

# CODE HOSPITALITY



## HAPPINESS IN HOSPITALITY 2019

A survey of the industry as a place to work

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Yapster

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# HAPPINESS IN HOSPITALITY 2019

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*Yapster is the mobile messaging app for hospitality teams*

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Staff can send 1-1 and group messages, initiate flash polls, and post to the social newsfeed - all they need is a smartphone. Unlike WhatsApp and other free-to-use platforms, Yapster is under the full control of our customers and allows colleagues to interact in a secure, closed environment.

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# HAPPINESS IN HOSPITALITY 2019

## A survey of the industry as a place to work

Happy staff equal happy customers.

This saying is so simple yet it rings true. We've all been in a restaurant where the food is sublime, the wine is flowing and the conversation fun-filled, but there's something not quite right. Is it the lighting? Perhaps a wonky table leg? Or the music genre is all wrong for the setting? As a New Yorker would say, "all-sizzle-but-no-steak."

At CODE we believe the essence of great hospitality stems from one source: the amazing people employed across our brilliant restaurants, hotels, bars, cafés and private members' clubs. An engaged workforce will deliver your customer a better experience. As we say, happy staff equal happy customers. But the question we often think about at CODE HQ is how do we make staff happy in the first place? We're all too familiar with the notion that those in our industry are not motivated solely by the amount they take home each month. So, why do people choose hospitality as a career?

Our second annual Happiness in Hospitality looks at important topics such as workplace happiness, diversity, mental health and wellbeing. As Kate Nicholls of UK Hospitality says, "Hospitality is the third largest private sector employer in the UK, employing 3.2 million people. That is double the number employed in financial services. The sector is a fantastic provider of opportunities and careers. The range of businesses in hospitality is diverse and so are the jobs available. Plus, ours is a sector where you can progress rapidly and far if you are hardworking. Not only are hospitality businesses vital economically, they are also valuable social hubs around the country. Hospitality is at the heart of the community, whether it be a restaurant, local pub, hotel or a coffee shop. Hospitality is an incredibly important sector and one that deserves our full support."

We hope our annual report will be a useful tool for both employers and employees and serve as a catalyst to effect positive change. We're all in the business of making people feel special. So, before we start making our guests feel special, we need to make our workforce feel special first.

Adam Hyman  
Founder, CODE Hospitality





# SETTING THE SCENE

The past 12 months have been turbulent for the hospitality industry in the UK. The backdrop of Brexit, a weak pound and rising costs for operators have all continued to whip up a perfect storm. We have witnessed a number of well-known casualties in the high-street sector, highlighting the market sentiment, but also reflecting customers' changing attitude towards dining out. Customers desire a more bespoke experiential offering and consequently new openings, alongside operators rolling out multiple sites, have slowed. However perhaps a natural steadying of the hospitality industry is no bad thing? The mid-market casual dining scene is going through a transformational period – are the days of the UK-wide high street dining chain a thing of the past? In their place seem to be the new wave of food halls that continue to appear in London and across the regions, posing the question: Is this the future of casual dining?

As always, attracting and retaining talent remains a major, if not the main, priority for all operators. The shortage of skilled staff continues to be a cause for concern across the industry, as operators search for alternative ways to recruit and retain staff, whether it's along the lines of more flexible working hours, better shifts or targeting different age groups. The one constant across the industry is the importance of people to a business and whilst the industry is starting to embrace technology, we believe it will never replace the human touch in hospitality.

## SURVEY DATA SUMMARY

- Responses were collected in May and June 2019 across the UK only
- 701 survey respondents
- 57% female / 43% male
- Majority 26-45 years old with 6+ years' industry experience
- 51 different nationalities
- All data has been anonymised



# Happiness in Hospitality: 2018 vs. 2019

The ever-present shadow surrounding Brexit, which according to 75% of survey respondents has made the industry a less attractive place to work, means our industry continues to face a myriad of challenges. Yet reassuring is the fact that despite external factors, 81% of

respondents would still recommend hospitality as a career (up from 78% last year).

