

# Sustainability Report 2024

Cooperating on a sustainable  
approach to gambling



**EGBA** | European Gaming &  
Betting Association



# Who we are

The European Gaming and Betting Association (EGBA) is the Brussels-based trade association representing the leading online gambling operators established, licensed, and regulated within the EU, including bet365, Betsson Group, Entain, Evoke, Flutter, and Kindred Group, while Aircash and Sumsb are associate members.

EGBA works together with national and EU authorities and other stakeholders towards a well-regulated and well-channelled online gambling market which provides a high level of consumer protection and takes account of the realities of the internet and online consumer demand.

For more information about EGBA and its activities, please visit [www.egba.eu](http://www.egba.eu).

# Our members

**bet365**

bet365.com

**betsson** group

betssongroup.com

**Entain**

entaingroup.com

**evoke**

evokeplc.com

**Flutter**<sup>™</sup>

flutter.com

**kindred**

kindredgroup.com

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**Associate members:**

**aircash**

aircash.eu

**sumsub**

sumsub.com

# About this report

This is the fourth consecutive annual Sustainability Report for EGBA. It outlines the joint efforts and progress made by the association and its members to promote a sustainable approach to gambling and contribute positively to society in Europe. The report aims to track yearly progress, support transparency, and reinforce a strong culture of social responsibility.

Included in the report are key sustainability highlights from EGBA and its members during the past year, as well as data points from its member operators related to customers, safer gambling tools and promotion, social contributions, employment and diversity, and energy and environment.

Unless stated otherwise, the data and commentary cover the online gambling operations of EGBA members in the EU and UK, for the reporting period from January 1, 2023, to December 31, 2023. Some commentary may cover activities up to July 2024.

Please note that due to rounding, data points may not add up precisely to the totals provided, and percentages may not precisely reflect absolute figures. The data included is aggregated from all six operator members of EGBA, unless specifically stated. While the report has not undergone an external audit, every effort has been made to ensure accuracy.

**We welcome feedback and suggestions about the contents of this report. For contact information, please visit [www.egba.eu/about-us/contact-us/](http://www.egba.eu/about-us/contact-us/).**

**Disclaimer:** This report is for informational purposes only. While EGBA strives for accuracy, reliability, and transparency, it does not accept any liability for the information contained herein.

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# Contents

**Foreword:**

Our vision for  
advancing safer  
gambling in 2024

**6**

**Key sustainability  
highlights (2023)**

**8**

**Joint CEO letter:**

Competitive,  
regulated online  
markets are the  
only solution to  
safeguard players

**10**

**In focus:**

Building Upon  
the Success of  
European Safer  
Gambling Week

**14**

**Members data:**

Key performance  
indicators (2023)

**16**

**Highlights from  
our operator  
members**

**39**

**Beyond gambling:**

Contributing  
positively to  
European society

**52**

# Foreword: Our vision for advancing safer gambling in 2024



**Maarten Haijer**

Secretary General, EGBA

E: [maarten.haijer@egba.eu](mailto:maarten.haijer@egba.eu)

First and foremost, thank you for taking the time to read our 2024 sustainability report. The importance of sustainability to us and our members is reflected in this report, but we can only share our progress if people take the time to read it.

Together with our members, a significant part of our sustainability agenda is ensuring that their customers have the safest gambling experience possible. This commitment extends to all players: the majority who play well within their limits, and those at risk of or exceeding their limits. In this, we are pleased to report substantial progress is being made, including positive trends in the uptake of safety tools and interactions with players to promote safer play. This year we are pleased to expand our data reporting in a number of areas.

In 2024, we hope that a common European standard on markers of gambling harm will be agreed upon. Some time ago, we proposed creating this standard due to a lack of common understanding of the behaviours that could signal harm. Addressing and preventing possible gambling harm is essential, and we are confident that this standard will greatly help once it is agreed upon, hopefully later this year.

Equally important is the rapid development of player intervention mechanisms. Our members, along with others in the industry, are developing these mechanisms with the help of health experts, technology, and AI. These systems allow a personalised approach to player safety by helping to analyse individual player behaviour for risks and triggering personalised communication towards players to encourage safer behaviour. This report includes insightful new data on these interactions, with improved and more detailed measurements of their success.

However, a worrying trend across Europe is the popularity of black market websites. Based outside Europe, these websites focus exclusively on profit over people, often lacking even the most basic consumer protection measures, let alone any policies on preventing gambling-related harm. This threatens the very sustainability of the industry and is a grave concern to our members. That is

why the CEOs of our member companies outline the damage the black market does to consumer protection later in this report. They rightly emphasise the need to counter this with a safe, secure, and attractive offering to keep consumers away from unsafe black market websites.

Last but not least, in 2024, we aim to build on last year's very successful 3rd edition of the European Safer Gambling Week. This included many safer gambling events across Europe, record engagement online and on social media, and active participation from several European gambling authorities. We hope to improve in all these areas this year, and we encourage all stakeholders committed to safer gambling to take part.

We will continue our efforts to foster greater engagement, responsibility, and cooperation between stakeholders inside and outside the industry. We invite you to dive into this year's

report and learn more about what we and our members are doing to contribute to a sustainable future for the industry.

Yours sincerely,

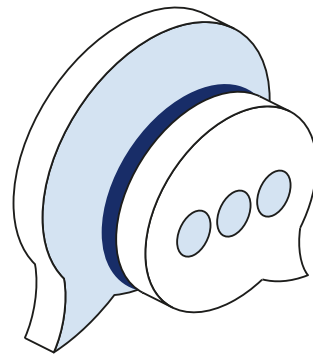
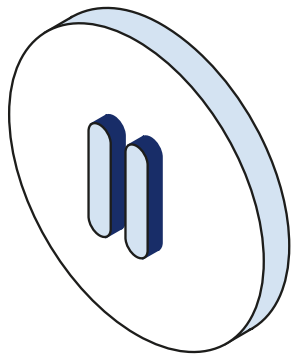


**Maarten Haijer**  
Secretary General, EGBA

# Key sustainability highlights (2023)

## 65% of all customers using safety tools.

This accounted for 21 million customers. Over half of these customers – 37% of all customers – were using tools voluntarily.

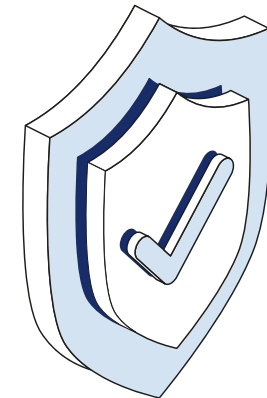


## 67 million messages sent to customers to promote safer play.

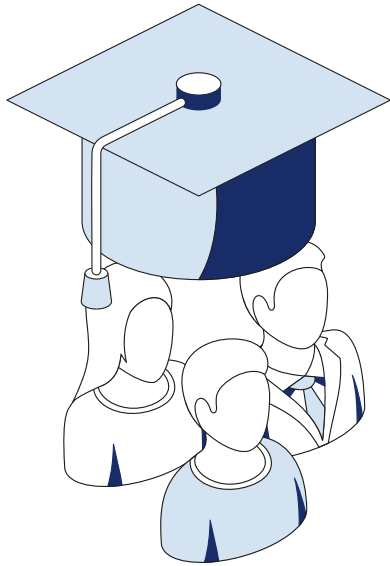
This represented a 49% yearly increase. Over a third (23 million) of these messages were personalised based on a customer's playing behaviour.

## 65% of customers with potentially problematic play improved or stabilised their play following safety messages.

Specifically, 45% improved their play, 10% refrained from playing, and 10% stabilised their play.





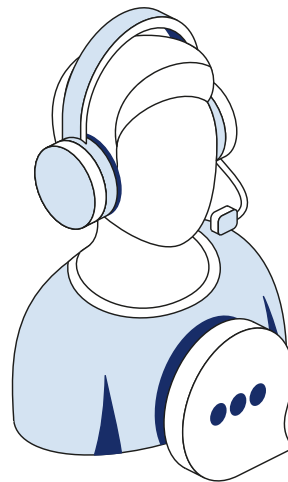


## 80% of employees trained in safer gambling.

This accounted for over 45,000 employees in both online and land-based operations.

## 14 million customer service interactions.

The most common topics were payment options (15%), account-related queries (15%), offers / bonuses (14%).



## €61 million in RET contributions.

This represented a 25% yearly increase in contributions to problem gambling research, education, and treatment services.

# Joint CEO letter: Competitive, regulated online markets are the only solution to safeguard players

As leaders in Europe's online gaming and betting sector, our top priority is to ensure the sustainability and safety of the entertainment we provide to our 32 million European customers. Whether they visit our websites to bet on sports or play casino games, we aim to provide them with an enjoyable experience that fosters trust and encourages them to return.

We have made significant progress by leveraging both human expertise and advanced technologies to proactively protect and support our players around the clock. This includes implementing and enhancing essential safeguards such as age and identity verification, safety tools, messaging, and self-exclusion. Through meticulous research, development, and ongoing refinement of our safer gambling strategies, we are fostering a strong culture of sustainable play across our entire operations.

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**“Through meticulous research, development, and ongoing refinement of our safer gambling strategies, we are fostering a strong culture of sustainable play across our entire operations.”**

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As Europe's leading regulated operators, we hold licenses and comply with license obligations in over 20 European countries. We employ harm prevention experts, adhere to national self-exclusion registers, and pay taxes and license fees in these countries. Our ongoing development of cutting-edge safety tools has led to nearly 40% of our European players now using these tools on a voluntary basis. Additionally, we are interacting with our players more than ever to promote safer play and continually refining our approach.

Despite this progress to ensure the safety of our players, we are facing a significant challenge. The growth of the black market for online gambling, driven by websites run from outside Europe, poses a mounting threat to the safety of European players, including our customers. These unregulated websites evade the responsibilities that regulated operators adhere to, and operate outside of regulatory oversight in Europe. Yet, the websites are easy to find, and the popularity of VPNs means they are easily accessible.

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**“We are interacting with our players more than ever to promote safer play and continually refining our approach.”**

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Worryingly, many black market operators lack even the most basic consumer protections such as age verification and safer gambling policies, exposing players to unacceptable risks. With lower operating costs, they entice players with attractive sign-up bonuses, promotions, and competitive odds, appealing particularly to vulnerable players seeking unrestricted play and a ‘no questions asked’ culture.

Unfortunately, the way that regulatory frameworks have developed in several European countries has exacerbated the problem of the black market. Why? Because severe restrictions in these countries prevent an attractive and competitive offer to players that steers them toward safer, locally regulated websites. For example, in France, where online casinos are banned, over 4 million players regularly use black market websites where they can play online casino, outnumbering the 3.6 million French players using regulated sites, according to data from the country's gambling regulator.<sup>1</sup>

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**“Unfortunately, the way that regulatory frameworks have developed in several European countries has exacerbated the problem of the black market.”**

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The worsening black market situation in Europe underscores the urgent need for national policymakers to take decisive action to protect their players. The time to act is now. While we strongly support enforcement measures against black market websites, competitive, regulated online gambling markets are the only effective solution. We call on national policymakers to design regulatory frameworks that balance robust consumer protections with a competitive and innovative online gambling environment that is attractive to players. Regulations should not

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1. AJFEL (2024). Available here: <https://afjel.fr/2024/04/24/chiffres-2023-du-marche-des-jeux-en-ligne-une-evolution-contrastee-marquee-par-lexpansion-massive-du-jeu-illegal/>.

inadvertently make unsafe alternatives more appealing, especially to vulnerable players. Taking a balanced approach is essential. By doing so, policymakers can mitigate the consumer protection risks associated with the black market and uphold the integrity and sustainability of their regulatory frameworks.

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**“We are proud to present the latest EGBA sustainability report, showcasing our collective efforts to champion safe and sustainable play in Europe.”**

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Looking ahead, we are committed to ensuring the safest and most enjoyable experience for our players. We will continue to incorporate the latest research into our approach, invest in state-of-the-art technologies and strategies, and bring our players with us every step of the way. This commitment not only builds trust with our players but is also an integral part of running a responsible, long-term business.

We are proud to present the latest EGBA sustainability report, showcasing our collective efforts to champion safe and sustainable play in Europe. This year, we report positive results in several key areas and have expanded our reporting to include new metrics on safety tools and customer interactions. By being transparent about our efforts, we aim to establish industry benchmarks, track our progress, and inspire our industry peers to prioritise sustainability in their operations.

Yours sincerely,



A handwritten signature in black ink, consisting of a stylized 'J' followed by a wavy line.

**John Coates**  
Joint Group Chief  
Executive, bet365



A handwritten signature in black ink, appearing to read 'Stella David' in a cursive style.

**Stella David**  
Interim CEO, Entain  
Group



A handwritten signature in black ink, appearing to read 'Peter Jackson' in a cursive style.

**Peter Jackson**  
CEO, Flutter  
Entertainment PLC



A handwritten signature in black ink, appearing to read 'Jesper Svensson' in a cursive style.

**Jesper Svensson**  
CEO, Betsson  
Operations



A handwritten signature in black ink, appearing to read 'Per Widerström' in a cursive style.

**Per Widerström**  
CEO, Evoke



A handwritten signature in black ink, appearing to read 'Nils Andén' in a cursive style.

**Nils Andén**  
CEO, Kindred Group

# In focus: Building Upon the Success of European Safer Gambling Week



**Barry Magee**

Senior Communications Manager, EGBA

E: [barry.magee@egba.eu](mailto:barry.magee@egba.eu)

Reflecting on the development and achievements of European Safer Gambling Week fills us with pride. Introduced in 2021, this annual initiative has gone from strength to strength, reaching new heights in its efforts to promote safer gambling across Europe. Last year marked its third edition, and the overwhelming support and engagement it received were significant milestones in EGBA's ongoing efforts to foster a strong culture of safer gambling in Europe.

Last year's campaign, supported by over 160 partners including operators, trade associations, harm-prevention organisations, and national gambling authorities, saw a remarkable increase in participation. What began as a localised initiative has now evolved into a truly pan-European movement, with activities spanning 20 countries, underscoring the increasing recognition of the importance of safer gambling across the sector.

A standout achievement from the last edition was the sharing of a record 8 million messages across social media platforms to promote safer play, representing a 430% increase from the previous year. These messages not only raised awareness about safer gambling but also provided invaluable resources and practical advice to players and the public. Translations in over 20 languages enhanced the accessibility of these messages, ensuring broader reach and impact across Europe's diverse linguistic and cultural landscapes.

Additionally, the initiative facilitated 18 local events dedicated to enhancing discussions on safer gambling. These gatherings served as vital platforms for industry experts, academics, harm-prevention advocates, and regulatory bodies to exchange insights and best practices. They covered the latest developments in safer gambling research, regulatory initiatives, and effective player protection strategies, emphasising the multi-faceted nature of the initiative.

