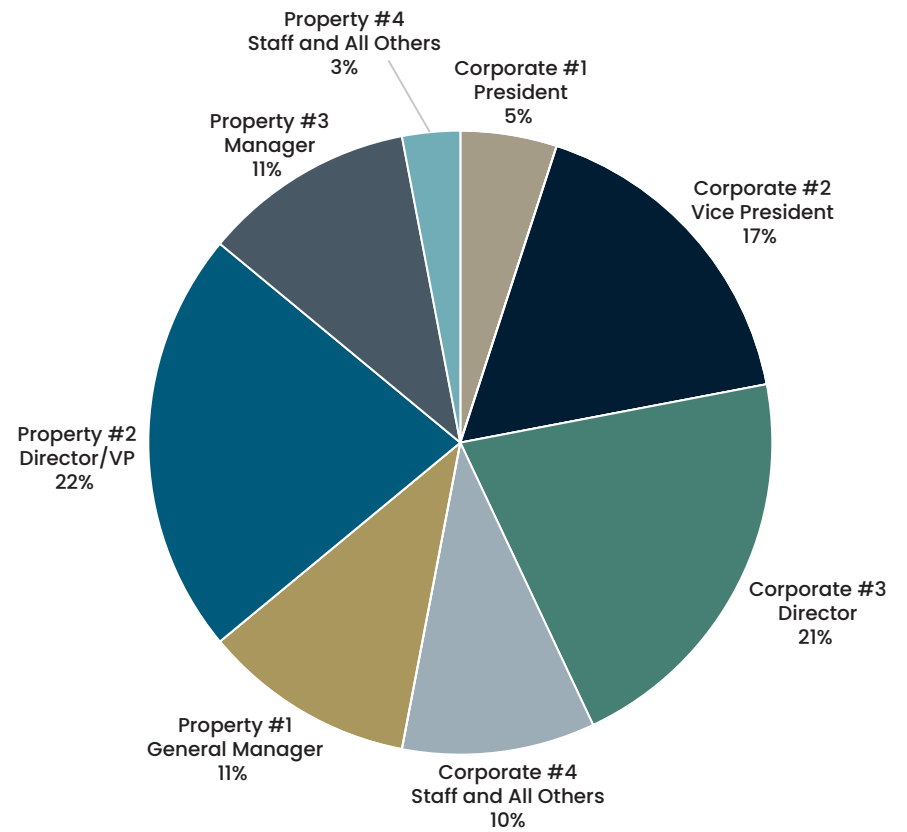
*Owning/Managing Organizations*



### Years Of Industry Experience



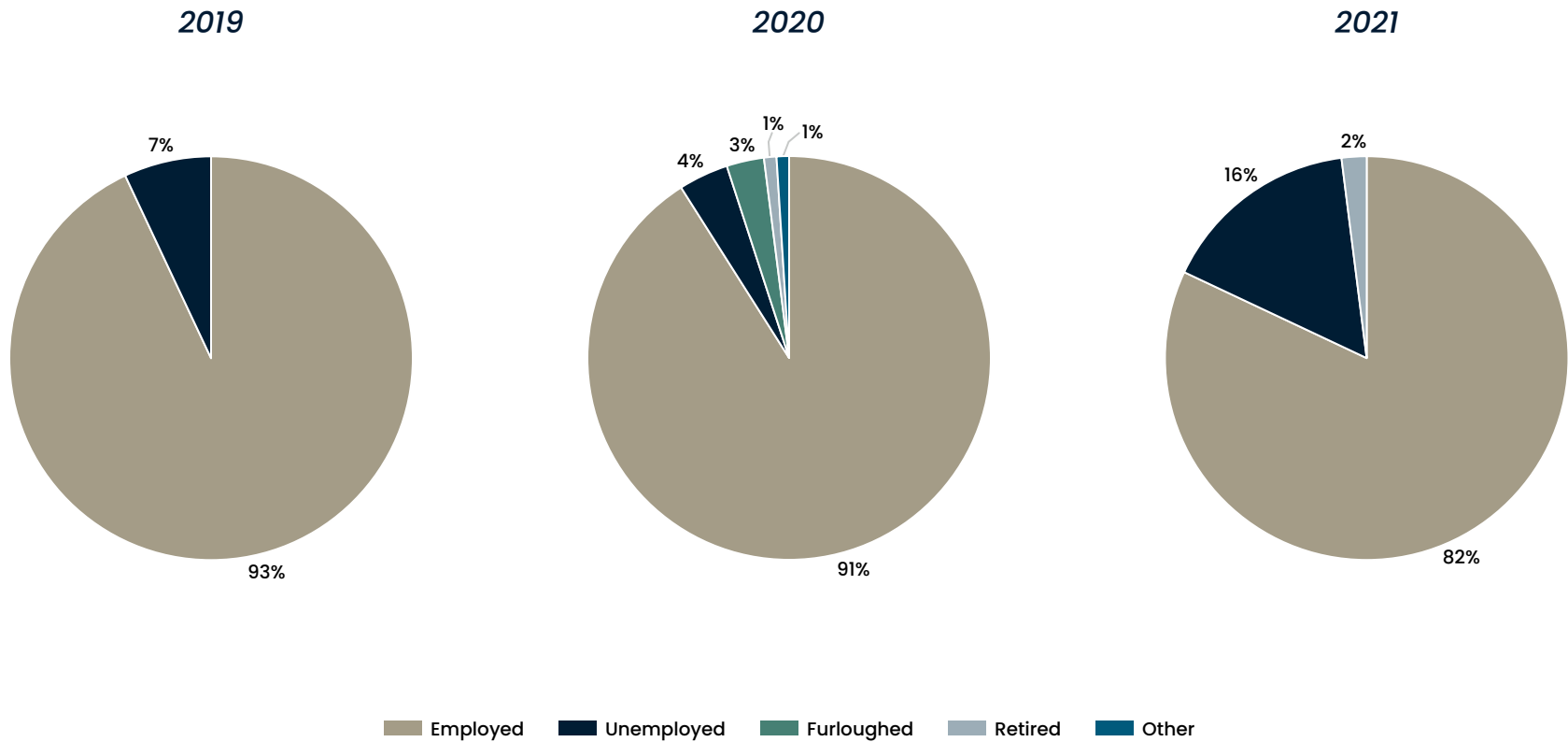
### Job Levels





The charts below represent the Survey respondents' employment status between 2019 and 2021.

### Employment Status - 2019 To 2021



Note: "Retired" was not a choice in the 2019 Survey







## EMPLOYERS OF CHOICE

### Brick and Mortar Properties

Out of 34 listed casino corporations and standalone casino properties, respondents were asked to choose their top two employers of interest.

For a second year in a row, Seminole Hard Rock holds their top employer title with nearly 14% of first choice votes. Penn National Gaming is in second with about 12% of votes. Station Casinos lands third place with nearly 9% of first choice votes. While Caesars Entertainment maintains its fourth-place position, Boyd Gaming bumps up by one ranking, receiving fifth place. Wynn Resorts moves down three rankings from last year, placing sixth. Along with Station Casinos, organizations that are new to the top 10 list include Cherokee Nation Entertainment in seventh and Choctaw Casinos & Resorts in eighth place. MGM falls four spots from fifth to ninth. San Manuel Casino, which recently changed its name to Yaamava' Resort & Casino at San Manuel, drops one spot from ninth to tenth.

Rather than selecting a listed company, over 6% of casino professionals have chosen "Other" as their first choice. Similar to 2020, write-in choices range from Tribal casinos to smaller companies. The number of corporations and properties that received over 1% of votes doubled from 13 in 2020 to 26 in 2021 and relates a more diverse representation in the Survey (see graph and link, p.10).

For employer of second preference, Caesars Entertainment moves up from fourth last year to take the top spot from Wynn Resorts with about 7% of the votes. The companies in the top 10 of second choice rankings, but not of first choice, include Bally's (5th), Las Vegas Sands (8th), and Churchill Downs (10th). Write-ins under "Other" account for 8% of votes for second choice (see graph, p.11).



## First Choice

- #1 Seminole Hard Rock
- #2 Penn National Gaming
- #3 Station Casinos



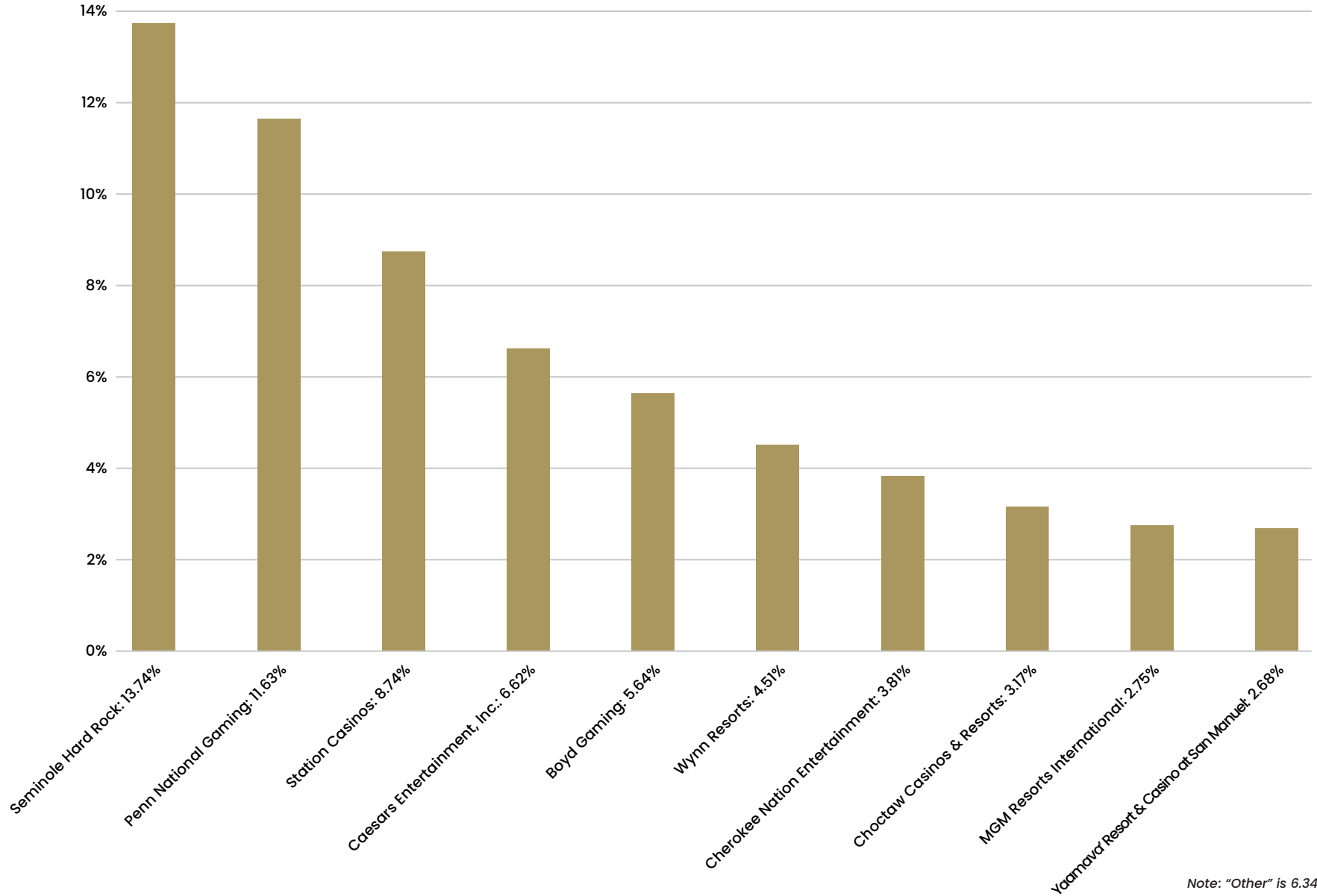
## Second Choice

- #1 Caesars Entertainment, Inc.
- #2 MGM Resorts International
- #3 Wynn Resorts



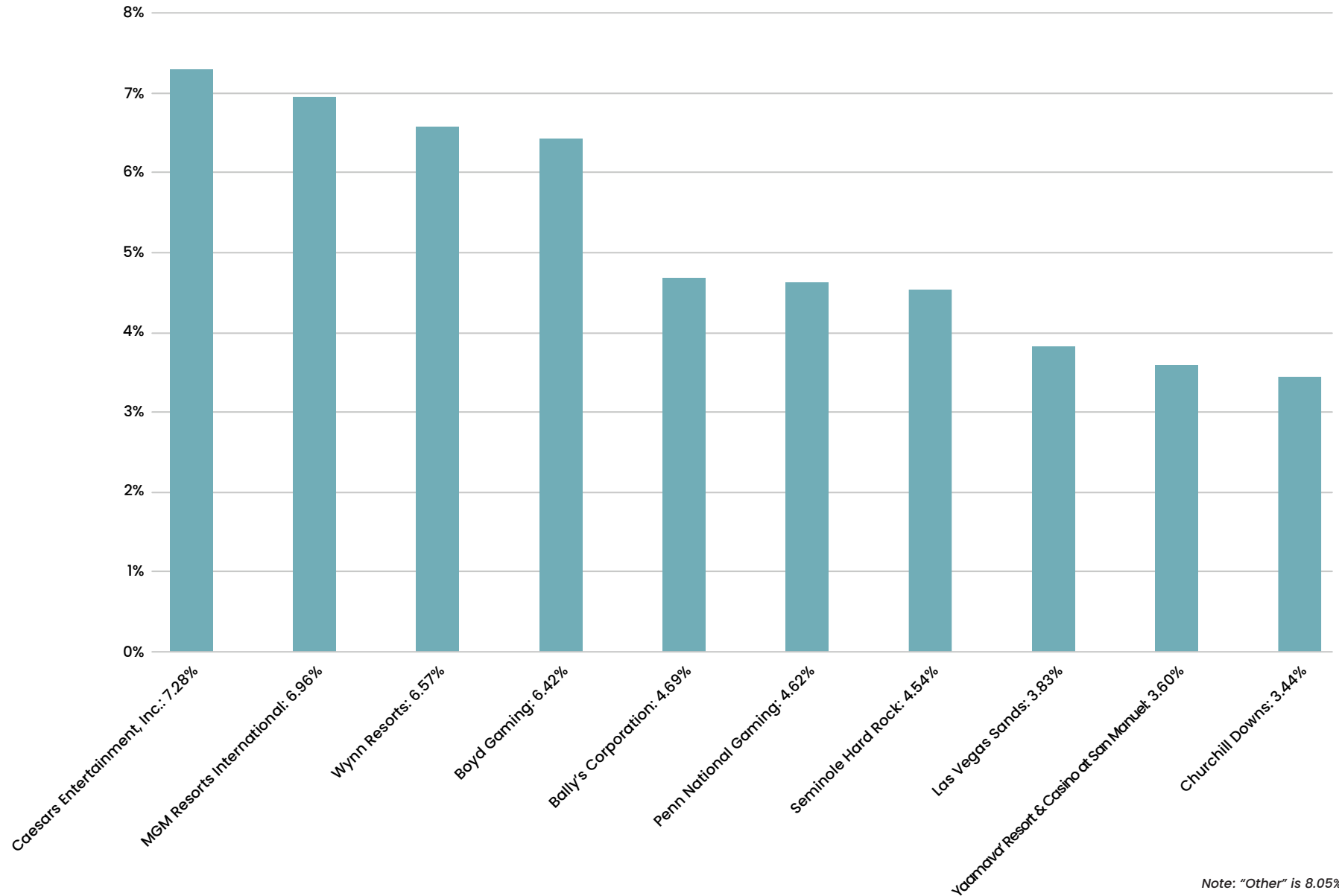


### Top 10 First Choice Brick and Mortar Organizations



[Click here for the full order of organizations](#)

### Top 10 Second Choice Brick and Mortar Organizations



[Click here for the full order of organizations](#)



## EMPLOYERS OF CHOICE

### iGaming and Mobile Sports Betting

Out of 28 listed iGaming and Mobile Sports Betting organizations, Penn Interactive, which includes MyChoice Casino and Barstool Sportsbook & Casino, claims the title of top employer of choice with over 9% of the votes. Hard Rock Online Casino comes in a close second with over 8% of votes. Caesars Interactive Entertainment lands third place with over 7% of the votes, bumping DraftKings down one rank from last year.