Here we take a snapshot of how our industry has changed over the past 12 months.

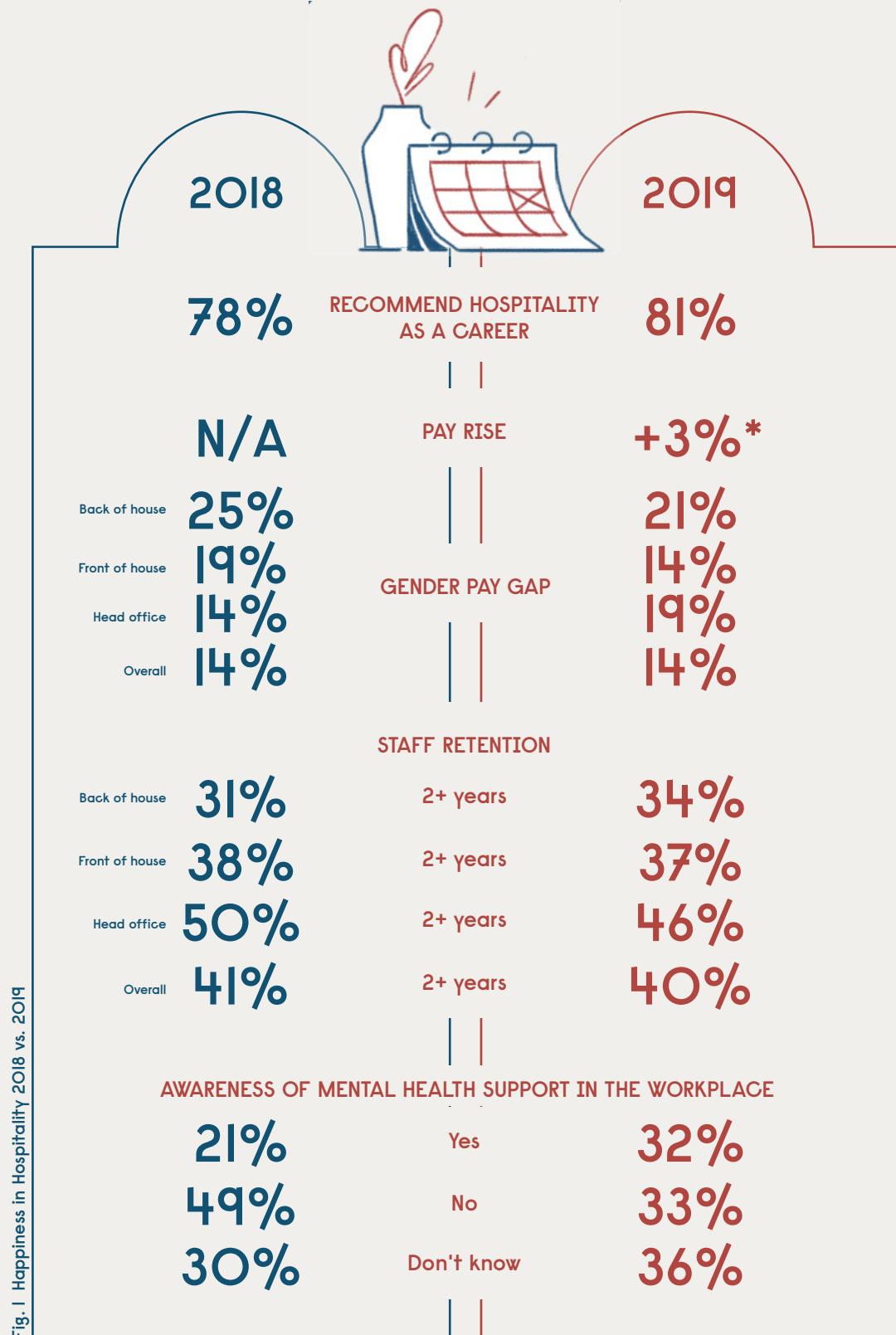


Fig. 1 Happiness in Hospitality 2018 vs. 2019

\* "2.5 % looks set to be the benchmark pay rise across the economy for 2019", Sheila Attwood of XpertHR (Reuters)



# Happiness in Hospitality

At CODE we have always maintained that careers in hospitality are about more than just a pay cheque, however it is encouraging to note that salaries have risen over the past 12 months at a higher rate than expected across the private sector (2.5%<sup>1</sup>), with average salaries up 3% year on year.