European Safer Gambling Week is more than just a week-long event - it reinforces a strong culture of safer gambling that resonates throughout the year. By equipping players with knowledge and tools, it enables players to make informed choices and encourages operators to think critically about their player protection strategies. The initiative also fosters ongoing discussions about research gaps and the role of regulatory frameworks in player protection. While it serves as a crucial platform to bring together a diverse range of stakeholders for these crucial discussions once a year, these discussions continue long after the week is over.

Looking ahead, the fourth edition is scheduled for November 18-24, 2024, and we invite all sector stakeholders to join us in advancing the shared responsibility of promoting safer gambling. This year, we aim to build on its successes by surpassing last year's record for safer messages shared, expanding its reach to cover even more countries, and engaging a greater number of participants than ever before. We encourage stakeholders to participate by organising local events, conducting new research initiatives, or joining our social media campaign to raise awareness about safer play.

At EGBA, we are inspired by the progress made so far and by the dedication of our partners, particularly our members, to the success of this initiative. Without cooperation across the sector, none of this would be possible.

For more information on how to get involved in the 2024 European Safer Gambling Week and help us foster an even stronger culture of safer gambling in Europe, please reach out to us. Join us in our efforts to drive positive change and foster a sustainable future for the sector and its players.



**Barry Magee**

Senior Communications Manager, EGBA

# Members data: Key performance indicators (2023)





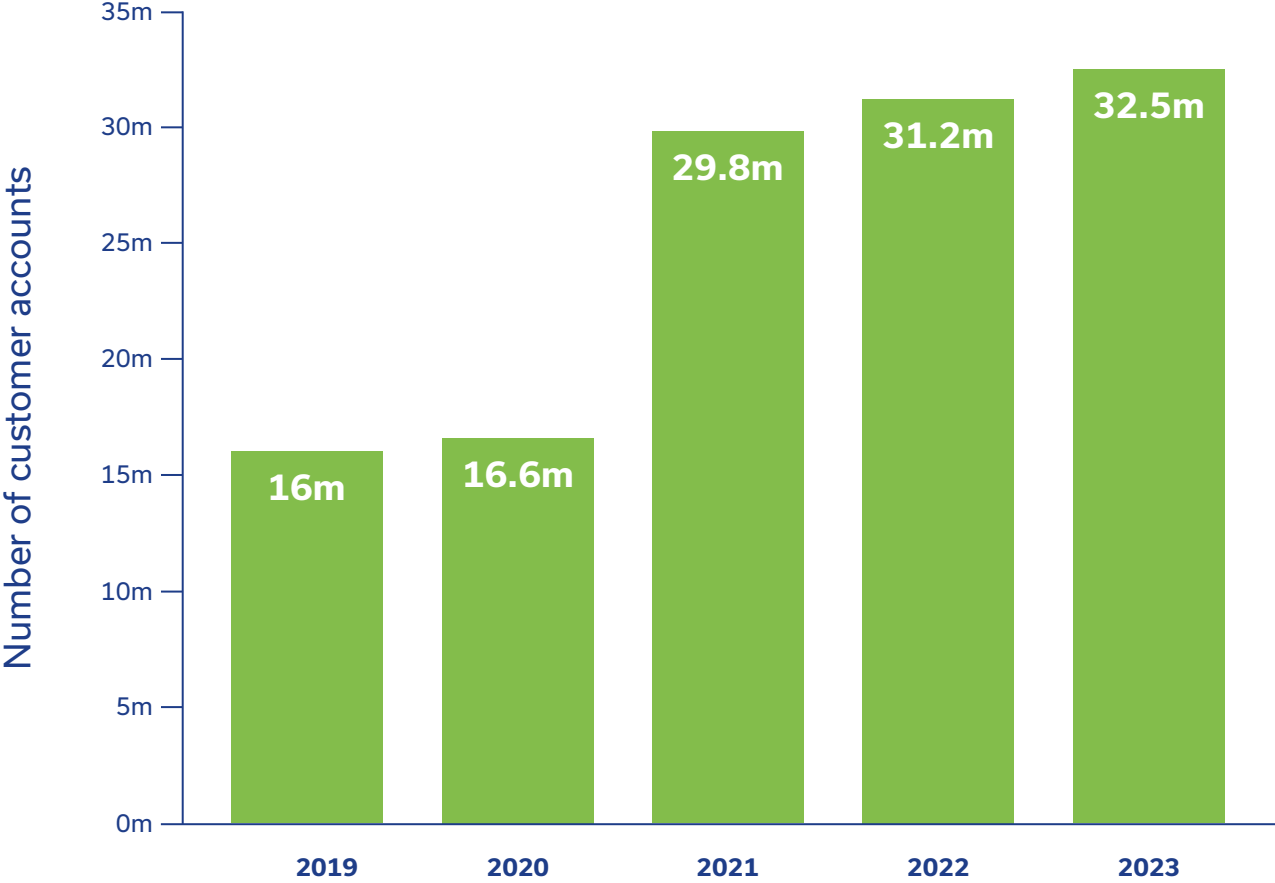
# Customers

The number of customer accounts has shown an upward trend over the past three years. In 2023, the number of customer accounts reached 32.5 million, representing a 4% increase from 2022.

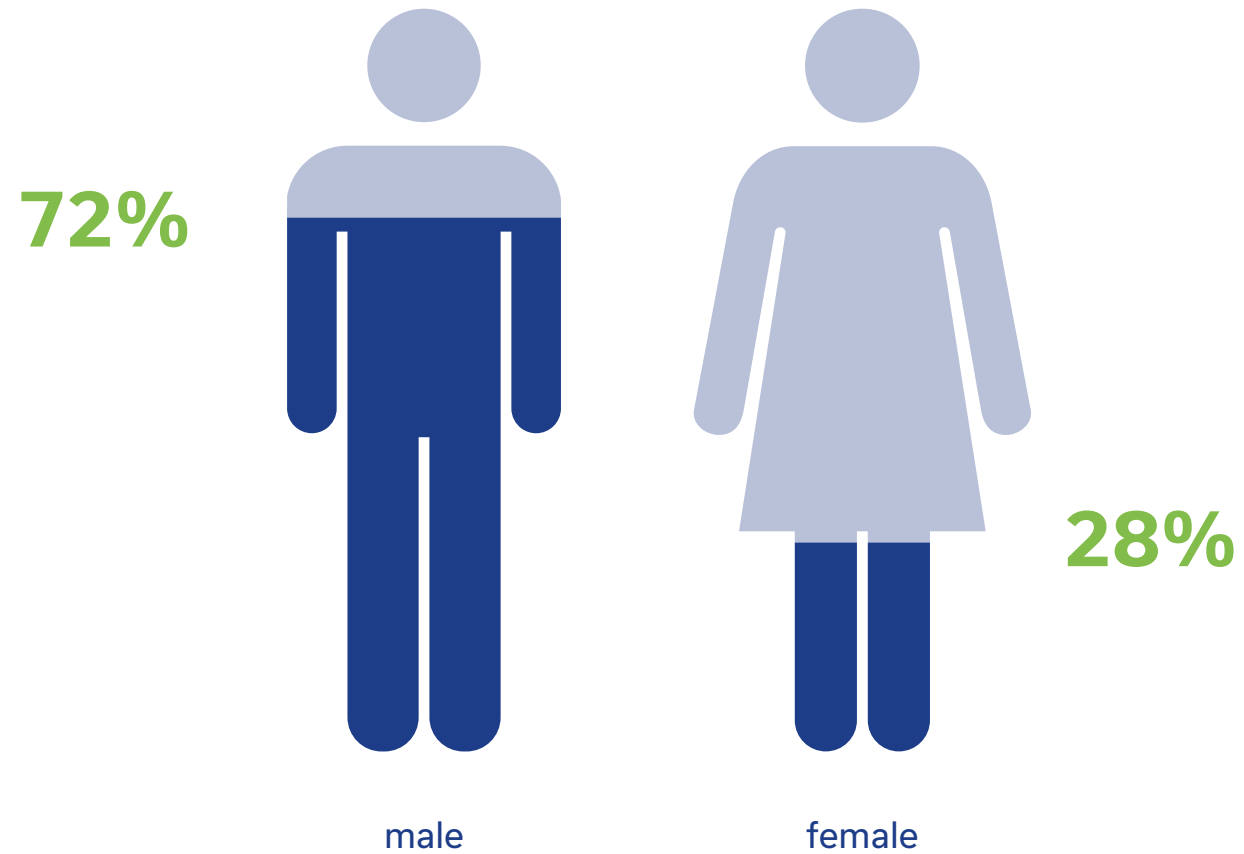
\* Based on active customer accounts (where a customer has placed a bet at least once during the reporting year).

**Note:** Data increases between 2020 and 2021 also includes the onboarding of new members and their inclusion in EGBA's data reporting for the first time.

### Number of customers



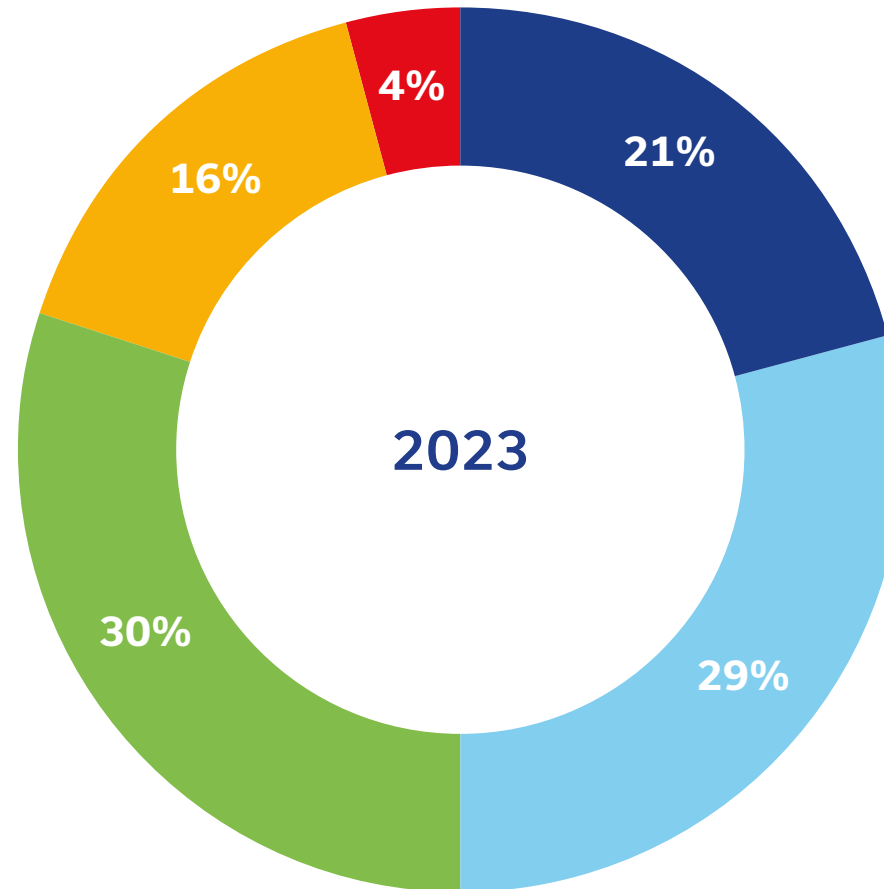
## Gender of customers



In 2023, 72% of customers were male, which was a slight decrease from 74% of customers in 2022. There was a slight but notable increase in the percentage of female customers, from 26% in 2022 to 28% in 2023.

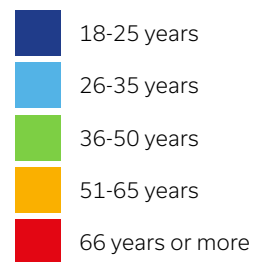
**Note:** The gender information was known for 93% of customers, while the information was not available for the remaining 7%.

## Age of customers



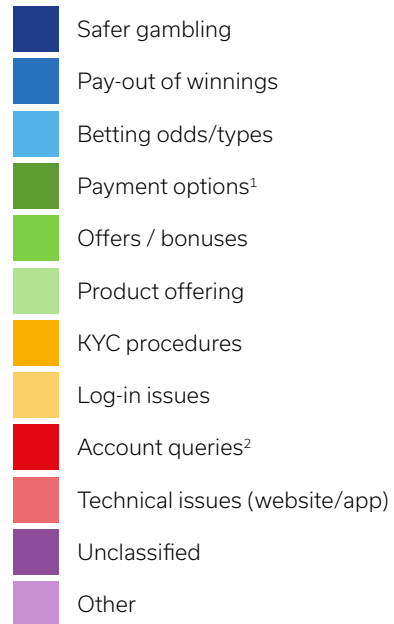
In 2023, the largest customer groups by age were the 26-35 years and 36-50 years groups, collectively representing 59% of customers.

**Note:** A customer's age is counted from the last calendar day in the reporting year.

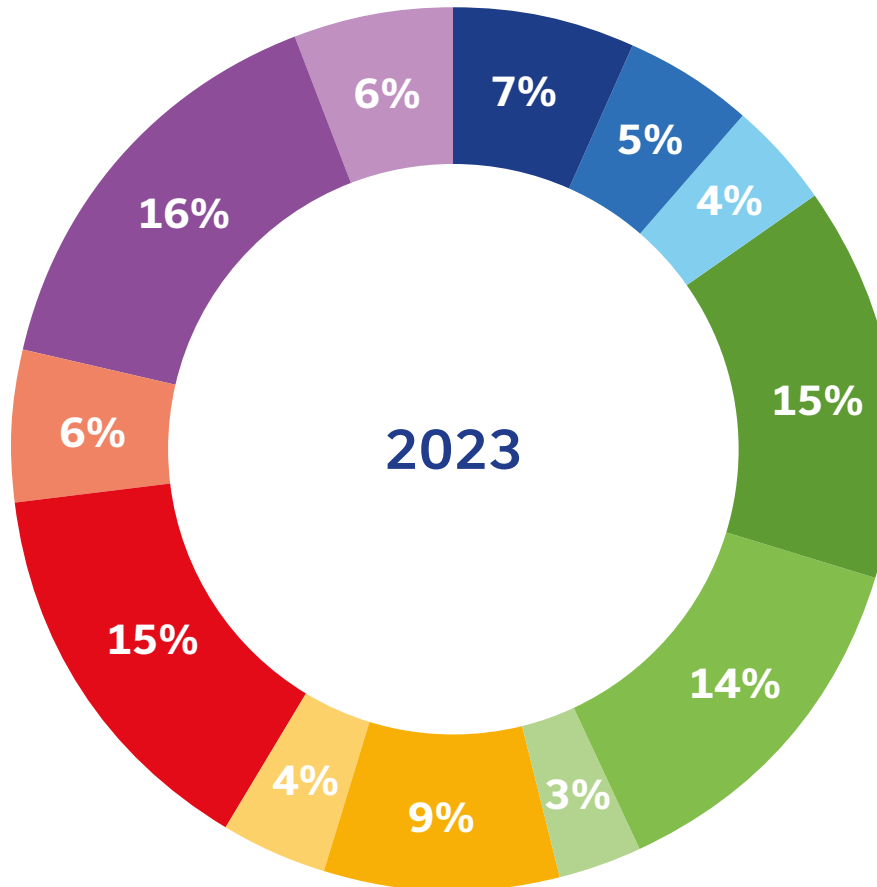


In 2023, there were 14.6 million customer service interactions across our member operators. Customers sought assistance on a variety of topics, with the most common being payment options (15%), account-related queries (15%), offers / bonuses (14%). These three categories together accounted for 44% of all customer service interactions.