Over 22% of respondents have no opinion regarding their preferred iGaming and Mobile Sports Betting organization, which is down 9% from 2020 (see graph, p.14). Eighteen percent of those who work for companies involved in the iGaming and Mobile Sports Betting industry do not have an opinion for top employer of choice.

For rankings of second preference, both DraftKings and FanDuel hold their first and second place spots, respectively. Hard Rock Online Casino takes the third-place title from William Hill, which went from third in 2020 to tenth place in 2021. Over 12% of respondents who did choose a first preference opted out of ranking their second preference of iGaming and Mobile Sports Betting organizations, a significant decrease from 45% in 2020 (see graph, p.15).



## First Choice

- #1 Penn Interactive
- #2 Hard Rock Online Casino
- #3 Caesars Interactive Entertainment, LLC



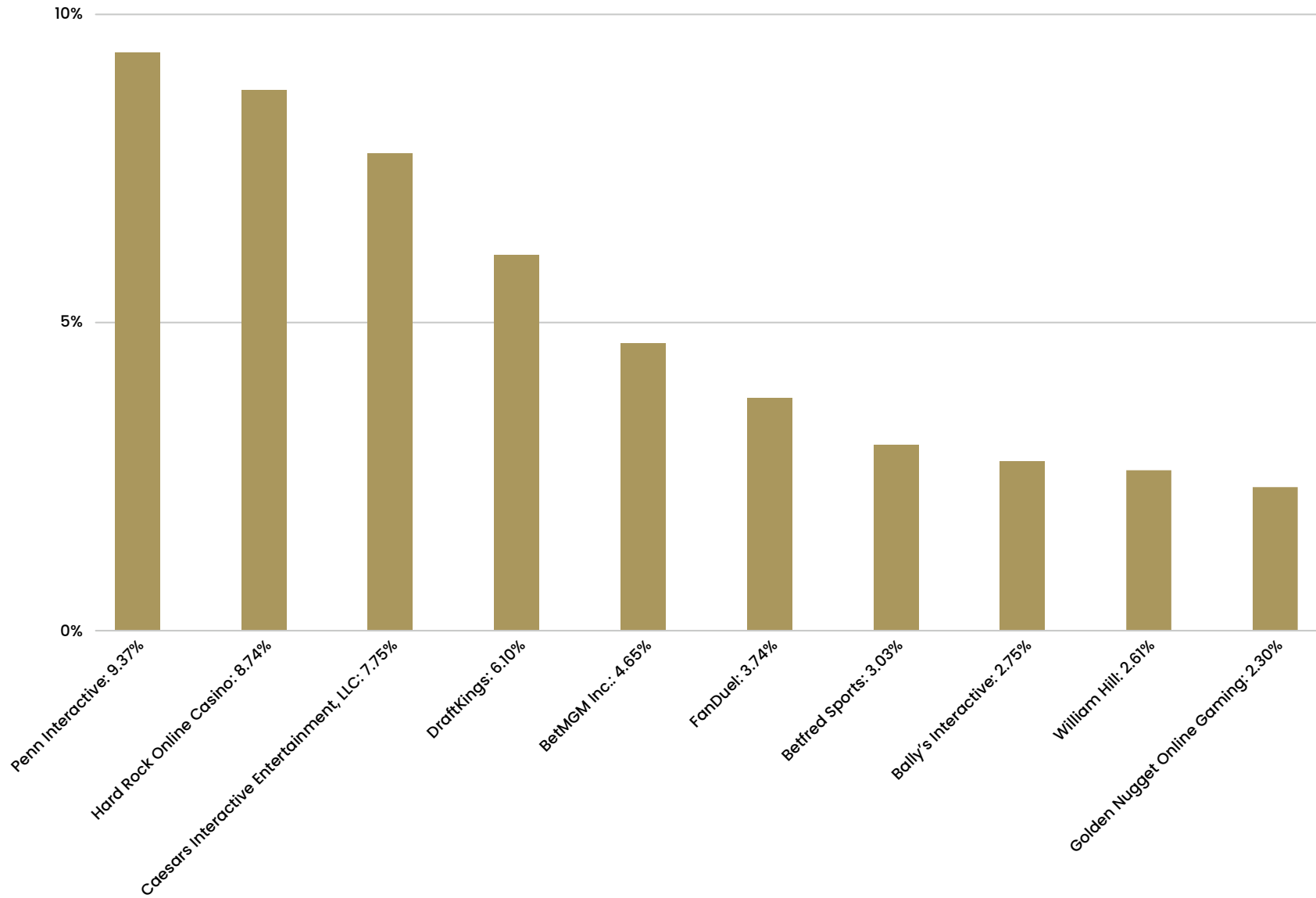
## Second Choice

- #1 DraftKings
- #2 FanDuel
- #3 Hard Rock Online Casino





### Top 10 First Choice iGaming and Mobile Sports Betting Organizations

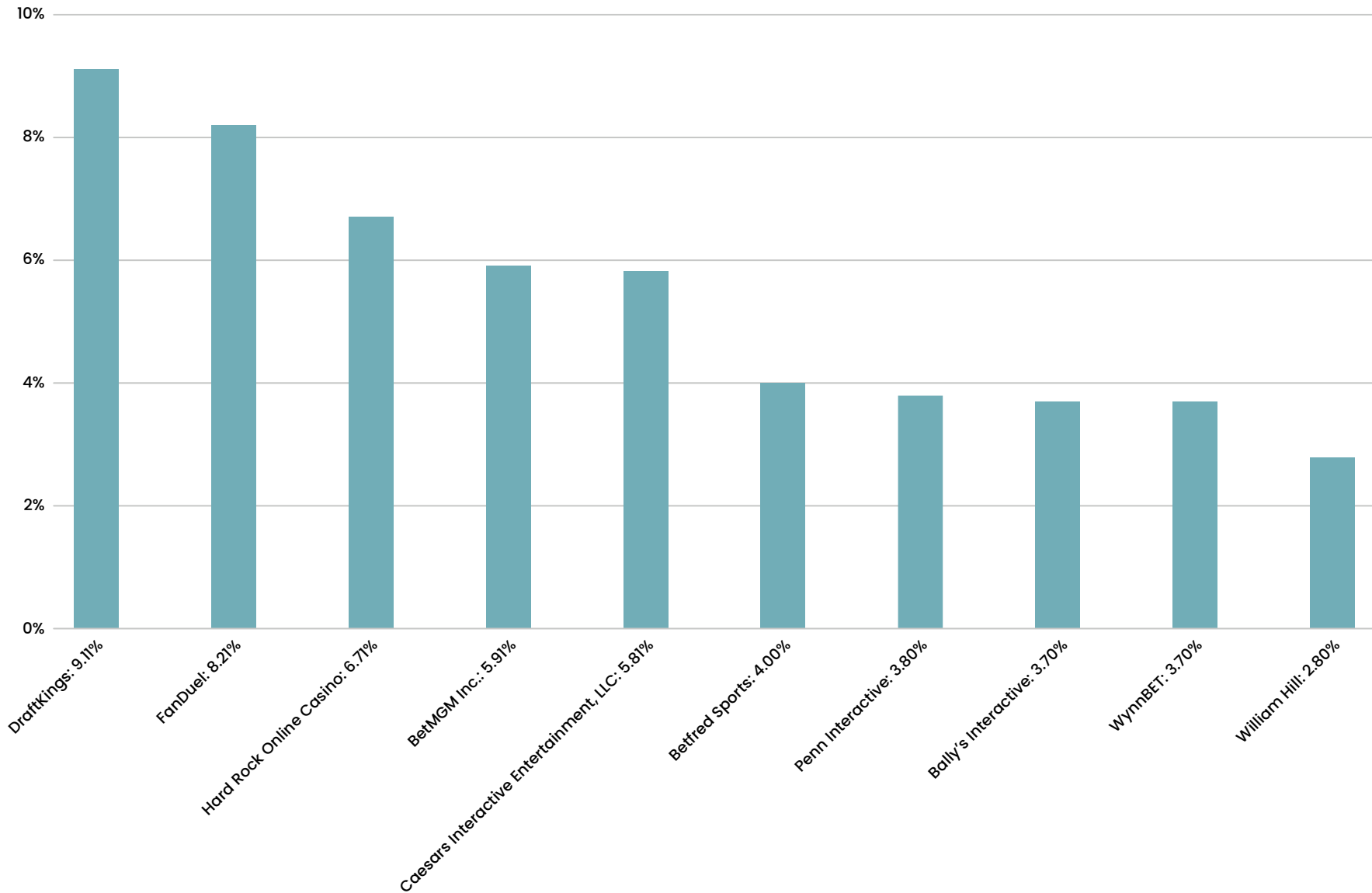


Note: "Other" is 1.52% and "No Opinion" is 22.55%

[Click here for the full order of organizations](#)



### Top 10 Second Choice iGaming and Mobile Sports Betting Organizations



Note: "Other" is 1.04% and "No Opinion" is 12.61%

[Click here for the full order of organizations](#)

## iGAMING AND MOBILE SPORTS BETTING SATISFACTION

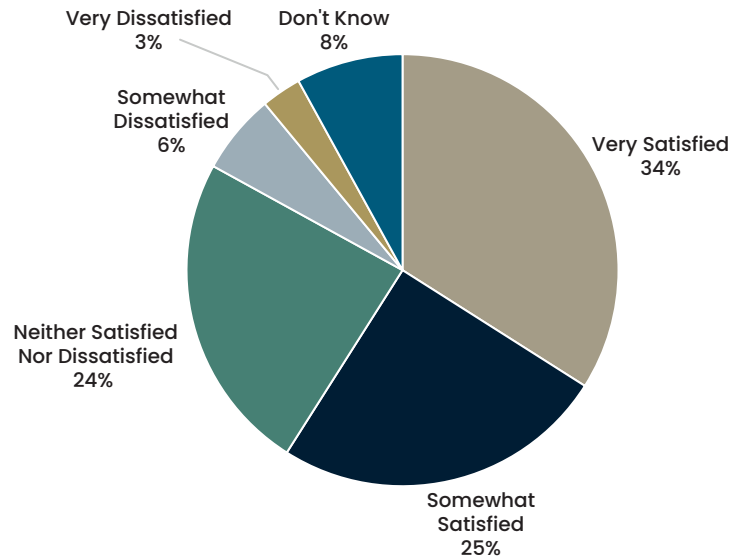
The iGaming and Mobile Sports Betting sectors of the industry continue to grow, from less than 1% of respondents last year to 12% in 2021 reporting working for a company strictly involved in those fields.

Seven out of ten respondents currently (or recently, if unemployed or retired) work for companies that are involved in iGaming or Mobile Sports Betting. More than half of this proportion are satisfied with their organization’s incorporation of iGaming and Mobile Sports Betting into their brick-and-mortar product (see chart, below).

Owning/managing organizations with the highest respondent counts are Publicly Held Casino Corporation, Privately Held Casino Corporation, and Native American Casino. Ninety percent of professionals who work for Publicly Held Casino Corporations report having their company involved in the iGaming and Mobile Sports Betting industry. Native American Casinos are the least involved in iGaming and Mobile Sports Betting among these three (58%; see graph, p.17).

### *Incorporation Satisfaction*

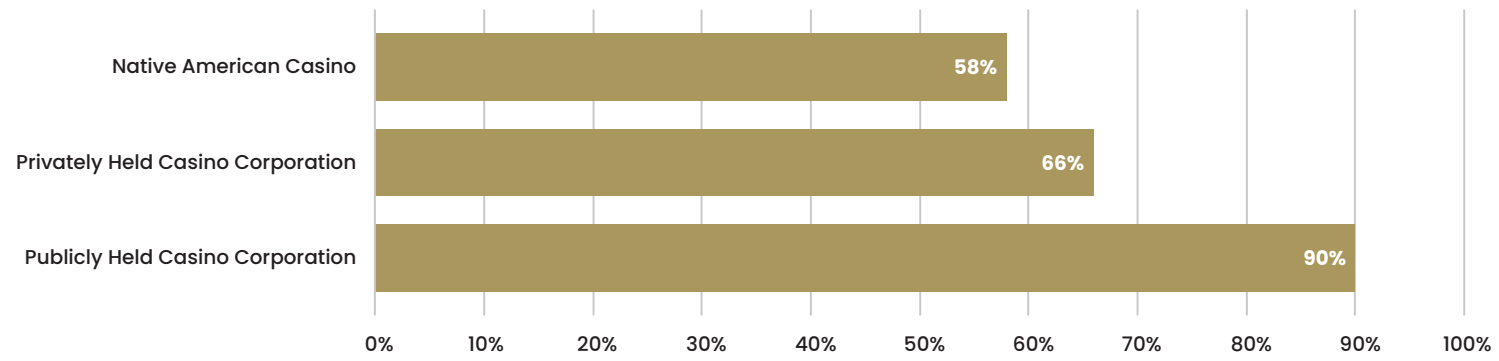
*Satisfaction with organization’s incorporation of iGaming and Mobile Sports Betting into the Brick and Mortar product*



*Note: Data comprises of respondents whose organization is involved in the iGaming/Mobile Sports Betting industry*



## iGaming & Mobile Sports Betting Involvement Among Casino Operators





## EMPLOYEE SATISFACTION

As a regular section of the annual Survey, employed professionals were asked to rate their level of agreement with statements that measure their satisfaction with their employer, management team, and direct supervisor. For reference, a 5-rating indicates “Strongly Agree,” a 4-rating indicates “Agree,” a 3-rating indicates “Neutral/No opinion,” a 2-rating indicates “Disagree,” and a 1-rating indicates “Strongly Disagree”.