The gender pay gap across the CODE community (focussed on the mid-to-high-end independent sector) has remained largely stable year on year at 14%, marginally better than the national average for full and part-time workers (17.9%<sup>2</sup>). However, this appears to have been skewed by a narrowing of the gap amongst head office roles, with those working on the frontline (front and back of house) seeing the gender pay gap widening - most starkly across back of house roles where the reported gender pay gap amongst those surveyed has increased to 25% (up from 21% in 2018).

Whilst pay discrepancy amongst back of house teams has increased at an alarming rate, retention has improved. 34% of back of house staff have been with their current employer for more than 2 years (up from 31% in 2018). However, despite this positive trend, turnover

remains a significant challenge faced by the industry with 36% of individuals having moved employer within the last 12 months (up from 34% last year), with front of house and head office roles seeing a fall in staff retention.

A key takeaway from our 2018 Happiness in Hospitality report was the lack of mental health support within the industry, with 72% of junior staff holding a negative opinion on mental health support at work and a noticeable absence of mental health policies in the industry (just 21% of employees were aware of one in their workplace). Over the past year the importance of talking openly and destigmatising mental health has continued to come to the fore, heightened by high profile industry figures openly sharing their mental health challenges across a variety of platforms (notably social media). It seems that employers have also started to take note. With 32% of respondents now aware of mental health policies in their workplace, the industry is moving closer to the UK average of 40%<sup>3</sup>; however, there is obviously plenty of work still to be done.



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1. XpertHR (Reuters), 2019  
2. Office for National Statistics, 2019  
3. Mind's Workplace Wellbeing Index, 2016/2017

# Diversity in hospitality

Evidence has shown that workplace diversity makes companies more effective, more successful and even leads to greater profitability<sup>4</sup>, and there is more scrutiny than ever on employers to improve the diversity of their workforce. Yet despite this, traditional corporate organisations consistently fail to effectively tap into the wide-ranging talent pools that exist in our society. Across key areas, including age, gender, ethnicity and sexual orientation, the hospitality industry appears to be leading the pack.