<sup>1</sup> Including withdrawals and deposits.  
<sup>2</sup> Including subject access requests (SAR) and data requests.



## Customer service topics



# Safer gambling tools

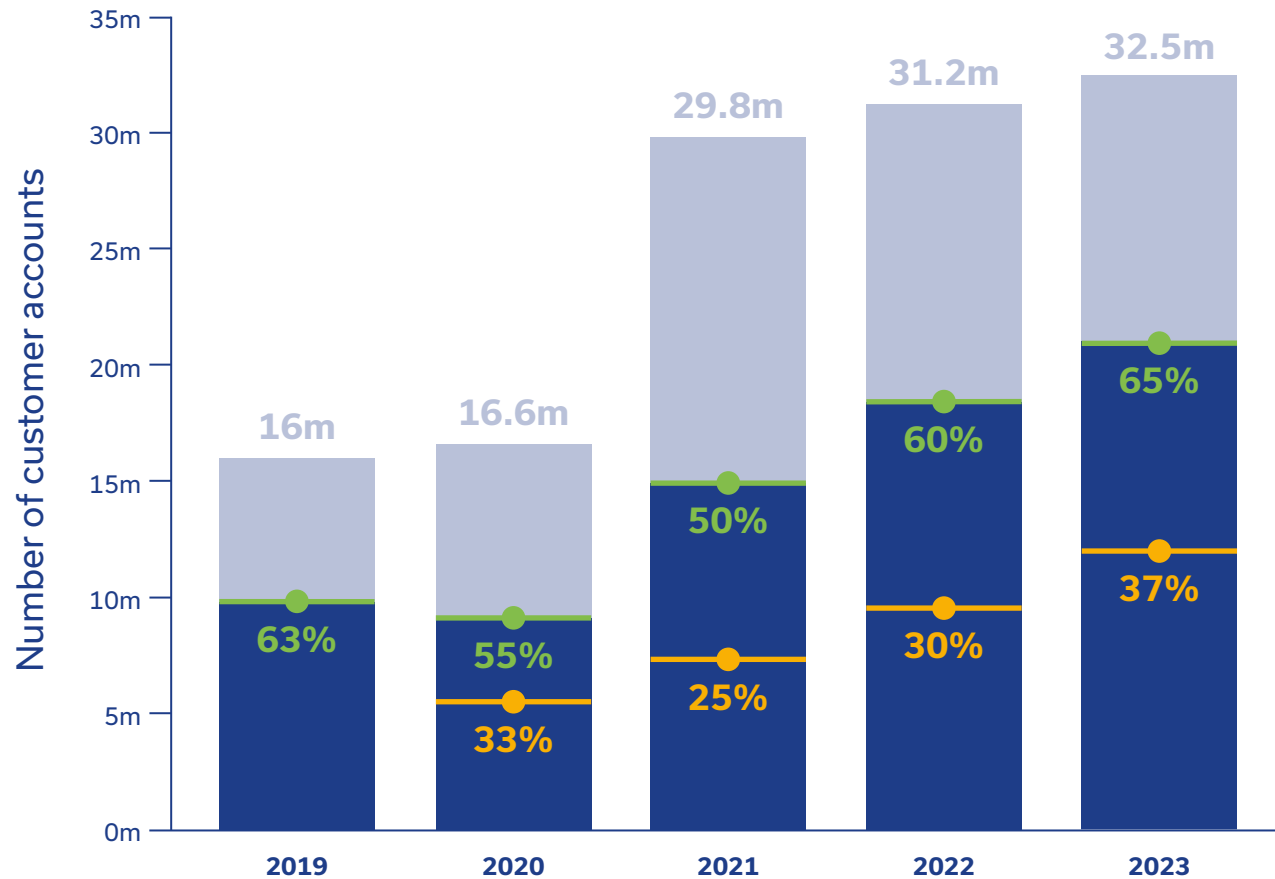
Safety tools, such as deposit limits, enable customers to manage their activity and are used by customers either voluntarily, or mandatorily due to some regulatory or operator requirements. In 2023, a record 21 million customers had one or more safety tools activated in their playing accounts, a 14% increase from the previous year. This accounted for 65% of total customers, up from 60% in 2022. Additionally, 37% of all customers, 12.1 million of them, used a safety tool voluntarily, an increase from 30% in 2022.

\* Includes deposit limits, time limit / reality checks, product blocks, or any other safety tool.

**Note:** Data increases between 2020 and 2021 also includes the onboarding of new members and their inclusion in EGBA's data reporting for the first time.

- Number of customers
- Number of customers using mandatory or voluntary tools
- Share of customers using mandatory or voluntary tools
- Share of customers using voluntary tools

## Use of safety tools



### Types of safety tools used

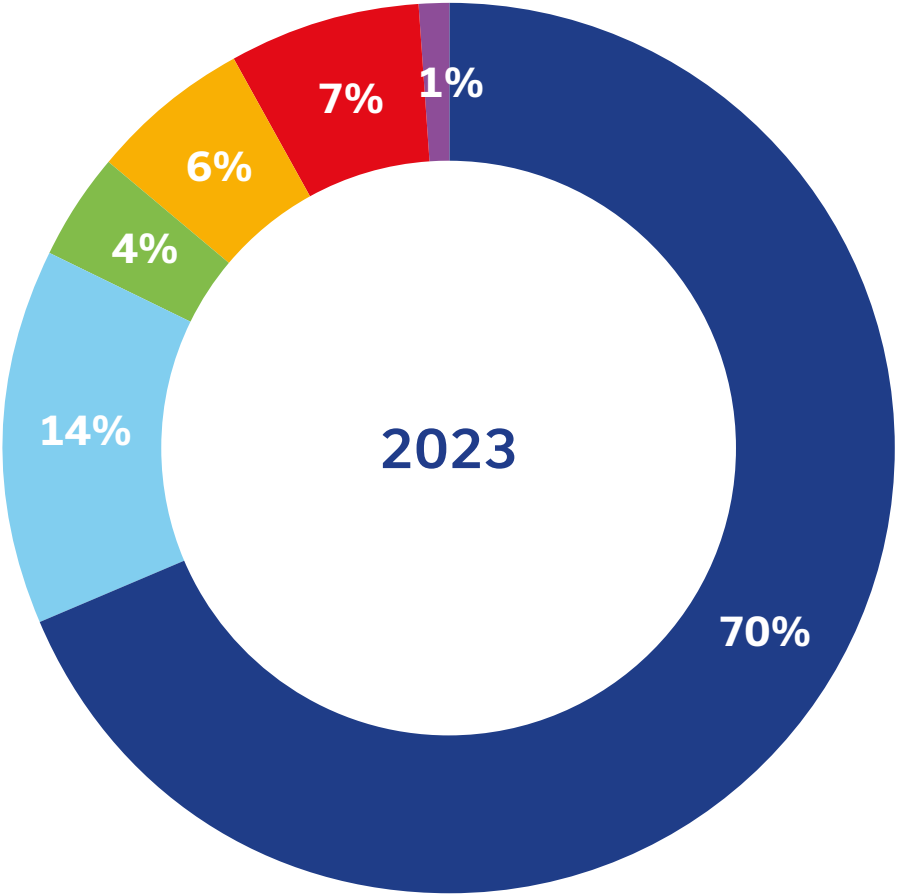
Deposit limits are the most popular safety tool, used by 70% of customers who use safety tools voluntarily, up from 67% in 2022.

\* Based on voluntary use of safety tools. This does not include customers who use a safety tool on a mandatory basis due to regulatory or operator requirements.

<sup>1</sup> Includes loss limits and stake limits.

**Note:** Includes customers who had more than one tool active in their account.

- Deposit limits
- Time limit / reality checks
- Product blocks
- Self-exclusion < 6 months
- Self-exclusion ≥ 6 months
- Other<sup>1</sup>



## Share of customers using safety tools

(by % share of active customer accounts) 2021    2022    2023

Deposit limits	Helps customers to stay in control of their spending	16%	23%	27%
Time limits / reality checks	Helps customers to stay in control of their time spent playing	3%	5%	5%
Product blocks	Helps customers to take a break from specific gambling products	1%	1%	2%
Self-exclusion < 6 months	Helps customers to stay in control by blocking access to their account for a set period of less than six months	2%	3%	3%
Self-exclusion ≥ 6 months	Helps customers to stay in control by blocking access to their account for a set period of six months or more	3%	2%	0%

The share of customers who had a deposit limit activated on their playing account voluntarily has increased significantly over three years: from 16% in 2021 to 23% in 2022, and to 27% in 2023.

\* Based on voluntary use of safety tools. This does not include customers who use a safety tool on a mandatory basis due to regulatory or operator requirements.

**Note:** Includes customers who had more than one tool active in their account.

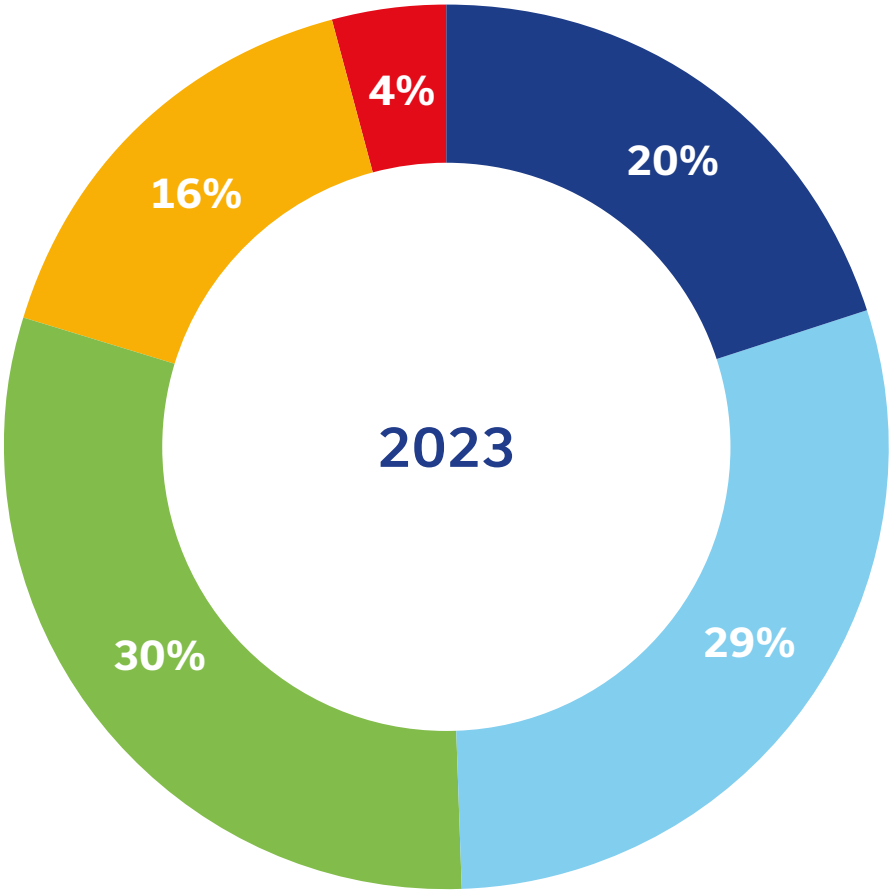
## Age groups of customers using safety tools

In 2023, 49% of customers, almost half, who used safety tools voluntarily were 35 years old or younger.

\* Based on voluntary use of safety tools. This does not include customers who use a safety tool on a mandatory basis due to regulatory or operator requirements.

**Note:** A customer's age is counted from the last calendar day in the reporting year.

- 18-25 years
- 26-35 years
- 36-50 years
- 51-65 years
- 66 years or more



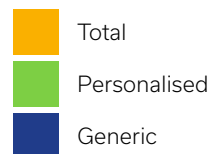


# Promotion of safer gambling

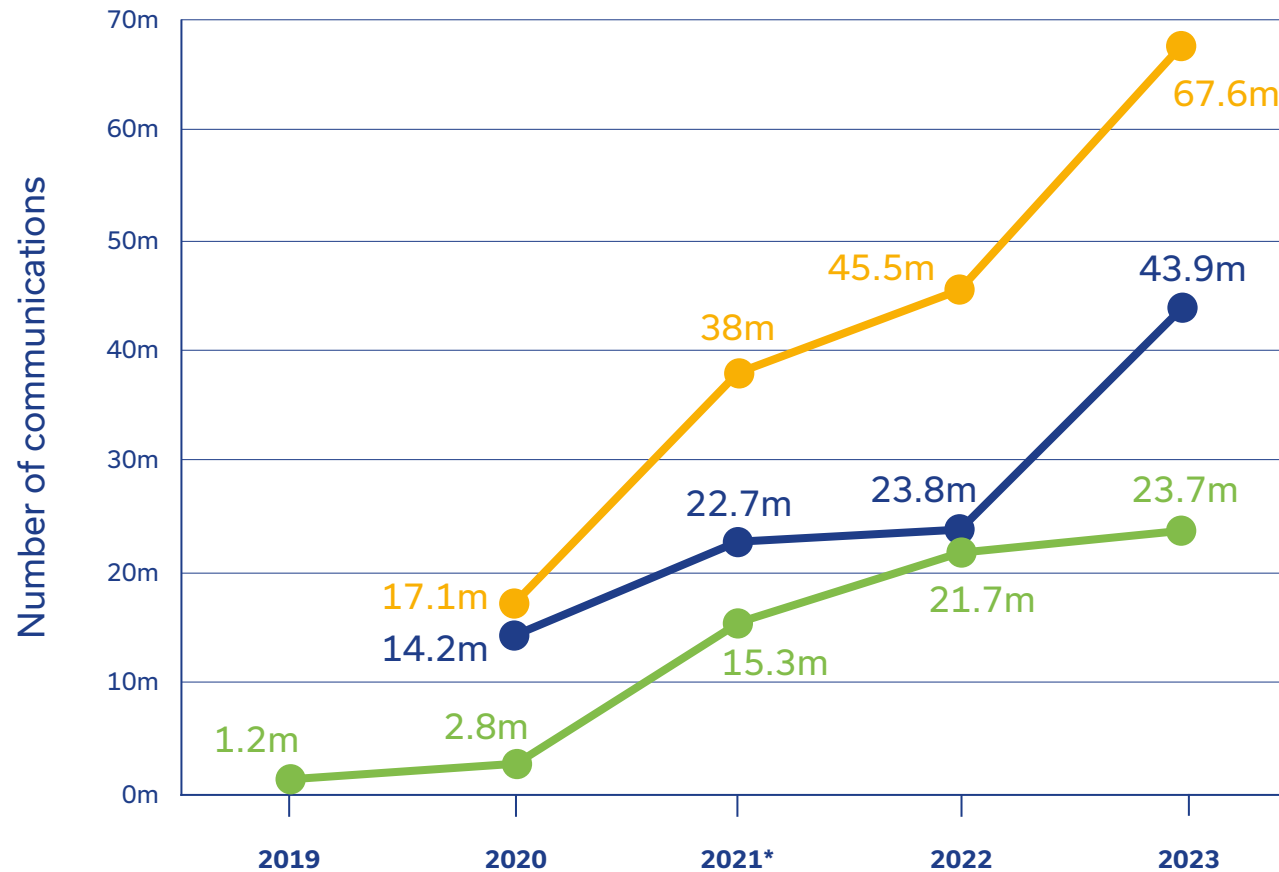
The total number of messages sent to customers to promote safer gambling increased significantly to 67.6 million in 2023, a yearly increase of 49%. Importantly, 23.7 million of these messages were personalised based on the customer's actual playing behaviour, a 9% increase from the previous year. Personalised messages accounted for 35% of all safety messages sent to customers.