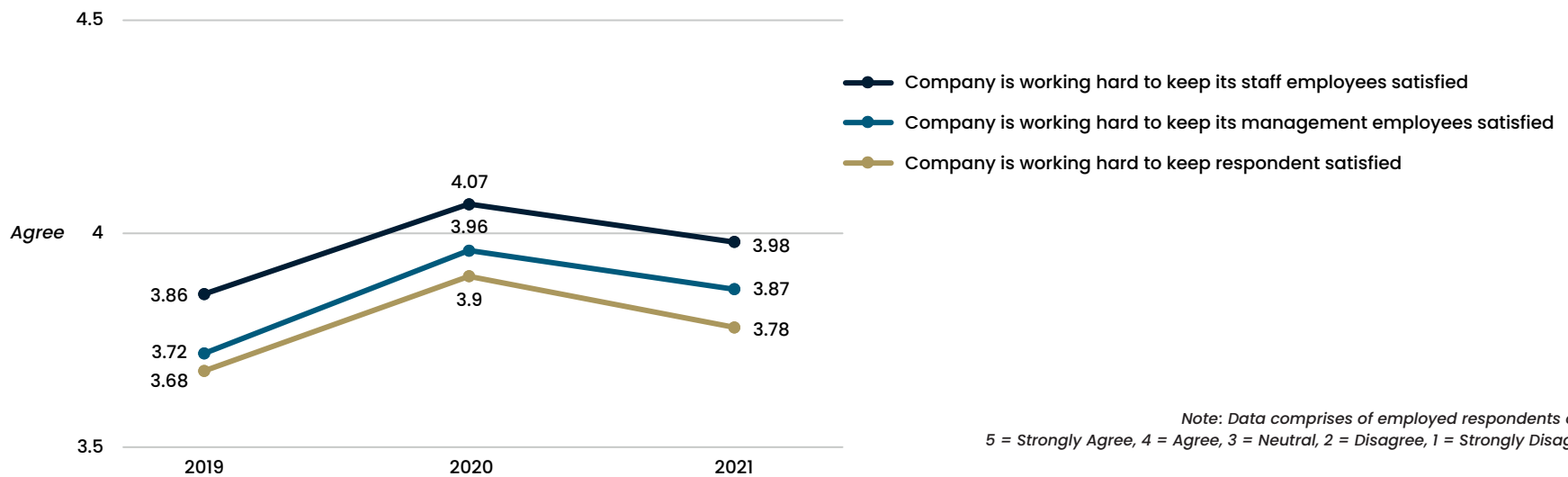
In 2021, all average ratings of satisfaction statements (keeping their staff employees, management team, and respondents themselves satisfied) landed between those of 2020 and 2019 (see graph, below).

Among all job levels, “Property #1 – General Manager” professionals are most satisfied with an average rating of 4.17 for the statement, “My company is working hard to keep me satisfied.” All other job levels report averages of 2.95 to 3.94.

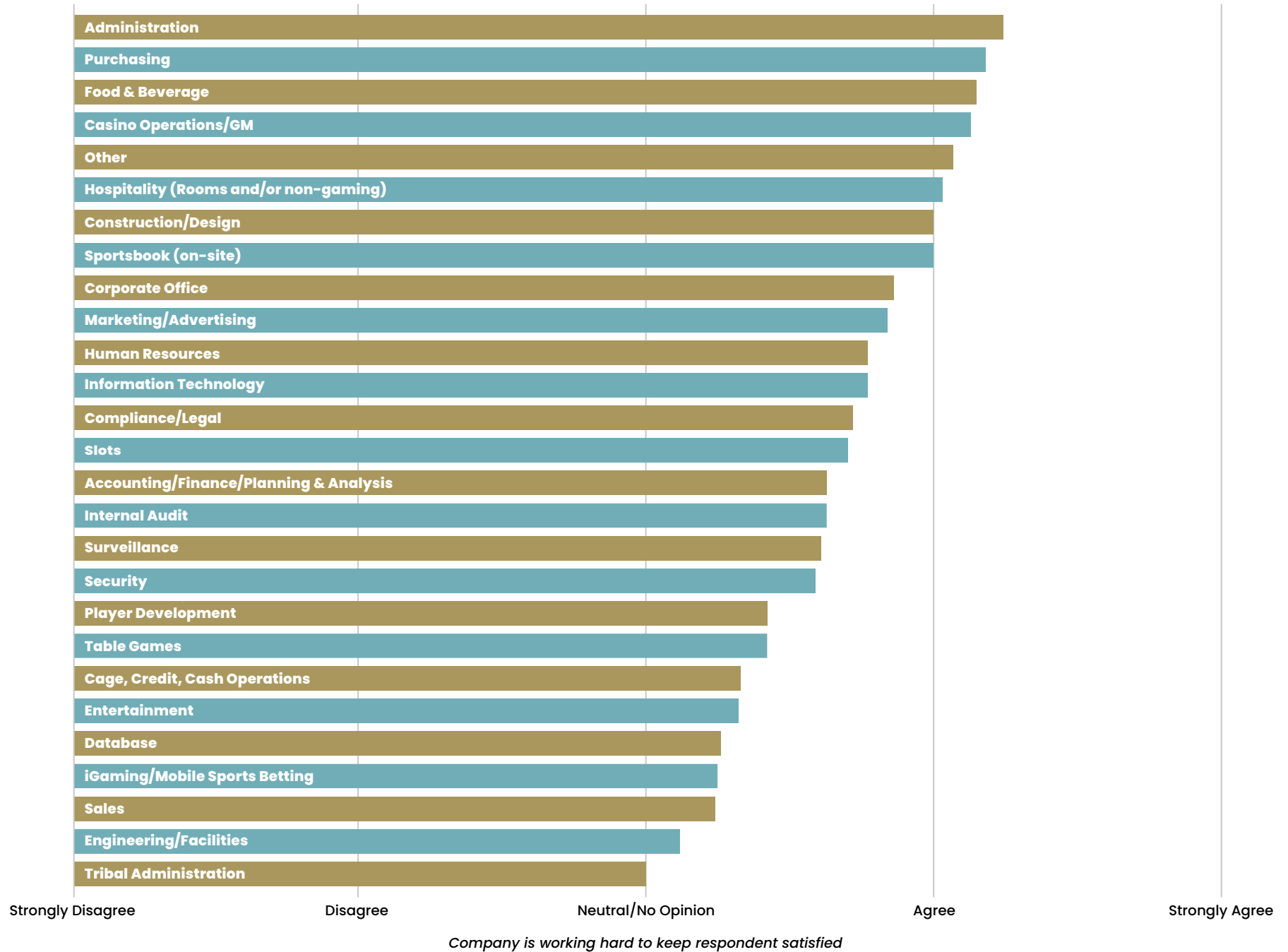
Relating to the statement, “My company is working hard to keep its staff employees satisfied,” executives who identify as “Property #1 – General Manager” have an average rating of 4.41. “Property #4 – Staff and All Others” respondents rate an average score of 2.95 to the statement, “My company is working hard to keep me satisfied,” the lowest of all job levels.

Of the three casino operators, respondents under “Publicly Held Casino Corporation” have the highest employee satisfaction with an average rating of 4.04 in comparison to professionals from “Native American Casino” (3.71) and “Privately Held Casino Corporation” (3.69). From the non-casino specific entities, average ratings range from 3.24 to 3.53 (“Other” is 3.69). By department, “Administration” had the highest level of agreement, followed by “Purchasing” and “Food & Beverage” (see graph, p.19).

**Satisfaction Statements – Averages From 2019 To 2021**



## Employee Satisfaction By Department - Average Ratings



Note: Data comprises of employed respondents only



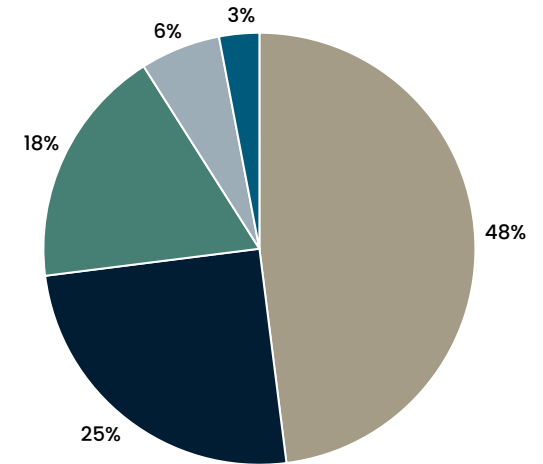
Employed professionals were also prompted to rate statements about staffing and support (see charts, below). The following is the breakdown of results:

- 47% of teams are adequately staffed on a regular basis
- 37% of properties are adequately staffed on a regular basis
- Four out of ten professionals have often felt overworked within the past year
- Nearly three-quarters of employees frequently feel supported by their bosses or fellow management team

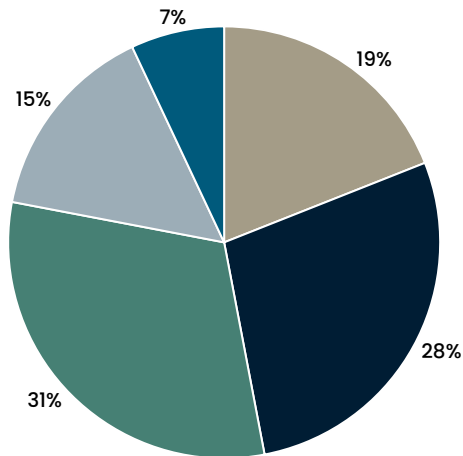
Over 70% of corporate level respondents feel supported in their career growth by their organization. For property-level positions, feelings of support fall with each staffing rank. Though 83% of "Property #1 – General Manager" respondents feel supported in their career growth, only 54% of "Property #4 – Staff and All Others" respondents share the same sentiment. Over a quarter of "Corporate #4 – Staff and All Others" respondents do not feel supported by their bosses, the highest disagreement among all job levels by nearly 10%.

### Have Support Of Bosses/Team

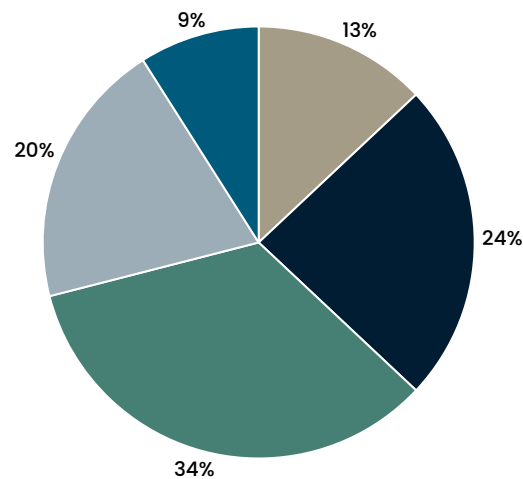
How often professionals have the support of bosses/fellow management team



### Team Is Adequately Staffed

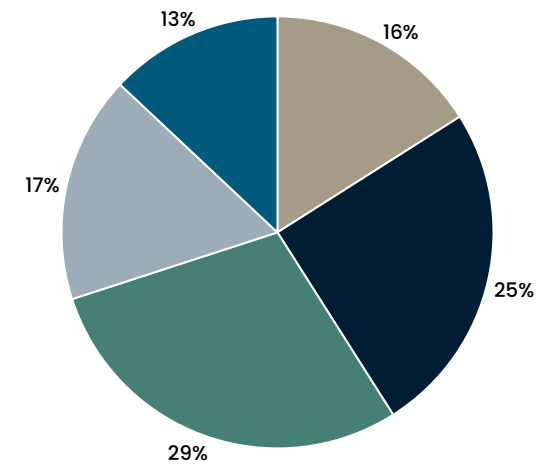


### Property Is Adequately Staffed



### Overworked In The Past Year

How often professionals felt overworked in the past year

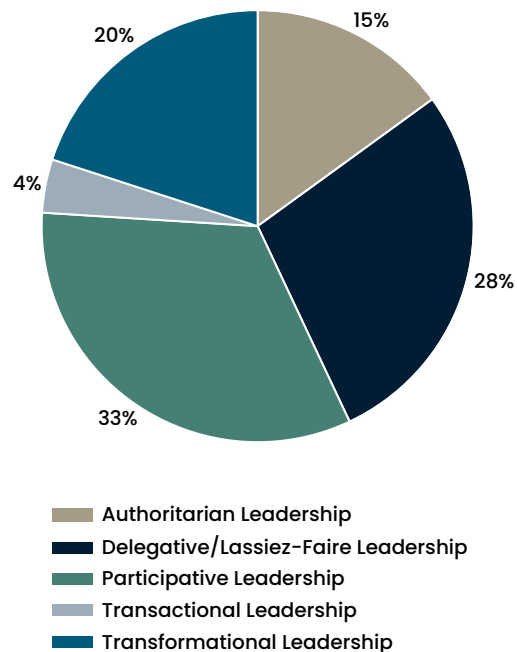


Note: Data comprises of employed respondents only for all four charts

Nearly three quarters of employed professionals are satisfied with their direct supervisors' leadership style (46% Very satisfied; 28% Somewhat satisfied). Of the five leadership styles listed in the Survey (see visual, right), Transformational Leadership has the most positive satisfaction rating with 97% of professionals under this type of leader marking "Very satisfied" (82%) or "Somewhat satisfied" (15%). While 39% of employees express satisfaction under Authoritarian leaders, 44% of them report dissatisfaction. The ranking of leadership style based on satisfaction are as follows:

1. Transformational Leadership (97% Employee Satisfaction)
2. Participative Leadership (84% Employee Satisfaction)
3. Delegative/Laissez-Faire Leadership (75% Employee Satisfaction)
4. Transactional Leadership (47% Employee Satisfaction)
5. Authoritarian Leadership (39% Employee Satisfaction)

### Direct Supervisor's Primary Leadership Style



Note: Data comprises of employed respondents who have a direct supervisor

### Leadership Style Descriptions:

#### Authoritarian Leadership

The leader takes control of all decision-making and rarely considers their team members' input

#### Delegative/Laissez-Faire Leadership

The leader delegates initiatives to team members with minimal guidance but provides them with the tools and resources they need

#### Participative Leadership

The leader involves all or most team members during the decision-making process before having the final say

#### Transactional Leadership

The leader uses "transactions," such as rewards and punishments, to motivate their team members to get work done

#### Transformational Leadership

The leader inspires their team members with a company vision and empowers them to achieve it

**75%** of professionals feel supported in their career growth by their organization

Note: Data comprises of respondents manager level and higher



Employees' feelings of their overall treatment are usually in line with whether they agree with their supervisors' leadership. The same relationship applies between feelings of support in career growth and the support received from colleagues.

Moreover, there is a negative correlation between casino professionals' satisfaction with their supervisors' leadership style and pursuit of a new career opportunity.

- Only two out of ten employed professionals who are satisfied with their direct supervisors' leadership are actively looking for work
- Only 17% of respondents who do not have a direct supervisor are looking for work
- Six out of ten employed respondents who are dissatisfied with their supervisors' leadership style are currently looking for work

Of professionals who do not have a direct supervisor, 69% feel that their company is working hard to keep them satisfied. Seventy-four percent are supported in their career growth and 78% have the support of their fellow management team.