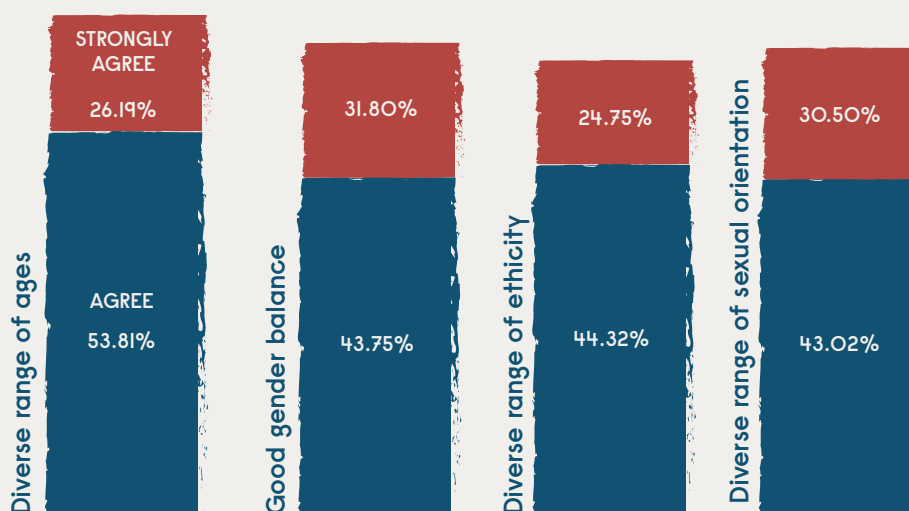


Fig. 2 Diversity in hospitality

The majority of respondents agreed that there is a diverse range of ages, gender, ethnicity and sexual orientation within their teams (on average 75% agreed or strongly agreed that their teams displayed diversity across these categories). Consequently it is perhaps not surprising that the diversity of the hospitality workforce is reflected in the diversity of cuisines and experiences we have access to as consumers. The UK, and in particular London, offers one of the most varied dining scenes in the world and has become a flagbearer for the rest of the economy in its ability to attract and nurture diverse talent.

**"LGBT+ PEOPLE ARE GENERALLY VERY WELL-REPRESENTED IN HOSPITALITY UP TO THE VERY HIGHEST LEVELS OF OUR INDUSTRY. HOWEVER, IT'S IMPORTANT NOT TO BE COMPLACENT. NOT EVERYONE IS IMMEDIATELY COMFORTABLE BEING OPEN ABOUT THEIR SEXUALITY OR GENDER IDENTITY AND IT'S IMPORTANT THAT EVERYONE WORKING IN HOSPITALITY ENSURES THAT THEY CREATE WORKPLACES WHICH ARE WELCOMING, NON-JUDGMENTAL AND FREE OF LANGUAGE AND BEHAVIOURS WHICH MIGHT INTIMIDATE."**

**HUGH WRIGHT - RESTAURANT PR & CONSULTANT**

# Diversity in hospitality

However, this is only part of the picture. Whilst on the surface there appears to be consensus regarding diversity, opinions begin to differ when the seniority of respondents is taken into account. For example, the results of our survey showed that senior staff felt more optimistic about the ethnic diversity of their establishments compared to their more junior counterparts, with employees in junior roles almost twice as likely to disagree with the statement that their teams have a diverse range of ethnic backgrounds. There are two possible explanations for this discrepancy, namely awareness and expectation. It is possible to argue that senior staff have a greater overview of the true diversity of their workforce, especially when considering multi-site operations, where the structure of teams may differ greatly from site to site. However, an alternative view is that those who have been in the industry for longer may have lower expectations for what they consider as good from a diversity standpoint, whilst those new to the workforce hold the industry to higher standards.

	Junior staff	Management	Snr. Management
Female	6 yrs	9 yrs	10 yrs
Male	6 yrs	10 yrs	13 yrs

Fig. 3 Average years of experience by gender and seniority (women are progressing faster to senior roles)

In addition, as highlighted through our look back over the last 12 months, whilst there may be a good gender balance within teams, the gender pay gap in the industry is as stark as ever, averaging 14%. Although opportunities for female employees to progress through the ranks are evident, with women seemingly afforded opportunities to progress into senior management roles quicker than their male counterparts (average years of industry experience for women in senior management roles is 10 years, versus 13 years for men. See Fig.3), pay is lagging behind. The pay gap becomes more pronounced as years of experience in the industry rise, for example women with 15+ years of hospitality experience are paid on average 39% less than men (see Fig. 4). However, at the junior end of the industry we are nearing pay equality, with the average salary for back of house staff with less than two years' experience in the industry equal across men and women. Looking forward, it will

be interesting to see whether we are undergoing a transitional period, in which those entering the industry today will see pay equality improve as they progress through their careers, or alternatively whether the experience pay gap will remain as the industry fails to retain female talent, due to working standards or a lack of flexibility and support for both genders, but especially women, looking to have a family and a career.