\* Including email, SMS, phone call, pop-ups, and other direct messages (in-website chat and playing account mailbox).

**Note:** Data increases between 2020 and 2021 also includes the onboarding of new members and their inclusion in EGBA's data reporting for the first time.



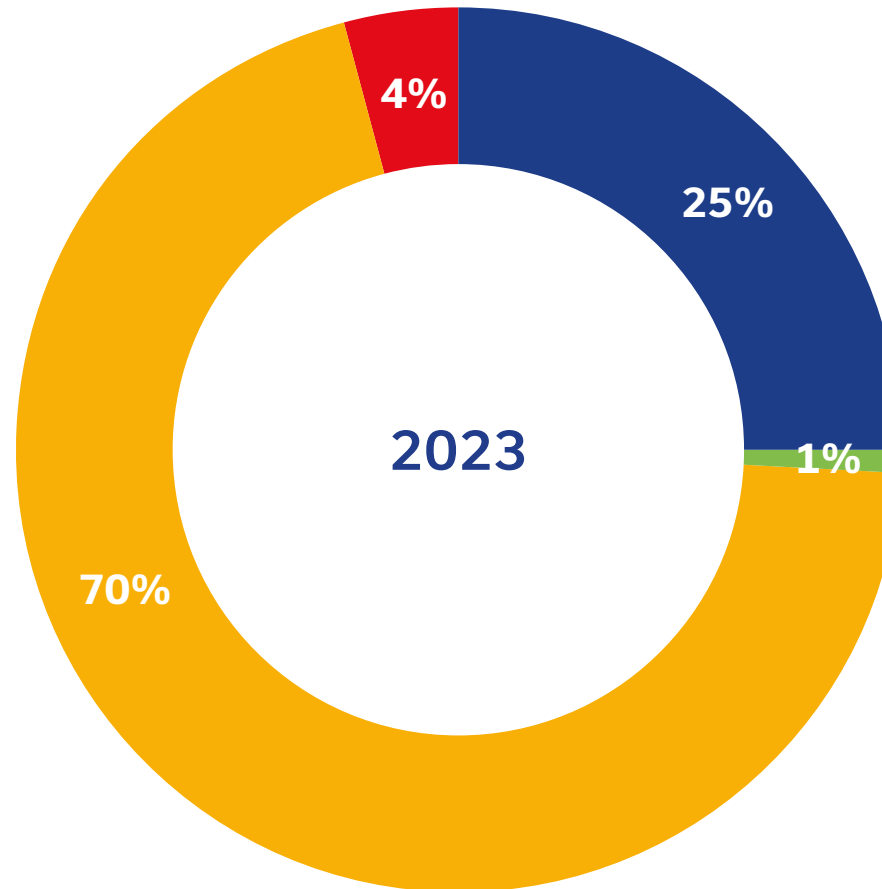
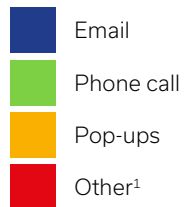
## Safety messages sent to customers



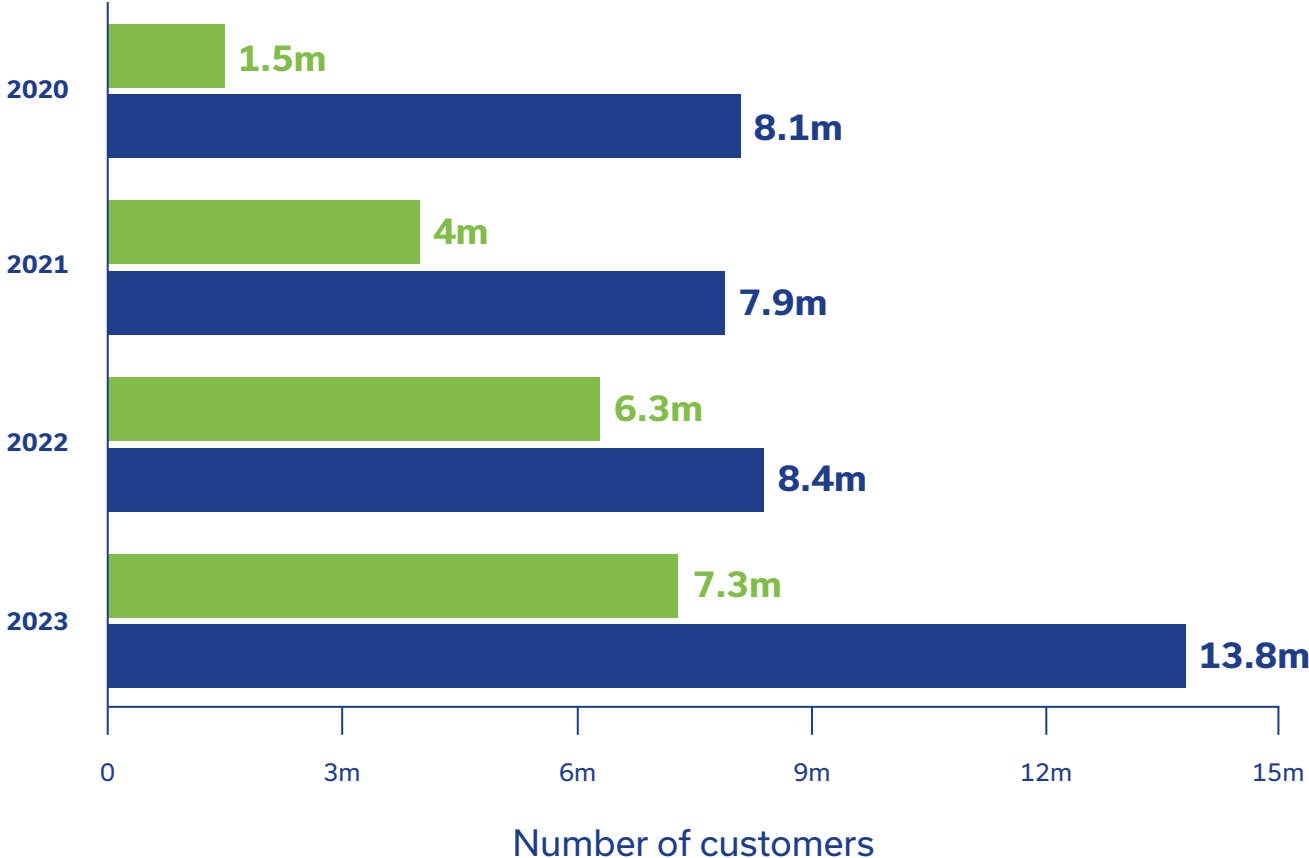
## Format of personalised safety messages

In 2023, 70% of personalised safety messages sent to customers were delivered via on-screen pop-ups and 25% were delivered by email. There were 160,000 phone calls made to customers, equivalent to 1% of the personalised messages delivered.

<sup>1</sup> Including SMS.



## Customers who were sent safety messages

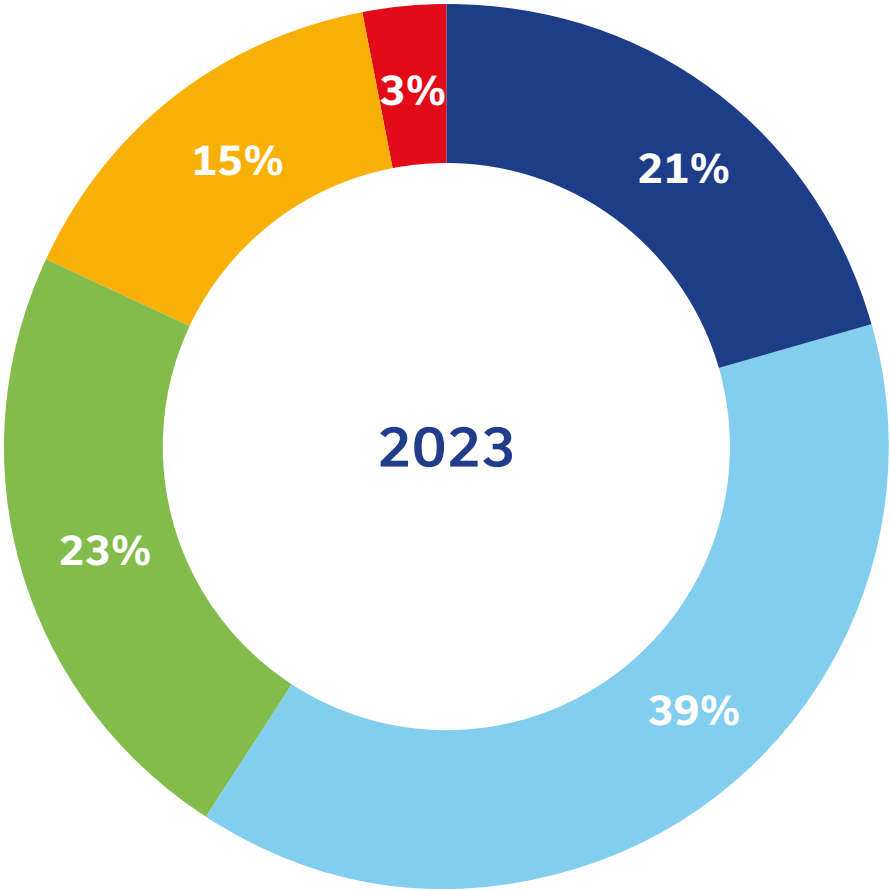


In 2023, 7.3 million customers were sent personalised safety messages, a 16% increase compared to the previous year, while 13.8 million customers were sent generic safety messages, an increase of 64% from 2022.

\* Including email, SMS, phone call, pop-ups, and other direct messages (in-website chat and playing account mailbox).

- Personalised
- Generic

### Age groups of customers sent personalised safety messages



In 2023, 60% of personalised safety messages were sent to customers aged 35 years or younger. Additionally, 23% of personalised messages were sent to customers in the 36-50 years old age group.

\* The customer age is counted as of the day when they were sent the last message during the reporting year.

- 18-25 years
- 26-35 years
- 36-50 years
- 51-65 years
- 66 years or more

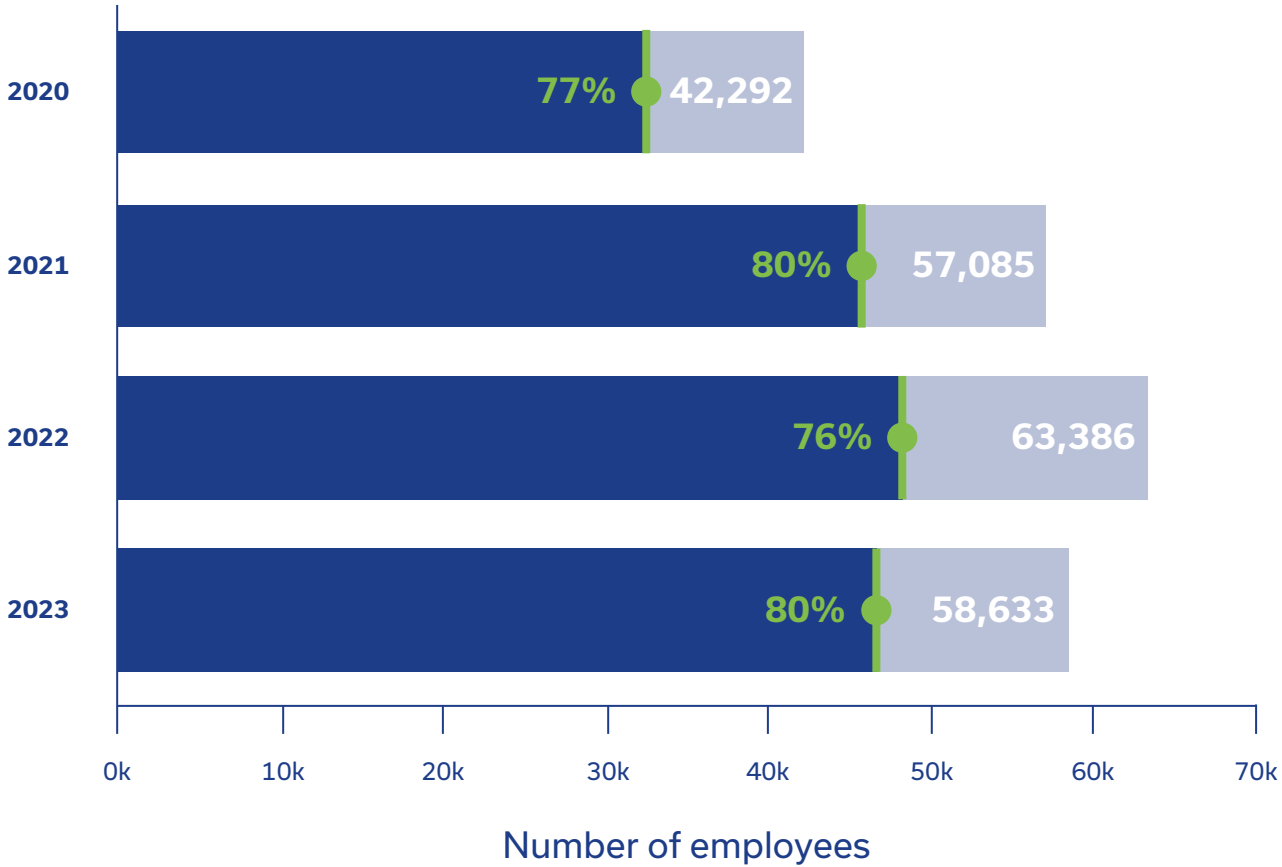
## Employees trained in safer gambling

In 2023, 80% of all employees received dedicated safer gambling training. While safer gambling teams and other customer-facing employees, such as customer service teams, receive a high degree of training in safer gambling, this figure also includes employees in corporate functions and those who do not work in customer-facing positions.

