



Fair Work Convention Survey of Hospitality Workers and Businesses in Scotland 2023

**Final Report
January 2024**

Produced by JRS for the Fair Work Convention

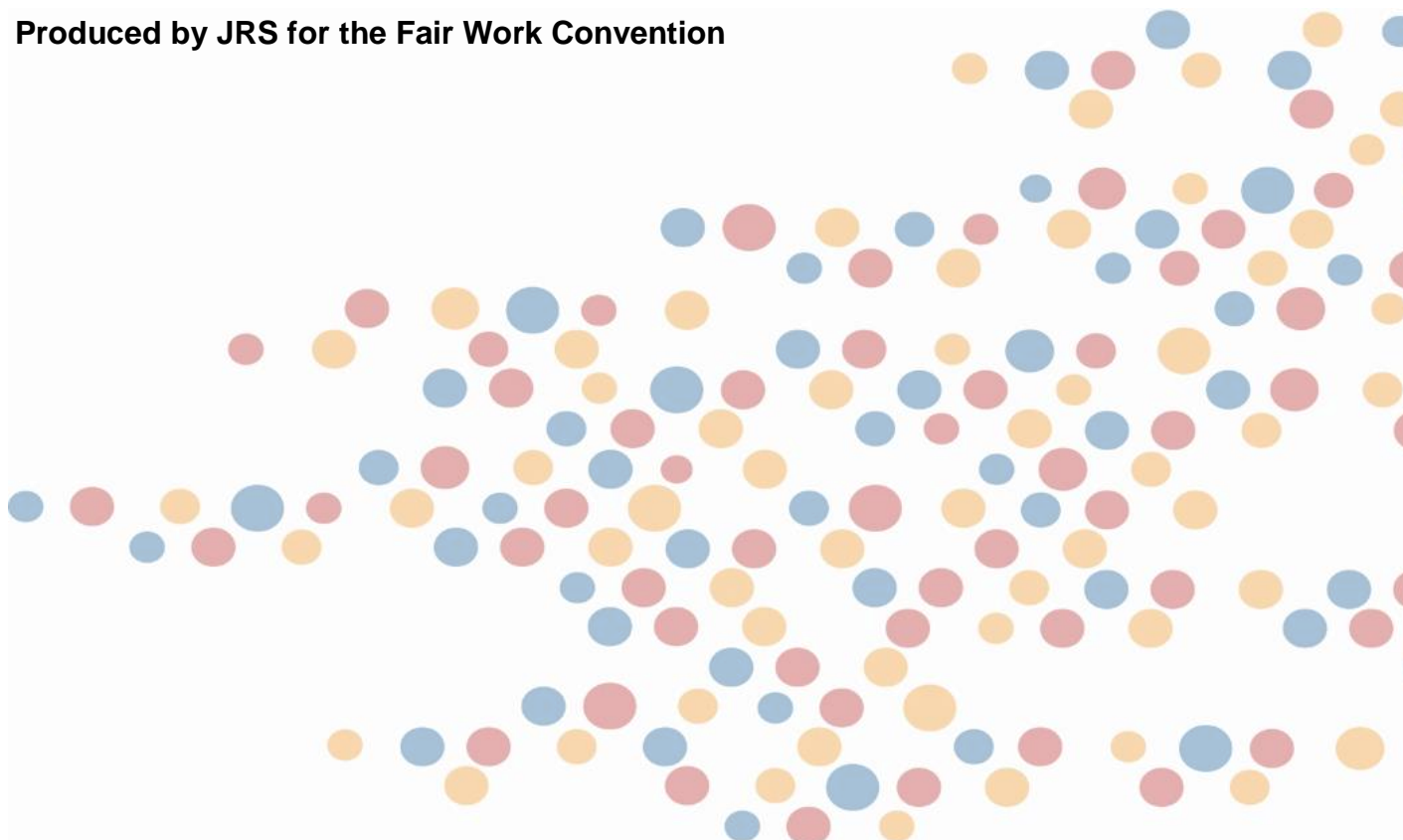


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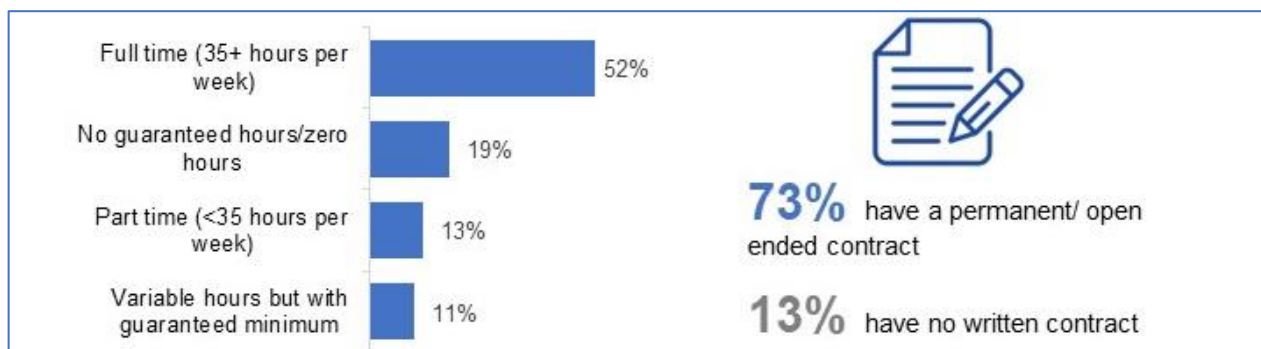
Executive summary

Summary of results from survey of workers

245 hospitality workers responded to the survey between 3rd May and 9th July 2023. With this size of sample, results are accurate to around +/-6% at the 95% levels of confidence.

Contracts

- 52% of survey respondents worked on a full time basis, 24% were employed part time or had variable hours with a minimum guaranteed number of hours, and 19% had a zero-hours contract.
- 73% of workers taking part in the survey had a permanent/ open ended contract, while much smaller percentages had other types of contract (2% fixed term, 2% temporary/seasonal). However, 3% of respondents had no written contract.



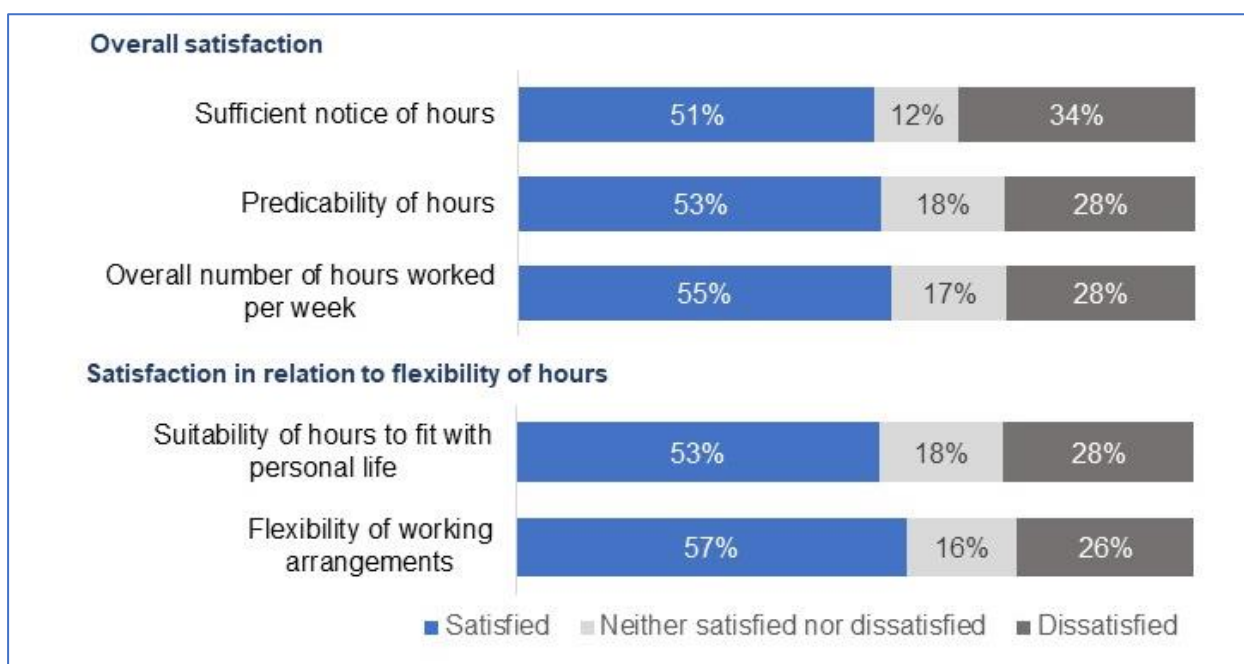
Pay

- While 54% of workers stated that their pay is always stable and predictable, 43% indicated that this is not the case (40% stated that their hours vary and 9% were sometimes sent home unpaid).
- 72% of responding workers were paid at or above the Real Living Wage; (notably this level is higher than provisional 2023 Scottish Government estimates for employees in the Accommodation and Food sector as a whole (54%) (ONS [Annual Survey of Hours and Earnings, 2023](#)), which could be a reflection of a variation in the profile of those taking part in the survey with the profile of all workers in the sector).
- 84% believe they are entitled to paid holiday entitlement, and 53% would expect to receive pay if they were off sick.



Hours

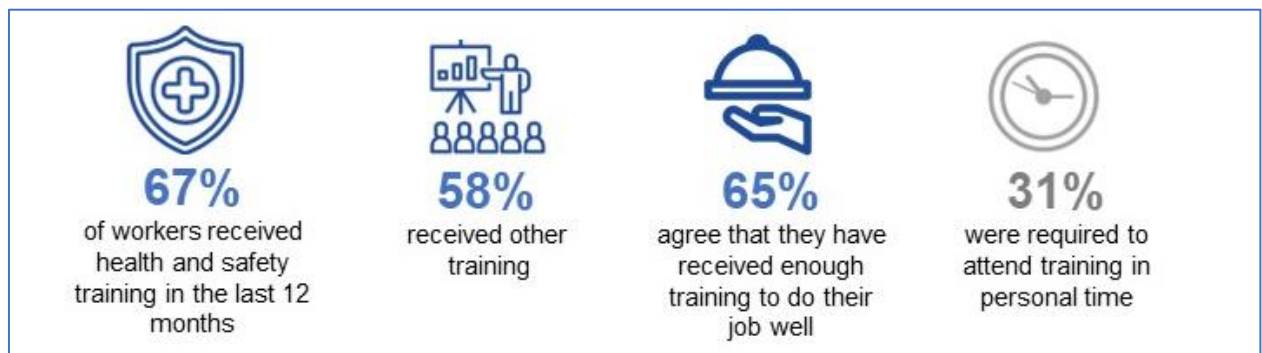
- While levels of satisfaction in relation to hours and the flexibility of hours worked varied across those responding to the survey, significant minorities expressed dissatisfaction with a number of aspects.



- In general, satisfaction with hours and flexibility of hours were highest amongst those working for hotels and those who see hospitality as a career, but lower amongst those working in hospitality while studying.
- 51% of survey respondents usually work unpaid overtime with an average of around 8.5 hours overtime worked per week.

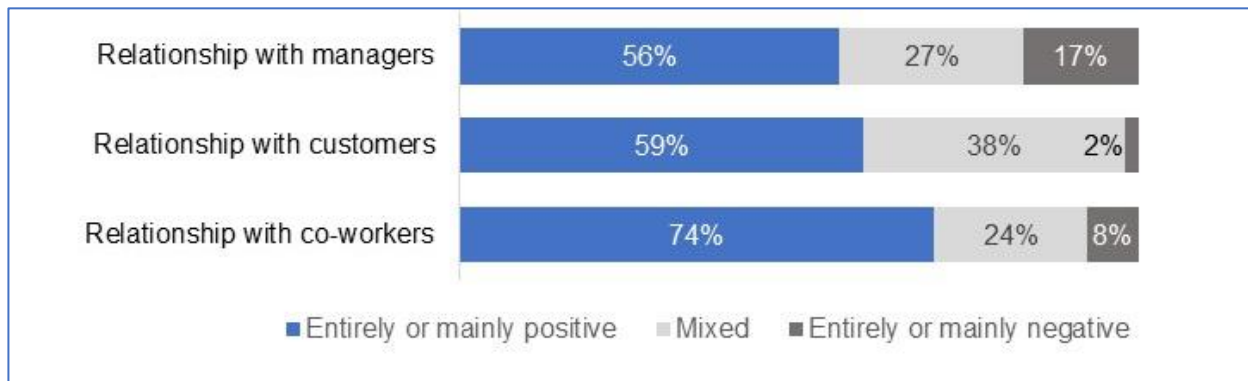
Training and development

- Although all employers are required to ensure their workers receive sufficient training to ensure their safety while at work, just 67% of hospitality workers reported having received health and safety training in the last 12 months.
- 58% had received training other than health and safety training during the last 12 months.
- 65% agreed that they had received enough training to be able to do their job well, but 30% did not think that they had received enough training.
- 31% had been required to attend training in personal time. This percentage was higher amongst:
 - those working in cafés and restaurants – 43%
 - those on a zero-hour contract - 44%



Relationships at work

- While relationships with co-workers were predominantly positive, more varied responses were provided regarding relationships with managers:



- 42% of workers responding to the survey personally experienced bullying or harassment at work in the last 12 months:
 - 30% from customers
 - 22% from managers
 - 13% from co-workers
- Amongst these respondents, bullying or harassment most often related to:
 - Their sex – 36%
 - Their age – 20%
 - Their accent – 20%
 - Their social class – 17%
- 42% of those who either personally experienced or witnessed bullying or harassment at work had not reported it, most often due to a lack of anyone to report instances to, or an expectation that no action would be taken.
- Furthermore, when bullying or harassment was reported, just 30% felt that the issues were dealt with effectively.

Employee voice

- 62% of workers felt that they had opportunities to have their voice and opinion listened to, but far fewer (43%) felt that their voice was taken into account in decisions.
- 46% had *never* challenged their employer about their rights. In 43% of these cases, they decided instead to put up with the issues they were facing, chose to leave their job, or just didn't want to challenge their employer.
- 20% were members of a trade union.

Overall views on working in hospitality

- While 45% of responding workers would recommend working in the hospitality sector to family or friends, 37% would not and 18% are uncertain.

Summary of results from survey of businesses

79 hospitality businesses responded to the survey between 3rd May and 9th July 2023. With this size of sample, results are accurate to around +/-11% at the 95% levels of confidence.

Challenges faced

- Staff shortages are one of the most significant challenges facing hospitality businesses:
 - 81% are having difficulties recruiting staff – a major problem for 47%
 - 72% are having difficulties with high levels of staff turnover – a major problem for 24%
 - The most difficult roles to recruit for include chefs, other kitchen staff, housekeeping, and bar staff.
- The most common impacts of staff shortages on hospitality businesses experiencing challenges were reported as follows:
 - Existing staff having to work longer hours – 67%
 - A need to change what is offered to customers – 59%
 - Being unable to meet customer demand – 50%
 - Negative impacts on the customer experience- 48%
 - Closing the business on certain days or reducing opening hours – 44%.



Contracts

- Many businesses are using a variety of contract types:
 - 90% use permanent/ open ended contracts
 - 39% use fixed term contracts
 - 37% use zero-hour contracts
 - 25% use agency workers
 - 25% provide apprenticeships

Pay

- 44% of responding businesses stated that they are Real Living Wage employers.
- 71% stated that everyone working in their business is paid the Real Living Wage or more.
- The most common reasons given for *not* paying at this level include:
 - levels not being affordable given rising operating costs
 - some staff being aged under 18.



Hours and benefits

- 78% of businesses offer flexible arrangements, most often in the form of flexible working hours (65%).
- The majority also offer non-pay terms and conditions including:
 - 78% provide employer contributions to a pension scheme – however as this benefit is a statutory requirement, it is notable that 22% do not offer it.
 - 76% offer discounts for workers and their friends and families.
 - 62% offer subsidised meals.

Training and development

- Businesses face a number of challenges in relation to delivering training:
 - 57% find it difficult to access specific funding to support training and upskilling
 - 51% find it difficult to find training solutions affordable to their business
 - 50% find it difficult to provide staff with paid time to undertake training
- 34% of businesses expect the amount of training they arrange or fund for staff during the next 12 months to increase, but the remainder anticipate that this will not change or that levels will decrease.



Employee voice

- The majority of businesses (either regularly or occasionally) hold meetings where staff can express their views on particular issues, most often on making improvements at work (95%), health and safety issues (92%) and working hours (88%).
- 95% feel that staff can be very or fairly influential at these meetings.
- 10% currently consult with trade unions, and 15% are interested in having a closer working relationship with trade unions.