	BOH		FOH	
	0-2 years	15+ years	0-2 years	15+ years
Female	£22.5k	£33.7k	£26k	£41.3k
Male	£22.5k	£52.7k	£27.9k	£52.9k

Fig. 4 Discrepancy of salary by gender and experience

**"PAYING MEN AND WOMEN DIFFERENTIAL RATES FOR SIMILAR WORK IS UNACCEPTABLE. NO EMPLOYER WOULD SIT IN A STAFF MEETING AND OPENLY POINT TO THE WOMEN IN THEIR TEAM AND TELL THEM "I VALUE YOU LESS", BUT THEY ARE DOING EXACTLY THAT BY COVERTLY PAYING THEM LESS. IN MY KITCHEN THE ENTIRE TEAM, INCLUDING ME, ARE ALL ON THE SAME HOURLY RATE. MONEY MATTERS- IT IS AN IMPORTANT WAY TO SIGNAL TO SOMEONE THAT THEY ARE EQUALLY VALUED IN THE TEAM."**

**ASMA KHAN - CHEF PATRON, DARJEELING EXPRESS**



## KEY TAKEAWAYS

- Our industry is one of the most diverse in the UK as reflected in our cuisines. Embrace diversity in your workplace. Diversity makes companies more effective,

more successful and even leads to greater profitability.

- Employers still need to work on reducing the gender pay gap in the industry, especially amongst

those who have been in the industry for 15+ years where on average women are still paid less than 39% than men.

# Workplace happiness

One of our major motivations for carrying out our Happiness in Hospitality survey is to help understand what makes people happy in the workplace. At CODE we've always believed that, across all industries, happy staff equal happy customers and our CODE community agrees, with 99.28% confirming they think the same. There have been numerous studies surrounding workplace happiness and whether it actually improves productivity. Even though this seems to be up for debate in many industries, there is clearly a direct correlation between happy staff and happy customers in the hospitality industry, primarily due to the nature of the business and the face-to-face element of working in the service sector.

Despite the hospitality industry still being perceived as a less viable career in the UK, 58% of our survey respondents rated their happiness 8 out of 10 or more. There are several factors that directly affect their happiness.

**99.28% AGREE THAT  
"HAPPY STAFF = HAPPY  
CUSTOMERS"**

## Wellbeing & mental health

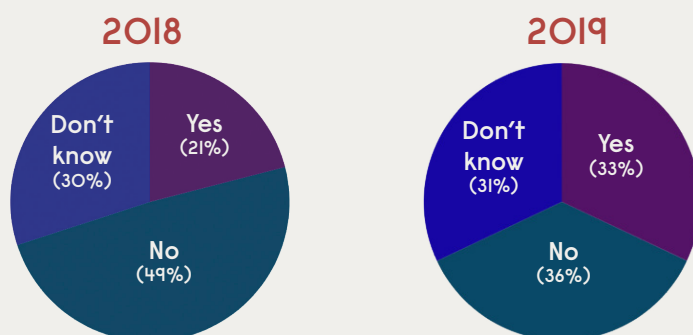


Fig. 5 Awareness of mental health policy in the workplace, 2018 vs. 2019

Our 2019 survey reveals that the general attitude towards and awareness of mental health and whether there is a policy for it in their workplace has improved since last year. This year, 33% of survey respondents are aware of their employer having a mental health policy, compared to 21% last year. The rise of more than 10% is likely attributable to the fact that mental health has become less of a taboo topic in society, with well-known public figures such as HRH The Duke of Sussex encouraging people to speak openly about their mental health and

employers becoming both increasingly aware of and expected to look after their workforce with regard to mental health support. Technology companies such as Google and Apple have long been at the forefront of championing employees' wellbeing and it is encouraging to see that the UK hospitality industry is starting to follow in their footsteps. We have noted that a number of mental health support services are now being offered to staff in the hospitality industry – something notably lacking in our 2018 report.

**"1 IN 4 PEOPLE IN THE UK HAVE BEEN DIAGNOSED WITH A MENTAL HEALTH PROBLEM, 56% OF PEOPLE WORKING IN HOSPITALITY EXPERIENCE POOR MENTAL HEALTH. I BELIEVE THAT THE FIRST STEP TO IMPROVING MENTAL HEALTH IS IN BURNING THE SILENCE, IGNITING CONVERSATIONS IN THE WORKPLACE AND CHALLENGING THE STIGMA ATTACHED TO MENTAL HEALTH PROBLEMS."**

**ANDREW CLARKE - CHEF PATRON, ST LEONARDS**

However, 31% of survey respondents this year, up from 30% in 2018, are still unsure whether their workplace has a mental health support policy. Furthermore, a disparity still exists between senior and junior staff, with junior staff less likely to know whether a policy exists in the workplace. We think this is likely due on the one hand to senior staff having a greater awareness of mental health policies from a pastoral point of view, and on the other hand to a failure to effectively communicate internal support mechanisms to junior staff, who may in turn lack the confidence to ask.