\* Employee numbers include both online and land-based operations.

**Note:** Includes various levels of trainings, from basic refresher courses to detailed trainings specifically designed for safer gambling teams.

- Number of employees
- Number of employees who received safer gambling training
- Share of employees who received safer gambling training



# Improvement effect of safety messages

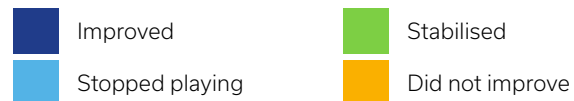
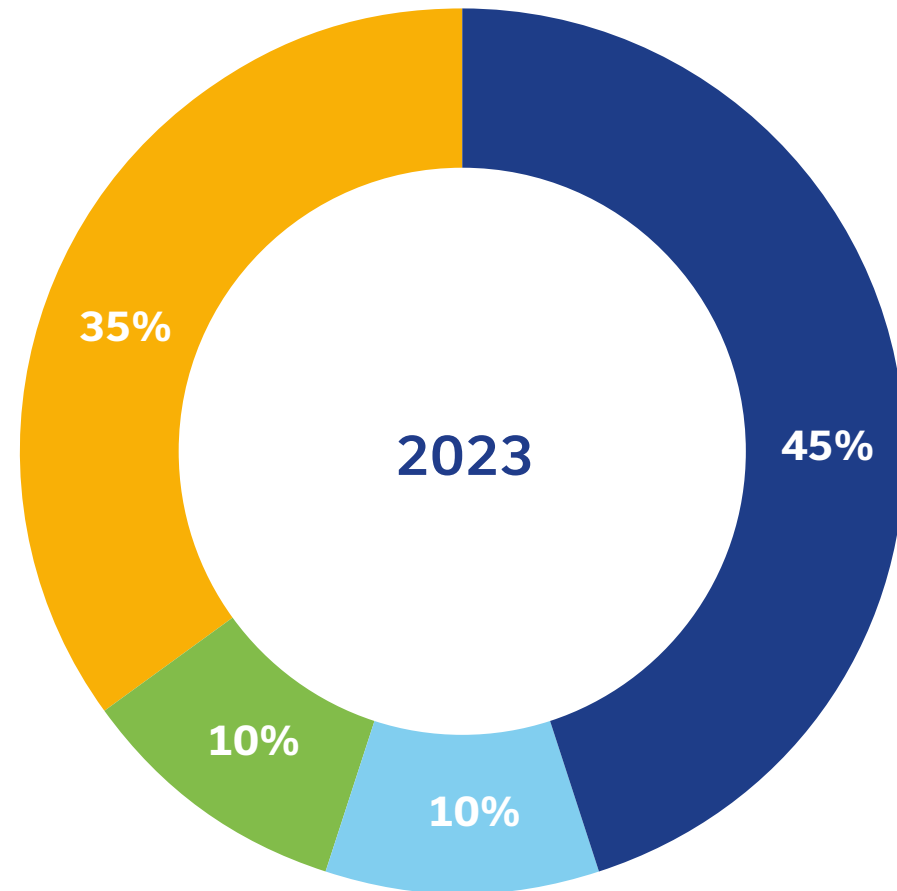
## Behavioural effects of safety messages on potentially problematic play

In 2023, 65% of the customers who displayed potentially problematic play, including low-risk behaviours, either improved or stabilised their play following safety messages. Specifically, 45% improved their play, 10% refrained from playing, and 10% stabilised their play. For those customers that did not improve their play, our members continued to interact with them to promote safer play and, in some cases, mandatorily activated or strengthened safety tools on their playing accounts.

\* Including email, SMS, phone call, pop-ups, and other direct messages (in-website chat and playing account mailbox).

**Note:** The improvement effect of safety messages is evaluated by comparing a customer's losses (the value of bets won and lost), excluding bonuses, over a 90-day period immediately before and after they were sent an initial safety message.

**Considerations:** The data presented highlights the varying behavioural effects of safety messages. The data is aggregated from our member operators who each have different risk thresholds and models for detecting potentially problematic play. The data is also not underpinned by a common definition of potentially problematic play. Due to these potential shortcomings, the data should be treated as a guide and is shared for informational purposes only. While a customer's losses is used as a proxy for potentially problematic play, we fully acknowledge that other markers of harm are used within the industry.



In 2023, 32% of the customers who displayed potentially problematic play, including low-risk behaviours, voluntarily activated or strengthened safety tools, including self-exclusion, in response to safety messages. Among them, 20% activated a new safety tool on their playing account, 5% made an existing tool more restrictive, and 7% opted for some form of self-exclusion. Additionally, our members mandatorily activated or strengthened safety tools on the playing accounts of 5% of the customers who displayed potentially problematic behaviours.

\* Including email, SMS, phone call, pop-ups, and other direct messages (in-website chat and playing account mailbox).

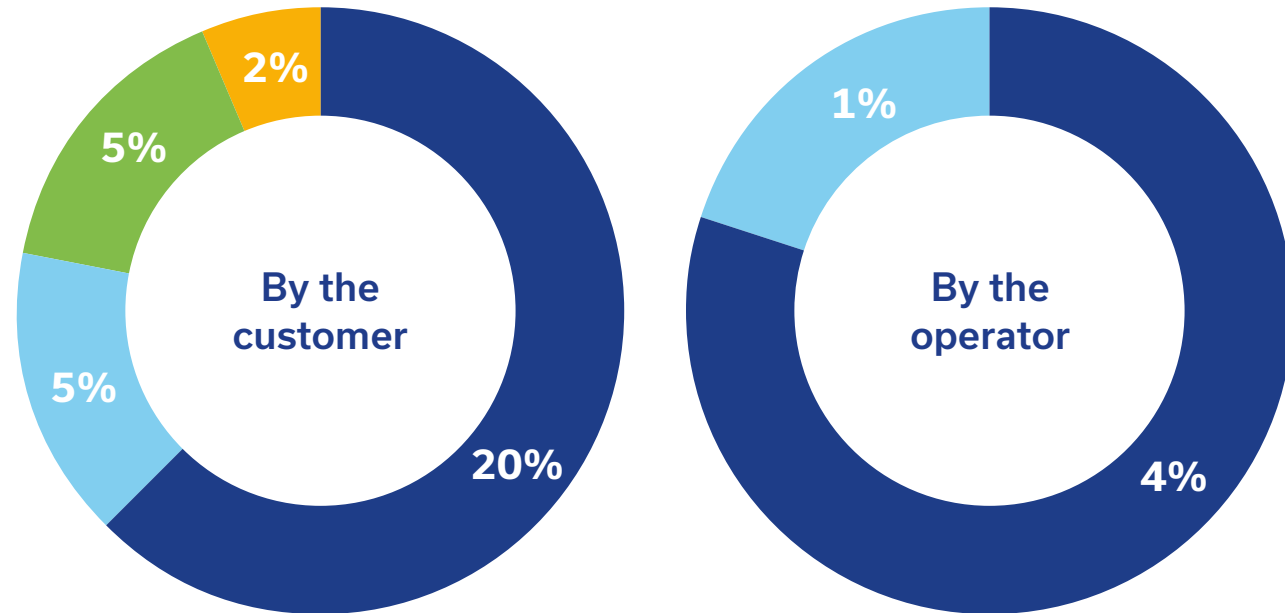
<sup>1</sup> Excluding self-exclusion.

<sup>2</sup> Strengthening a tool means making it more restrictive, e.g. setting a lower deposit limit threshold than previously.

**Note:** The activation of safety tools compares the tools activated on a customer's account over a 90-day period immediately before and after they were sent an initial safety message.

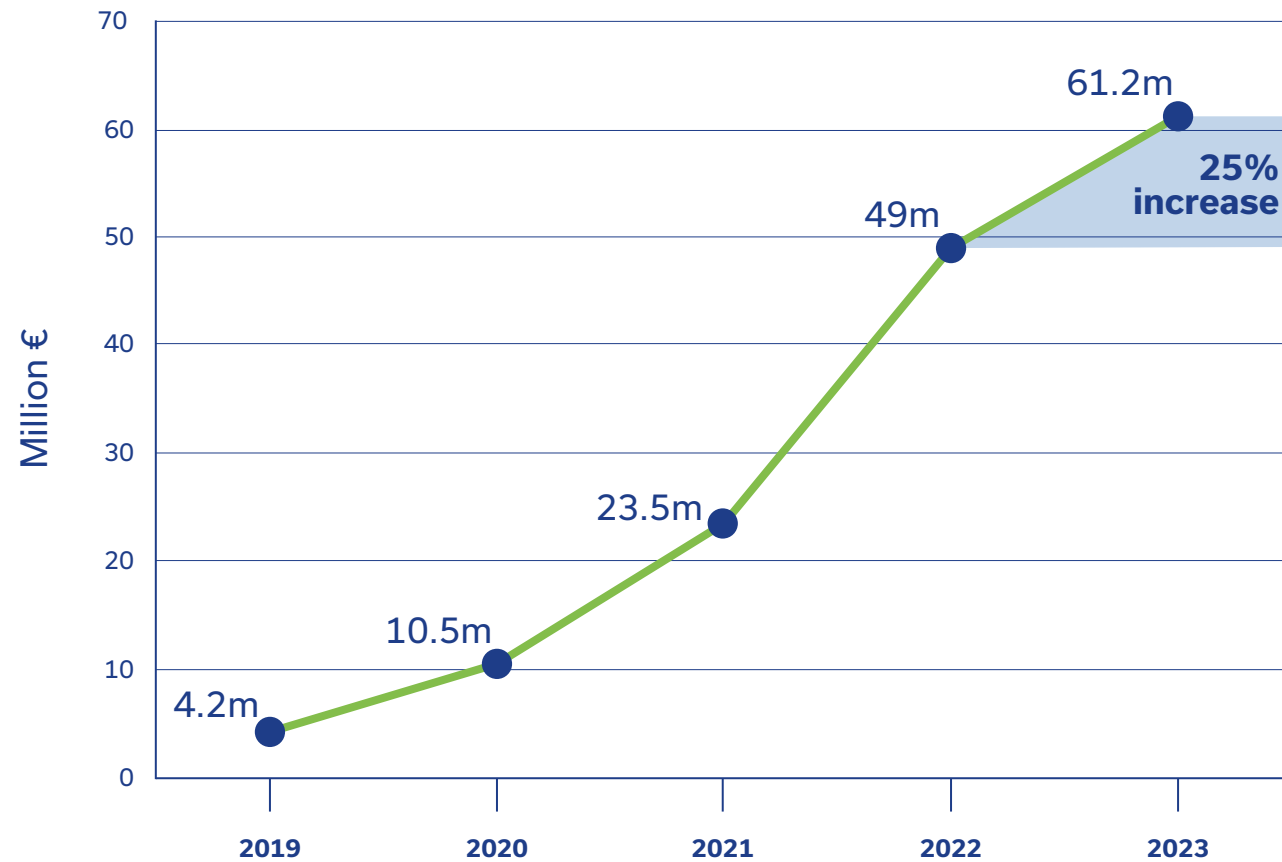
- Activated a safety tool<sup>1</sup>
- Strengthened an existing safety tool<sup>2</sup>
- Self-exclusion < 6 months
- Self-exclusion ≥ 6 months

## Action taken following a safety message on potentially problematic play



# Social contributions

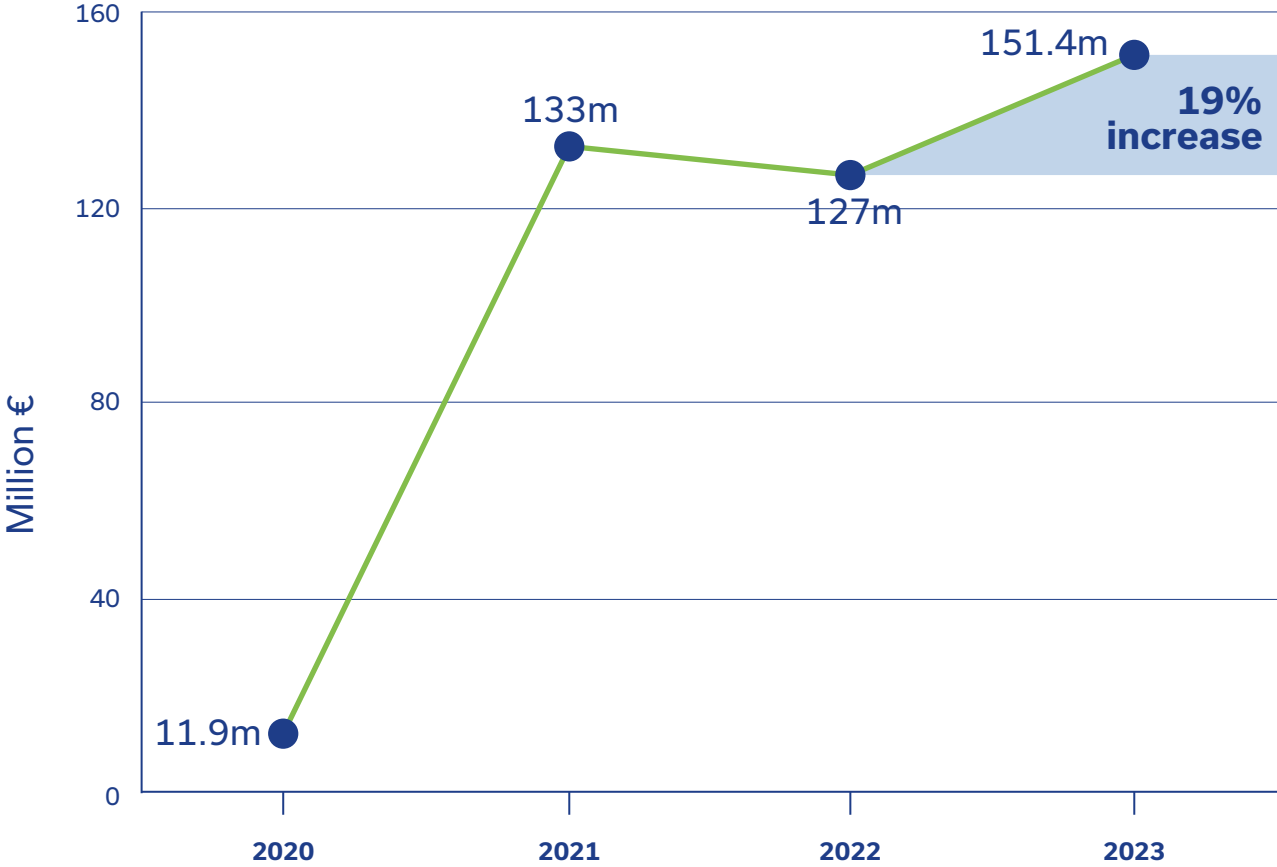
## Contributions to problem gambling research, education, and treatment (RET)



Contributions to problem gambling research, education, and treatment (RET) have increased steadily each year, reaching €61.2 million in 2023, marking a significant 25% yearly increase.