Grievances and disciplinary procedures

- 9% of businesses taking part in the survey did not have a formal procedure for dealing with grievances.
- 91% of businesses taking part in the survey have a formal procedure for dealing with discipline and dismissals other than redundancies.
- 38% stated that disciplinary action had taken place in their workplace in the past year.

Overall views on working in hospitality

- Nearly all of the businesses responding (97%) stated that they believed that their business was a good one to work for.
- When asked how the sector could be made a more attractive career choice, the most common suggestions relate to increased/fairer pay (25%), providing more flexible hours that allow a better work-life balance (17%) and improving communications with staff (15%).
- Businesses cited a number of challenges making it harder for employers who were seeking to make the industry more attractive, most notably rising costs and low profit margins (36%), concerns over the attitudes of employees (18%) and a recognition that the sector has a bad reputation (13%).



Summary of cross cutting themes

Hours

- Working hours were identified as a key issue by both businesses and workers. For businesses, issues focus around ensuring sufficient staff availability to cover the hours of work needed - 71% of businesses reported problems with staff recruitment, with the most common 'knock on' impact of these issues reported (67%) being that existing staff are required to work longer hours.

For workers, receiving appropriate and predictable hours were essential to support both work-life balance and an adequate standard of living. Despite this, workers responding to the survey expressed fairly negative views in relation to their working hours with only 56% satisfied with their overall number of hours, 54% satisfied with the predictability of their hours, and 53% satisfied that their working hours fitted with their personal life.

Training

- The vast majority of businesses stated that they delivered staff training, most often on the job (94%). However, possibly reflecting the commercial challenges faced by many businesses, only 53% of businesses had a budget for delivering training beyond mandatory requirements (such as health and safety) and only 1 in 3 held regular meetings with staff to discuss training plans.

The worker perspective on training was fairly negative, with only 65% of hospitality workers indicating that they felt that they had received enough training to do their job well.

Relationships and grievances

- 46% of businesses stated that any grievances had been raised in the past year. The most common grievances related to pay/ terms & conditions, unfair treatment/relationships with line managers and bullying or harassment at work.

This resonates with the workers survey where 17% of workers responding rated their relationship with managers as entirely or mainly negative, and 22% of employees stated that they had experienced bullying or harassment from managers.

Employee voice

- Businesses responding to the survey had a largely positive perspective on levels of engagement with employees with 68% stating that they regularly hold meetings with staff where they can express their views.

However, just 42% of workers believe their voice is taken into account in management decisions.

Conclusion

The high percentage of Real Living Wage employers and workers who receive the Real Living Wage in the sample suggests a potential positive skew in results. Despite this, it is important to recognise that over half of workers surveyed (60%) would recommend their employer, and 45% would recommend the overall sector as a place to work.

Positive feedback was provided by many workers in relation to key areas related to fair work. For example, 65% felt that they had received sufficient training to do their job well, 54% stated that pay was always stable and predictable, 56% were satisfied with their hours, and 54% were satisfied with their work/life balance.

These findings also suggest, however, that for many workers experiences of working in the hospitality sector are less positive, with issues raised around flexibility and predictability of hours, fairness in pay, insufficient training, poor relationships with managers, and challenges around communications and voice mechanisms.

Experiences of poor practice are more frequently reported amongst certain groups of workers including women, younger people, people with a long-term health condition or disability, and those working in hospitality to earn extra money or while studying.

While it is undoubtedly a challenging time for hospitality businesses, there is still scope to make progress and a focus on improving access to basic rights, particularly stable and predictable hours, could support better outcomes for workers and employers in the industry.

1 Introduction

1.1 Background

The Fair Work Convention (FWC) was established in 2015 following a recommendation of the Working Together Review. The Convention's remit is to drive forward fair work in Scotland. Its aspirational agenda is about fair work becoming a hallmark of Scotland's workplaces and economy.

The FWC is an independent body which brings together employers, trade unions and academic expertise. The Convention's role is to:

- Provide impartial advice and recommendations on fair work to Scottish Ministers, the Scottish Government and policy makers to support the fair work agenda; and
- Advocate and promote fair work.

The FWC developed a Fair Work Framework. It comprises five dimensions of fair work: effective voice, security, respect, fulfilment and opportunity.

1.1.1 Hospitality Inquiry

From June 2022, the Fair Work Convention's (FWC) Inquiry into the hospitality industry has sought to assess the extent to which work in the sector can be described as 'fair work' and to make recommendations for advancing fair work in the sector. It is set to report in 2024.

The Inquiry is considering the following sectors and sub-sectors:

On-premises hospitality including:

- Hotels
- Restaurants (including fast food and chains)
- Cafés
- Bars
- Nightclubs

Off-premises food and drink including:

- Takeaway food
- Mobile food services

Secondary food and drink

- Food and drink operations within other businesses (e.g. supermarkets, casinos, bowling alleys, visitor attractions)
- Event catering, including sports and music.

Having heard evidence on the fair work issues in the hospitality sector, the Inquiry Group will develop recommendations for advancing fair work in the industry. This requires a good base of knowledge about challenges and opportunities facing workers and employers.

1.2 Research aim and objectives

Given this background, the FWC commissioned research to support the Inquiry with the aim of providing data on the fair work issues facing businesses and those working in the sector in Scotland.

To meet this aim, the JRS Research Consortium were commissioned in December 2022 with the following research objectives:

- To design a set of survey questions which fill the gaps in current knowledge and/or which validate key findings in previous research and analysis.
- To undertake two surveys – one of relevant businesses (as defined above) and one of workers in the sector.
- To analyse the fair work experience of workers, under each of the fair work dimensions, and explore employers/businesses understanding of fair work, their sense of their own performance on fair work and the barriers they perceive to improving their fair work practice.

2 Research Methodology

2.1 Survey design

2.1.1 Kick off workshop

The project commenced in January 2023 with an in-person kick-off workshop attended by the key members of the JRS team and key representatives from the FWC Secretariat.

Areas agreed during this meeting included the approaches to be taken to promote survey participation, information priorities to be considered during the questionnaire design stage and requirements for the reporting of results during and after the completion of survey fieldwork.

2.1.2 Questionnaire design

The questionnaires for both the survey of workers and survey of businesses were structured around the Fair Work Dimensions as shown in the table below and overleaf.

Table 1 – Topics included in surveys
Workers Survey Question Topics

Effective Voice	Opportunity	Security	Fulfilment	Respect
<p>Opportunities to have voice heard and impact on decision making</p> <p>Raising issues at work and how they are dealt with</p> <p>Challenging on rights</p> <p>Member of trade union</p>	<p>Access to flexible work</p> <p>Also: analysis of worker experiences across protected characteristics.</p>	<p>Contract types</p> <p>Pay, holiday pay, sick pay, tips and real living wage</p> <p>Hours (including satisfaction of hours) and breaks</p> <p>Overtime</p> <p>Self-employment</p> <p>Tenure</p>	<p>Access to, and timing of, training</p> <p>Type of training</p> <p>Skills to do the job</p>	<p>Work related ill health</p> <p>Relationships at work</p> <p>Bullying and harassment</p> <p>Reporting mechanisms</p>
Continued overleaf				

Business Survey Question Themes

Effective Voice	Opportunity	Security	Fulfilment	Respect
Consultation and working relationships with trade unions (including recognition agreements) Staff associations and networks Meetings for staff to express views and influence outcomes	Flexible working arrangements Non-pay terms & conditions Recruitment Challenges	Contractual arrangements used Real living wage (accreditation and payment)	Skill shortage vacancies Delivery of training, challenges delivering training and training budgets	Grievance procedures Disciplinary action

Questionnaire design was an iterative process with valuable input received during the kick off workshop and from subsequent discussions with members of the FWC Secretariat, Hospitality Inquiry members, FWC members and other partner organisations.

The questionnaire design was also informed by a review of previous relevant research undertaken in Scotland and elsewhere including the findings of [qualitative research undertaken by National Institute of Economic and Social Research](#) on behalf of the FWC during 2022.

While it was important to ensure that a wide range of areas of interest were included in the questionnaires, keeping the questionnaire to a manageable length for respondents was also a priority to ensure high levels of response and good quality in the data collected.

Copies of the final questionnaires are provided in Appendix 1.

2.2 Survey approach

An online approach was used with the two questionnaires accessible via a single online 'landing page' which provided links to the surveys together with brief details on the Fair Work Convention, the purpose of the surveys and where to obtain further information.

Survey fieldwork ran over a 9-week period from 3rd May to 9th July 2023. During this period, survey participation was promoted by the FWC, Hospitality Inquiry members (which includes STA, UK Hospitality, Scottish Pub and Beer association, Unite Hospitality and NUS Scotland) and a large number of other key organisations comprising individual businesses, colleges and universities, enterprise agencies and local authorities.

Channels used to promote the survey over this period included social media, e-mail newsletters, verbal communications at meetings and other channels available to the FWC and their partners. This included a paid promotion of the survey via Instagram undertaken by Unite Hospitality.

By the final deadline, a total of 245 hospitality workers and 79 hospitality businesses had taken part.

With the exception of the open ended ("type in") questions, respondents to both surveys were required to complete all of the questions to progress through the survey and submit their response. As such, unless otherwise stated, results are based on the full sample.

Details of the profile of businesses and workers taking part in the survey are provided in the sections which follow.

2.3 Levels of accuracy

In common with any sample survey, a number of factors impact upon the accuracy of the results of the surveys undertaken as part of this study including the following:

2.3.1 A self-selecting sample

Given the nature of the survey approach although both surveys were promoted extensively by the FWC and their partners, those businesses and hospitality workers who chose to take part in the survey were self-selecting. As such the profile of survey participants varies from the overall profile of the hospitality sector in Scotland and those who are employed in it.

As shown in the sections which follow, this includes a higher representation of certain types of business in the survey sample than in the sector as a whole. Business types over-represented included hotels, larger businesses and those that pay employees the Real Living Wage. These variations suggest that the businesses responding to the survey may be to some extent skewed towards those that perform better than the norm in terms of delivering against some of the key Fair Work principles measured in this survey.

Similarly, there are variations between the profile of workers taking part in the survey and the profile of all workers across the whole hospitality workforce. For example, the survey under-represents those in younger age groups and those working on a part-time basis or zero-hour contact basis. These variations suggest that the responses obtained from survey participants may to some extent be skewed toward those who have a more positive view and experience of the sector.

While these variations between the sample profile and the true profile of the sector are not unexpected given the self-completion approaches used, they should be taken into account when using the results.

2.3.2 Statistical margins of error

Whilst the surveys were promoted widely and fieldwork was open for a 9-week period, the final sample sizes obtained (245 workers and 79 businesses) represent a small proportion of the total hospitality sector in Scotland.

Given these sample sizes, at the 95% level of confidence, results from the survey of workers have a maximum margin of error of +/-6% while results from the survey of businesses have a maximum margin of error of +/-11%.

When results are presented for sub-groups within the sample (e.g. particular demographics or types of business), sample sizes for these groups are smaller so margins of error are larger.

In producing this report, only those differences between sub-groups which are statistically significant at the 95% level of confidence have been referenced in the commentary.

2.4 Further information

If you would like to find out more about the survey or the Hospitality Industry Inquiry visit the website - <https://www.fairworkconvention.scot/fair-work-in-hospitality-inquiry/>

3 Results from the survey of workers

This chapter details the key findings from the survey of workers with sections describing the demographic and employment profile of those working in the sector, contractual arrangements, pay, hours, training, working relationships and employee voice.

3.1 Demographic and employment profile

Overall, 245 hospitality workers responded to the survey. The following section provides details on the profile of these workers including key demographics and details of their employment.

3.1.1 Key demographics

Table 2 illustrates the percentage of survey respondents in a number of key groups of interest and, for comparison, the percentages of these groups within the whole sector workforce.

The survey sample profile is broadly representative in terms of percentage of women, non-UK nationals, ethnic minorities and rural residents. However, the survey under-represents workers aged 16 to 24 (21% of survey respondents vs 38% of total workers in sector) and zero-hour contract workers (19% vs 28%) but over-represents people with a disability (32% vs 14%).

Table 2 –Profile of respondents versus all in sector by key characteristics

	Profile of workers responding to survey	Profile of those in employment in the accommodation and food services sector*
Female (16+)	51%	55%
Aged 16-24	21%	38%
Non-UK Nationals (16+)	20%	19%
Rural (16+)^	22%	16%
With Disability (16-64)	32%	14%
Ethnic Minority (16+)	8%	12%
Part Time (16+)	44%	48%
Zero-hour contract†	19%	28%

*Sources: ONS Annual Population Survey 2022; ONS Labour Force Survey 2023

^Survey results relates to location of business worked in

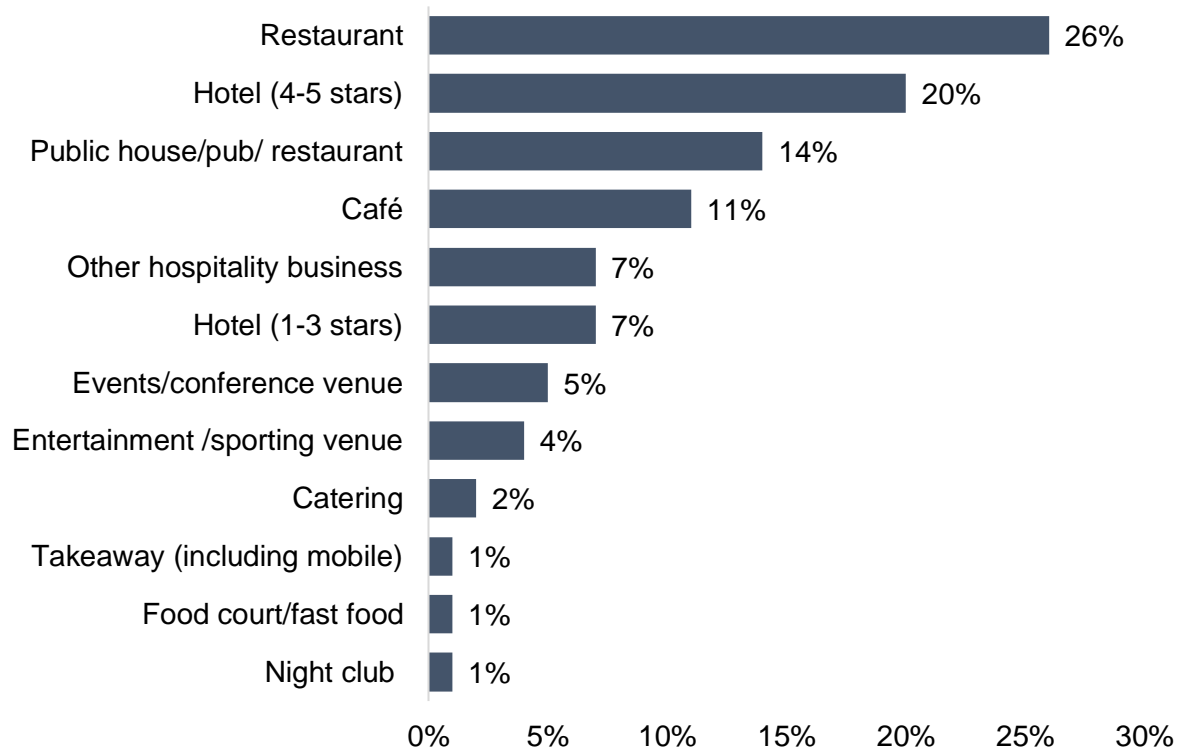
†ZHC sector profile relates to UK as a whole

3.1.1 Type of business

As shown in Figure 1, workers from a wide range of hospitality businesses participated in the survey.

While the largest percentages worked for restaurants, hotels, pubs and cafés, workers from other types of business such as catering companies, takeaways and night clubs were also represented.

Figure 1 – Types of hospitality business which respondents work for



Base: All workers (n=245).

Q2 Which of the following best represents the nature of the business where you work?

Comparing the worker survey sample profile with Scottish Government data on the profile of all employees working in hospitality in Scotland (Table 3), illustrates an under-representation in the survey of workers in certain types of business, most notably takeaways, while coverage of workers in other types of businesses was higher in the survey sample than in the industry as a whole, most notably hotels.