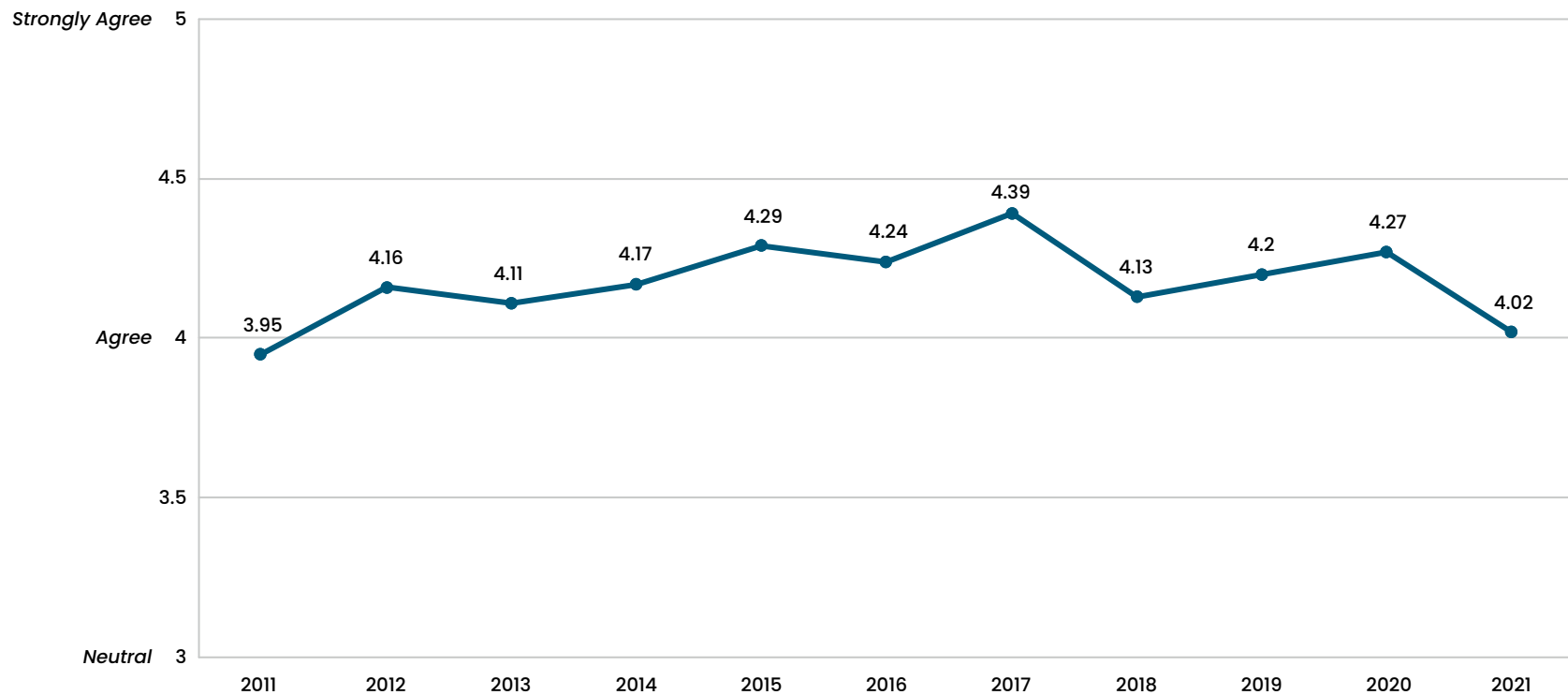


# OPTIMISM

Professionals were asked to rate their level of agreement with the statement, "I am optimistic about the future of my career." While the rating has continued to stay above 4.0 since 2012, this year marks the lowest average rating in the past nine years (see graph, below). Only 70% of respondents are optimistic about their professional future, a 10% drop from 2020.



*Optimism About Future Of Career - Averages From 2011 To 2021*





## JOB SEARCH, RESIGNATION REASONS, AND CAREER PRIORITIES

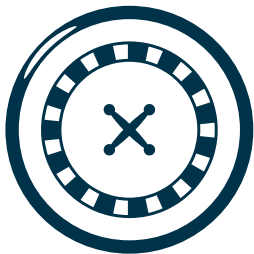
Nearly four out of ten respondents who are management level or higher are actively looking for a new career opportunity. Nearly three-quarters of them have been actively looking for six months or less (from the time of taking the Survey); 39% have been looking for three to six months and 34% for less than three months.

*Manager level and up who are actively looking for work:*

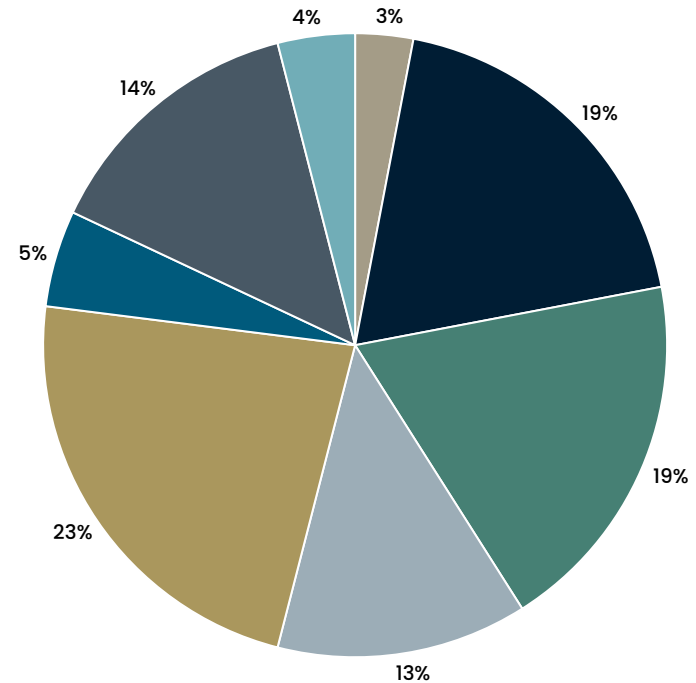
**36%** Looking

**64%** Not Looking

Only 10% have been searching for seven to nine months, 6% for 10-12 months, and 11% for longer than a year. This shows that more people have recently entered the job search market. From the seven options provided in the Survey, "Growth Opportunities" is the top primary reason for this group to job search (see chart, right).



*Primary Reason For Job Search*



- Better Fit With Coworkers
- Better Fit With Direct Report/Immediate Supervisor
- Company Culture
- Currently Unemployed
- Growth Opportunities
- Job Stability
- Salary and/or Benefits
- Other

*Note: Data comprises of manager level and higher who are actively looking for work*





Taking only those who are currently employed from this group of manager level and higher, their top reasons for currently looking for work are “Growth Opportunities” (30%), “Salary and/or Benefits” (20%), “Company Culture” (18%), and “Better Fit With Direct Report/Immediate Supervisor” (17%). Over a third of manager level and higher who are employed and have been with their employer for three years or less are currently looking for a job, while only 15% of those with 10 years or more of tenure are actively searching. Sixty-five percent of retired respondents are actively looking for a new opportunity.

In the last three years, the proportion of managers and up who were actively job searching has increased from 17% to 36%. In 2019, 24% had been looking for a new job for longer than a year, decreasing to 11% in 2021. For all respondents, confidence in finding a better job elsewhere

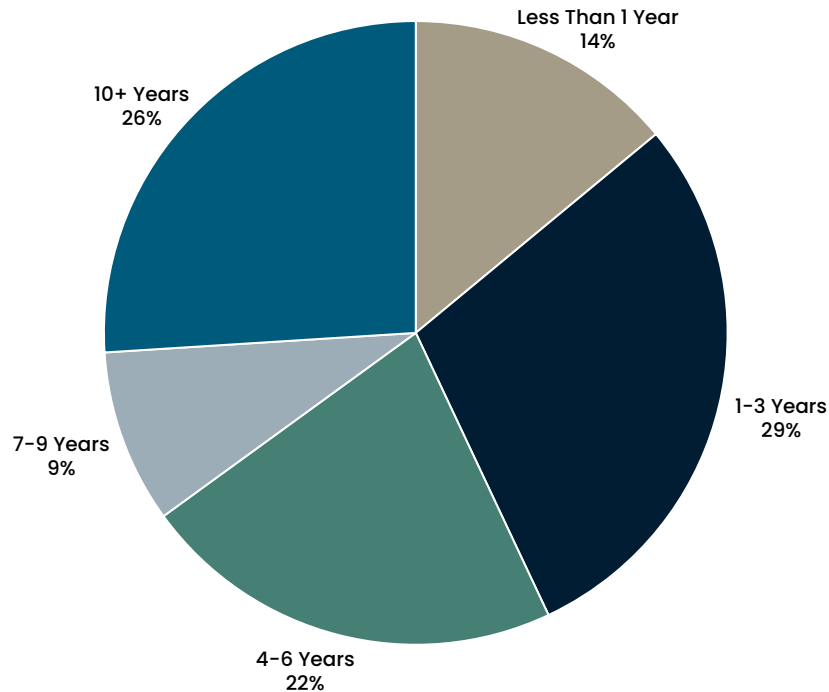
has not drastically changed in the past three years with just a slight dip in 2020 (see graph, p.27). Over a third are confident that they can find a better job elsewhere (see chart, bottom right).

Other stats for all employed respondents:

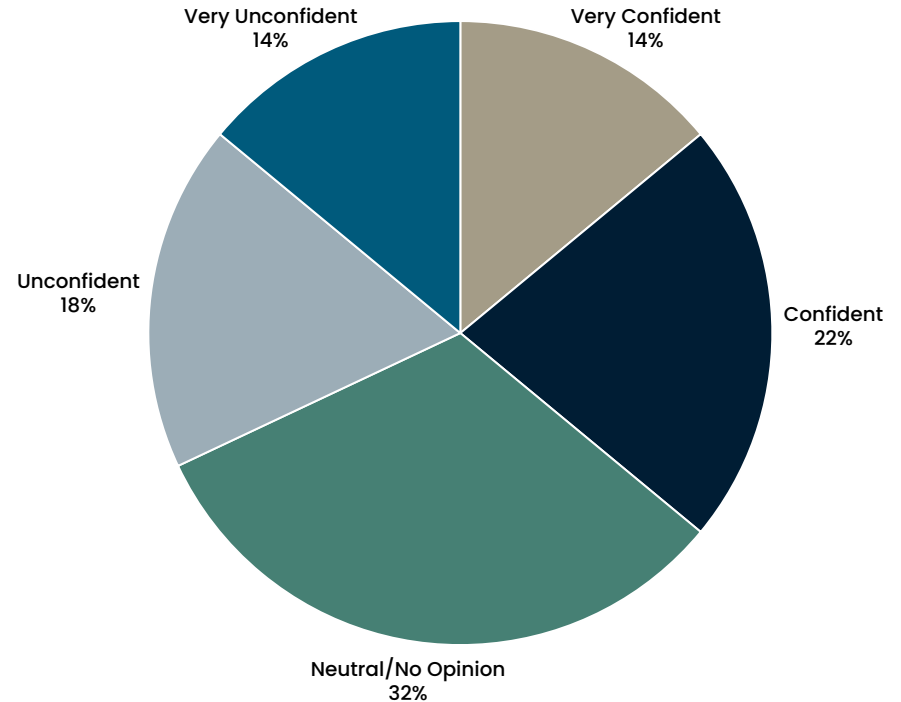
- Over half have no interest in leaving their present employer within the next couple of years
- 45% would seriously consider a reasonable offer of new employment

Employed casino professionals' willingness to consider a reasonable offer of new employment has gradually decreased since 2019. Their interest in leaving their current employer within the next couple of years has increased from 2020 with more opportunities available since the height of the pandemic.

### Tenure With Current Employer

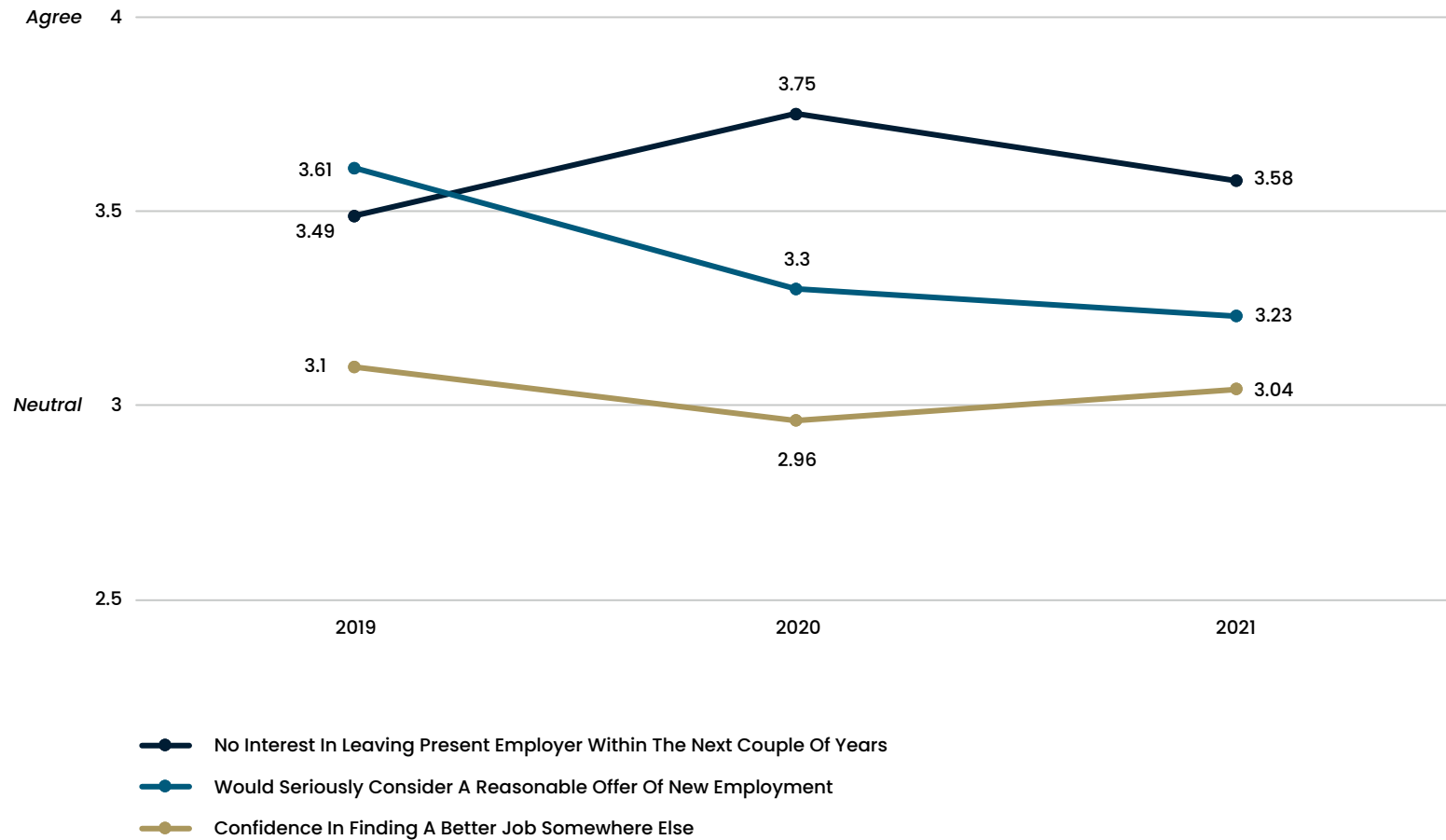


### Confidence In Finding A Better Job Elsewhere



Note: Data comprises of employed respondents only

### Job Search Statements – Averages From 2019 To 2021



Note: Data comprises of employed respondents for the first two statements and all respondents for the third statement



Within the last five years, 65% of casino professionals have worked for only one or two employers, with 2.47 being the average of all respondents. With the Great Resignation being a trending topic this year, nearly a quarter of manager level and higher respondents share that they left their employer voluntarily in 2021. The top reasons for leaving include a better opportunity/offer or family/personal circumstances (see graph, below).