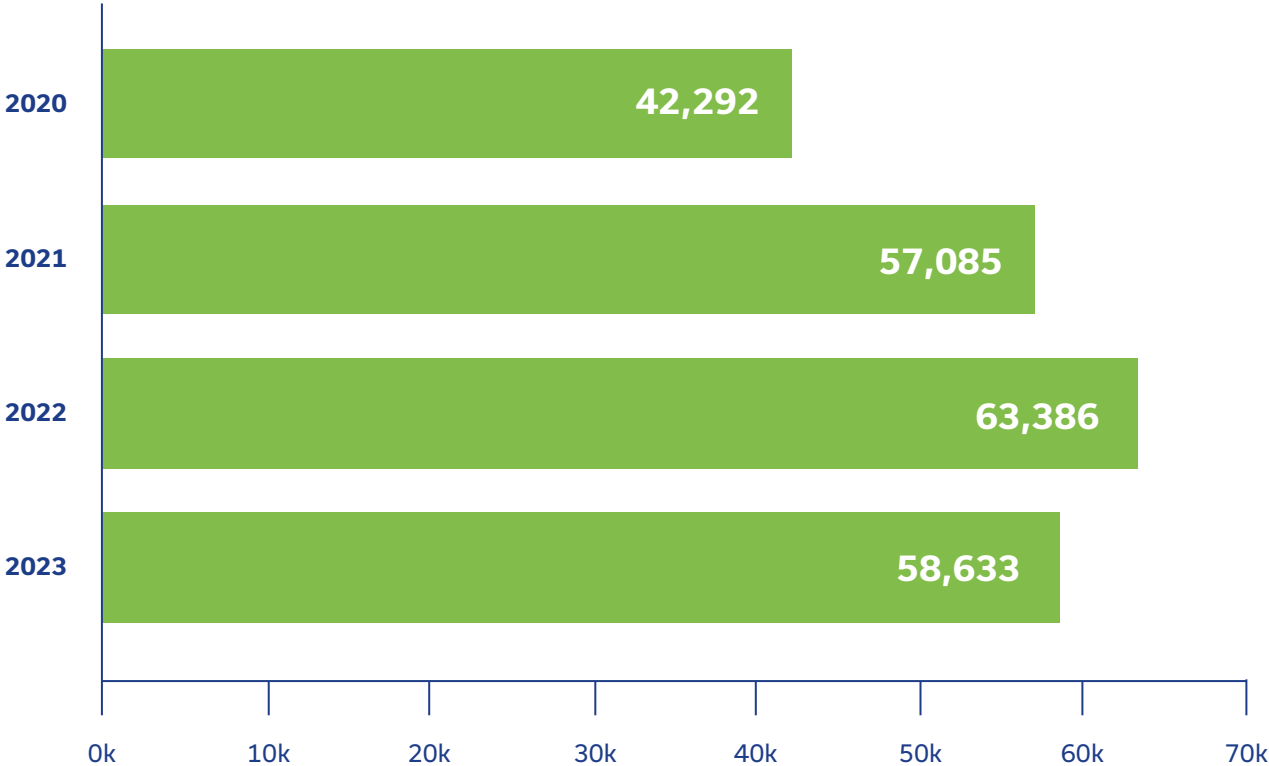
### Donations to charities



In 2023, our members donated €151.4 million to various charities and community initiatives in Europe, marking a substantial 19% increase from the previous year.

# Employment and diversity

### Number of employees

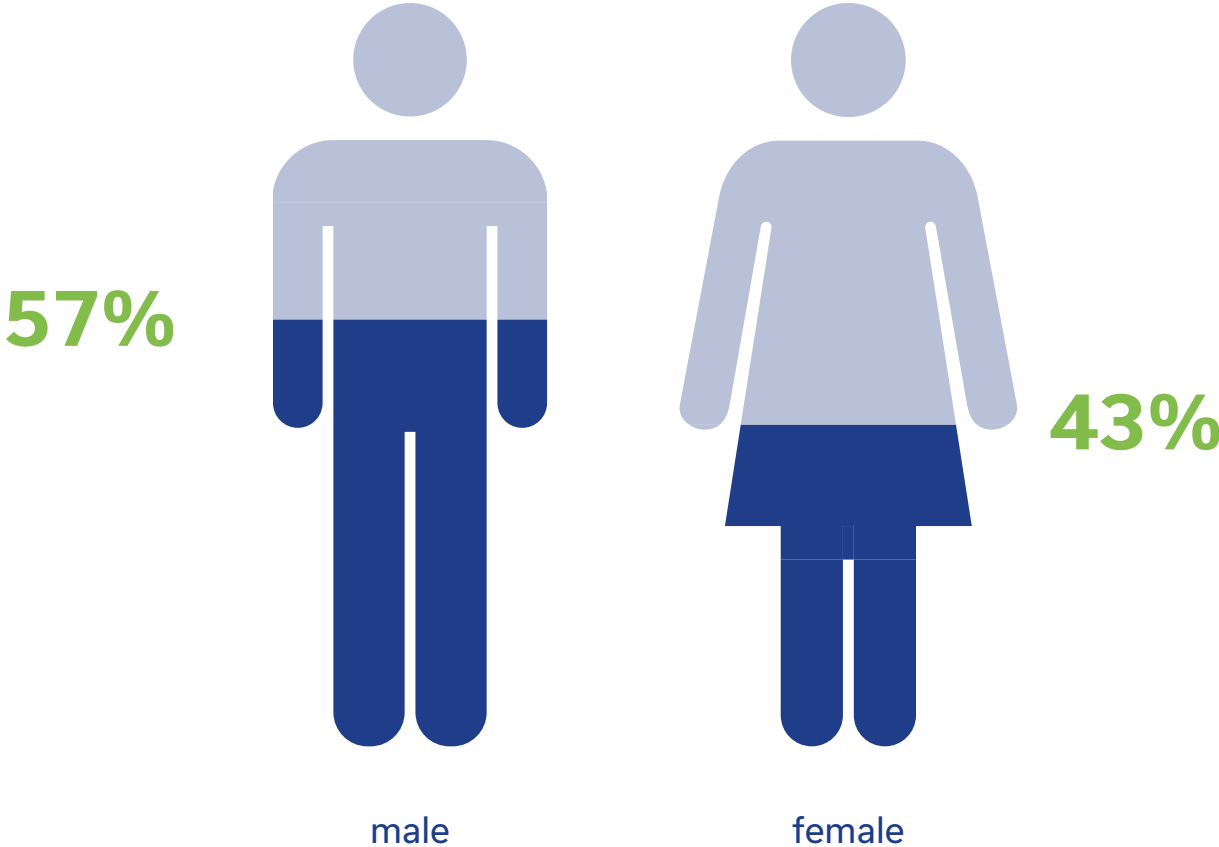


In 2023, our members had 58,633 employees, reflecting a 7% decrease compared to the previous year.

\* Employee data includes both online and land-based operations.

### Number of employees

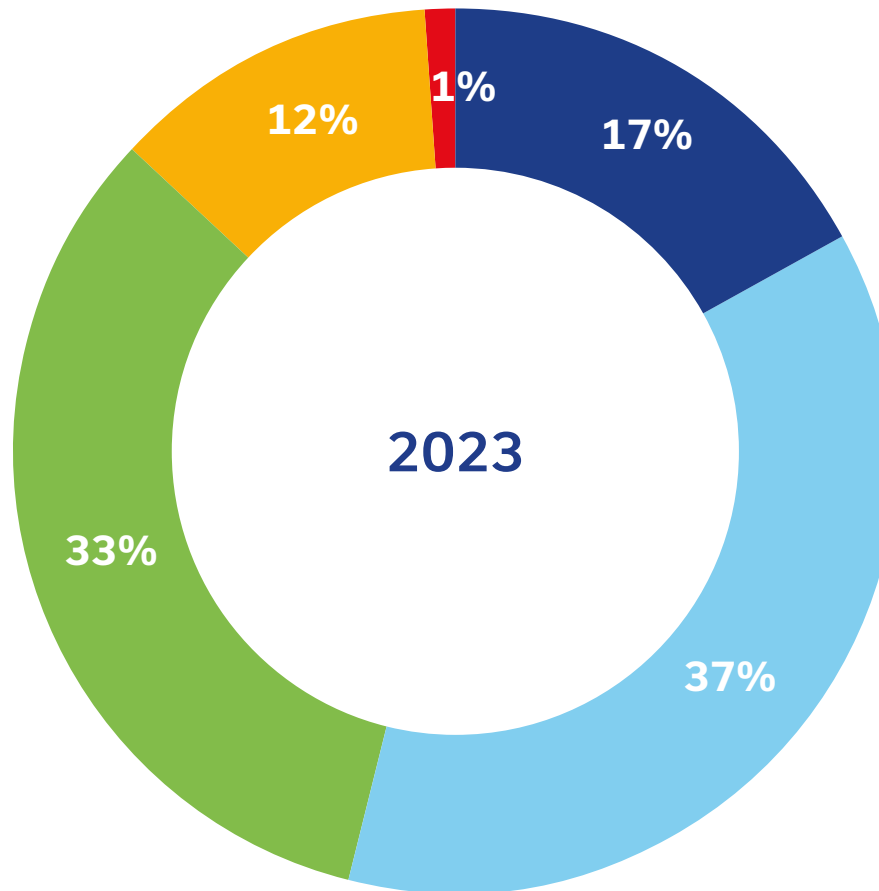
## Gender of employees



In 2023, 57% of employees were male, while 43% were female, maintaining the same gender distribution as in 2022.

\* Employee data includes both online and land-based operations.

## Age of employees



In 2023, employees aged 26-35 constituted the largest age group, comprising 37% of our members' total workforce.

\* Employee data includes both online and land-based operations.

- 18-25 years
- 26-35 years
- 36-50 years
- 51-65 years
- 66 years or more

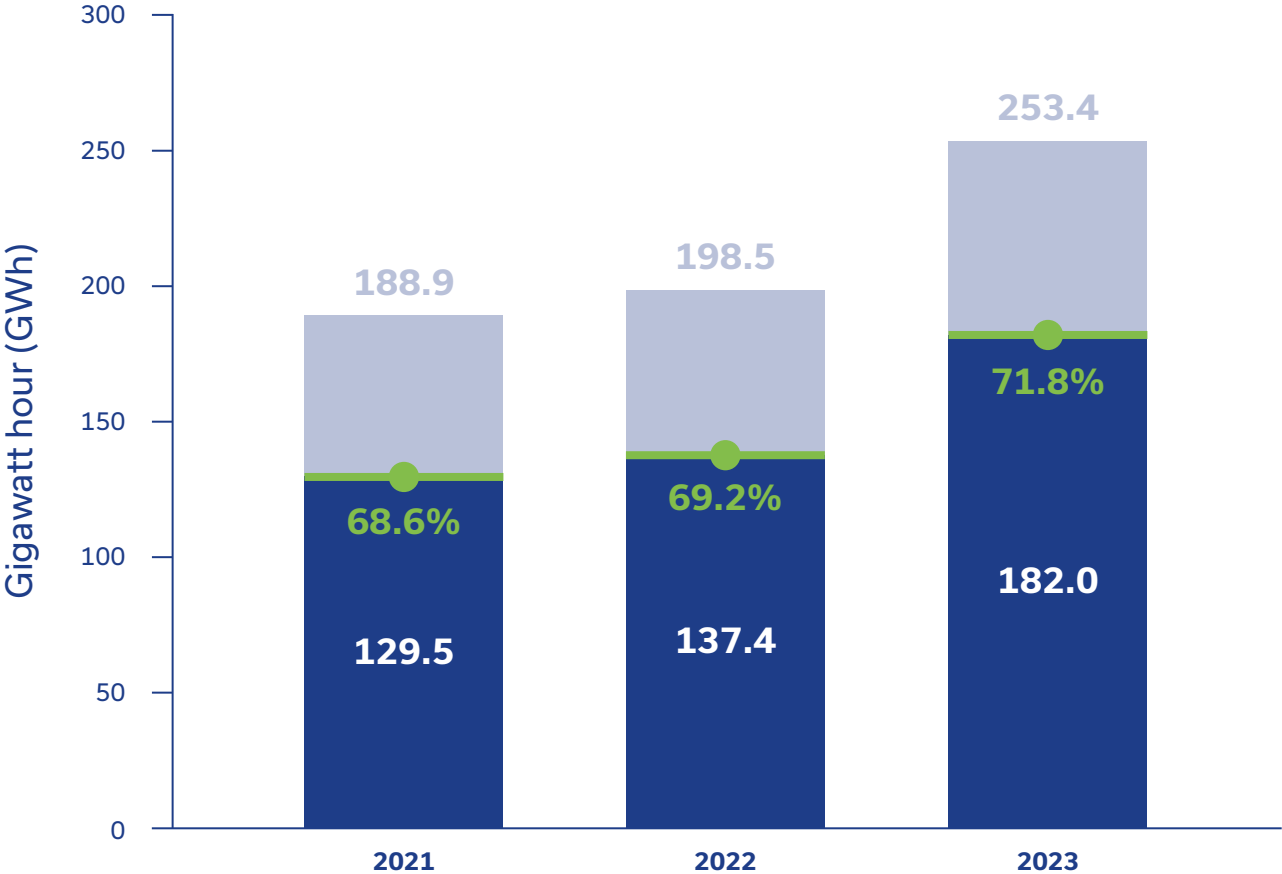
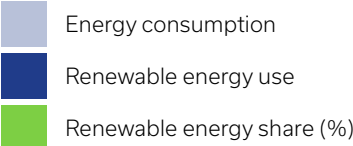
# Energy and environment

Energy consumption and renewable energy use

In 2023, our members' total energy consumption amounted to 253.4 gigawatt hours (GWh). Of this total, 182.0 GWh, or 71.8%, was sourced from renewable energy.

\* Energy consumption and renewable energy use data includes both online and land-based operations.

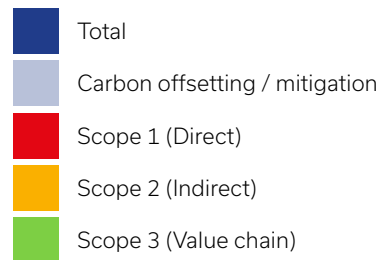
**Note:** Data from one member company is omitted from the data provided for 2021 and 2022 years.