Table 3 – Survey sample profile of workers by business sector

	Survey of workers sample profile	Proportion of hospitality employment*
Hotels	27%	24%
Restaurants and cafés	37%	38%
Takeaways	1%	11%
Catering/ other hospitality	18%	10%
Pubs and bars	14%	14%
Licenced clubs	1%	2%

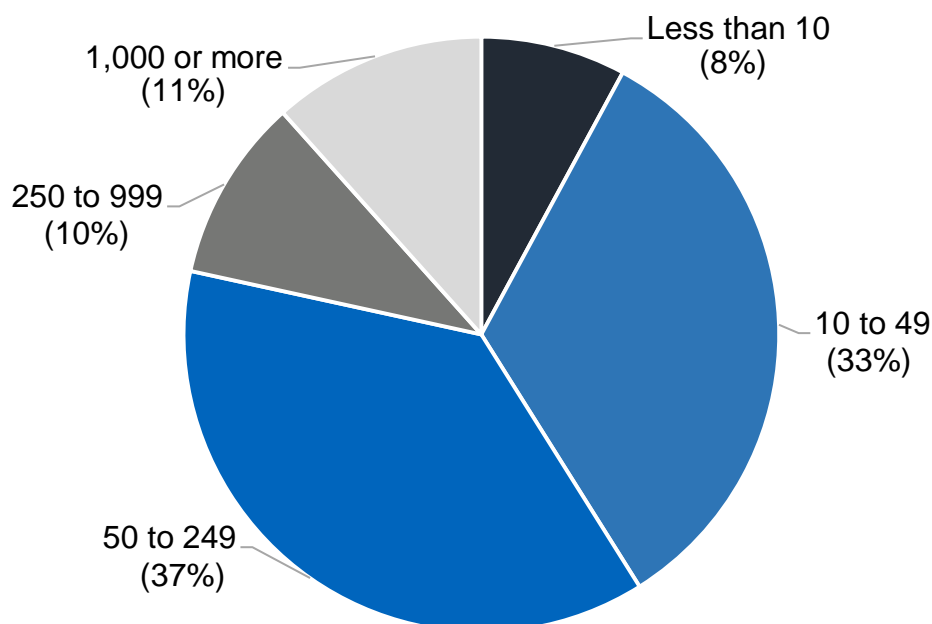
Source: Business Register and Employment Survey 2022 for Employment

*Proportions calculated using rounded data.

3.1.2 Size of organisation

Respondents to the survey worked for a range of sizes of business. 41% worked for businesses with fewer than 50 employees, 37% for businesses with 50 to 249 employees and 21% for larger businesses with 250+ employees.

Figure 2 – Size of hospitality businesses which respondents work for



Base: All workers (n=245)

Q4 Considering the whole organisation that you work for, approximately how many employees are there?

By comparison, as shown in Table 4, data on the overall workforce in the sector reports that 52% work for businesses with 0-49 staff, 13% for business with 50 to 249 staff and 35% for larger businesses with 250+ staff.

Table 4 – Survey sample profile by number of employees

	Survey of workers sample profile	Proportion of accommodation and food services employment*
0-49 employees	41%	52%
50-249 employees	37%	13%
250+ employees	21%	35%

Source: Businesses in Scotland, Scottish Government, 2023

*Proportions for registered private sector businesses only and calculated using rounded employment data.

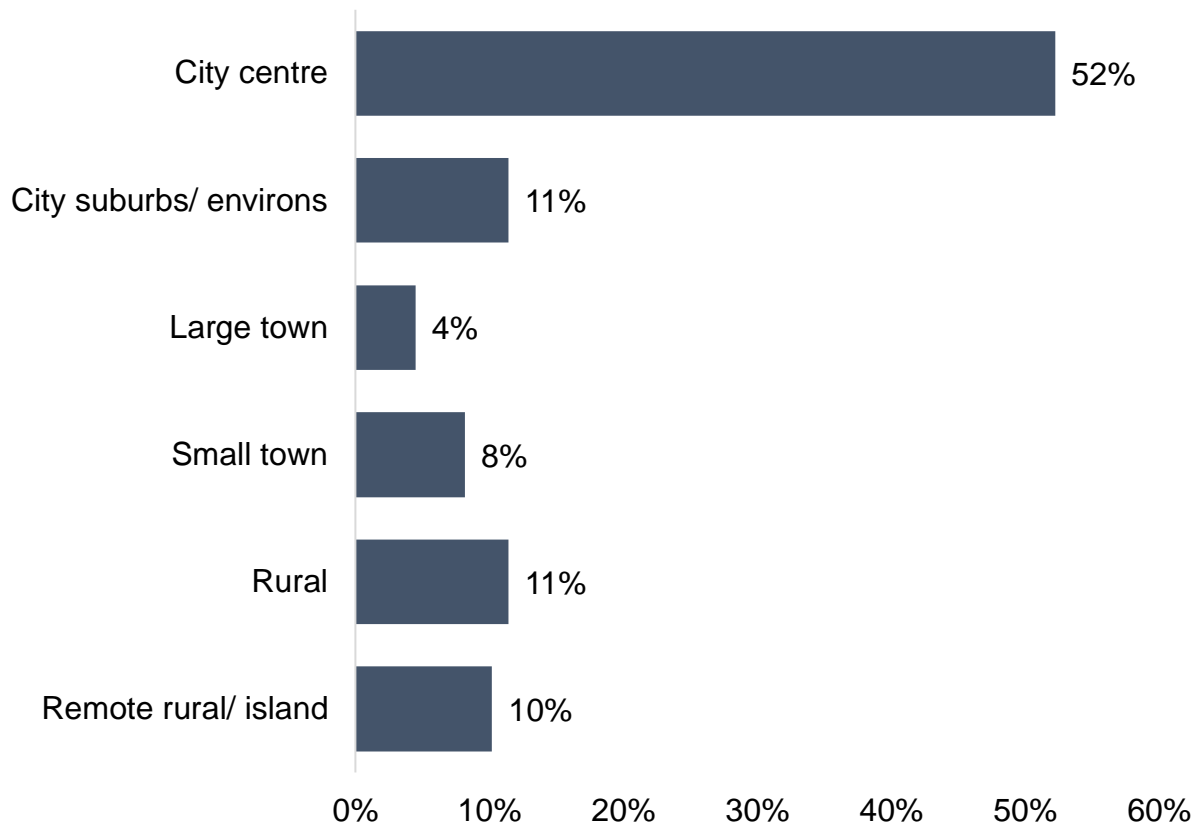
3.1.3 Location of business

The survey received responses from hospitality workers from across Scotland including people working within 28 of the country's 32 local authorities.

Reflecting the population distribution, the largest percentages worked for businesses in the central belt (27% in Glasgow and 25% in Edinburgh) but other rural and island authorities were also represented (including 6% in the Highland Council area and 2% from Argyll and Bute).

Respondents were asked to indicate which of the descriptions shown in Figure 3 best described the location of the business they worked for. While 52% worked in city centre businesses or other urban locations, a significant minority worked in rural (11%) or remote rural/ island (10%) locations.

Figure 3 – Location of hospitality business respondents work for



Base: All workers (n=245)

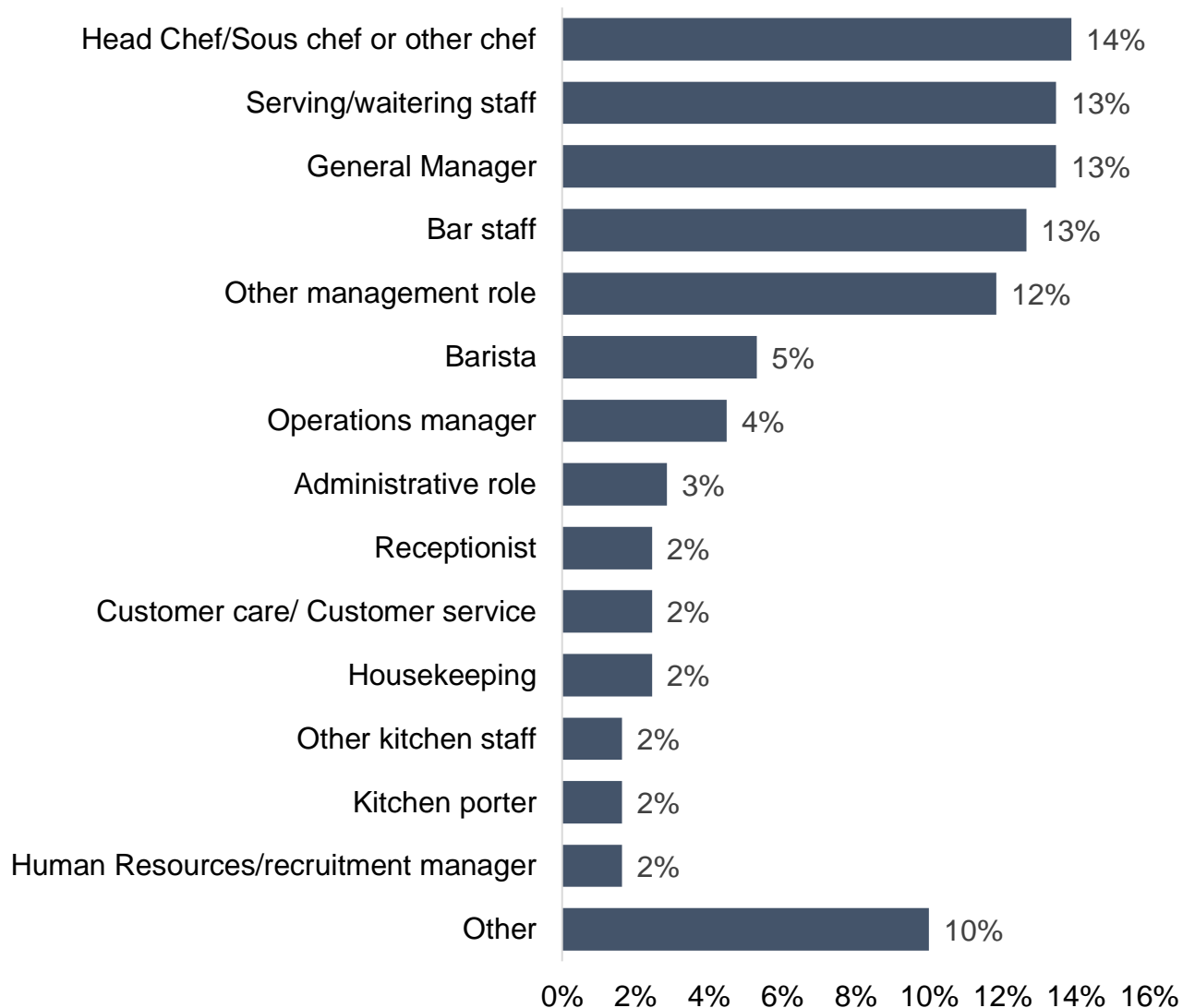
Q48 Which of the following best describes where you work?

The urban-rural distribution of the businesses that respondents worked for broadly reflected the overall distribution of workers in the sector, with 76% of survey respondents in urban areas, compared with 82% across the overall sector, and 22% of survey respondents in rural areas, compared with 18% in the overall sector (Businesses in Scotland, Scottish Government, 2023. Note that proportions are for registered private sector businesses only using rounded employment data).

3.1.4 Role in the business

As shown in Figure 4, the survey was completed by workers undertaking a wide range of both front and back of house roles.

Figure 4 – Respondents role within business



Base: All workers (n=245)

Q5 Which of the following best describes your role in the business?

50% of respondents indicated that they line manage other staff. This percentage was higher for those aged 35 and over (72%) than amongst those aged 16 to 34 (36%).

3.1.5 Experience and tenure in sector

While 9% of workers taking part in the survey had worked in hospitality for less than a year and 8% had worked in the sector for 1 or 2 years, the majority had much longer experience. 19% had worked in the sector for 3 to 5 years and 63% for longer than 5 years.

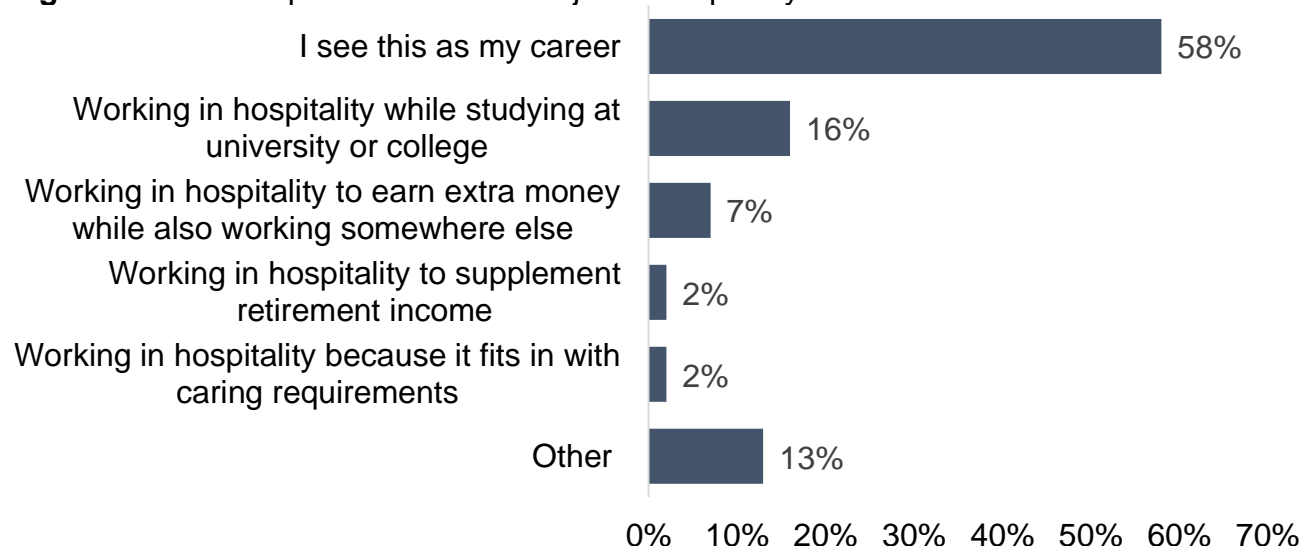
The average length of experience in the sector was 8.9 years but this varied by business type from 10.6 years amongst hotel workers to 8.3 years amongst those working for restaurants and cafés and 6.6 years amongst those working in pubs and bars¹.

During their time working in the hospitality sector, workers had on average worked for five different hospitality businesses. Taking this together with the above information on total time working in the sector, suggests that the average amount of time spent working with each employer was just under two years (21 months).

When asked which of the statements shown in Figure 5 best described how they view their job in hospitality, 58% stated they saw it as their career. This was more common amongst those who worked for a hotel (72%) compared with 52% working for restaurants and cafés, and 50% for pubs and bars. Also, 77% of workers aged 35 or over provided this response, compared with just 24% aged 16 to 24, and 57% aged 25 to 34.

Overall, 25% stated that they were working in hospitality to supplement their income while studying, retired or working in another job. This response was provided by 48% of workers aged between 16 and 24, compared with 29% aged 25 to 34, and just 9% aged 35 and over.

Figure 5 – How respondents view their job in hospitality



Base: All workers (n=245)

Q3 Choose the option which best describes how you view your job in hospitality.

¹ Note average duration working in the sector values are based on mid-points of the answer options included in the survey questionnaire.

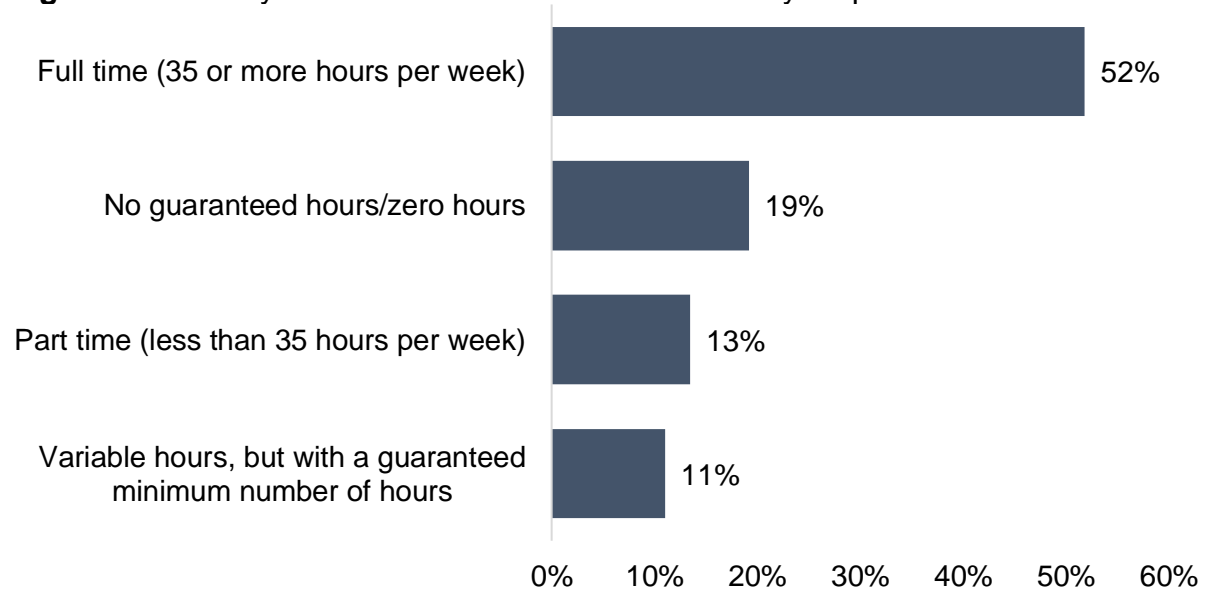
3.2 Employment and contractual status

3.2.1 Basic or contracted hours

As shown in Figure 6, while 52% of workers taking part in the survey worked on a full-time basis, 13% were employed on a part-time basis and 11% had variable hours but with a minimum guaranteed number of hours.