When it comes to implementation of mental health policies, half of our survey respondents believe that the focus should be on preventative measures rather than crisis management. Interestingly only 15% of survey respondents with a mental health policy in place at work rated their happiness less than 7 out of 10, compared to 38% of those without a policy in place. Our 2018 report stated that a lack of support in the workplace was the highest cause of burnout (53%) and that both personal and industry support networks play an equally important role in maintaining positive mental health.

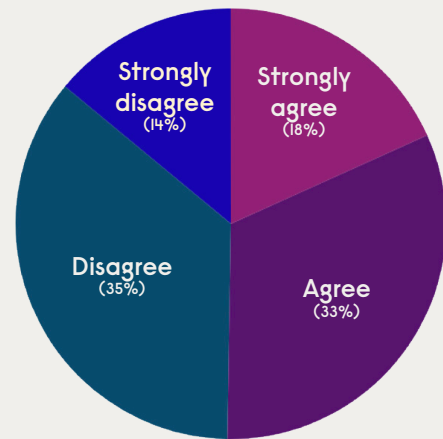


Fig.6 Employee sentiment towards mental health policy implementation

## Mentorship

We've long championed mentorships at CODE and believe they improve career prospects and provide an important support network to people at all stages of their career. A study<sup>5</sup> discovered that mentored employees compared to non-mentored employees:

- Receive higher compensation
- Receive a greater number of promotions
- Feel more satisfied and committed with their career
- Are more likely to believe that they will advance in their career

Additionally, mentoring programmes create a more productive and successful, as well as a more engaged, workforce. In a survey of 170 sales and marketing professionals, employees who were part of a mentoring relationship were found to have significantly higher engagement scores than employees who were not<sup>6</sup>. Mentored employees all:

- Felt more positive about their workplace
- Felt more positive about their workplace's senior leadership
- Believed their workplace provided opportunities for career growth
- More informed about the future of their workplace

Mentoring has also been found to reduce turnover intention<sup>7, 8</sup>, as well as actual turnover<sup>9</sup>. When more than 5,000 newly hired sales representatives were surveyed, those who indicated that they were part of a mentoring relationship reported significantly higher workplace commitment and lower intentions to leave their workplace than non-mentored respondents<sup>8</sup>. Similarly, in a study of 1,300 U.S. Army officers, being part of a mentoring relationship was found to decrease odds of turnover by 38%<sup>9</sup>.

5. Allen et al., 2004  
6. Joiner et al., 2004

7- Brashear et al., 2006  
8 - Lankau & Scandura, 2002

9- Payne & Huffman, 2005



DO YOU TAKE PART IN A MENTORSHIP PROGRAMME?



Fig.7 Participation in mentorship programme

REASONS FOR BEING UNABLE TO JOIN A MENTORSHIP PROGRAMME?

**36% IDENTIFIED THE LACK OF SPARE TIME AS THEIR MAIN REASON FOR NOT JOINING A MENTORSHIP PROGRAMME**

Other reasons included:

- 30% Access to a mentor
- 12% Access to a mentee
- 10% I don't think it would be beneficial
- 8% My employer wouldn't support me
- 4% I lack the confidence

**33% TAKING PART IN A MENTORSHIP PROGRAMME RATE THEIR WORKPLACE HAPPINESS ABOVE 9/10**

**16% NOT TAKING PART IN A MENTORSHIP PROGRAMME RATE THEIR WORKPLACE HAPPINESS ABOVE 9/10**

## Workplace culture

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How can employers impact happiness in the workplace? We believe that creating a workplace culture that supports and motivates staff is crucial to a happy workforce. This year, we asked respondents what they considered to be the key qualities of their workplace in relation to their happiness.