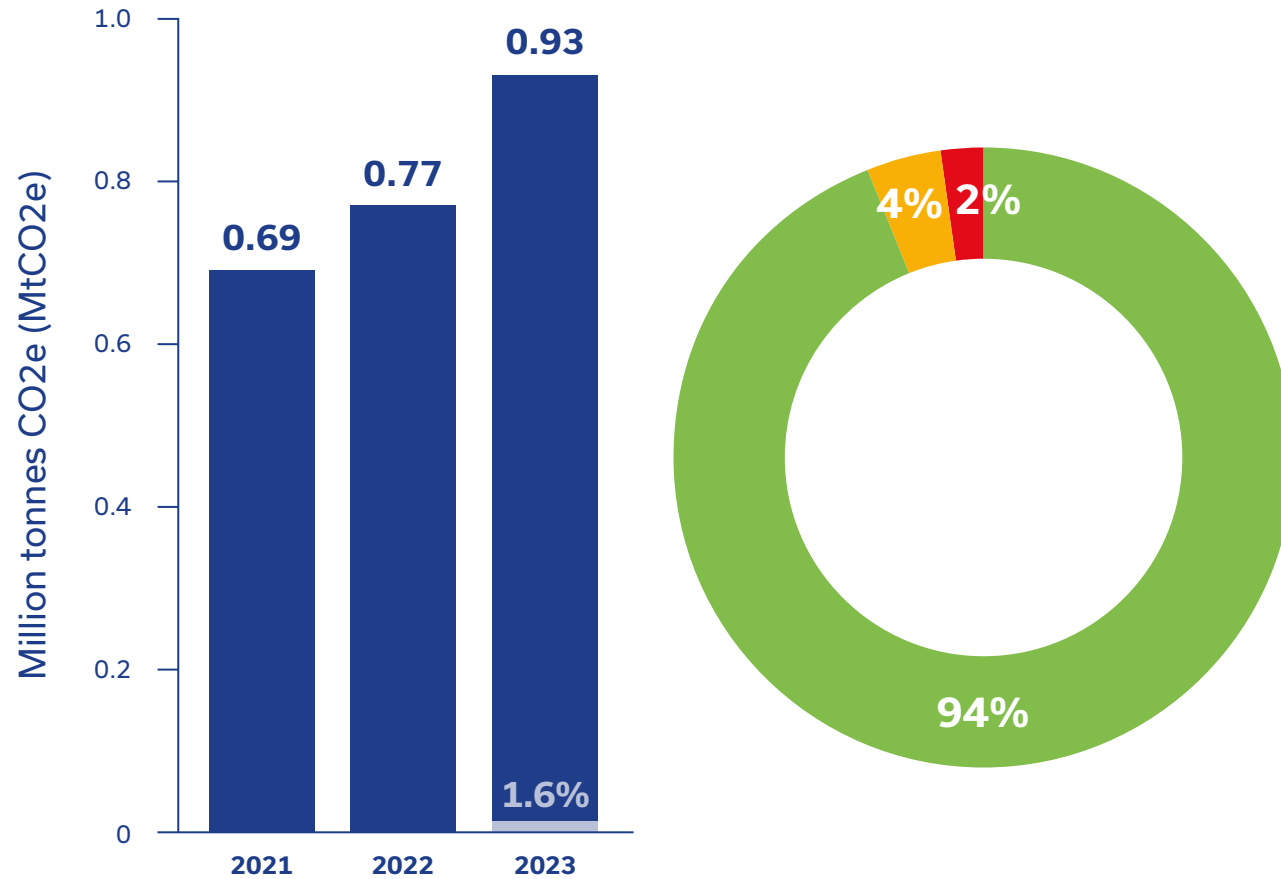
In 2023, our members' total greenhouse gas (GHG) emissions amounted to 0.93 million tonnes CO<sub>2</sub>e (MtCO<sub>2</sub>e), with Scope 3 emissions, representing value chain emissions not directly owned or controlled by our members' businesses, comprising 94% of the total. To partially mitigate emissions, members implemented carbon offset schemes, successfully mitigating 0.01 MtCO<sub>2</sub>e, equivalent to 1.6% of their total emissions.

\* GHG emissions data includes both online and land-based operations.

**Note:** Data from one member company is omitted from the data provided for 2021 and 2022 years.



## Greenhouse gas emissions



# Highlights from our operator members

Our members are putting sustainability at the heart of what they do. In 2023, they launched various initiatives to promote a sustainable approach to gambling and contribute positively to society in Europe.

In this section you will find these highlights from our members this past year.

**bet365**

[bet365.com](https://bet365.com)

**betsson** group

[betssongroup.com](https://betssongroup.com)

**Entain**

[entaingroup.com](https://entaingroup.com)

**evoke**

[evokeplc.com](https://evokeplc.com)

**Flutter**<sup>™</sup>

[flutter.com](https://flutter.com)

**>k** kindred

[kindredgroup.com](https://kindredgroup.com)

## Supporting research, education and treatment in the UK

bet365 is proud to be a responsible operator with player protection at the core of our business, whether that is in the provision of customer-led tools or the utilisation of behavioural analytics and customer monitoring and intervention on our side.

Our commitment to responsible behaviour does not stop here and nor should it. We have consistently gone over and above that required by regulation in terms of supporting Research, Education and Treatment (RET) causes.

The Gambling Commission in the UK has historically required that operators pay 0.1% of Gross Gambling Yield (GGY) to registered RET organisations. We have done this and more – and increased our contributions year on year to the one per cent donated in 2023/24. We have committed

to doing so at this level regardless of a regulatory requirement to do so.

As part of the review of gambling regulation in the UK undertaken in recent years, the Government is moving to change the way in which operators support RET causes. In its Gambling White Paper *High Stakes: Gambling Reform for the Digital Age* published in April 2023, it committed to introducing a “statutory levy paid by operators and collected and distributed by the Gambling Commission under the direction and approval of Treasury and DCMS ministers”. It is expected that the new Levy will be introduced at a mandatory rate for remote operators of one per cent GGY.

bet365 has supported this proposal from the outset. As we await the final details of how the money will be collected, distributed, and a commencement date for the introduction of the Levy, it is important to ensure the continued viability of the existing expert third sector organisations that currently support those affected by gambling-related harm. It is especially important that those expert organisations are supported and able to continue the delivery of those services under the new commissioning regime.

To this end, bet365 has been able to support such organisations either directly, or collectively alongside other major UK operators, as they move to safeguard their longer-term future. Specifically, we have supported work that will help ensure that those organisations are positioned to maximise their chances of securing funding in this new era.

We are proud to be able to support these organisations in this endeavour.



**More information:**  
**Read more about bet365's sustainability efforts<sup>1</sup>**



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1. <https://responsiblegambling.bet365.com/>

## 60 years of entertainment

In 2023, Betsson celebrated its 60th anniversary<sup>1</sup>. This means that for over half a century, we have provided entertainment to customers worldwide.

2023 was also the year when the Group was recognised with the ESG Strategy of the Year<sup>2</sup> award at the EGR Operator Awards. We are honoured and humbled by this recognition – proud of how far we have come, and excited about the journey we are on since there is always more to be done.

A long-term approach, always putting the customer experience at the centre, is crucial for generating shareholder value and includes taking long-term responsibility for customers, employees, and the communities in which the Group operates. It therefore follows naturally that sustainability is an integrated part of our business strategy.

Responsible gaming<sup>3</sup> is the most important sustainability area for Betsson, but all areas of ESG (Environment, Social and Governance) need to be considered when running a successful business.

## Social

**Employees:** At Betsson, we prioritise our people<sup>4</sup>, believing that investing in their well-being and development translates to exceptional customer care. This includes providing an outstanding employee experience and great leadership. In 2023, over 90% of employees rated their direct manager highly in our employee survey.

Comprehensive compliance and responsible gaming training is mandatory for all employees, with customer-facing personnel undergoing specialised courses. 93% of employees rate us as a responsible operator. The Group also has extensive, global leadership training, with 96% of participants noting that the learnings were directly applicable to their role.

In 2023, Betsson championed diversity and inclusion by arranging conferences with participants from within and outside of the industry to discuss, share best practices, and drive the diversity agenda forward. Betsson has also launched an external D&I network<sup>5</sup>. The Group received several awards pertaining to best place to work and diversity.

**Customers:** Just like any other company, we strive for long-term customer loyalty<sup>6</sup>. The only way to achieve that is for customers to be comfortable with the level of their gambling. Betsson must therefore offer first-class entertainment and the best customer experience, including guidance, support, and security for players.

In 2023, we saw that 89.3% of all active customers had some kind of responsible gaming<sup>7</sup> tool activated. This include reality checks, self-assessment, time and deposit limits, etc. 63,816 customers were manually analysed and checked by our dedicated responsible gaming team. Betsson uses a wide spectrum of follow-up actions, ranging from providing more information about safer gaming or asking the customer a set of questions, to encouraging the customer to set deposit limits or to take a timeout from playing. Betsson may also enforce a specific limit on the customer's account or exclude the player from further gaming.

**Society:** When it comes to community engagement<sup>8</sup>, Betsson remains committed to making a positive impact in the communities where we operate. We support local NGOs, participate in clean-ups, and contribute to fundraising efforts. Amid global challenges, such as the conflict in

Ukraine, Betsson has consistently supported humanitarian aid, and most recently funded the purchase of an ambulance.

## Environmental

To mitigate our environmental footprint<sup>9</sup>, Betsson offsets the electricity usage of customers' gaming devices and our operational activities through verified climate-positive projects. Our climate roadmap includes science-based targets to reduce emissions, ensuring sustainable practices across our operations.

## Governance

Our sustainability policy sets the tone and governance process for our ESG efforts. Betsson has a sustainability framework<sup>10</sup> with five focus areas: Responsible gaming, Business compliance, Employee impact, Social impact, and Climate impact, each supported by clear ambitions, goals, and KPIs. As an official participant of the U.N. Global Compact<sup>11</sup>, Betsson aligns its operations with its 10 principles and the U.N. Sustainable Development Goals<sup>12</sup>, thus reinforcing our commitment to ethical business practices and global sustainability.

## More information:

### Read more about Betsson's sustainability efforts<sup>13</sup>



1. <https://www.betssongroup.com/pioneering-gaming-for-60-years/>
2. [https://www.linkedin.com/posts/betsson-group\\_betssongroup-egoperatorawards2023-esg-activity-7123549170480599040-llb2?utm\\_source=li\\_share&utm\\_content=feedcontent&utm\\_medium=g\\_dt\\_web&utm\\_campaign=copy](https://www.linkedin.com/posts/betsson-group_betssongroup-egoperatorawards2023-esg-activity-7123549170480599040-llb2?utm_source=li_share&utm_content=feedcontent&utm_medium=g_dt_web&utm_campaign=copy)
3. <https://www.betssonab.com/sustainability/responsible-gaming>
4. <https://www.betssonab.com/sustainability/employee-impact>
5. <https://www.betssongroup.com/diversity-and-inclusion-network/>
6. <https://www.betssongroup.com/caring-for-our-customers/>
7. <https://www.betssonab.com/sustainability/responsible-gaming>
8. <https://www.onebetsson.com/csr/>
9. <https://www.betssonab.com/sustainability/climate-impact>
10. <https://www.betssonab.com/sustainability/sustainability-framework>
11. <https://www.betssongroup.com/ungc/>
12. <https://www.betssonab.com/sustainability/un-sdgs>
13. <https://www.betssonab.com/sustainability/>

## Delivering sustainable success

2023 was a pivotal year at Entain as we unveiled our new Sustainability Strategy,<sup>1</sup> building on our longstanding commitment to sustainability and taking it to the next level. We also made important progress in our strategic sustainability initiatives.

As we reflect on 2023, we are proud to report extensive progress across the four pillars of our refreshed sustainability strategy: 1. Be a leader in player protection; 2. Provide a secure and trusted platform; 3. Create the environment for everyone to do their best work; and 4. Positively impact our communities.

In player protection, we continued rolling out our player protection programme ARC™ (Advanced Responsibility & Care)<sup>2</sup> in our digital offer to cover 27 jurisdictions and launching ARC™ for retail in the UK and the Republic of Ireland. We increased our voluntary contribution to fund UK Research,

Education and Treatment (RET) to 1% of our UK Gross Gaming Yield ("GGY") to total £18.7m.

In the US, we expanded our stakeholder education and training through our partnership with EPIC Global Solutions and the major leagues as well as players associations such as the Major League Baseball, National Football League, League Soccer Players, Associations and the NHL Alumni Association.

In line with our commitment to provide a secure and trusted platform, in February 2023 we reached a position where 100% of our revenues are derived from regulated or regulating markets. 2023 also saw us launch a new Ethics & Compliance Charter and Strategy and refine our ESG governance structure with the creation of two board-level committees (Sustainability & Compliance and People & Governance).

To meet our objective to create the environment for everyone to do their best work we launched 'Your Goals', Entain's new objective-setting programme as well as a refreshed set of values and behaviours. Our ground breaking returnship programme in partnership with McLaren Racing<sup>3</sup> saw us win Innovator of the Year at the Women in Gaming Diversity Awards.

To help us make a positive impact on our communities and reduce our environmental impact we scaled up our partnership with EcoVadis, the world's largest platform for supplier sustainability ratings, onboarding 35% of in-scope vendors and supporting them to improve their sustainability performance whilst helping us gain greater insight into our value chain. We purchased just under 100% of our electricity from renewable sources in the UK and Republic of Ireland, amounting to 70% of our purchased electricity globally.

In order to ensure we are focussed on the right issues, we refreshed our materiality assessment, aligning with the principle of double materiality. This helped us understand our unique sustainability-related risks and opportunities, and our impacts on society and the environment, gathering input from over 250 internal and external stakeholders.

Supporting our new strategy is the work of the Entain Foundation,<sup>5</sup> which works with partners around the world to support communities where we operate and create impact at a broader level beyond our own operations and value chain. Highlights of the Foundation's work include donating a total of £25.4m, to support partner organisations creating impact in the community.

We continued to support 248 non-league football clubs via our Pitching In grassroots investment fund since and we made further investments in up-and-coming athletics talent through a funding of our partnership with SportsAid.



### By Jay Dossetter

Interim Group Head of Sustainability

### More information:

### Read more about Entain's sustainability efforts<sup>5</sup>



1. <https://www.entaingroup.com/sustainability-esg/>
2. <https://www.entaingroup.com/sustainability-esg/safer-betting-and-gaming/>
3. <https://www.entaingroup.com/news-insights/latest-news/2023/entain-mclaren-f1-team-open-the-doors-for-women-to-return-to-work/>
4. <https://www.entaingroup.com/sustainability-esg/entain-foundation/>
5. <https://www.entaingroup.com/sustainability-esg/>



## Players, People, Planet

As we evolve our business following the acquisition of William Hill by 888 Holdings we have continued to embed our ESG framework, Players, People, Planet, across the organisation. Highlights in 2024 include:

### Players

We want to build long term sustainable relationships with our customers across the globe and recognise that this area has not traditionally been a strength of our business, hence we are stepping up our investment in this area.