The remaining 19% stated that their contract had no guaranteed hours/ was a zero-hour contract. 42% of those working for pubs and bars, 44% of those working in hospitality while at university or college and 38% of workers aged 16 to 24 stated that they had a zero-hour contract.

Figure 6 – Weekly basic or contracted hours worked by respondent



Base: All workers (n=245)

Q11 What are your basic or contracted hours each week in your job at this workplace?

3.2.2 Employment situation

Asked about their current employment situation, 87% of workers stated that they were directly employed by the business they worked for while much smaller percentages had the following statuses:

- Paid through an umbrella company/ payroll company – 5%
- Paid a salary or wage by an agency – 4%
- Self-employed – 2%

Given these small percentages, the survey sample sizes for these respondents are too small to allow separate analysis amongst any of these groups.

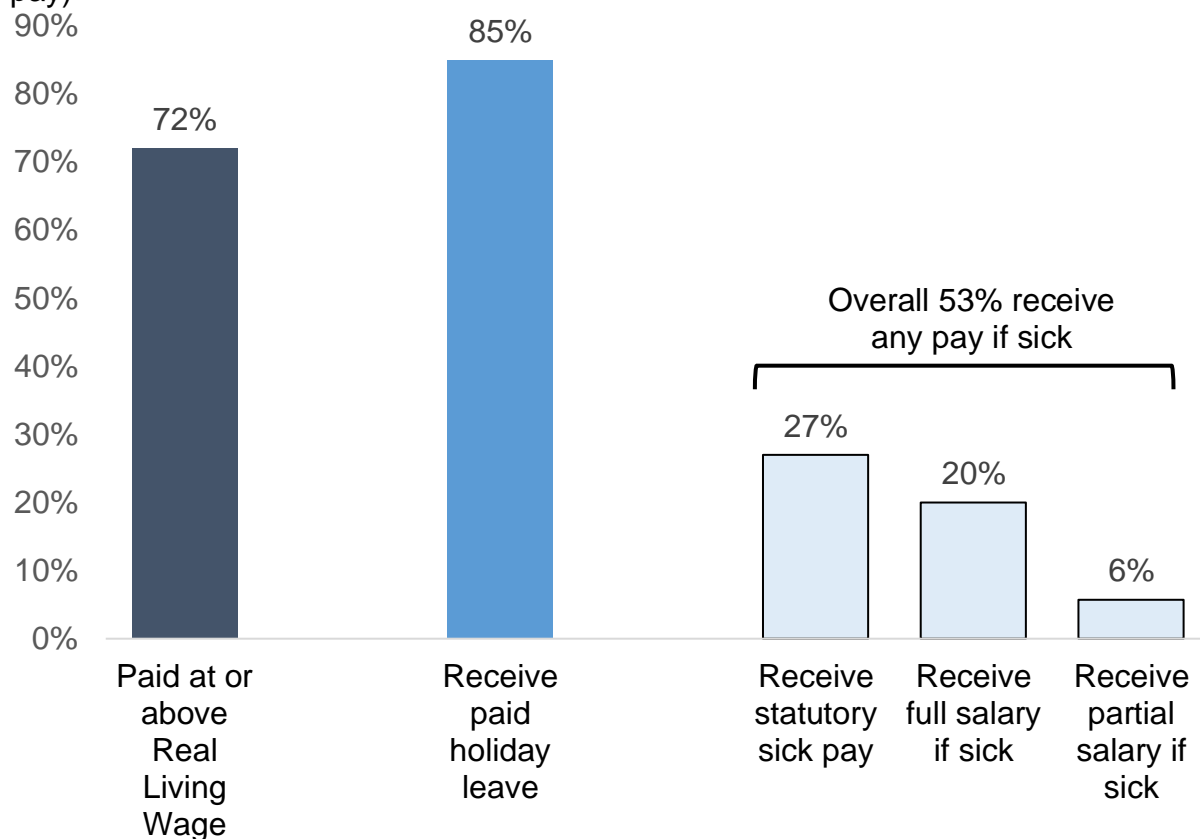
3.2.3 Type of contract

73% of respondents reported having a permanent/open-ended contract and 13% of respondents stated that they had no written contract². This was more often the case amongst staff working for a pub or bar (37%) and those working in businesses with fewer than 50 employees (23%). Analysis also compared results amongst other groups including disabled workers, member of ethnic minorities and migrant workers but there were no statistically significant differences.

3.3 Pay

Workers who were employed (i.e. excluding self-employed workers) were asked a series of questions about the pay they receive.

Figure 7 – Pay received by respondents (Real Living Wage, holiday leave and sick pay)



Base: All workers excluding those that are self-employed (n=241)

Q13 Is your hourly pay at or above the Real Living Wage?

Q14 If you are off sick, do you receive sick pay?

Q15 Do you receive annual (holiday) leave?

² While a contract is not legally required, legislation requires that employers must give employees and workers a document stating the main conditions of employment when they start work.

3.3.1 Real Living Wage

As shown in Figure 7, 72% stated that the pay they receive is at or above the Real Living Wage. Notably this is a higher level than the provisional 2023 estimate of 54% of employees in the accommodation and food services sector recorded in the Scottish Government's 2023 Annual Survey of Hours and Earnings. This difference is likely to reflect the profile of workers taking part in the survey and how this compares with all employees in the sector, as described in Section 3.1.

Groups most likely to state that they were *not* paid the Real Living Wage included those working in pubs and bars (47%), those working for businesses with fewer than 50 employees (40%), women (37%) and those aged 16 to 24 (58%).

3.3.2 Holiday leave

Almost all workers are entitled to paid holiday entitlement, This includes: agency workers; workers with irregular hours; workers on zero-hours contracts (Source: Gov.UK (2023), [Holiday Entitlement](#)). However, in the survey of workers, only 84% of respondents (excluding self-employed) stated that they received paid annual (holiday) leave while 9% stated that they did not and 6% did not know if they received this.

The groups surveyed most likely *not* to receive holiday leave reflected those less likely to be paid the Real Living Wage, including those working for pubs and bars (21%) and those on a zero-hour contract (18%) or with no written contract (31%).

3.3.3 Sick pay

Unless they are self-employed, workers who are unable to work due to illness, are likely to be eligible for statutory sick pay after three 'qualifying days' (assuming they normally earn more than £123 per week on average) (Source: Acas (2023), [Statutory Sick Pay](#)).

However, only 53% of survey respondents (excluding self-employed) stated that they would receive pay if they were off sick (20% would receive full salary, 6% partial salary and 26% statutory sick pay).

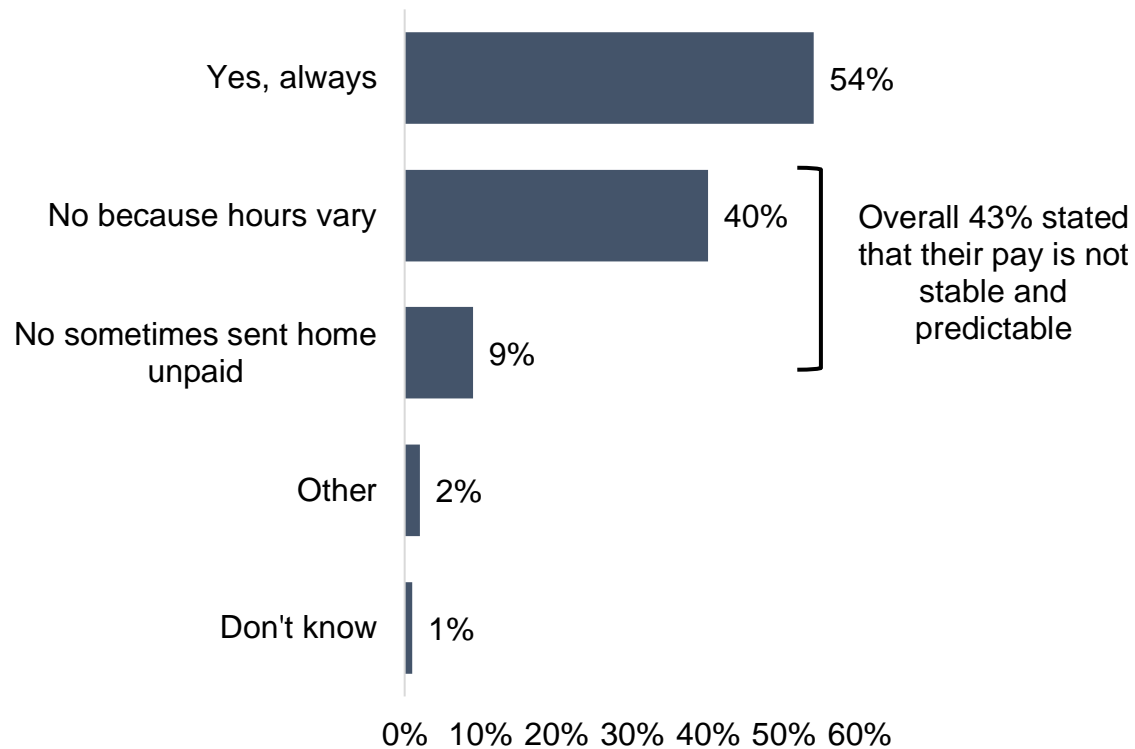
A third (33%) stated they would not receive any sick pay, while 13% did not know what they would receive.

Those working for businesses with fewer than 50 employees (46% of this group) and those on a zero-hour contract or with no written contract (both 72%) were more likely to say they would *not* receive any sick pay.

3.3.4 Stability of pay

As shown in Figure 8 below, while 54% stated that their pay was always stable and predictable, 40% stated that this was not the case because their hours varied and 9% were sometimes sent home unpaid.

Figure 8 – Stability of pay as reported by respondents



Base: All workers (n=245)

Q16 Is your pay stable and predictable?

Overall, 43% stated that their pay was *not* stable and predictable. This percentage was higher amongst those working for pubs and bars (63%) but somewhat lower amongst those working for a hotel (19%).

The percentage stating that their pay was not stable and predictable was also higher amongst those working for businesses with fewer than 50 employees (57%).

Other groups more likely to state that their pay was not stable and predictable included those aged under 35 (62%), those with a disability or long-term health condition (66%) and those on a zero-hour contract (89%).

3.3.5 Tips

74% of workers in businesses where customers usually leave tips stated that they normally received a share of tips. 23% did not normally receive a share and 3% did not know.

Whether or not a share of tips was received varied most by job role, with those *not* receiving a share more likely to line manage staff (30% vs 16% amongst those who don't line manage anyone) or be in general management or other management roles (36%).

Amongst those receiving tips, 78% stated that how tips were shared was clear. However, 19% stated that this was not clear and 3% did not know.

The proportion indicating that it was unclear how tips were shared was highest amongst those working in restaurants and cafés (30%).

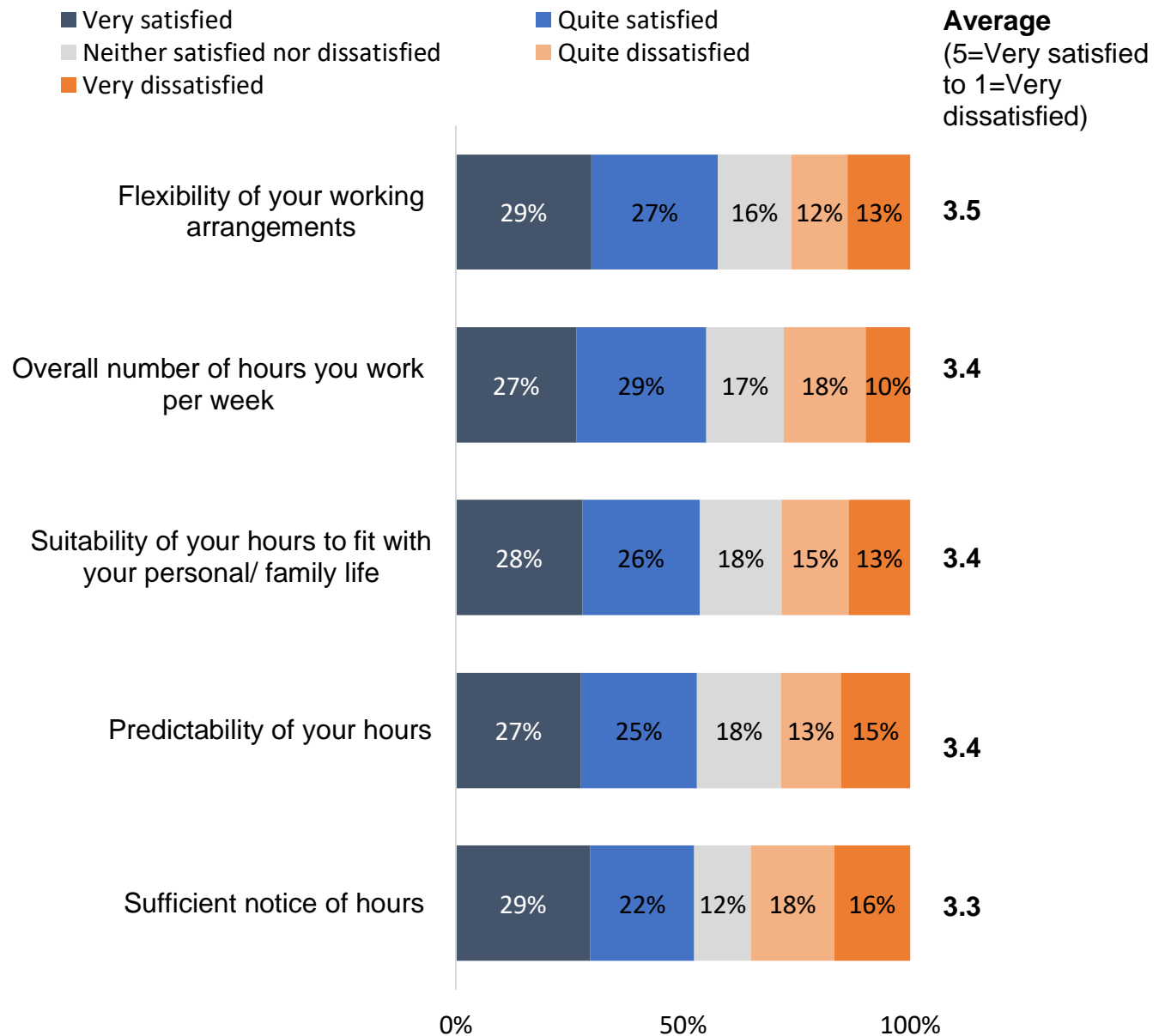
Overall, 16% of those receiving tips stated that their employer took a deduction from their tips.

3.4 Hours

3.4.1 Overall satisfaction with hours

As shown in Figure 9 overleaf, respondents were asked to rate aspects relating to their hours at work. A wide range of responses were received with just over half stating that they were very or quite satisfied with each of the aspects rated but at least a quarter either quite or very dissatisfied.

Figure 9 – Satisfaction with aspects of working hours



Base: All workers (n=245)

Q20 Thinking about your current employment, how satisfied are you with the following aspects?

Figure 9 shows the average rating given to each area based on a maximum rating of 5 for a response of ‘very satisfied’ and minimum of 1 for ‘very dissatisfied’.

Comparing this average rating across different groups of workers illustrates some variations:

Flexibility of your working arrangements (average 3.5 overall) – highest satisfaction amongst hotel workers (3.8) and those who see hospitality as their career (3.7). Lowest satisfaction amongst those working in hospitality while studying (2.9).

Overall number of hours you work per week (average 3.4 overall) – highest satisfaction amongst hotel workers (3.9) and those who work in rural or remote rural locations (3.9) but lowest amongst those working in hospitality while studying (2.8), those aged under 35 (3.2) and those on zero-hour contracts (2.8).

Additionally, of those who stated that they were not satisfied with the number of hours they worked per week, 53% said they felt they worked too many hours while 41% felt that they did not work enough hours.

Suitability of your hours to fit with your personal/ family life (average 3.4 overall) - highest satisfaction amongst those who see hospitality as their career (3.6) and those aged 35 and over (3.8). Lowest satisfaction amongst those working in a restaurant or café (3.1), those working in hospitality while studying (3.1) and those aged 16-24 (2.8).