The iGaming and Mobile Sports Betting sector has the highest resignation rate of managers and up in 2021; 61% report leaving their employer voluntarily this year. That is 16% higher than in Lottery, the second-highest rate. There is a higher resignation rate from the non-casino specific entities as opposed to the casino operators. Publicly Held Casino Corporations have the lowest resignation rate in the past year (9%).

For the first time since 2018 (when the current Survey ranking format was introduced), “Corporate Culture” ranks as the top career priority for 29% of manager level and higher, a preponderance of responses.

*Manager level and up who left one of their employers voluntarily in 2021:*

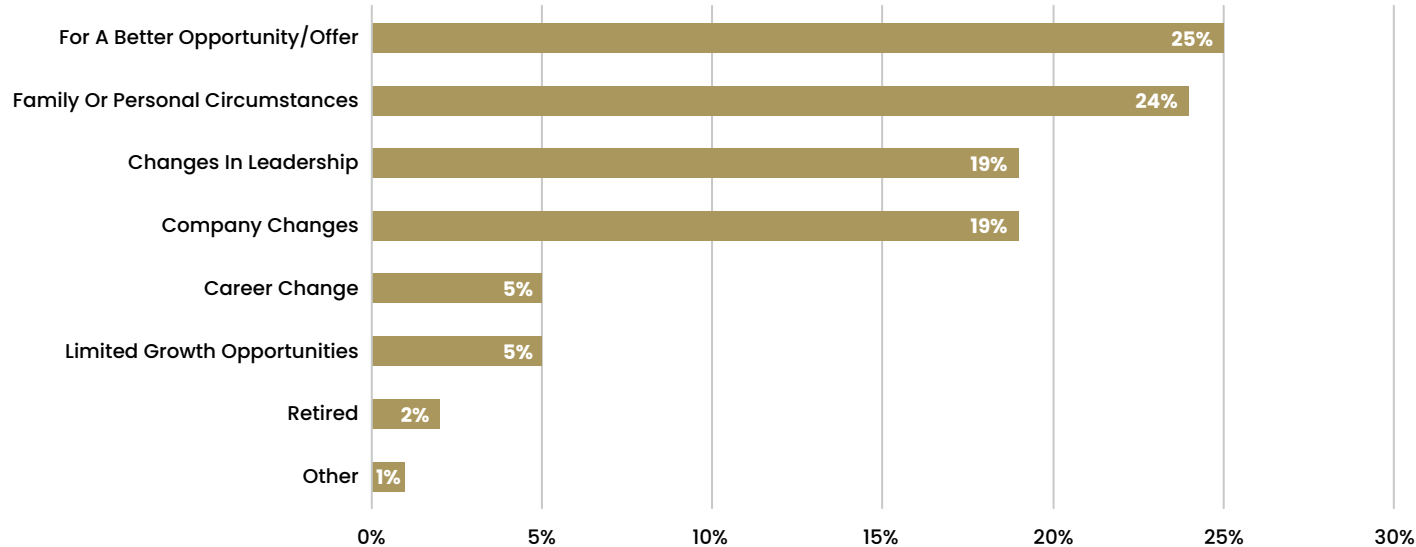
**24% Left**

**76% Did Not Leave**

It jumped from third place with 12% in 2020. “Career Opportunity and Growth”, a consistent top career priority in past years, falls two ranks, landing as the third highest priority when considering an employer. “Work-Life Balance” bumps up to fourth highest priority among casino professionals over “Job Security”. Thirty-five percent select “Weather and Lifestyle” as their lowest priority (see visuals, p.29).

Management-level and up with ten years or less experience in the gaming industry rank “Compensation” as their highest priority. Those with 11-15 years of experience prioritize “Career Opportunity and Growth” the most, and seasoned professionals with over 15 years of experience prioritize “Corporate Culture” the most.

### Primary Reason For Leaving Employer Voluntarily



*Highest Career Priority Ranking:*

- 1. Corporate Culture (29%)**
- 2. Compensation (26%)**
- 3. Career Opportunity and Growth (24%)**
- 4. Work–Life Balance (8%)**
- 5. Job Security (6%)**
- 6. Location (5%)**
- 7. Weather and Lifestyle (1%)**
- 8. Paid Time Off (1%)**

*Note: Data comprises of respondents manager level and higher*

*Lowest Career Priority Ranking:*

- 1. Weather and Lifestyle (35%)**
- 2. Paid Time Off (21%)**
- 3. Location (15%)**
- 4. Work–Life Balance (7%)**
- 5. Career Opportunity and Growth (7%)**
- 6. Job Security (6%)**
- 7. Corporate Culture (5%)**
- 8. Compensation (4%)**

*Note: Data comprises of respondents manager level and higher*



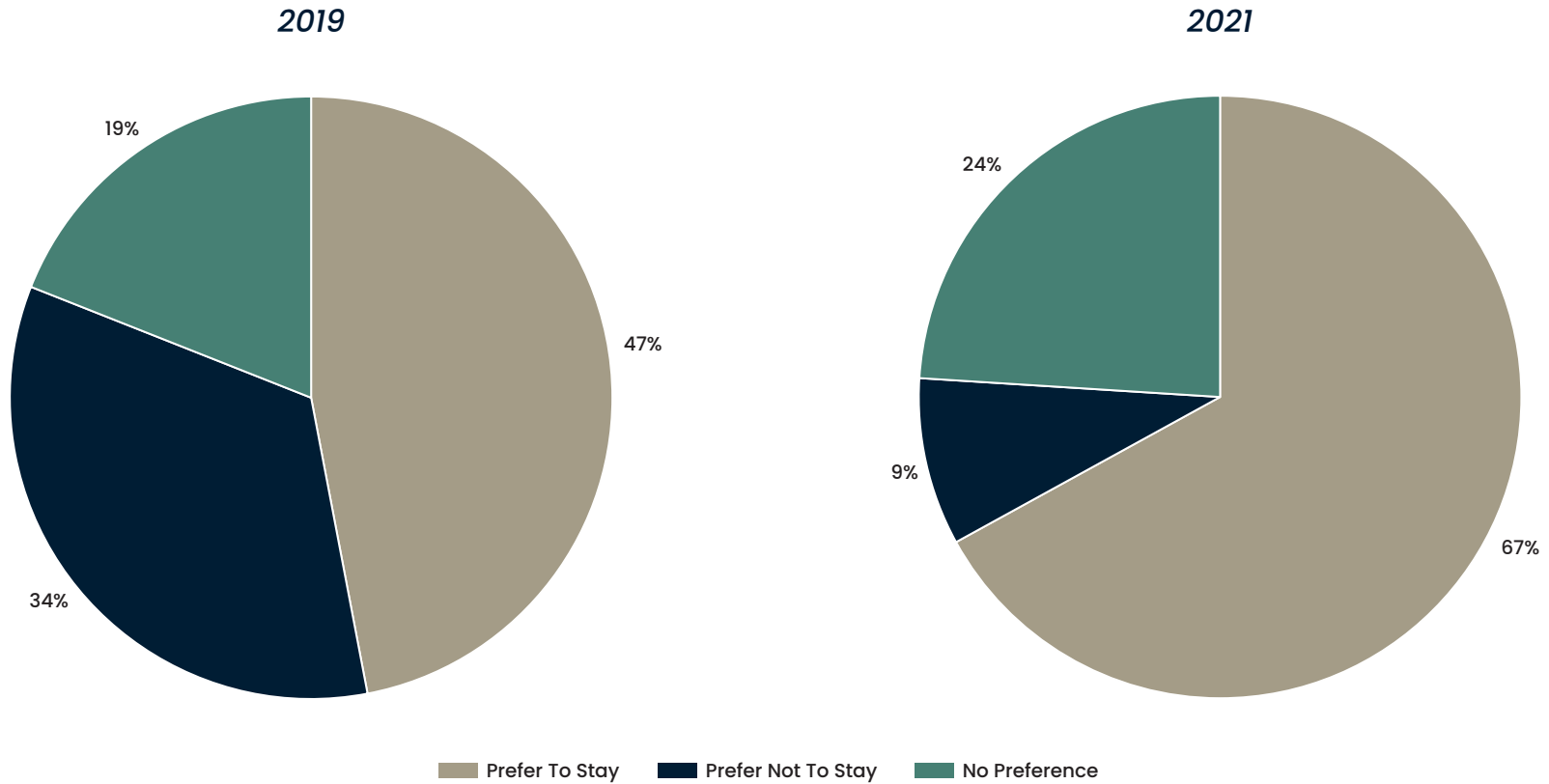


## LOCATION

Respondents were asked questions related to location and relocation preferences. The three states with the most Survey respondents are California (20.51%), Nevada (15.08%), and Florida (10.01%; see map, p.31). In 2021, 67% of casino professionals prefer staying in the area where they

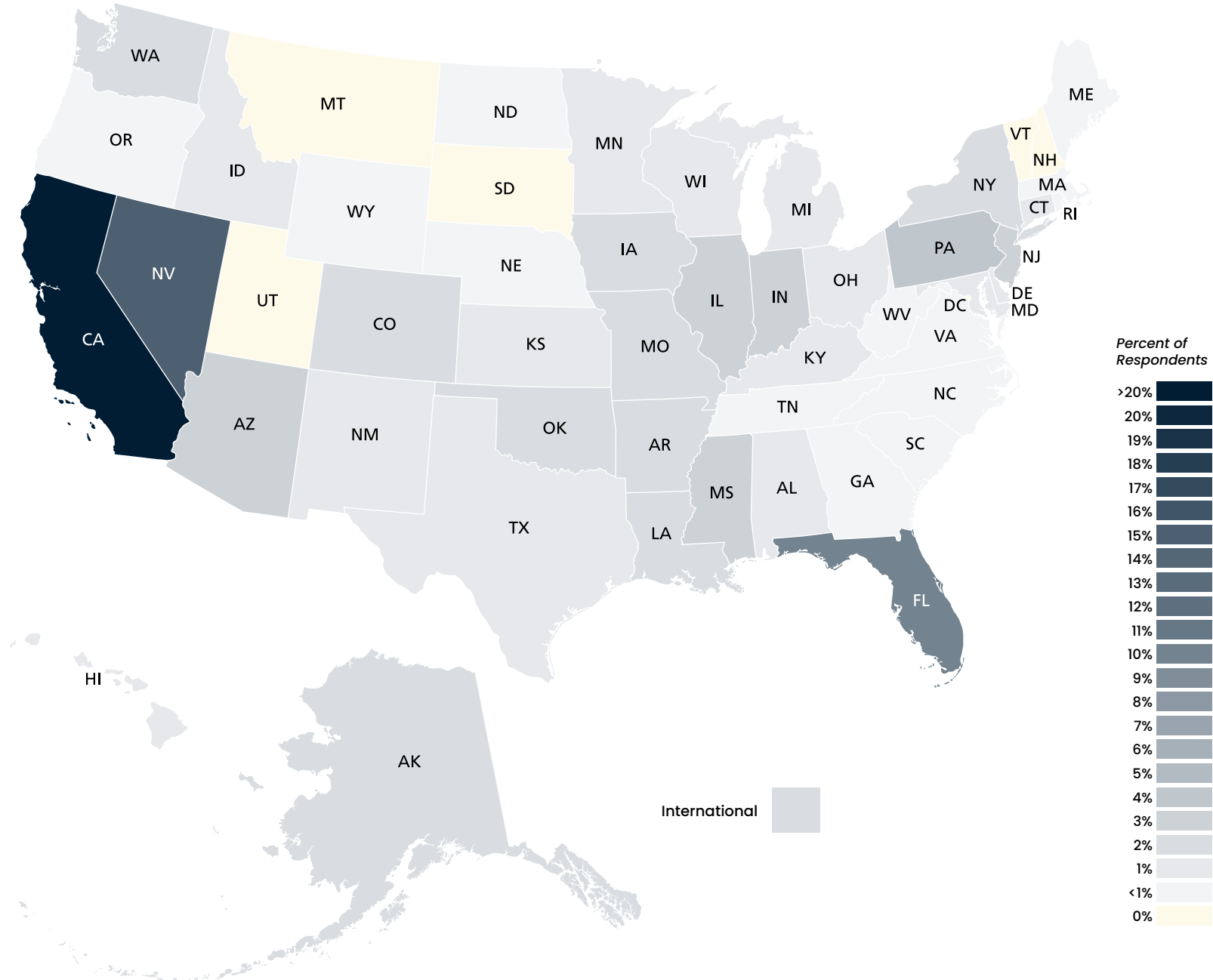
are currently employed, a 20% increase since 2019 (see charts, below). Only 9% of respondents do not want to stay in their current location, a 25% drop since 2019.

*Preference To Stay In Current Location*





### Location





By region, Western (74%) and Southern (69%) residents have the greatest preference to stay in their current locations compared to Midwestern (57%) and Northeastern (54%) professionals. Of all regions, employed Southerners express the highest level of agreement to the statement, "My company is working hard to keep me satisfied" (47%).