As our results show, respondents stated that a positive team attitude was the most important factor in relation to workplace happiness. Encouragement and positive reinforcement not only improve team's happiness, but also their confidence. Whether on the floor, in the kitchen or in the office, improved confidence can improve a workforce's performance.

### FACTORS INFLUENCING WORKPLACE HAPPINESS

1. Positive team attitude
2. A fair salary
3. Supportive management
4. A connection to management
5. Opportunities for promotion

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A further benefit of a positive team attitude is that obstacles and issues faced by individuals or groups will be more readily communicated. Supportive management, alongside clear channels of communication, allow action to be taken ahead of time and prevent the development of a toxic workplace culture.

Furthermore, the industry is unique in that the lines between work and leisure are less rigid.

Additionally, being part of a community and experiencing hospitality first-hand can have a direct impact on workplace happiness. The CODE app allows for increased exposure to best-in-class operators, leading to increased breadth of knowledge and experience for hospitality professionals, as well as having a positive effect on general workplace happiness, as shown by the statistic below.

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### 70% OF RESPONDENTS WHO HAVE THE CODE APP AS A STAFF BENEFIT RATED THEIR HAPPINESS AS 8/10 AND ABOVE

Whilst junior staff prefer workplace benefits that better their lives in the short-term, long-term initiatives, such as private medical insurance, are in higher demand amongst more senior staff. Whilst the key benefit of providing private medical insurance is that it acts as an

invaluable resource to those who desire it, a major incentive for employers is that it can help to reduce absenteeism and therefore avoid drops in productivity, service and quality of products.





## TOP 5 DESIRED WORKPLACE BENEFITS

### JUNIOR STAFF

1. Team trips
2. Subsidised gym membership
3. Flexible working
4. Dental insurance
5. External discounts and subsidies

### MANAGEMENT

1. Private medical insurance
2. Team trips
3. Subsidised gym membership
4. Flexible working
5. Dental insurance

### SENIOR MANAGEMENT

1. Private medical insurance
2. Subsidised gym membership
3. Team trips
4. Dental insurance
5. Flexible working

### OWNERS

1. Private medical insurance
2. Team trips
3. Subsidised gym membership
4. Dental insurance
5. Flexible working

Fig.8 Desired workplace benefits



## KEY TAKEAWAYS

- Remember: “happy staff equal happy customers”
- Continue to provide workforce with mental health support and communicate it: 31% are still unsure whether their workplace has a policy. There are now also a number of mental health support services available to hospitality staff
- Setup and encourage mentorship programmes

for your workforce and allocate time for this to be implemented: 36% identified the lack of spare time as their main reason for not joining a mentorship programme

- The overriding importance of a positive team attitude to workplace happiness and the direct impact on performance

- Corporate benefits are in higher demand. Having an extensive and relevant benefit

scheme in place can begin to contribute to changing the perception of the industry for the better, as well as attracting new talent

- Flexible working still remains a desired benefit across all experience levels and is one that will continue to grow in demand

# Looking forward

At CODE we don't believe in predicting trends but we do think it is important to look forward and pose some potential questions that may be of importance to the industry.

## Fly the flag

Whilst the industry is under pressure, there is confidence that professionals will remain in the industry and that the perception of a career in hospitality is changing for the better. However, there is still a lot of work to be done and this cannot happen overnight. To continue to change perceptions, we need to start educating parents and going into schools and places of higher education to fly the flag for hospitality.

We must collectively consider how to attract new talent into the industry, whilst ensuring we build on existing talent. It is also important to keep in mind that hospitality professionals have a growing need and desire for a better work/life balance, with 74% of respondents stating they would move abroad for their career for a better work/life balance.