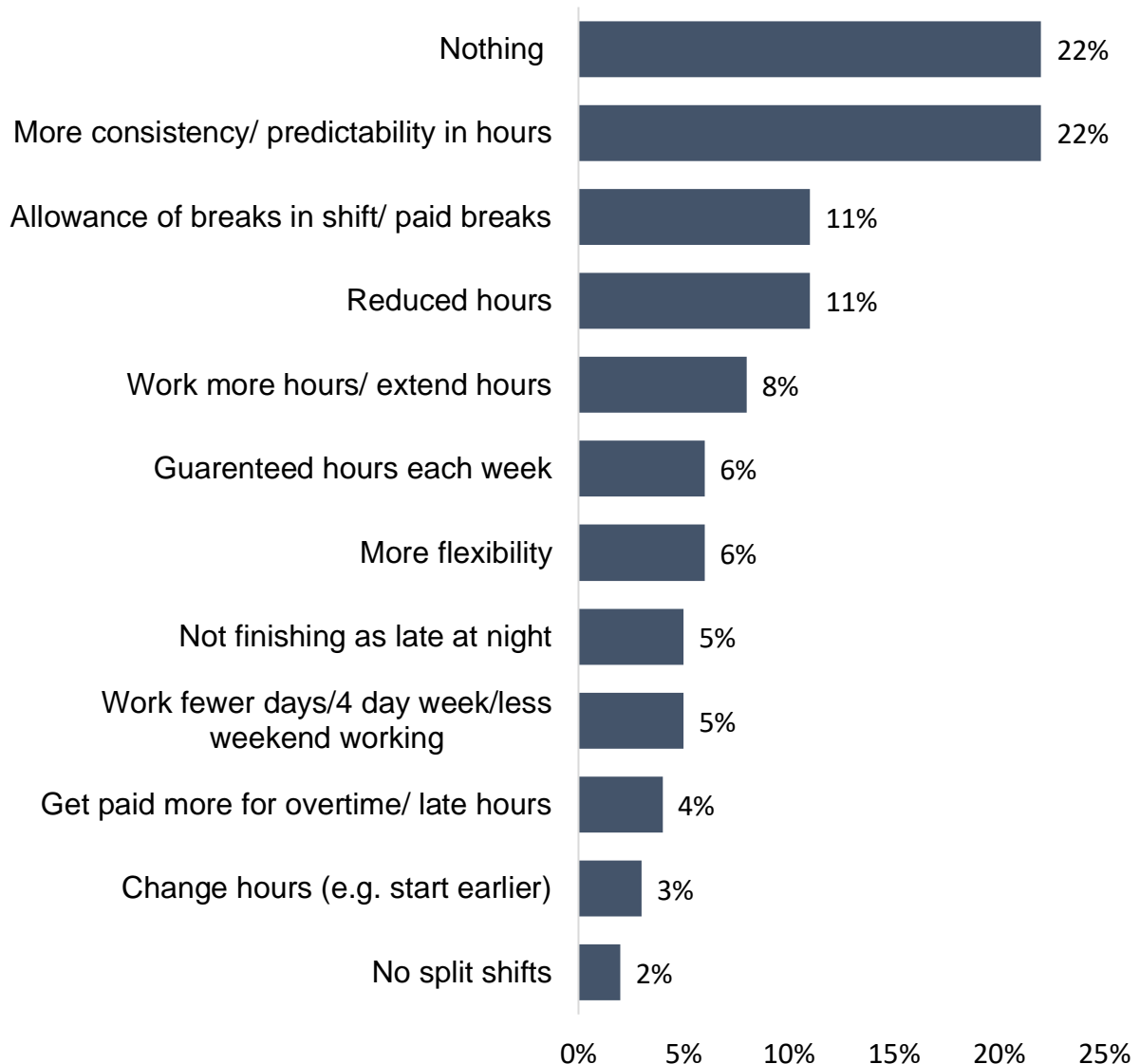
Predictability of your hours (average 3.4 overall) – highest satisfaction amongst hotel workers (3.8) and those who see hospitality as their career, but lowest amongst restaurant and café workers (3.0), those working in hospitality while studying (2.7) and those aged 16-24 (2.5).

Sufficient notice of hours (average 3.3 overall) – highest satisfaction amongst hotel workers (3.7), those who see hospitality as their career (3.7) and those aged 35 or over (3.7). Lowest amongst those working in restaurants and cafés (3.0), those working in hospitality while studying (2.5), those aged 16-24 (2.8) and those with a zero-hour contract (2.5).

As shown in Figure 10 overleaf, respondents were also asked to type in their suggestions on one thing which could be done to improve their working hours. While 22% stated that nothing could be done, the responses provided supported the ratings shown in Figure 9 with the most commonly provided answers relating to improving the consistency and predictability in hours (22%) and allowing breaks in their shifts (11%).

A small selection of the verbatim comments provided are also included.

Figure 10 – One thing survey respondents would like to change about working hours (Open ended question coded to categories. Note: respondents could only suggest one change)



Base: All workers (n=185 providing a response)

Q27 - If you could change one thing about your working hours, what would it be?

“Consistency in shift patterns and hours week to week. No more 3pm-12am then back at 7am and then no shifts for 4 days followed by the same ordeal.”³

“I would like a contract so that I am guaranteed a specific and agreed number of hours per week as minimum.”

“Slightly less hours would enable more time at home with young family.”

³ Note this example provided by a survey respondent appears to describe a breach of working time regulations which requires a minimum of 11 hours rest between shifts. [Rest breaks at work: Overview - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/topics/rest-breaks-at-work)

3.4.2 Working overtime

57% of workers work overtime/ above their contracted hours. This percentage was higher amongst those who see hospitality as their career (67%) and those working on a full-time basis (74%).

Those who worked any overtime were asked whether this time was paid, unpaid or a mix of paid and unpaid and for how many hours they usually worked overtime per week.

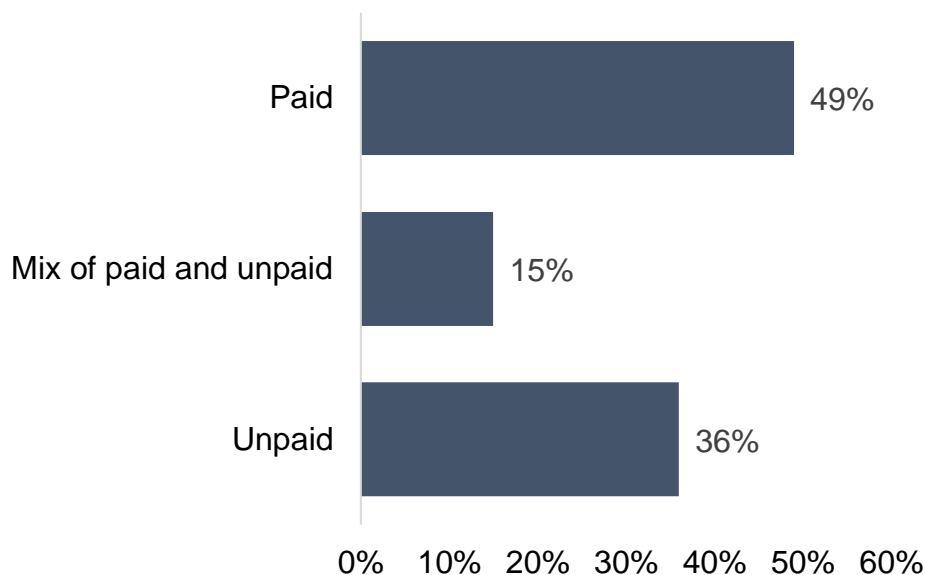
As shown in Figure 11, around 49% worked paid overtime. Groups more likely than average to work paid overtime included women (64% compared to 33% of men) and those not normally working on a full-time basis (78%).

Those who normally worked paid overtime, worked on this basis for an average of 8 hours and 22 minutes per week.

Overall, 51% either worked unpaid overtime or worked a mix of paid and unpaid overtime. A higher percentage of those who see hospitality as their career normally worked unpaid or a mix of paid and unpaid overtime (62%). The incidence of working overtime or a mix of paid and unpaid overtime was also higher amongst those who line manage staff (66%), those who work full time (65%) and men (67%).

Those who normally worked unpaid overtime, worked on this basis for an average of 8 hours and 32 minutes per week.

Figure 11 – Nature of overtime worked by respondents



Base: Workers who work overtime/ above their contracted hours (n=140)

Q23 - Is the overtime you work...

Q24 - How many hours of paid overtime do you usually work per week?

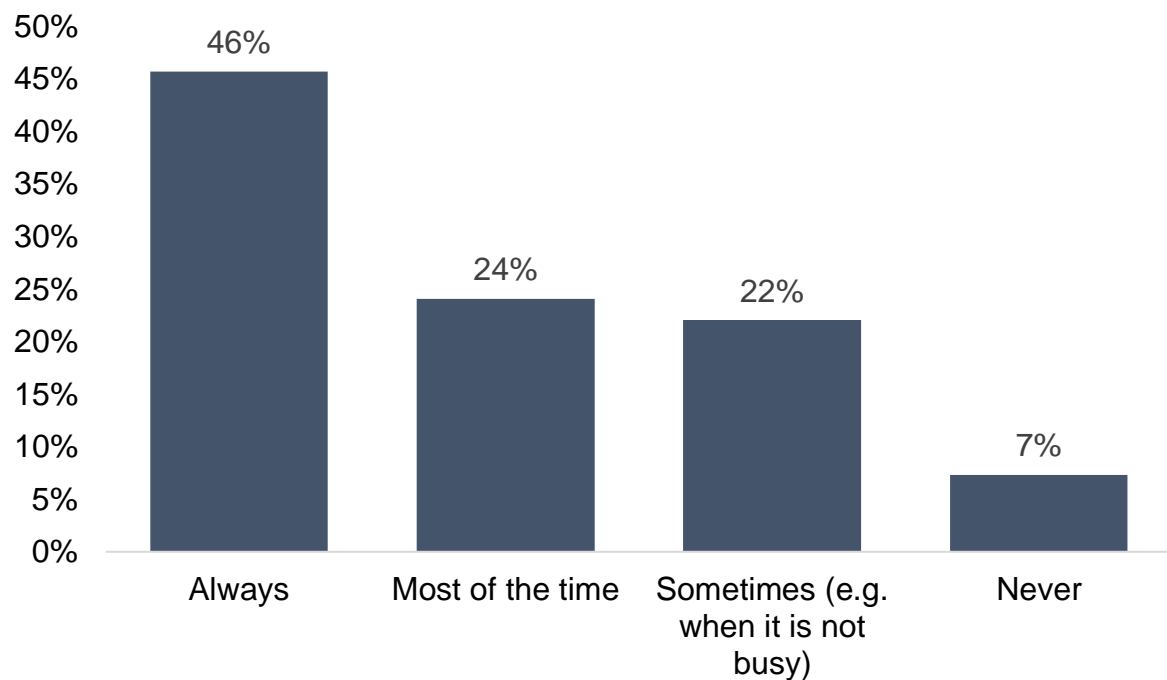
Q25 - How many hours of unpaid overtime do you usually work per week?

3.4.3 Breaks

As shown in Figure 12 while 46% of workers 'always' receive breaks, 46% receive them 'most of the time' or 'sometimes' and 7% 'never' receive breaks.

While never receiving breaks may be a reflection of working hours or contract type (e.g. with no requirement for breaks), 46% of workers reporting variable or inconsistent access to breaks suggests that there may be issues for workers in accessing their basic employment or contractual rights.

Figure 12 – How often respondents receive breaks



Base: All workers (n=245)
Q26 - Do you receive breaks?

3.5 Training and development

3.5.1 Training received

Mandatory training is training which is essential and which ensures all staff are adequately trained on safe working practices. As such, everyone in an organisation should have received appropriate health and safety training which should be refreshed regularly.

However, just 67% of hospitality workers taking part in the survey had received health and safety training during the last 12 months. This was highest in hotels (85%) and lowest in pubs and bars (45%).

58% of hospitality workers taking part in the survey had received any other type of training either paid for or organised by their employer.

3.5.2 Satisfaction with training received

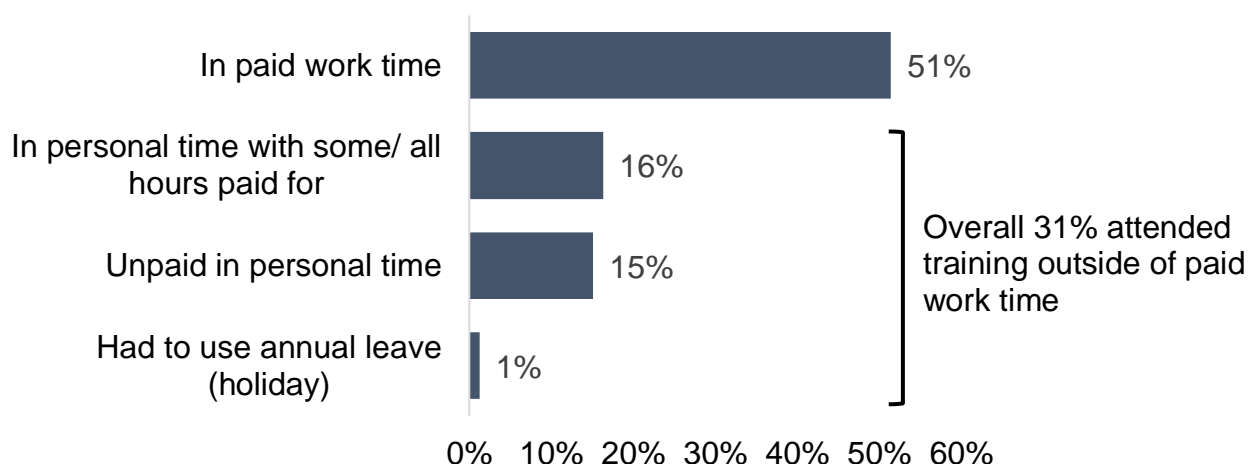
65% of hospitality workers taking part in the survey agreed that they had received enough training to be able to do their job well, but 30% did not think that they had received enough training (the remaining 5% did not know).

3.5.3 When training is delivered

As shown in Figure 13, while 51% of hospitality workers stated that they had received training during paid work time, 31% had been required to attend training in personal time. To meet fair work standards, training should be undertaken in paid for work time.

The delivery of training in personal time was most often reported by respondents working for cafés or restaurants (43%) and those on a zero-hour contract (44%).

Figure 13 – When respondents have received training



Base: All workers (n=245). Note 21% of respondents did not answer as they had not received training in the previous 12 months
Q31-When was the training undertaken?

3.6 Relationships at work

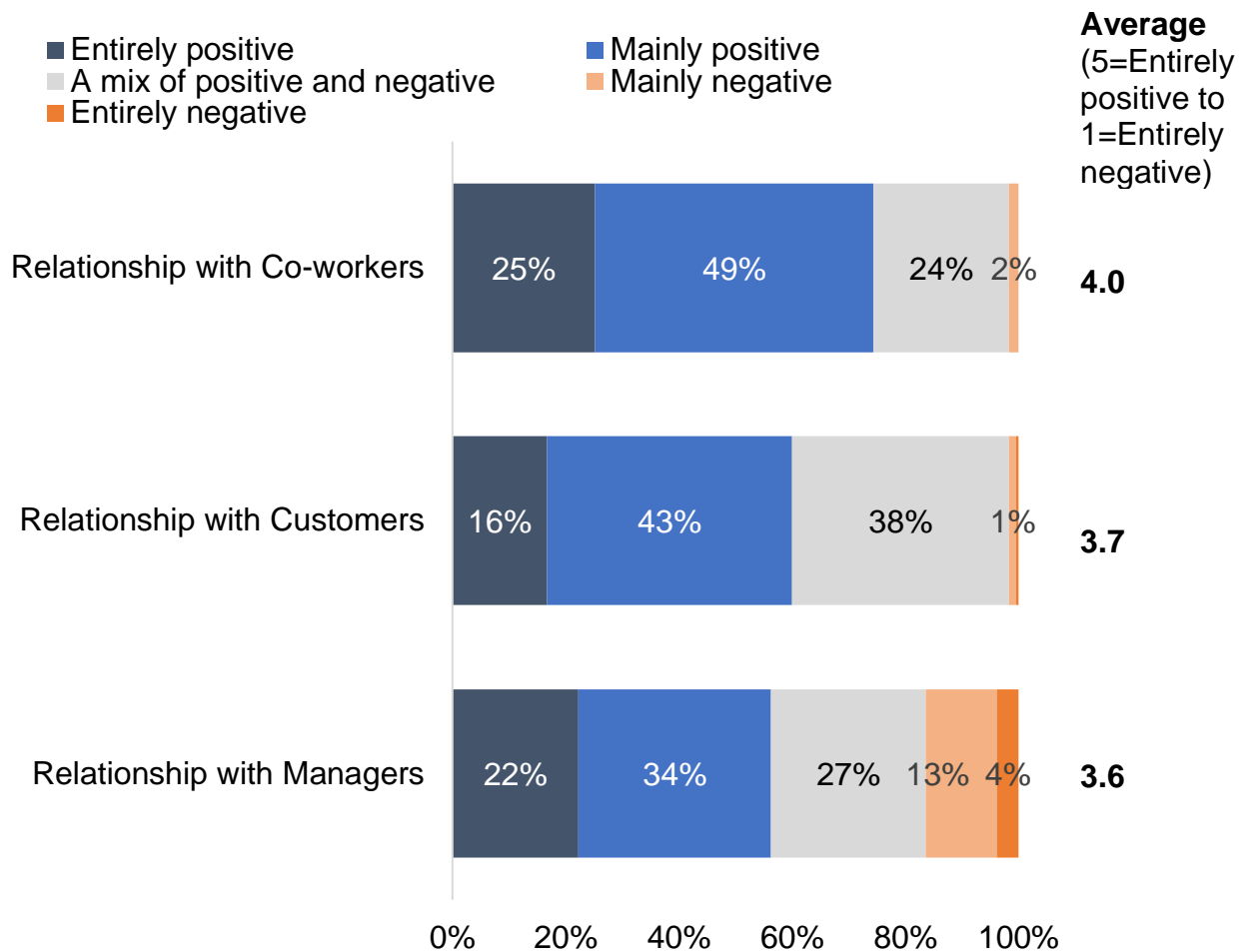
3.6.1 Rating relationships

As shown in Figure 14, workers responding to the survey were asked to rate their relationships with the people they encounter at work using a 5-point scale from 'entirely positive' to 'entirely negative'.