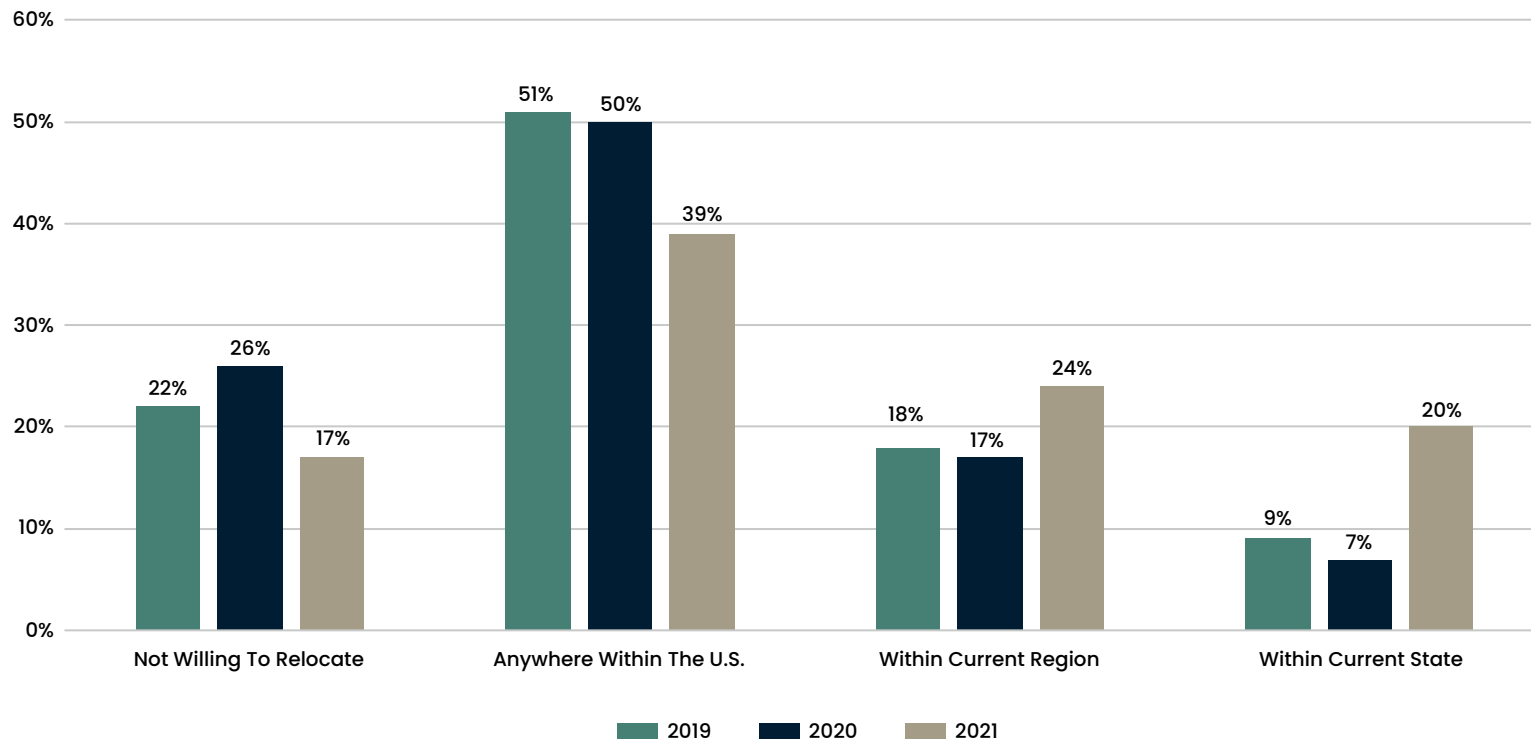
For professionals who do not want to stay in their current area, the most desirable states include: Nevada (18%), California (15%), and Florida (11%).

When rating the statement, "My company is working hard to keep me

satisfied," 75% of Florida residents agree as do 72% of Nevada and 54% of California residents.

As shown in the graph below, interest in relocating within a current state and region has increased since 2020. Interest in relocating anywhere in the U.S. has decreased from 50% to 39%. Those not willing to relocate has decreased from 26% to 17%. Nearly a quarter of casino respondents are willing to relocate anywhere in the U.S. even though they prefer to stay in the area of their current employment.

### Willingness To Relocate For A Career Opportunity - From 2019 To 2021







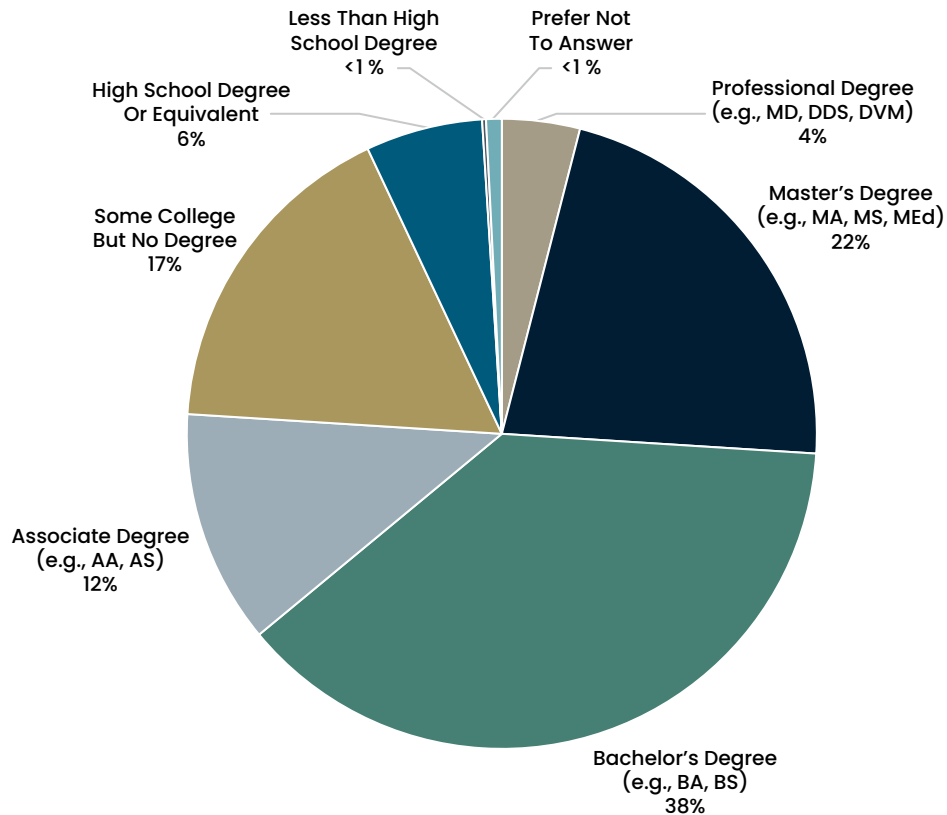
## HOURS, SALARY, AND EDUCATION

Managerial level and higher respondents work an average of 51.67 hours per week, remaining at last year’s level. Director level and higher decreased by up to three hours this year. “Property #3 – Manager,” and “Property #4 – Staff and All Others” hours increased. “Corporate #4 – Staff and All Others” report a significant jump of nine additional hours per week.

Below are two demographic charts for education and salary levels.

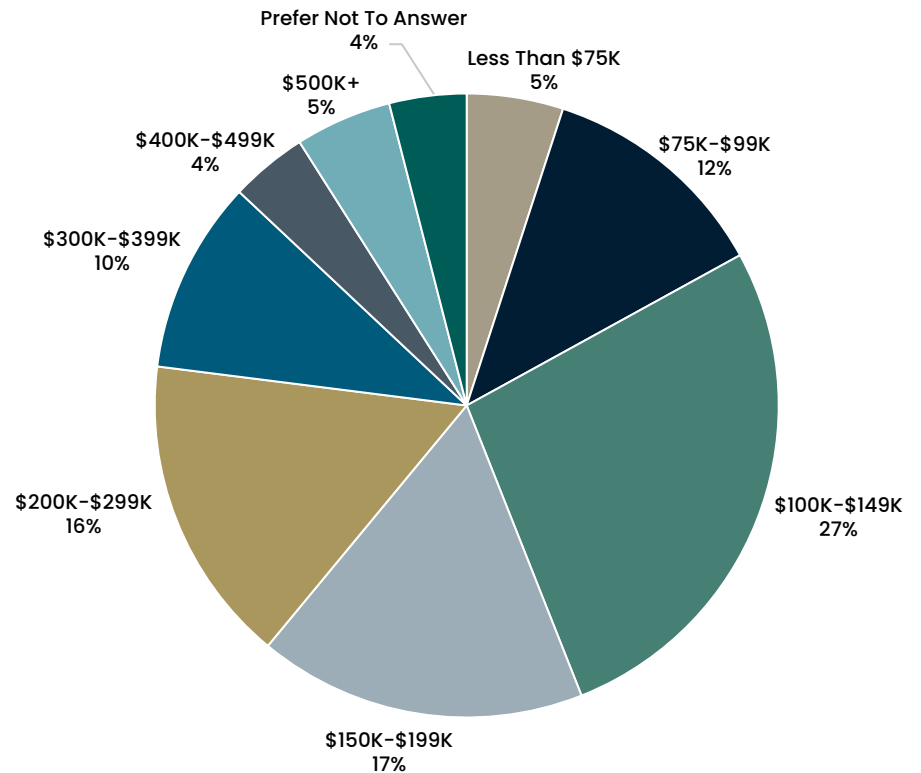
Seventy-two percent of corporate managers and up have completed a Bachelor’s degree or higher compared to 57% at properties. Education and salary amongst this group are similar when analyzing by region. By state, California has nearly triple the professionals by proportion who have completed a Master’s degree or higher than either Florida or Nevada. In addition, manager level and higher in California have slightly higher compensation ranges than those in the other two states (see table charts, p.35-37).

**Education**



Note: Data comprises of respondents manager level and higher

**Salary**



Note: Data comprises of respondents manager level and higher

### Annual Income - By Job Level

Annual Income (Base and Bonus)	Corporate #1 (President)	Property #1 (General Manager)	Corporate #2 (Vice President)	Property #2 (Director/VP)	Corporate #3 (Director)	Property #3 (Manager)
\$500K or more	30%	8%	11%	1%	1%	1%
\$400K-\$499K	3%	9%	9%	1%	1%	4%
\$300K-\$399K	2%	27%	17%	6%	5%	3%
\$200K-\$299K	21%	19%	24%	15%	13%	9%
\$150K-\$199K	18%	10%	14%	21%	21%	9%
\$100K-\$149K	11%	14%	11%	36%	43%	25%
\$75K-\$99K	11%	6%	5%	11%	13%	24%
Less than \$75K	0%	1%	4%	5%	1%	21%
Prefer not to answer	4%	6%	5%	4%	2%	4%

### Education - By Job Level

Highest degree received/ highest level of school completed	Corporate #1 (President)	Property #1 (General Manager)	Corporate #2 (Vice President)	Property #2 (Director/VP)	Corporate #3 (Director)	Property #3 (Manager)
Professional degree (e.g. MD, DDS, DVM)	11%	3%	8%	1%	3%	2%
Master's degree (e.g. MA, MS, MEd)	28%	23%	32%	17%	22%	17%
Bachelor's degree (e.g. BA, BS)	38%	42%	42%	41%	37%	25%
Associate degree (e.g. AA, AS)	13%	18%	3%	10%	13%	20%
Some college but no degree	8%	9%	11%	24%	19%	20%
High school degree or equivalent	2%	4%	3%	6%	5%	13%
Less than high school degree	0%	0%	0%	0%	0%	2%
Prefer not to answer	0%	1%	1%	1%	1%	1%



### Annual Income - By Region

Annual Income (Base and Bonus)	West	Midwest	South	Northeast	International
\$500K or more	6%	3%	5%	5%	8%
\$400K-\$499K	5%	2%	3%	7%	4%
\$300K-\$399K	12%	5%	11%	11%	0%
\$200K-\$299K	17%	21%	13%	14%	17%
\$150K-\$199K	15%	21%	15%	19%	17%
\$100K-\$149K	24%	25%	32%	31%	25%
\$75K-\$99K	13%	12%	10%	9%	17%
Less than \$75K	6%	5%	6%	1%	4%
Prefer not to answer	2%	6%	5%	3%	8%

### Education - By Region

Highest degree received/ highest level of school completed	West	Midwest	South	Northeast	International
Professional degree (e.g. MD, DDS, DVM)	3%	3%	4%	4%	8%
Master's degree (e.g. MA, MS, MEd)	27%	22%	15%	20%	17%
Bachelor's degree (e.g. BA, BS)	35%	36%	43%	44%	38%
Associate degree (e.g. AA, AS)	12%	15%	12%	9%	13%
Some college but no degree	18%	17%	16%	17%	13%
High school degree or equivalent	4%	5%	9%	6%	8%
Less than high school degree	<1%	1%	< 1%	0%	0%
Prefer not to answer	<1%	1%	< 1%	0%	3%

Note: Data comprises of respondents manager level and higher for both charts

### Annual Income - For States With Highest Number of Respondents

Annual Income (Base and Bonus)	California	Florida	Nevada
\$500K or more	6%	8%	7%
\$400K-\$499K	10%	2%	1%
\$300K-\$399K	14%	14%	8%
\$200K-\$299K	21%	14%	12%
\$150K-\$199K	19%	14%	10%
\$100K-\$149K	22%	29%	31%
\$75K-\$99K	5%	7%	18%
Less than \$75K	2%	7%	9%
Prefer not to answer	1%	5%	4%

### Education - For States With Highest Number of Respondents

Highest degree received/ highest level of school completed	California	Florida	Nevada
Professional degree (e.g. MD, DDS, DVM)	4%	2%	2%
Master's degree (e.g. MA, MS, MEd)	38%	13%	13%
Bachelor's degree (e.g. BA, BS)	29%	47%	45%
Associate degree (e.g. AA, AS)	13%	13%	7%
Some college but no degree	13%	17%	27%
High school degree or equivalent	2%	8%	5%
Less than high school degree	<1%	0%	0%
Prefer not to answer	<1%	0%	1%

Note: Data comprises of respondents manager level and higher for both charts



# COVID-19

Employed respondents were asked if their organization requires proof of vaccination or negative COVID test results. Thirty-five percent work for companies that require verification from employees and 21% work for companies requiring so of guests/visitors (see charts, bottom left).

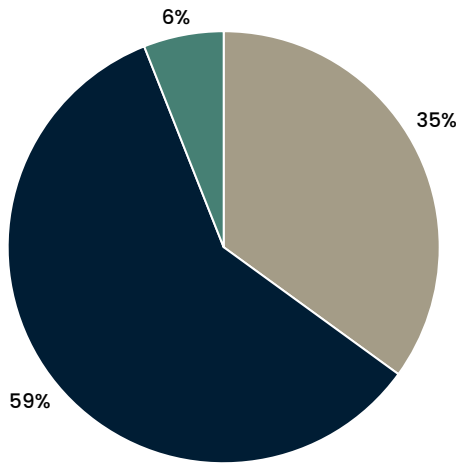
Overall, 89% of employed respondents who work in person full-time or work remotely part-time feel safe working on-site at their organization during the pandemic (see chart, bottom right). While only 6% of "Corporate #1 – President" and "Property #1 – General Manager" feel unsafe, 38% percent of "Staff and All Others" from corporate and properties report feeling unsafe. None of the "Property #4 – Staff and

All Others" felt "Very Safe" working in person at their organization (see graphs, p.39).

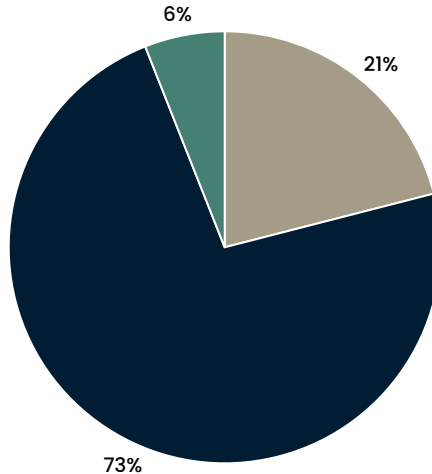
Among the 26 listed departments, 100% of Internal Audit, 100% of Purchasing, 94.74% of Entertainment, and 93.67% of Marketing/Advertising respondents feel safe working on-site. On the other hand, 29.03% of Compliance/Legal, 18.75% of Table Games, 16.67% of Construction/Design, and 16.67% of Engineering/Facilities professionals feel unsafe. Under five percent of each department feel very unsafe, aside from the four departments aforementioned (5.56% - 16.67%).