**74%**  
**OF RESPONDENTS  
WOULD MOVE  
ABROAD FOR A  
BETTER WORK/LIFE  
BALANCE**

**63%**  
**OF RESPONDENTS  
BELIEVE THE  
PUBLIC IMAGE OF  
THE INDUSTRY HAS  
IMPROVED**

**89%**  
**OF RESPONDENTS  
BELIEVE THE  
HOSPITALITY  
INDUSTRY IS UNDER  
MORE PRESSURE  
THAN EVER**

"Higher wages and better perks will attract talented people to the roles, and in turn begin to change the external perception of the industry and its workers"

"If we want to attract more people to the industry, we need to be more vocal externally about the personal success and career achievements that are possible, rather than allowing our perception to always be negative"

"Use key industry figures as role models to reach out to schools and other institutions to encourage the consideration of hospitality as a viable, rewarding and fascinating career option."

"The best way to bring more talent into the industry is to bring the standard of career development and supporting benefits in line with other industries. This will attract committed and passionate professionals who are at a range of stages in their career"

Fig.9 Opinions on how to improve the industry as a workplace

**"OUR PURPOSE AT THE GALLIVANT IS TO RESTORE PEOPLE'S HAPPINESS AND WELLBEING. FINDING TRUE HAPPINESS IS AN INNATELY PERSONAL JOURNEY AND I AM INSPIRED BY THE NOTION OF CREATING A MORE HOLISTIC HOSPITALITY BRAND THAT IS IN MANY WAYS A PLATFORM FROM WHICH INDIVIDUALS ARE INSPIRED TO EXPLORE OTHER POSITIVE STRATEGIES TO A HAPPIER SELF."**

**HARRY CRAGOE - OWNER, THE GALLIVANT**

## Flexible working

There has been a monumental shift in flexible working across all industries over the past five years. Accordingly, our survey reveals that flexible working is in demand across all age groups in hospitality and is something we must think about moving forward.

Although in other industries flexible working is easier to attainable, it remains questionable how this would be achieved in the hospitality industry, given the alternative working

environment. We believe employers must consider looking at different shift patterns, more sympathetic rotas which are accessible in advance, embracing the over-50s demographic and finally drawing attention to varied job roles. After all, working in hospitality cannot be narrowed down to just working in the kitchen or front of house, but rather there are a myriad of opportunities available.

**81% OF RESPONDENTS  
ANTICIPATE HAVING A MORE  
FLEXIBLE WORKING PATTERN  
IN THE FUTURE**

## Technology

The hospitality industry has been renowned for its slow uptake of technology compared to other industries. Used in the right way, it can have a positive impact not only on your workforce, but can also help to enhance the experience of guests. Technology is making the industry a better place to work, as well as assisting in people's roles, whether it's in regard to reservations, stock-ordering or people management. However, we are also keen to highlight that in our opinion technology can never replace human interaction in the hospitality industry, nor should it.

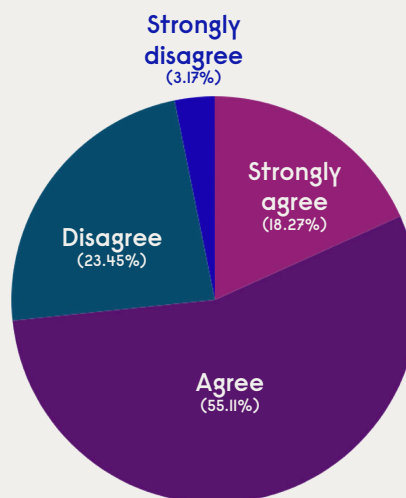


Fig. 10 Has hospitality tech improved day-to-day roles?



## KEY TAKEAWAYS

- We must continue to 'fly the flag' and champion the hospitality industry as a viable career to attract the next generation of talent
- Employers must respect the changing attitude of their

staffs' desire for a better work-life balance than the previous generation

- Embrace flexible working – different shift patterns, more sympathetic rotas and encouraging different

demographics into employment (Over-50s, mothers)

- Utilise the benefits of tech to your business but remember it can never, nor should it, replace human interaction

**codehospitality.co.uk**

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