Overall, relationships with co-workers received the most positive ratings, and very little negativity, while relationships with managers were most varied across the

survey sample, including 17% stating that their relationships were either mainly or entirely negative.

Figure 14 – Rating of relationships with people respondents encounter at work



Base: All workers (n=245)

Q33 In general, how would you rate the relationships you have with the people you encounter at work?

An average rating was applied to responses ranging from 5 for a response of 'entirely positive' to 1 for 'entirely negative'.

Comparing this average rating across different groups of workers illustrates some variations, particularly in terms of relationships with managers which were more positive amongst those working in hotels (average 4.0) but less positive for those working in pubs and bars (3.3) and restaurants and cafés (3.4).

Relationships with managers were more positive amongst those working in hospitality as a career (3.8 vs 3.1 amongst those working while studying) and those aged 35 or over (3.9 vs 3.3 amongst those aged 16 to 34).

3.6.2 Bullying and harassment

As shown in Figure 15, 42% of workers taking part in the survey had personally experienced bullying or harassment while at work and 56% had witnessed bullying or harassment.

Figure 15 – Whether respondents experienced or witnessed bullying or harassment in the last 12 months



Base: All workers (n=245). Multiple responses could be provided so results total more than 100%.

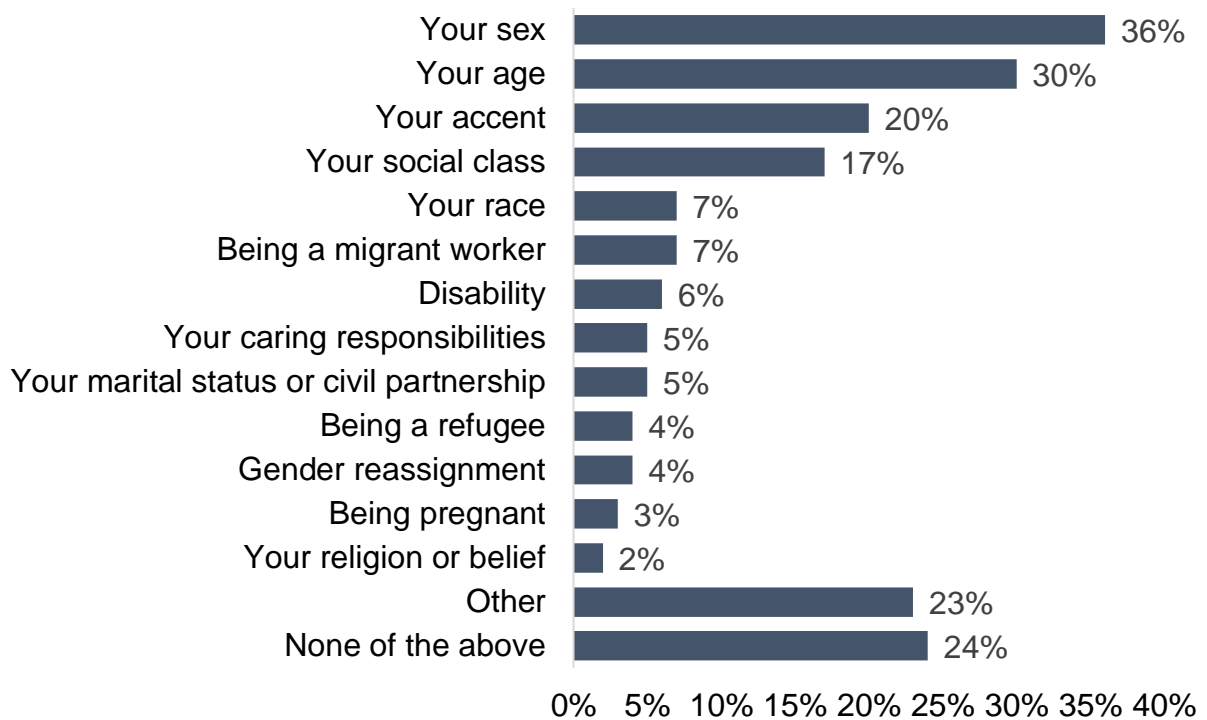
Q34 During the last 12 months, have you personally experienced bullying or harassment from any of the following people?

Q35 During the last 12 months, have you witnessed any of your co-workers being bullied or harassed at work?

Those in the youngest age groups were more likely than older survey respondents to have personal experiences of bullying and harassment, with 55% aged 16 to 34 reporting issues, compared with 30% of those aged 35 or over.

Respondents who had personally experienced bullying or harassment were asked if this related to any of the areas listed in Figure 16. The largest percentages stated that the issues they had experienced related to their sex, age, accent or social class. Also, 23% stated that the bullying or harassment related to factors other than those listed.

Figure 16 – What bullying or harassment experienced by respondents related to



Base: Workers who had experienced bullying or harassment in the last 12 months (n=103).

Multiple responses could be provided so results total more than 100%.

Q36 Was any of the bullying or harassment you personally experienced from customers, co-workers or managers related to any of the following?

47% of those who had either experienced or witnessed any issues of bullying or harassment in the last 12 months had reported these issues, while 42% had not reported them (the remaining 11% did not know or preferred not to say).

The most common reasons given for *not* reporting the issues were:

- A lack of anyone available to report the issues to (e.g. no HR department, no one more senior than the managers the issues related to)
- An expectation that no action would be taken so there was no point reporting the issues
- A general acceptance of the issues, being 'used to it'
- A feeling that reporting issues would lead to dismissal or make working relationships worse
- A preference to deal with the issues personally rather than reporting them

A selection of the reasons provided for not reporting issues, in the words of respondents, are provided below.

"Because I will be fired or ignored."

"Fear of being bullied further or losing hours."

"I didn't feel like anything could be done about it - it would just make my work life more difficult."

"Report to who? The bullying came from management. No HR department."

"Our workplace has no HR department and our managers are either not present in the workplace or don't care enough to do anything, and oftentimes would blame us."

Amongst those who *did* report the bullying and harassment they had experienced or witnessed, 30% stated that the issue had been dealt with effectively, 36% that it was dealt with, but not effectively, and 25% stated that it was not dealt with at all (the remaining 9% did not know or stated that they would prefer not to say).

3.7 Employee voice

3.7.1 Opportunities to influence decisions

Overall, 62% of hospitality workers taking part in the survey have a channel through which they can have their voice and opinion listened to at work. However, 29% stated that this was not the case, while the remaining 9% either did not know or preferred not to say.

Only 43% of hospitality workers agreed that they felt that their voice and the collective voice of their co-workers was taken into account when decisions were made at work. This suggests that in many cases while a voice channel exists, its effectiveness feels limited to workers.

Respondents working in hotels (61%), those working full time (59%) and those who manage other staff (56%) were more likely to feel that their voice was taken into account when decisions were made.

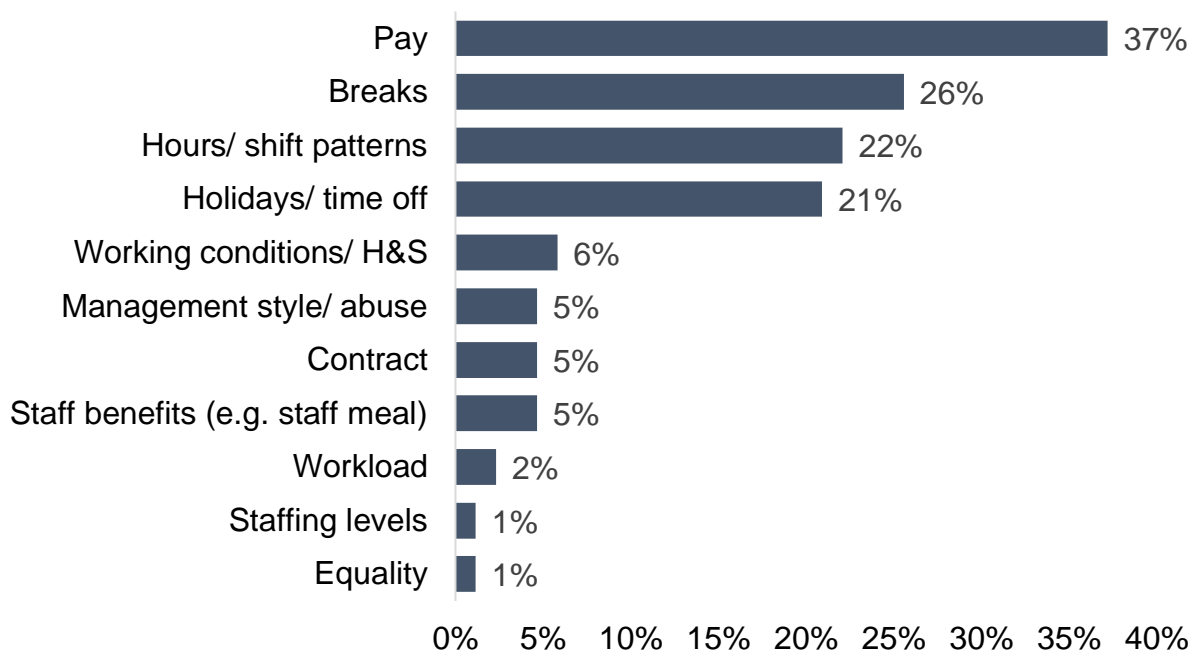
However, just 31% of those working in restaurants and cafés, 31% of those aged under 35, and 13% of those working in hospitality while studying, felt their voice was taken into account in decisions.

3.7.2 Challenging employer about rights at work

46% of hospitality workers taking part in the survey had ever had to challenge their employer about rights at work.

As shown in Figure 17, this was most commonly in relation to pay, breaks, hours or shift patterns and holidays.

Figure 17 – Areas respondents have had to challenge employer over



Base: Workers who challenged their employer over rights at work (n=86).

Multiple responses could be provided so results total more than 100%.

Q43 - If you can, please give further details on the occasion(s) when you had to challenge your employer.

A selection of the responses provided when respondents were asked to give details on situations when they had to challenge their employer are provided below.

“Challenged about working a set number of hours each week when I have no contract to state how many hours I do.”

“During the pandemic, there was a massive struggle with pay and holidays. Tips are a constant issue as they are not split fairly.”

“I was hired part time due to being a single parent and full time college student but employer was putting me in full time/5 days a week, the other two days I was in college and I asked for my rota to be reduced to part time hours and he told me no that it’s not good for his business.”

“The right to breaks during long shifts and the compelling through guilt trips to stay after shift end owing to the organisation not having enough staff on shift.”

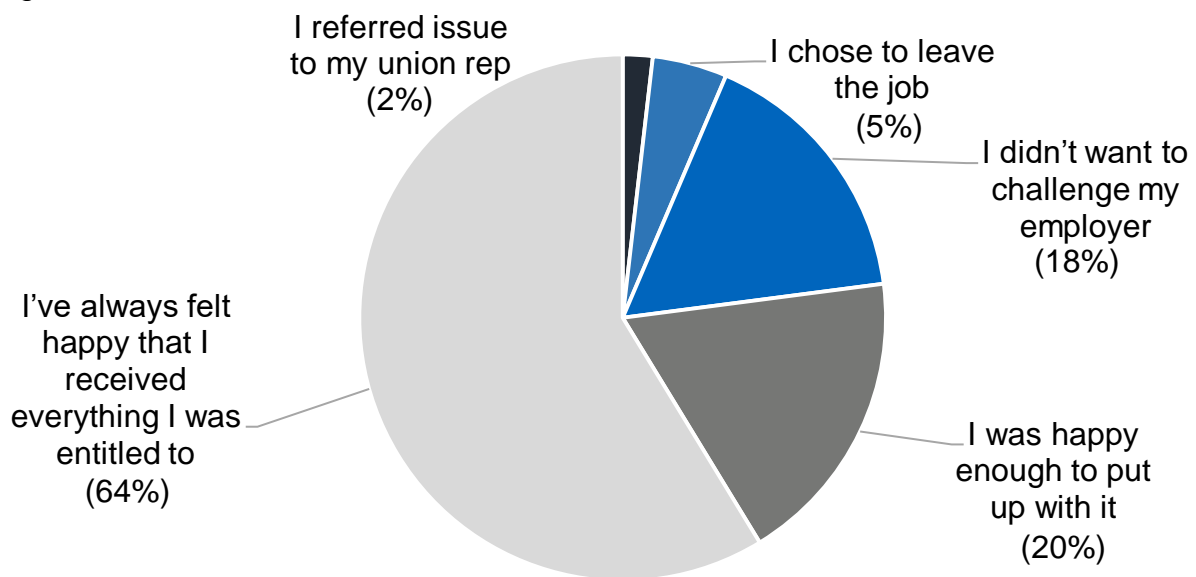
“We always receive our wages late and we have tried to ask what our official payday is but the managers refused to tell us and got angry at us for asking. We have also discovered our managers have been taking our tip money and we are about to challenge them on this.”

“As live-in I pay more rent than people with nicer rooms because of them being friends with management, tips and service charge are only paid in January and not paid if you leave before then.”⁴

The 46% of workers who had *never* challenged their employer about their rights at work were asked to specify why this was the case.

As shown in Figure 18, 64% stated that this was because they had always felt happy that they received everything they were entitled to, 20% were happy to put up with it and 18% did not want to challenge their employer.

Figure 18 – Reasons given by respondents for never challenging employer about rights



Base: Workers who have never challenged their employer over rights at work (n=112)

Q44 You said that you've never had to challenge your employer about your rights whilst working in the hospitality sector. Which of the following statements best describe why this is the case?

⁴ From 2024 new legislation will require tips to be shared on an at least monthly basis.

3.7.3 Long term illness, disabilities and health conditions

32% of hospitality workers responding to the survey stated that they have a physical or mental health condition or illness lasting or expected to last 12 months or more indicating that they meet the Equality Act definition of having a disability. This proportion is somewhat higher than recorded amongst the overall proportion of adults in employment in Scotland who are Equality Act disabled (17%) or recorded in Scottish Government data relating to the proportion of adults employed in the Accommodation & Food Services sector who are Equality Act disabled (14%) (ONS Annual Population Survey, Jan – Dec 2022).

Furthermore, when shown a list of impairments and conditions, 38% selected one or more of those shown with the largest percentages indicating that they have a mental health condition (24%) and/or a learning difficulty (18%).

- Making adjustments to support work

Those respondents who indicated that they were disabled were asked to what extent, if any, their employer had made reasonable adjustments to support their work (The Equality Act 2010 requires employers to make reasonable adjustments):

- 49% indicated that they *hadn't asked* their employer for any adjustments
- 15% had asked their employer and *all reasonable adjustments had been made*
- 18% had asked their employer and *some adjustments were made*, but there are more that would benefit them
- 14% had asked their employer but they refused to make adjustments
- The remaining 4% preferred not to answer.

3.7.4 Trade union membership

20% of workers responding to the survey were members of a trade union. This is considerably higher than trade union membership for employees in the accommodation and food service sector at the UK level, which is 3.2% (Labour Force Survey, Oct - Dec 2022, Department for Business and Trade).