## Organizations Requiring Proof Of Vaccination/Negative Test

### For Employees



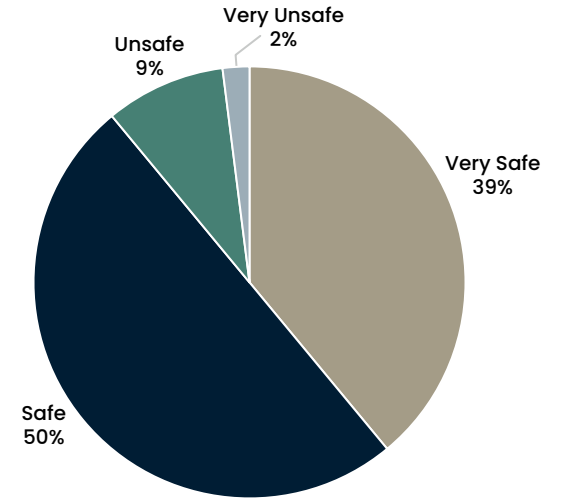
### For Guests



Required Not Required N/A

Note: Data comprises of employed respondents only for both charts

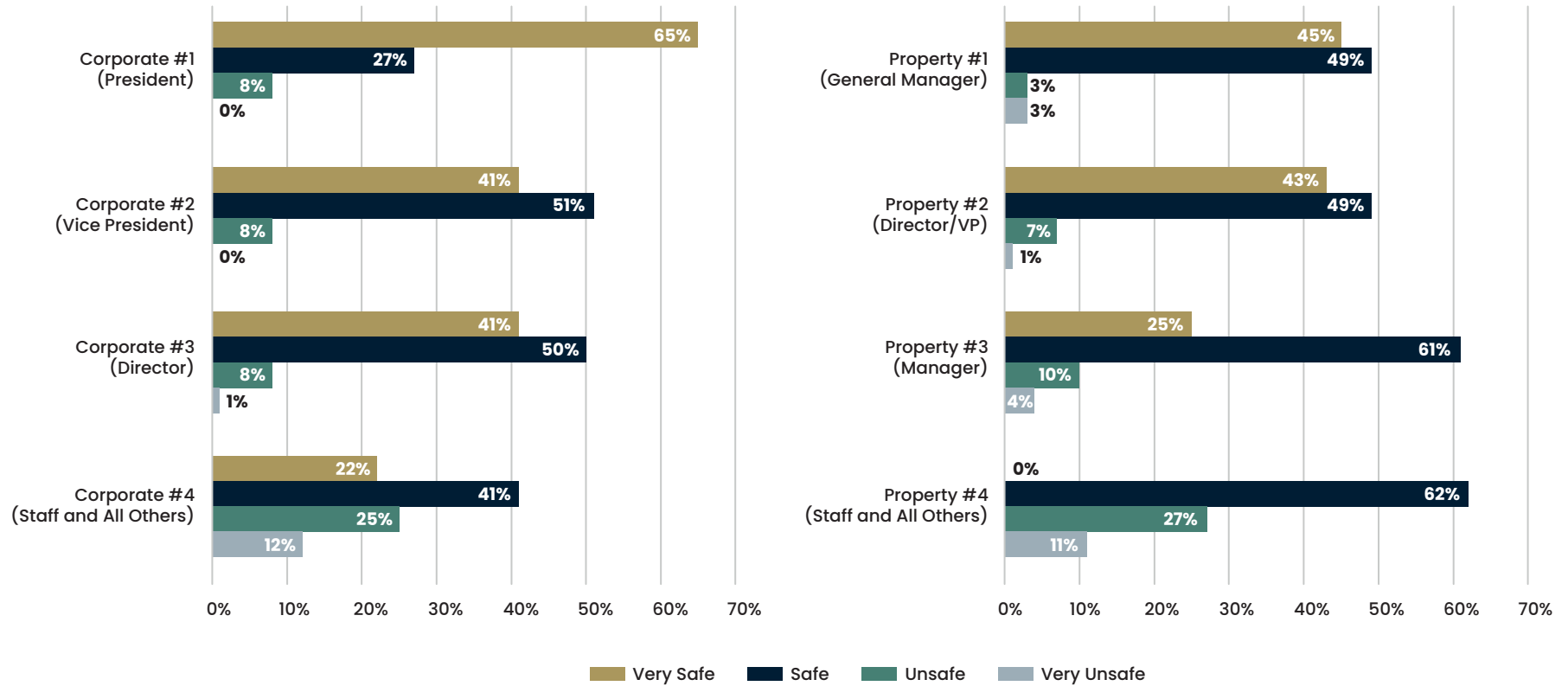
## Opinions About Working On-Site



Note: Data comprises of employed respondents who currently work from home part-time or not at all



### Opinions About Working On-Site - Corporate Level vs Property Level



Note: Data comprises of employed respondents who currently work from home part-time or not at all

## WORK-LIFE BALANCE

With remote work on the rise for most industries, respondents were asked questions related to work-life balance and working from home.

Nearly 60% of professionals report working flexible hours on a regular basis. Roughly four out of ten casino professionals currently work from home full-time or part-time (see chart, right). Nearly six out of ten corporate level respondents and three out of ten property level respondents currently work from home on a full-time or part-time basis.

Nearly half of property level professionals who currently work on-site full-time or are unemployed would prefer not to work from home. In contrast, corporate level professionals who currently do not work from home at all or are unemployed, 36% would work full-time from home, 32% would work part-time remote, and 32% would work fully on-site.

Fifty-seven percent of managers and up who currently work from home full-time want to remain remote, 30% would prefer working remotely part-time, and 13% would rather work strictly on-site. Six out of ten current part-time remote workers who are managerial level and higher want to continue working remotely part-time; only 11% express interest in working from home full-time. Cumulatively, 39% of respondents prefer working remotely on a part-time basis and 29% prefer working remotely on a full-time basis (see call-out, p. 41). The charts on p. 41 represent all job level preferences.

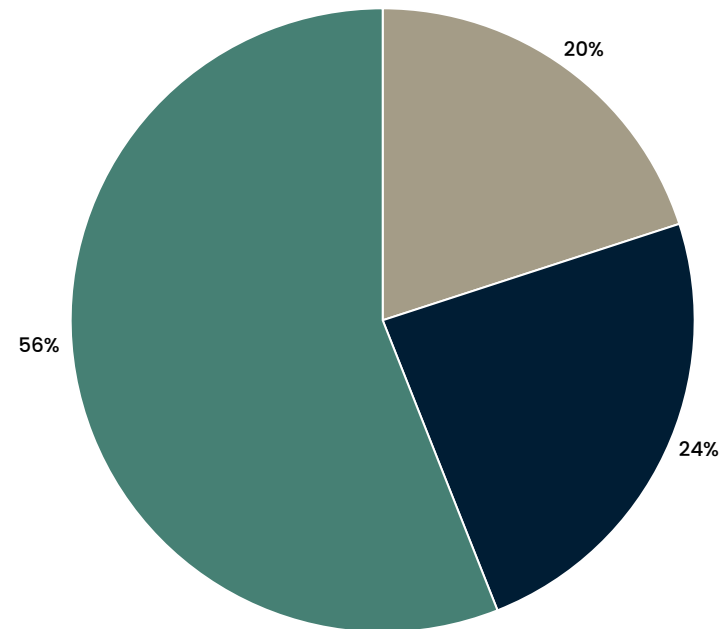
Among those who work full-time, on average, on-site managers and up work an hour more per week (51.62 hours) than full-time remote (50.19 hours) and part-time remote (50.71 hours) employees.

Manager level and higher who work from home full-time have less satisfaction compared to part-time remote workers and on-site employees. For the statement, "My company is working hard to keep me satisfied:"

- 66% of those on-site "Agree or "Strongly Agree"
- 61% of part-time remote workers "Agree" or "Strongly Agree"
- 54% of full-time remote workers "Agree" or "Strongly Agree"

Fifty-two percent of managers and up who work strictly on-site are willing to relocate anywhere in the U.S., as well as 36% who work remotely part-time and 28% who work from home full-time. Thirty-seven percent of full-time remote managers and higher are willing to relocate within their current state and 14% are not willing to relocate at all.

### Current Ability To Work From Home



Full-time Remote Work
  Part-time Remote Work
  On-site Work Only

*Note: Data comprises of employed respondents only*

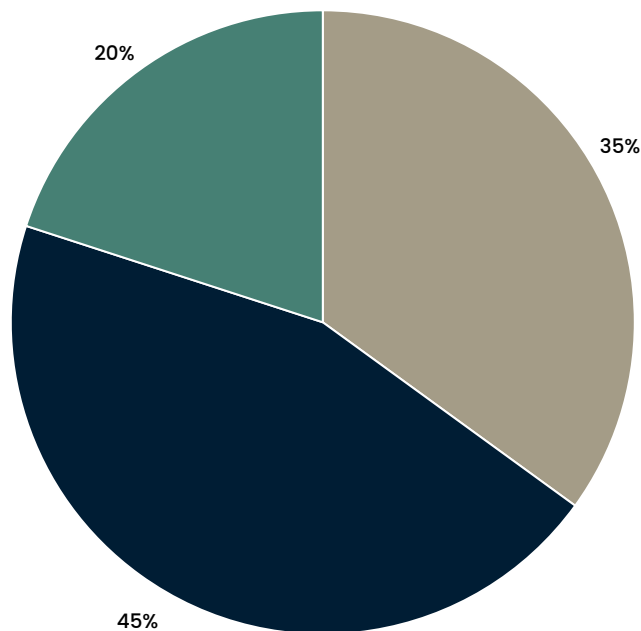
Overall preferences on ability to work from home:

- 29%** Would Prefer Full-time Remote Work
- 39%** Would Prefer Hybrid Work
- 32%** Would Prefer On-site Only Work

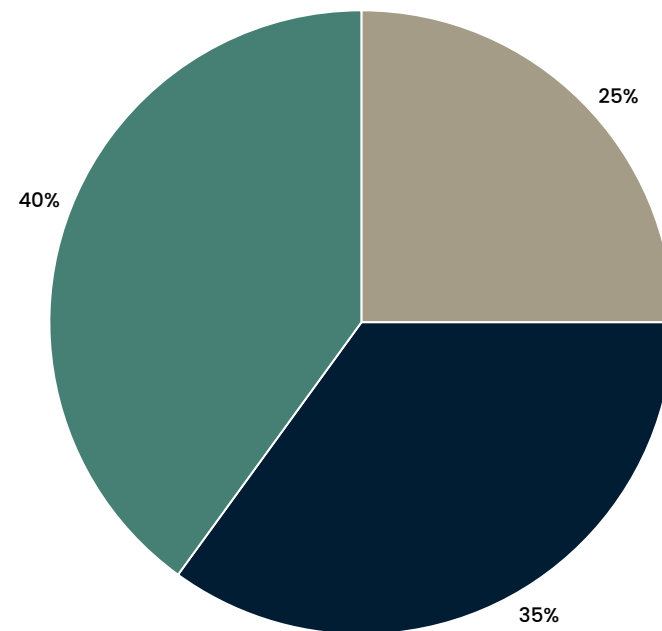
*Note: Data does not include retired respondents*

### Work From Home Preferences

Of Remote Workers



Of On-site Workers/Unemployed



Full-time Remote Work
  Part-time Remote Work
  On-site Work Only

*Note: Data comprises of employed respondents from all job levels who work from home full-time or part-time*

*Note: Data comprises of employed respondents from all job levels who do not work from home and unemployed respondents*



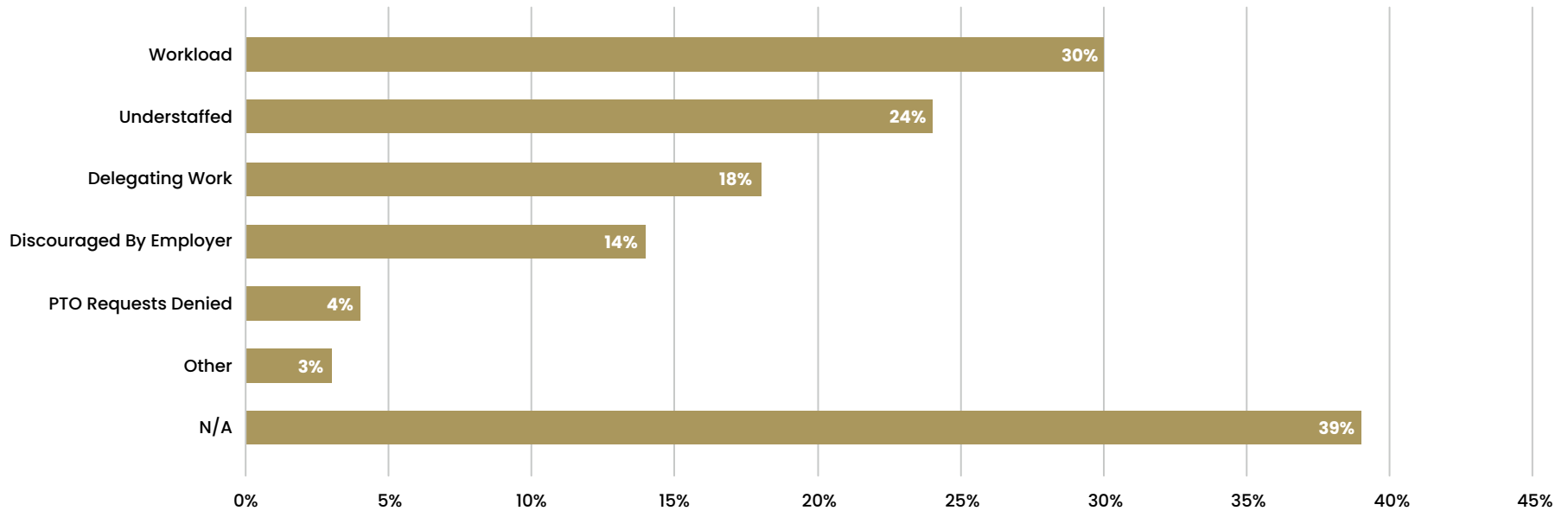
# PTO

Respondents were asked to select reasons that have affected their decisions to take time off. Thirty percent of managers and up claim that the amount of work they would have to make up upon their return has influenced their judgment to use PTO (see graph, below).