- We sent over 1.3 million messages to players based on individual customer behaviours. In 2024, we will continue to evolve our interaction strategy to offer interactions bespoke to individual customer behaviours.
- On our 888 platform, over 70% of customers now have access to our proprietary Control Centre product as we roll the product out across different jurisdictions. Control Centre

contains our enhanced safer gambling toolset including a proprietary profit and loss tool.

- In our UK retail shops, further enhancements across our safer gambling framework were introduced. Over 127,000 interactions took place with customers in the year, including discussions of affordability of spend.
- We gave over £10m to UK charities voluntarily, as part of the final year of our four-year commitment to fund Research, Education and Treatment of gambling harms.
- To ensure up-to-date and thorough oversight of our safer gambling strategy, our Board received training from Regulus Partners, designed to better educate them on gambling-related harms.

### People

We wish evoke to be a brilliant, diverse and inclusive place to work that supports the communities where our business and customers are based.

- We have worked to define our new organisational culture across the business,

creating new, inspiring values of 'raise of game,' 'win together' and 'customers first.'

- We have continued to expand our in-house leadership development programmes across 3 areas: the essentials, the diploma and talent club. These programmes work to upskill all levels of leader around the business.
- We created our first Company-wide 'Community Month', hosted across all 13 locations in September 2023. More than 500 colleagues got involved in the event and projects included:
  - Colleagues in Krakow helped renovate an old pasta factory, transforming it into a community space that serves refugees.
  - Our teams in Malta organised a full week of activities including blood donations, a beach clean-up, and volunteering at a dog sanctuary.
  - Our people in Leeds continued our ongoing support for local community team St Chad's Cricket Club.
- We donated 100% of company profits from the Eurovision Song Contest, held in Liverpool in

May 2023, to the charity Support Ukraine.<sup>1</sup> This donation of £200,000 provided essential aid to a substantial number of Ukrainians forced to flee to the UK, as well as providing support and humanitarian aid to families who are unable to leave the country safely.

## Planet

We recognise the climate emergency the planet faces and are determined to play our part in reducing impacts to the world. We have set ourselves ambitious targets to be a net zero business, well ahead of mandated deadlines.

- Net zero on scope 1 and 2 by 2030: Achieved a 6% reduction in Scope 1 and 2 emissions from the new 2022 re-baselined data.

- Net zero across value chain by 2035: Scope 3 emissions increased 33% YOY following methodological changes to our reporting methods.
- We continued to be well rated across the highest-profile ESG ratings, retaining FTSE4Good membership, achieving a C on the CDP and a score of 34 on the CSA.



### By Ben Wright

Director of ESG and Sustainability

## More information:

[Read more about Evoke's sustainability efforts<sup>2</sup>](#)



1. <https://www.evokeplc.com/news-and-media/latest-news/william-hill-donates-gbp200k-support-ukraine-following-eurovision-final/>
2. <https://www.evokeplc.com/sustainability/>

## Changing the game for good

Flutter's Positive Impact Plan sets a clear sustainability agenda to drive change in our business and our sector. In 2023, we made meaningful progress against each of our four pillars:

- Play Well,<sup>1</sup> supporting our customers to have positive playing experiences. Our goal is for 75% of customers using a Play Well tool by 2030. In 2023, we increased tool usage by 10.6% to 44.9%.
- Work Better,<sup>2</sup> creating an inclusive and empowering environment for our colleagues. Our goal is for 40% of leadership roles to be held by women by the end of 2026. In 2023, we increased this metric by 2.8% to 35.7%.
- Do More,<sup>3</sup> supporting our communities. Our goal is to improve the lives of 10 million people by the end of 2030. In 2023, we reached a cumulative total of 1.5 million lives improved – an increase of 1.1 million.

- Go Zero,<sup>4</sup> driving our path to net zero carbon and reducing our environmental impact. In 2023, we reached 100% renewable energy coverage in Scope 2 emissions and gained SBTi approval<sup>5</sup> of our 2035 net zero target.

### Spotlight on Play Well

Our customers are at the heart of everything we do, and we want them to have an entertaining, positive experience with us. In 2023, we continued to focus on player wellbeing. We increased our global investment to \$101m in the year (2022: \$77m), spending on frontline safer gambling specialists, technology, tools, along with marketing Play Well to our customers.

By leveraging our scale, we turned data insights from our businesses worldwide into collective action through our Global Analytics Working Group. We bolstered our reporting transparency by introducing a comprehensive quarterly overview of initiatives. Importantly, we continued to link remuneration to Play Well, with 20% of all Group bonuses linked to a Play Well metric.

Across Flutter, we focused our resources on risk identification strategies to better inform our

programmes. In Italy, our Sisal brand explored a risk identification model for online customers including the introduction of an anti-dependence algorithm, which received a patent from the Ministero delle Imprese for industrial invention.

In the UK & Ireland, we created the Customer Safety Tribe, aligning nearly 300 colleagues focused on Play Well. We increased our tech development squads; creating a team dedicated to identification and intervention of customers showing potential signs of risky behaviour. And we launched a new Profit and Loss tool in our Betfair and Paddy Power brands, providing customers with an easy way to track spend and make informed decisions.

In PokerStars, we began a programme to implement a Positive Play Scale survey, working with Dr Richard Wood, a psychologist specialising in the study of gaming behaviour at GamRes.<sup>6</sup> By identifying customers' levels of personal responsibility, gambling literacy, honesty, control and pre-commitment, we can offer more tailored engagement.

We also launched our first Play Well Challenge<sup>7</sup> in collaboration with Alpha Hub,<sup>8</sup> our start-up partnership programme, and the Responsible



Gambling Council.<sup>9</sup> Through this we offer seed funding and expertise to tech start-ups supporting innovation in responsible play.

I'm really proud of the progress we've made in 2023 across Flutter which is testament to a dedicated team of people, and the passion and commitment of our colleagues worldwide. We've leveraged our knowledge and experience, and by doing so are playing our part in changing the game for good.



### By Sue Albion

Group Director of Sustainability and Regulatory Affairs

## More information:

### Read more about Flutter's sustainability efforts<sup>10</sup>



1. <https://www.flutter.com/play-well/>
2. <https://www.flutter.com/sustainability/colleagues/>
3. <https://www.flutter.com/sustainability/communities/>
4. <https://www.flutter.com/sustainability/environment/>
5. <https://www.flutter.com/news-and-insights/press-release/flutter-receives-formal-approval-of-its-science-based-targets/>
6. <https://gamres.org/>
7. <https://www.flutter.com/news-and-insights/press-release/flutter-calls-for-startups-to-help-tackle-societal-challenges-and-safer-gambling-innovations-from-around-the-world/>
8. <https://www.alphahub.tech/>
9. <https://responsiblegambling.org/>
10. <https://www.flutter.com/sustainability>



## **We want gambling at its best: 100 per cent enjoyable, keeping customers safe at all times with fun, fair and transparent products.**

Kindred continuously manages the impact, risks and opportunities of sustainability. To do so provides long-term commercial resilience, reduces market volatility, and puts us in a strong position to attract and retain the best people. Examples of our work includes collaboration<sup>1</sup> with universities and gambling-risk experts, partnerships with professional sports clubs, and hosting the annual Sustainable Gambling Conferences.<sup>2</sup> This work helps us to navigate the evolving landscape of

technical, regulatory and market impacts the gambling industry faces.

Our purpose, with sustainability at its heart, is “to transform gambling by being a trusted source of entertainment that contributes positively to society”. We focus on a specific ambitions such as our Journey towards Zero<sup>3</sup>, meaning we aim to reduce any unhealthy engagement with gambling as far as possible from our platforms. Since 2021, we report publicly the share of revenue derived from high-risk gambling.

Our sustainability strategy<sup>4</sup> focuses on the topics most relevant to our stakeholders and our business.

### **Responsible gambling**

Our ambition is to make gambling 100 per cent enjoyable. To ensure customers are comfortable with the time and budget they spend on our site, we promote responsible gambling and offer a variety of control tools. Despite our efforts to create awareness and make tools available, there are a small number of customers who have difficulty in controlling their gambling behaviour. To support these customers our focus has been on improving

detection and intervention, as well as optimising control tools.

### **A secure platform**

We work hard to keep operations and customers safe at all times. We safeguard customer data and protect our operating platform with advanced cybersecurity measures. We do this to maximise trust in Kindred so that our customers, regulators and wider society remain confident that our products are safe and secure. Our teams of specialists block cyber-attacks, keep information systems secure, and maintain external certifications and wider controls to satisfy our anti-money laundering policy.

### **Product integrity**

We offer fun, fair and understandable products. This involves watertight sportsbook integrity and prevention of match-fixing. To maximise trust in sport means detecting suspicious activity effectively, promoting a healthy sporting culture, and responsible marketing. We want a positive impact for our customers and for us. The development of our new in-house Kindred Sportsbook Platform (KSP) will deliver enhanced

customer experience and greater end-to-end control of our product offering.

## Foundations

Kindred's business depends on a set of fundamental values, principles, and effective organisational infrastructure. This includes healthy and long-standing relationships with partners, colleagues and communities, based on trust and respect. What we do is guided by policies and procedures – for example, our Sustainability Policy and our People Code of Conduct – supported by our corporate governance arrangements and risk management processes.

### More information:

#### Read more about Kindred's sustainability efforts<sup>5</sup>



1. <https://www.kindredgroup.com/sustainability/collaborating-for-engagement/partnerships/>
2. <https://www.kindredgroup.com/sustainability/collaborating-for-engagement/sustainable-gambling-conference/>
3. <https://www.kindredgroup.com/sustainability/our-journey-towards-zero/>
4. <https://www.kindredgroup.com/sustainability/strategy/>
5. <https://www.kindredgroup.com/news--insights/2024/kindred-publishes-2023-annual-and-sustainability-report/>

# Beyond gambling: Contributing positively to European society

## Austria

- Supported "Kicken ohne Grenzen", a not-for-profit organization in Vienna, which supports and empowers young, disadvantaged women and men re-entering the education system and planning their careers and thus make an important contribution to their equal and sustainable integration into society. The most important skills are being taught through tailor-made football trainings.<sup>1</sup>

## Belgium

- Kindred engaged with Coup de Couer<sup>2</sup> and iSavelives who installed new defibrillators and digital first-aid kits as part of the No Heart/No Glory Foundation project for health awareness in sports.

## Bulgaria

- Organised a clothes collection and volunteering at a homeless shelter, Caritas Sofia refugee camp.<sup>3</sup>

## Estonia

- Donated 460kg of food items to the Estonian foodbank.<sup>4</sup>
- Contributed to the Solaride Academy to support its students in developing a solar car to race in the Bridgestone World Solar Challenge.<sup>5</sup>

## France

- Kindred's thriving #AuCoeurDu Sport<sup>6</sup> programme, which means 'Sports at Heart', provided 400 amateur football and basketball clubs with sports kit and equipment during 2023.
- BetBlocker is an innovative, simple-to-use app that helps individuals ensure that they can manage their access to betting and gaming in a safe and appropriate manner. As the only free, multi- platform betting and gaming blocking software in the world, they have over 7,500 daily users and can prevent access to 15,000 betting and gaming sites as well as 1,500 apps. Entain supported the charity to translate and localise their software in French and Spanish, unlocking access to a wider user base.<sup>7</sup>

## Greece

- The Entain Foundation's Greek "Team Future" campaign in partnership with bwin promotes sports in Greece through supporting clubs, European tournaments, and individual athletes. Team Future supports the next generation of Olympic athletes consisting of 18 talented athletes, who strive daily to achieve their goals.<sup>8</sup>

## Hungary

- Assembled care packages for the homeless, in partnership with the NPO Budapest Bike Maffia.<sup>9</sup>

## Ireland

- Colleagues in Spectate's Dublin office volunteered at K2Alpacas, a therapeutic farm that will provide support to beneficiaries of The Down Syndrome Centre.<sup>10</sup>

## Italy

- Support for “Sport Senze Frontiere” which helps underprivileged young people and their families in cities and towns across Italy, through the provision of community sports and tutoring. Entain’s investment will go straight into their intervention programme, which provides beneficiaries with school and tutoring services, counselling, health education and medical support. The project aims to reach a total of 400 direct beneficiaries in Naples, Rome, Milan, Turin, Bergamo and Trento.<sup>11</sup>

## Lithuania

- Organised a bake sale to support the Pink October campaign.<sup>12</sup>



## Malta

- Contribution to the L-Istrina event organised by The Malta Community Chest Fund Foundation (MCCFF).<sup>13</sup>
- Collected food items through the Foodbank Lifeline Foundation's annual Reverse Advent Calendar campaign.<sup>14</sup>
- Beach cleaning activity at Las Palmas from volunteers, clearing up more than 100kgs of waste.<sup>15</sup>

## Netherlands

- Through Unibet Impact<sup>16</sup>, supported community work with sports clubs to strengthen the social power of sport, combat match-fixing, promote mental health, and improve viability of clubs.
- Partnership fund with EFDN to support the More than Football Fund.

## Poland

- Spent Community Month volunteering for the Freedom Space Foundation, where our William Hill colleagues worked to transform an old pasta factory into a community space for refugees.<sup>17</sup>

## Spain

- BetBlocker is an innovative, simple-to-use app that helps individuals ensure that they can manage their access to betting and gaming in a safe and appropriate manner. As the only free, multi- platform betting and gaming blocking software in the world, they have over 7,500 daily users and can prevent access to 15,000 betting and gaming sites as well as 1,500 apps. Entain supported the charity to translate and localise their software in French and Spanish, unlocking access to a wider user base.<sup>18</sup>

## Sweden

- Supported Movember, a global movement aimed at raising awareness for men's health issues.<sup>19</sup>
- Collaboration with Rena Mälaren to remove 500 kg of marine waste from Lake Mälaren.<sup>20</sup>
- Partnership with Svensk Elitfotboll (SEF) and treatment center Spelfriheten to support clubs<sup>21</sup> and raise gambling related issues<sup>22</sup> among players and leaders.
- Kindred made an annual donation to youth sports academies through its Unicoach programme.<sup>23</sup>

## UK

- Rangers Charity Foundation and Kindred renewed the Team Talk funding agreement<sup>24</sup> to support men in the Glasgow area in mental health and wellbeing.
- Together with Women in Racing,<sup>25</sup> Kindred developed the profile of women in of horse racing, supported mothers returning to work.

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