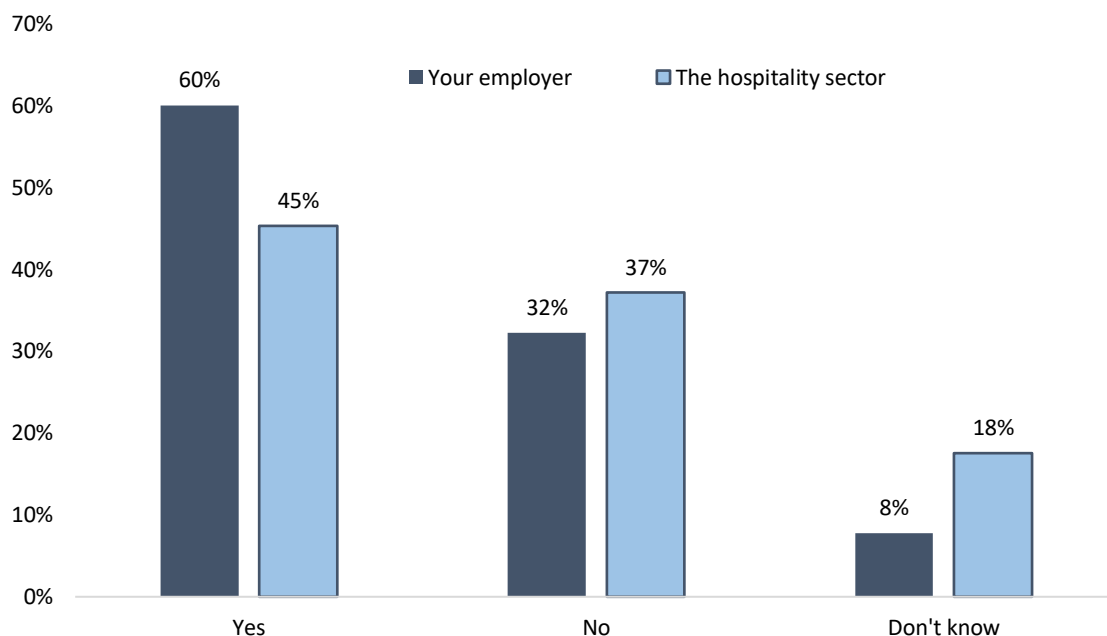
3.8 Overall satisfaction with employment in hospitality

The final questions in the survey of workers asked whether, all things considered, they would recommend their employer and the wider hospitality sector as a place to work to family or friends.

As shown below, 60% would recommend their employer but only 45% would recommend the overall hospitality sector.

The proportions agreeing that they would recommend the sector varied by type of business, ranging from 58% of hotel workers to 47% of those working in pubs and bars and 34% of those working in restaurants and cafés.

Figure 19 – Whether respondents would recommend current employer/ the hospitality sector to family or friends as a good place to work



Base: All workers (n=245)

Q45 All things considered, would you recommend your employer to family or friends as a good place to work?

Q47 All things considered, would you recommend the hospitality sector to family or friends as a good place to work?

Some of the specific comments provided by respondents were as follows:

Responses from those who would recommend their place of work

“The environment is a lovely place to be. Not had any issues with anyone that I work with and I have received the most amount of training in any job.”

“I consider myself lucky working for my employer as care, support, trainings, meetings and well-being are regularly checked from above to all team members. Difficult to find these days.”

“Good work-life balance considering hospitality industry. Good pay, especially for low- skilled employees.”

“Very personal relationship with owners, they’ve gone out of their way in their personal lives to accommodate me during medical emergencies.”

“Large organisation with trade union recognition, good for the most part and when there are issues they can usually be resolved quickly and amicably.”

Responses from those who would not recommend their place of work

“Absolutely no respect for staff and no communication or training, just being abused for not doing things as expected.”

“They don’t listen to us and continue to push constant growth without supporting us. We work under our contracts and it’s just accepted. The place is always run in a skeleton team that is burning out staff.”

“I don’t like hospitality anymore and studying and working is very tough. Every place is not worth the effort to work ...managers are the real problem sometimes.”

“Very unpleasant place to work. Bad atmosphere coming from management, unreliable breaks, bad pay, we don’t get a share of the tips even though were told we will, unpredictable rotas, no training but you are expected to know how everything is done from day 1, targeted harassment of a few of my co-workers and feeling powerless about it.”

“I was lied to at my interview so that I would take the job. Everything I was told was a lie. I get my rota on a Saturday night for the Monday coming. I don’t get my contracted hours. I get sent home early all the time and get shifts cancelled very last minute.”

4 Results of survey of businesses

This chapter details the key findings from the survey of businesses with sections describing the profile of businesses responding to the survey, challenges faced in running the business, contracts, pay, hours and benefits, training and development, employee voice, and grievances and discipline.

4.1 Profile of businesses

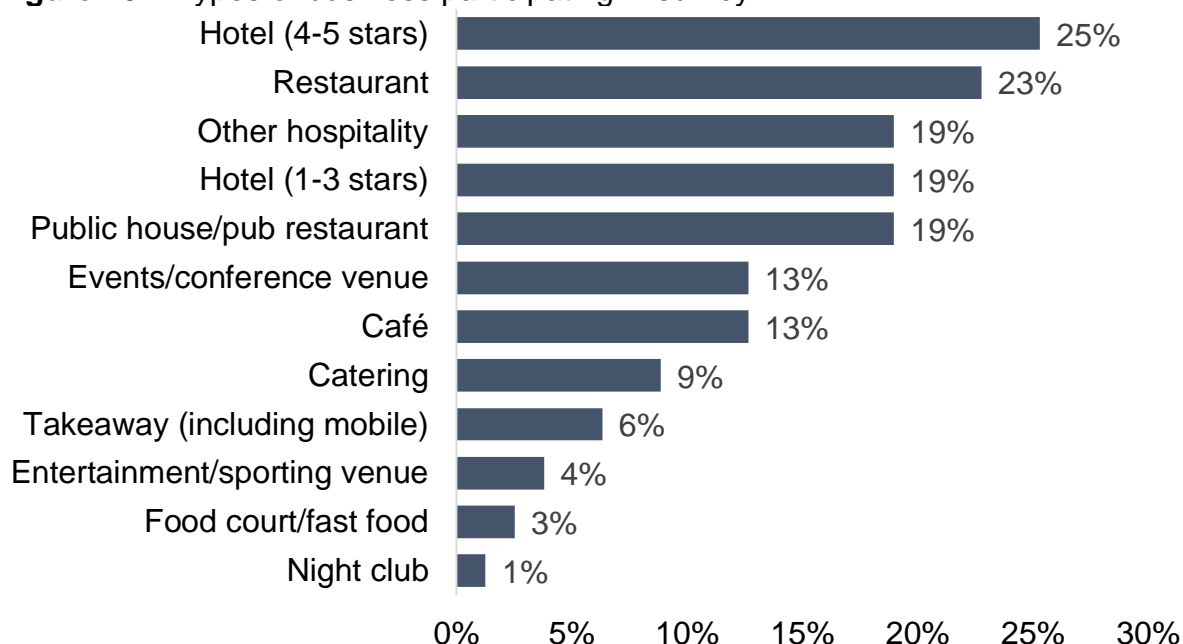
Overall, 79 hospitality businesses responded to the survey. The following sections provide details on the profile of these businesses including business type, size and location.

As explained in Chapter 2, the sample sizes are too small to report comparisons between individual types of businesses at a statistically significant level.

4.1.1 Nature of business

As shown in Figure 20, a broad mix of types of hospitality business took part in the survey. 44% were hotels (including all star gradings), 23% were restaurants and 19% were pubs.

Figure 20 – Types of business participating in survey



Base: All businesses (n=79).

Multiple responses could be provided so results total more than 100%.

Q1 Which of the following best represents the nature of your business?

Comparing the sample profile with data on the profile of all hospitality businesses in Scotland (see Table 4) illustrates an under-representation of takeaways, while coverage of hotels was higher in the survey sample. The representation of other

types of businesses in the survey largely reflected their proportions in the wider sector.

Table 4 – Survey sample profile by business type

	Survey of businesses sample profile	Proportion of hospitality businesses in Scotland*
Hotels	44%	12%
Restaurants and cafés	34%	35%
Takeaways	6%	29%
Pubs and bars	19%	16%
Licenced clubs	1%	3%

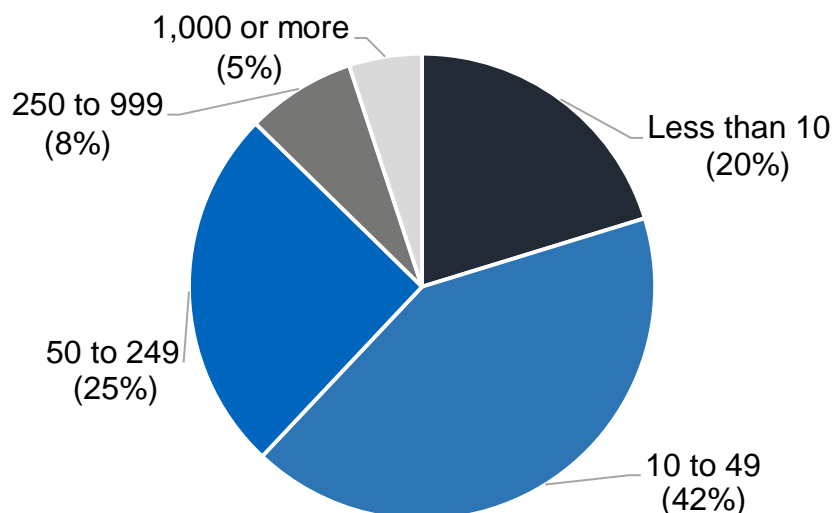
*Source: ONS Businesses – Inter-Departmental Business Register 2023

4.1.2 Size of business and ownership

62% of businesses that took part in the survey employed less than 50 staff, 25% employed between 50 and 249 staff and 13% employed 250 or more staff.

By comparison, Scottish Government data indicates that a much larger percentage of all businesses in the sector (97%) have fewer than 50 employees, while 2% have between 50-249 employees and 1% employ 250 or more (Source: Businesses in Scotland, Scottish Government, 2023. Note: proportions for registered private sector businesses only and use rounded number of businesses).

Figure 21 – Size of businesses participating in survey by numbers of staff

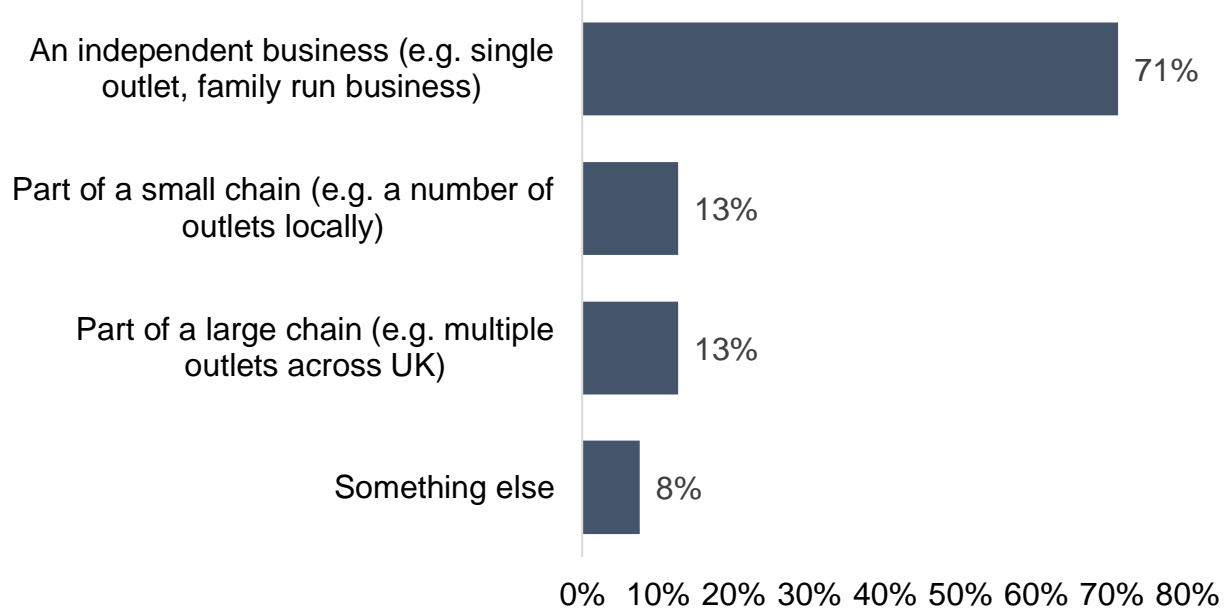


Base: All businesses (n=79)

Q6 Approximately how many staff does your business currently employ?

As shown in Figure 22, the sample also contained a mix of independent hospitality businesses and businesses which were part of a small or large chain.

Figure 22 – Whether responding businesses are part of a chain or independent



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

Q4 Which of the following best describes your business?

Also, 80% of the businesses taking part in the survey stated that they were operating in the private sector, 8% were in the third sector, 6% were in the public sector and 6% stated that their business was in a different sector or that they didn't know.

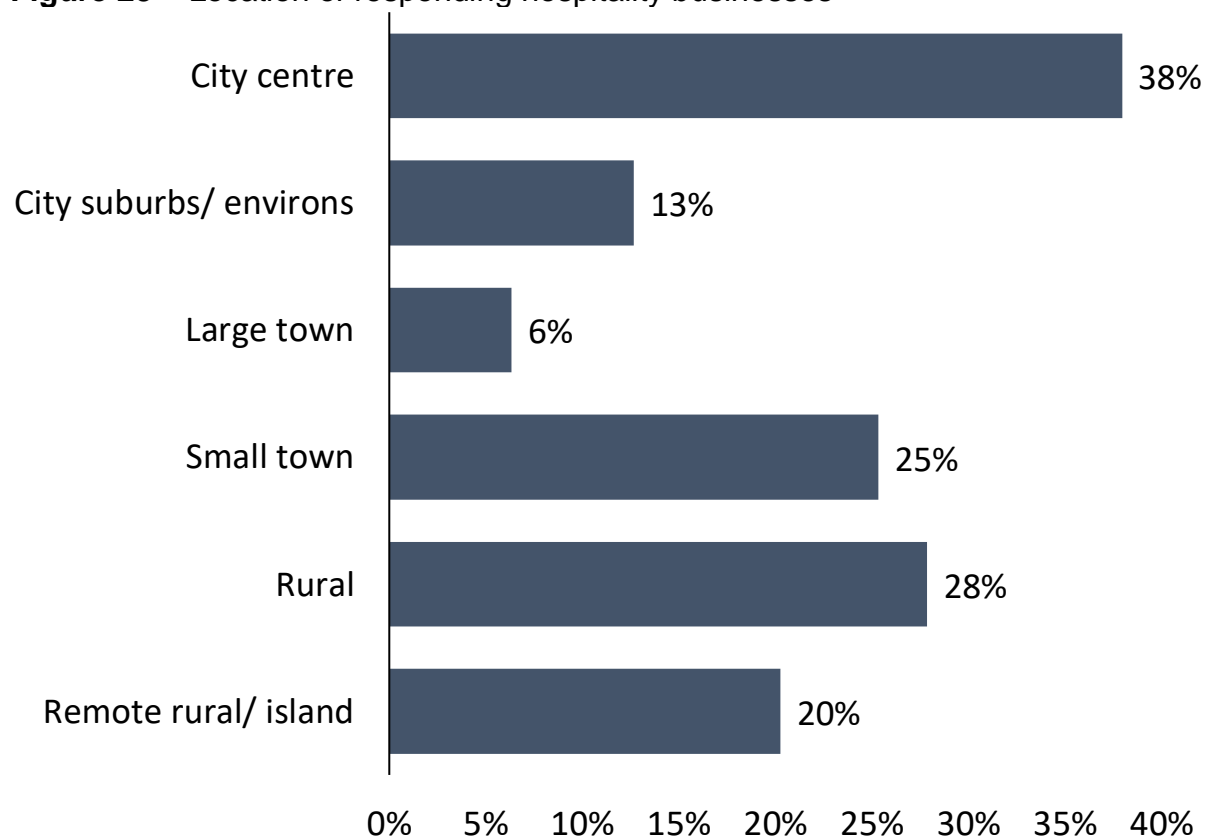
4.1.3 Location of business

Responding businesses were asked to indicate where their business operated. More than one option could be selected as some operated multiple premises/outlets.

Overall, the 79 participating businesses had premises in 26 of Scotland's 32 local authority areas with the largest percentages operating premises in Edinburgh (32%), Glasgow (14%), the Highlands (11%) and Aberdeen (9%).

Also, the businesses operated in a mix of urban and rural locations including 20% in areas they classified as remote rural or island.