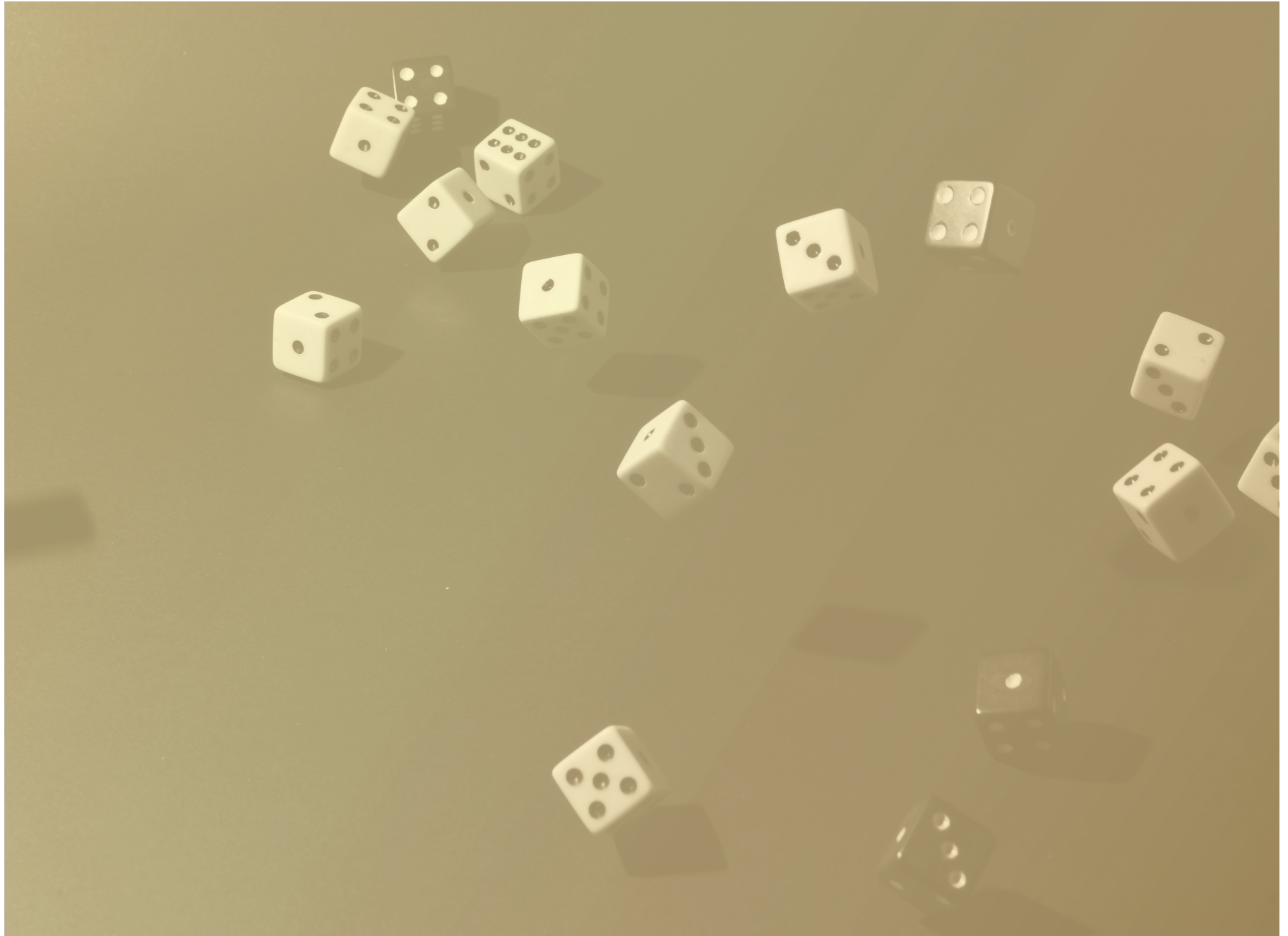
The same group was also asked if they ever miss being at work, or the work itself, while on PTO (see call-out, right). The longer professionals have been in the gaming industry, the less they miss work while on PTO. While 76% of manager and up who have been in the industry for ten years or less miss their work while they are off, only 48% of those with over 11 years of experience express missing their work.

*Managers and higher who report missing being at work or the work itself while on PTO:*  
**57% Do Miss Being at Work/The Work Itself**  
**43% Do Not Miss Being at Work/The Work Itself**

*Reasons That Affect Executives' Decision To Take Time Off*



*Note: Respondents were allowed to select more than one answer*



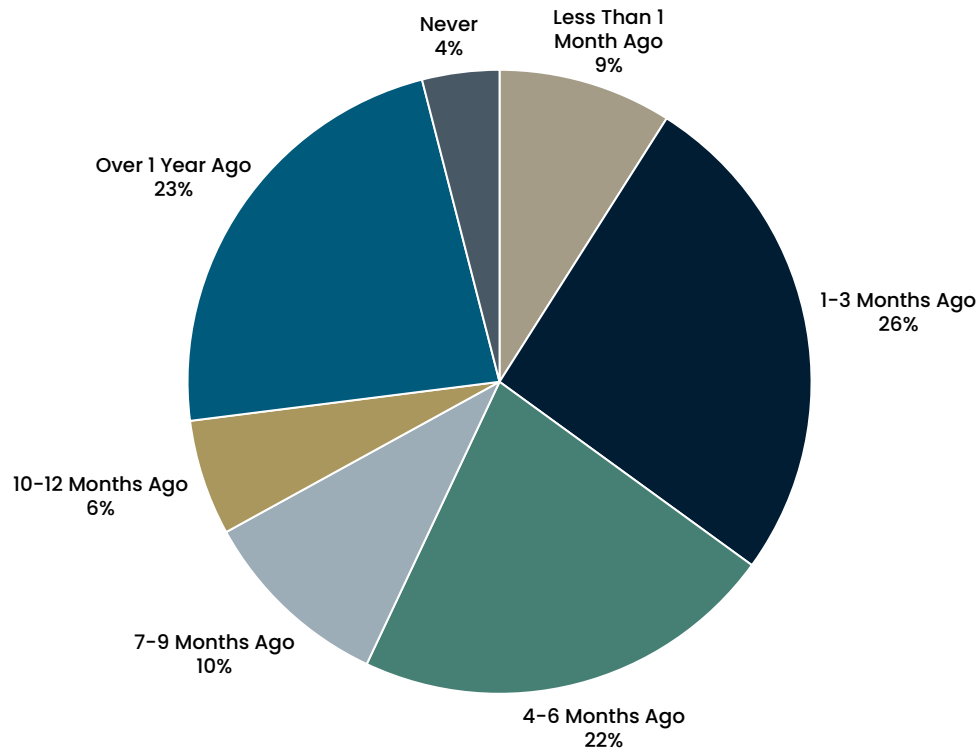


## VACATION

Nearly three-quarters of managers and up who have been with their current employer for a year or longer have taken a vacation, defined as 5+ consecutive days of time off, within the past year (see chart, bottom left). While over a quarter are encouraged to work often while on vacation, 65% report that they often work voluntarily during their time off (see charts, p.45).

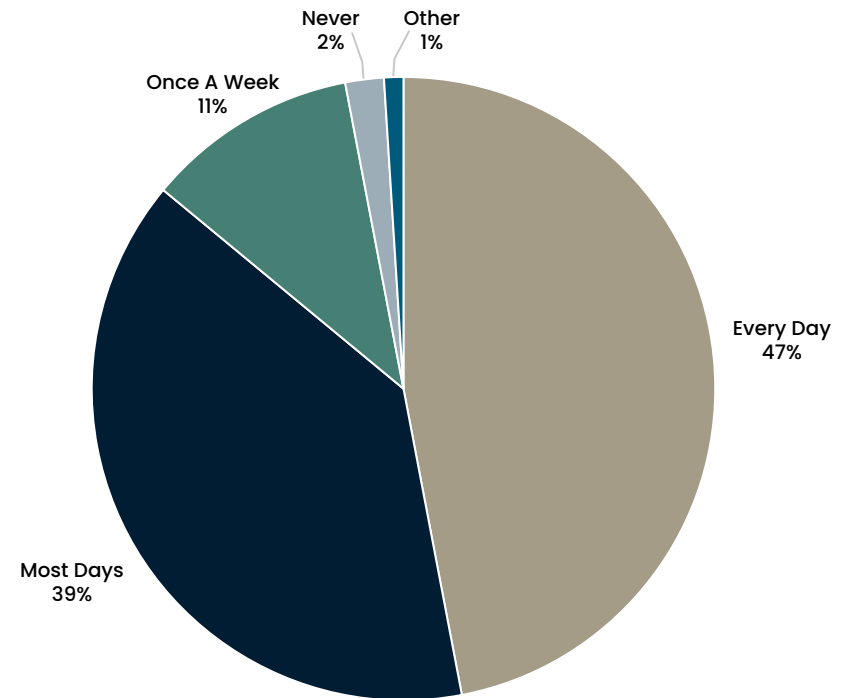
Eighty-six percent of managers and up work “Every day” or “Most days” while on vacation (see chart, bottom right). Respondents who check on work once a week has increased from 5% in 2019 to 11% in 2021.

*Most Recent Vacation*



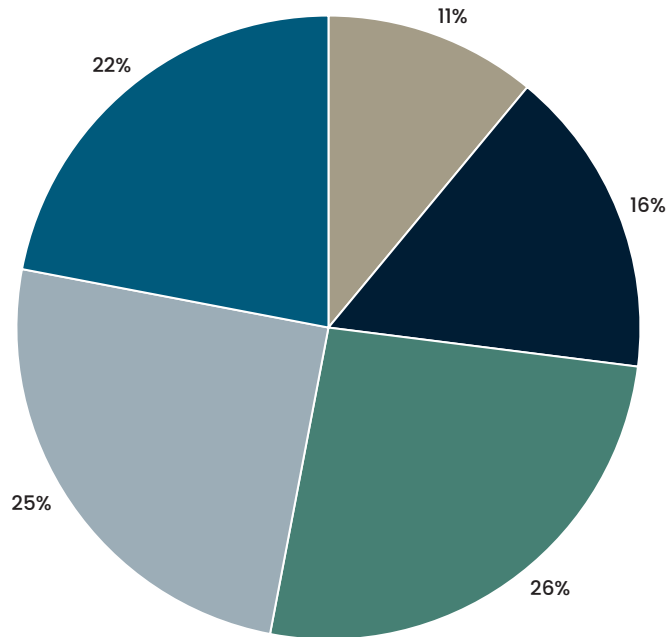
*Note: Data comprises of employed respondents manager level and higher with one year or more of tenure*

*Frequency Working While On Vacation*

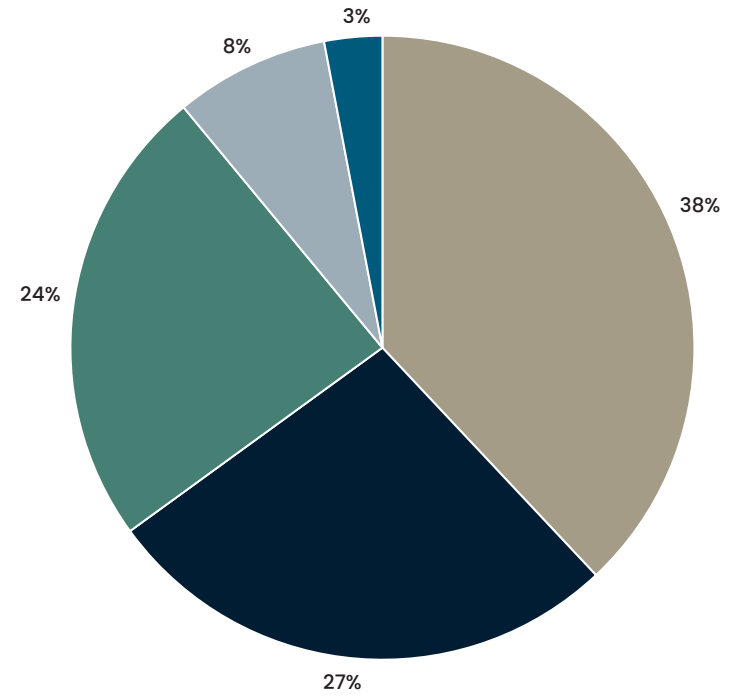


*Note: Data comprises of respondents manager level and higher*

*Feel Encouraged To Work While On Vacation*



*Voluntarily Work While On Vacation*



Always    Very Often    Sometimes    Rarely    Never

*Note: Data comprises of employed respondents manager level and higher for both charts*





## CONCLUSION

Overall, both employee satisfaction and optimism have decreased since 2020. Ever since the start of the pandemic, executives' priorities and preferences have shifted in the gaming industry.

Even though companies have struggled to fill lower-level positions, executives continue to be in a competitive job market. As corporate culture becomes the highest career priority when considering an employer, organizations should reflect and implement strategies that ensure their company culture will attract and retain executive talent. With the importance of work-life balance also on the rise, employers should evaluate if working from home part-time would be beneficial for executive satisfaction, if the position allows for it. The Survey results show that part-time remote work is more desirable than full-time remote work models.

Management also continues to have a significant impact on the employee experience. Findings show that direct supervisors affect their employees' opinion of the organization as a whole. From a recruiting standpoint, employers should use the interview process to ensure that

not only is the candidate qualified for the role but will also be a good cultural fit and the right leader for their team.

"When Bristol and Spectrum launched this survey more than two decades ago, we knew enough to anticipate the unanticipated," says Spectrum Gaming Group's Managing Director Michael Pollock. "The ongoing shocks from the COVID pandemic fall into that category. Like so many industries, gaming has to adapt to a new HR environment. This survey again offers a roadmap for meeting those changing demands."

Bristol Associates' President Benjamin Farber adds, "To sum up 2021 in one word, resilience. Incredible growth spurts occurred as a result of the challenges faced. Since we began measuring work-life balance back in 2019, the value of this relatively new concept has drastically increased for society as a whole. In just a few years, this practice has grown from a consideration to a major focus. Remote work and work from home flexibility are now commonplace options that are intrinsically tied to our health, especially as we aim to put the pandemic in our rear-view mirror."





## ABOUT THE AUTHORS



### About Bristol Associates, Inc.

Founded in 1967, Bristol Associates, Inc. is an executive search firm that has well-established, successful recruitment practices in Casino Gaming; CBD; Facility and Concession; Food and Beverage Manufacturing; Healthcare and Hospital; Hotel and Resort; Nonprofit; Restaurant and Foodservice; and Travel, Tourism, and Attraction.

Bristol is known for offering highly focused personal service, depth of experience, and professional knowledge of the industries in which they work. The firm has been established with a focus on responsiveness, honesty, integrity, and strict adherence to ethical standards. Bristol maintains the largest proprietary database of executive talent in the industry.

Typical searches in the Casino Gaming industry include key corporate and property-level executives within engineering and facilities; finance and accounting; food and beverage; hospitality; human resources; iGaming and mobile sports betting; information technology; operations; sales and marketing; and security and surveillance. Current searches and examples of completed searches can be found on Bristol's website. The casino executive recruitment efforts are led directly by the Company President, Benjamin Farber.

For more information, visit [www.bristolassoc.com](http://www.bristolassoc.com).



### About Spectrum Gaming Group

Spectrum Gaming Group is a non-partisan consultancy that specializes in the economics, regulation, and policy of legalized gambling worldwide. We have provided independent research and professional services to public- and private-sector clients since 1993. We bring wide industry perspective to every engagement, having worked in 40 US states and territories and in 48 countries on six continents.

Employing renowned experts in every facet of the gaming industry, Spectrum serves state lotteries, tribal and national governments, casino operators, hospitality groups, suppliers, regulators, developers, investors, law firms, and other gaming-related professionals in all sectors of the legalized gambling industry.

For more information, visit [www.spectrumgaming.com](http://www.spectrumgaming.com).