Figure 23 – Location of responding hospitality businesses



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

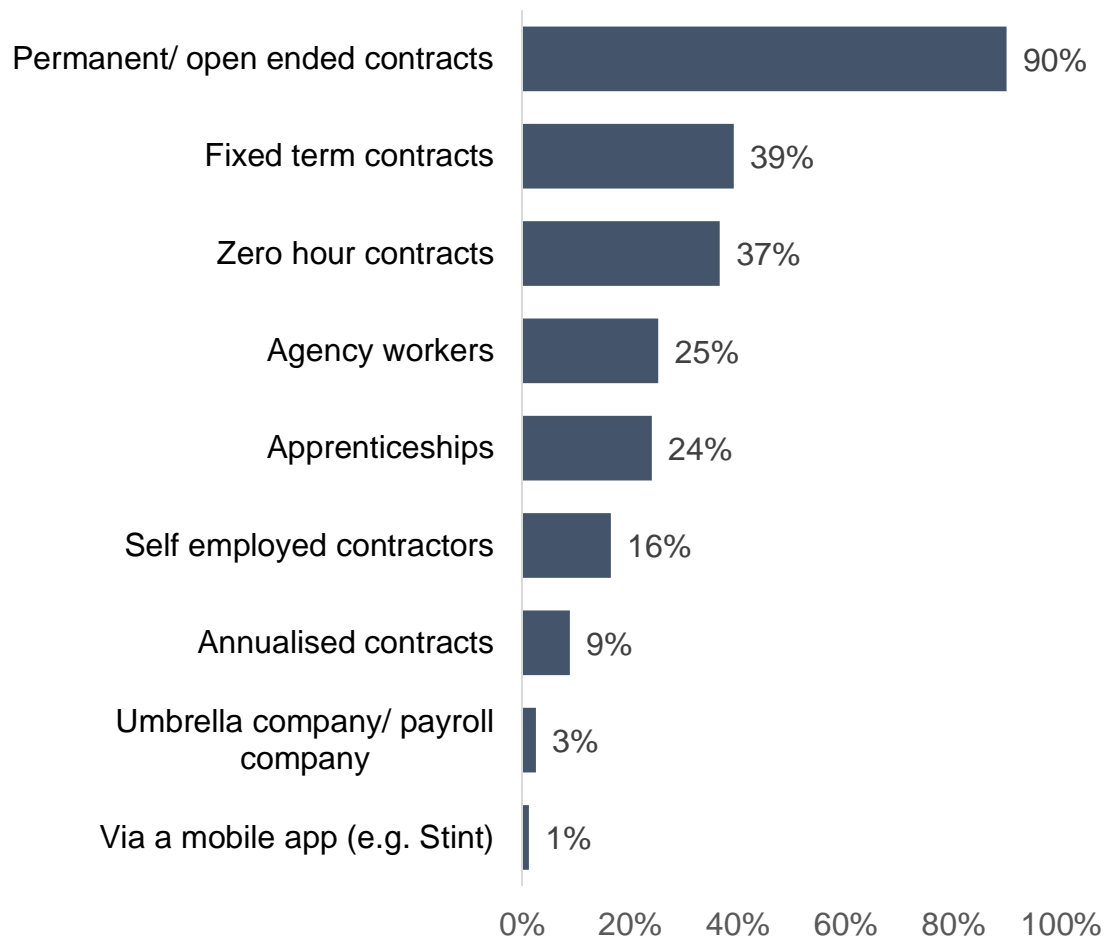
Q5 In which of the following types of location is your business based?

4.2 Contracts

Businesses were asked to specify the types of contractual arrangements in place in their organisation. As shown in Figure 24, many businesses are using a variety of types of contract, 90% indicated that they had permanent/ open ended contracts in place, while 39% used fixed term contracts and 37% used zero-hour contracts.

Overall, 25% used agency workers but this increased to 49% amongst hotels.

Figure 24 – Types of contractual arrangements in place



Base: All businesses (n=79)

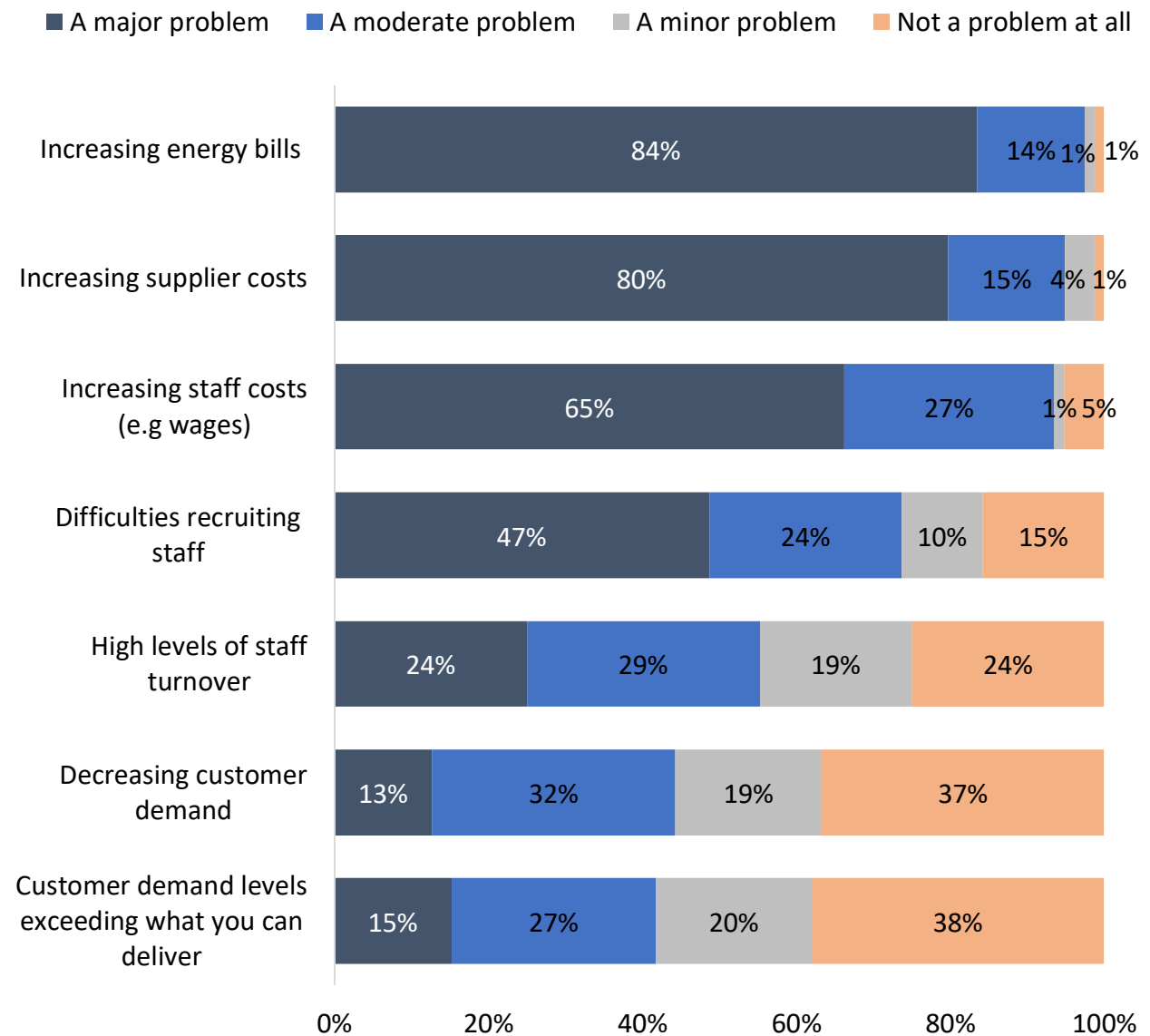
Multiple responses could be provided so results total more than 100%.

Q12 What type(s) of contractual arrangements are used at your organisation?

4.3 Challenges faced

Respondents were presented with the list of potential challenges shown in Figure 25 and asked to what extent, if any, each of these were problems for their businesses.

Figure 25 – Challenges faced by responding hospitality businesses



Base: All businesses (n=79)

Q7 - To what extent, if any, is your business experiencing any of the following problems?

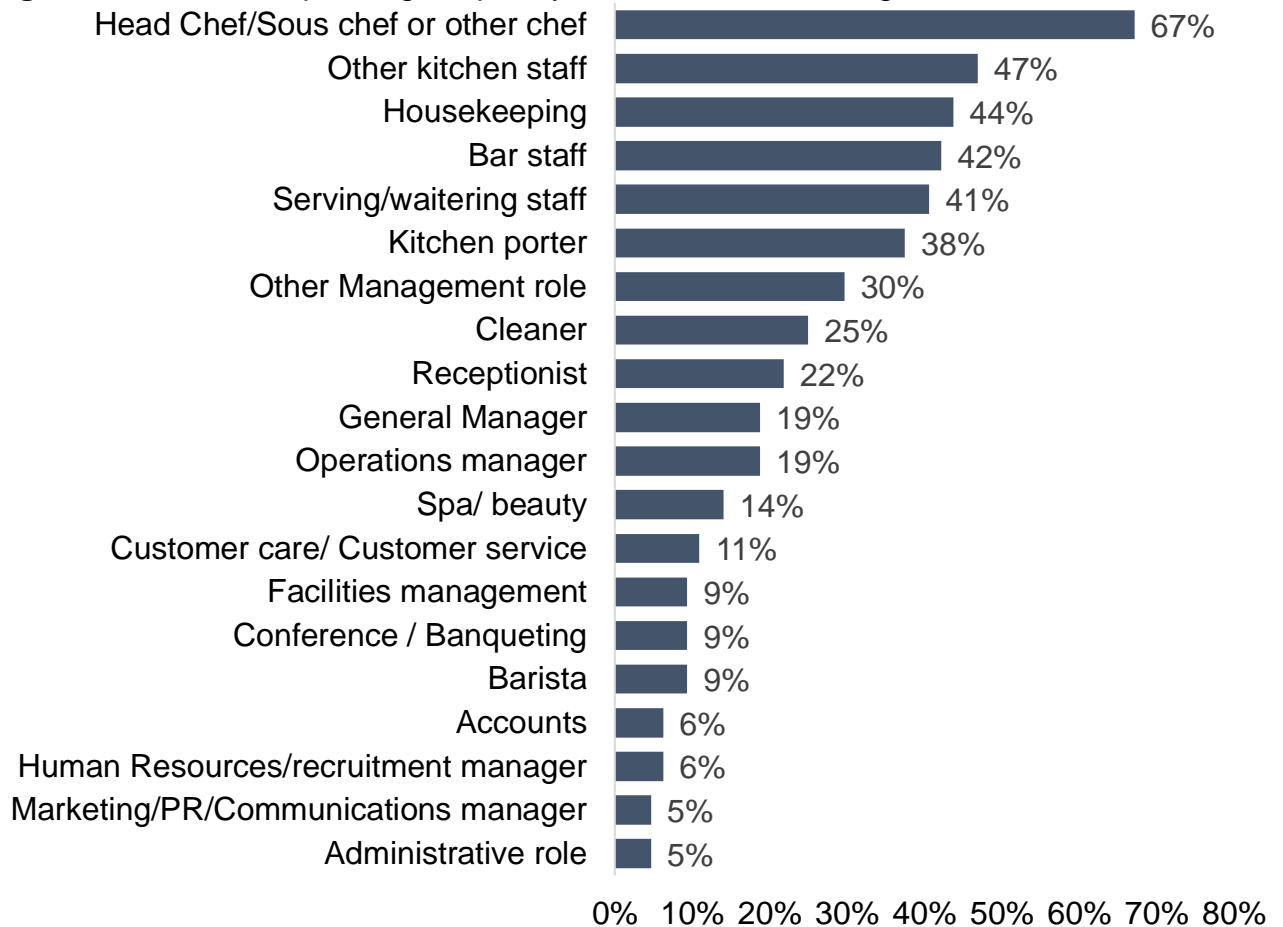
The most significant issues rated as “a major problem” or “a moderate problem” by the vast majority of businesses were increasing energy bills (98%), increasing supplier costs (95%) and increasing staff costs (92%).

4.2.1 Details and impacts of recruitment challenges

The 71% of businesses that indicated they were experiencing problems with staff recruitment were asked a series of further questions regarding these difficulties.

As shown in Figure 26, the roles which businesses were most often finding difficult to recruit were in the kitchen, in particular chefs, but also other kitchen staff and kitchen porters. However, a wide range of other front and back of house roles were also frequently identified as difficult to recruit.

Figure 26 – Roles responding hospitality businesses are finding difficult to recruit



Base: Businesses experiencing recruitment challenges (n=64)

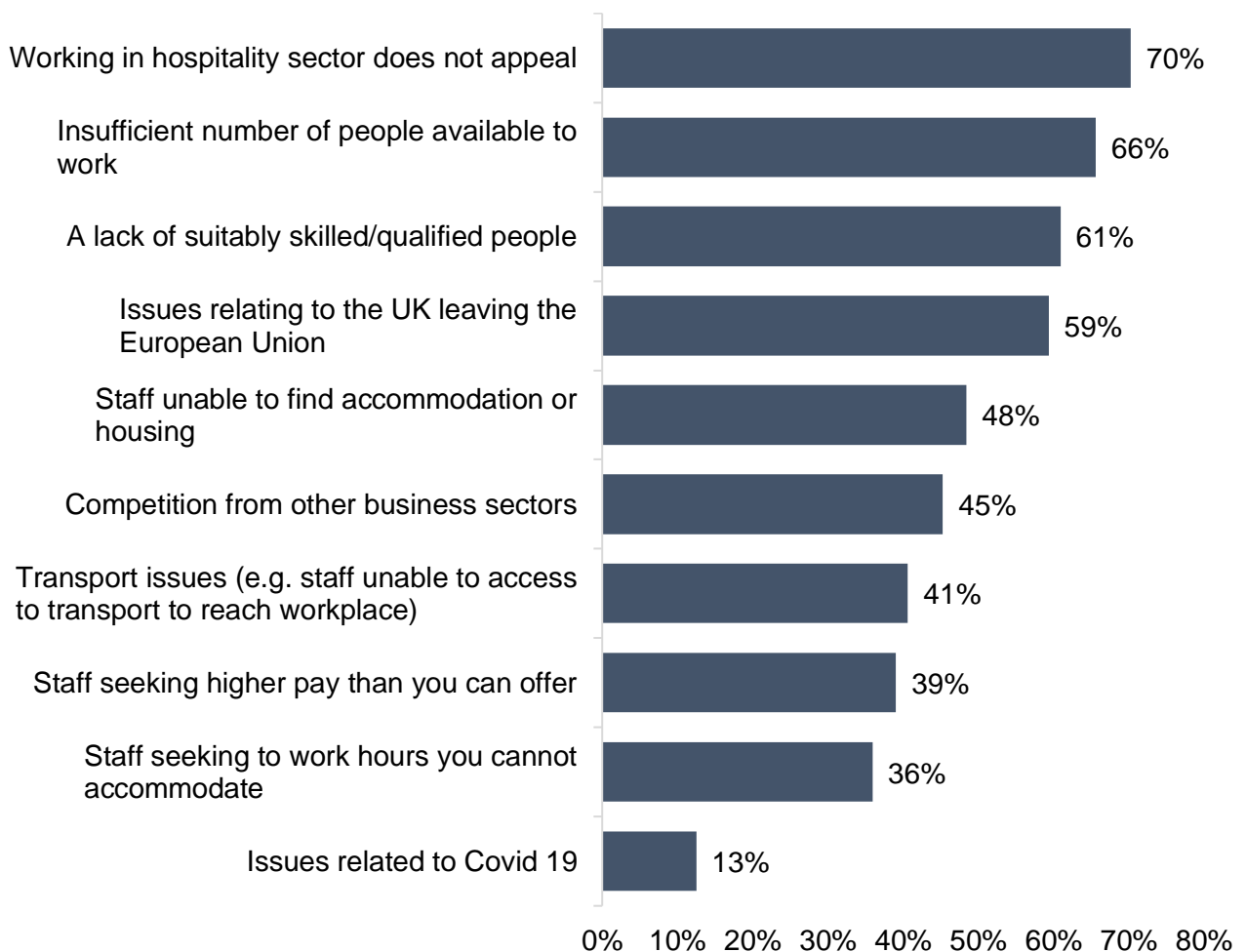
Multiple responses could be provided so results total more than 100%.

Q9 Which roles are you finding it difficult to recruit?

Asked for their opinions on the factors contributing towards their recruitment problems (Figure 27), the options selected by over half of businesses were the general lack of appeal of working in the sector, a lack of enough or suitably skilled people to employ and issues relating to the UK leaving the EU.

Responses varied by location with businesses based in rural and remote rural areas more likely to state that staff being unable to find accommodation or housing and transport issues were contributing towards problems recruiting staff (73% and 67% respectively).

Figure 27 – Factors reported by responding businesses as contributing to problems recruiting staff



Base: Businesses experiencing recruitment challenges (n=64)

Multiple responses could be provided so results total more than 100%.

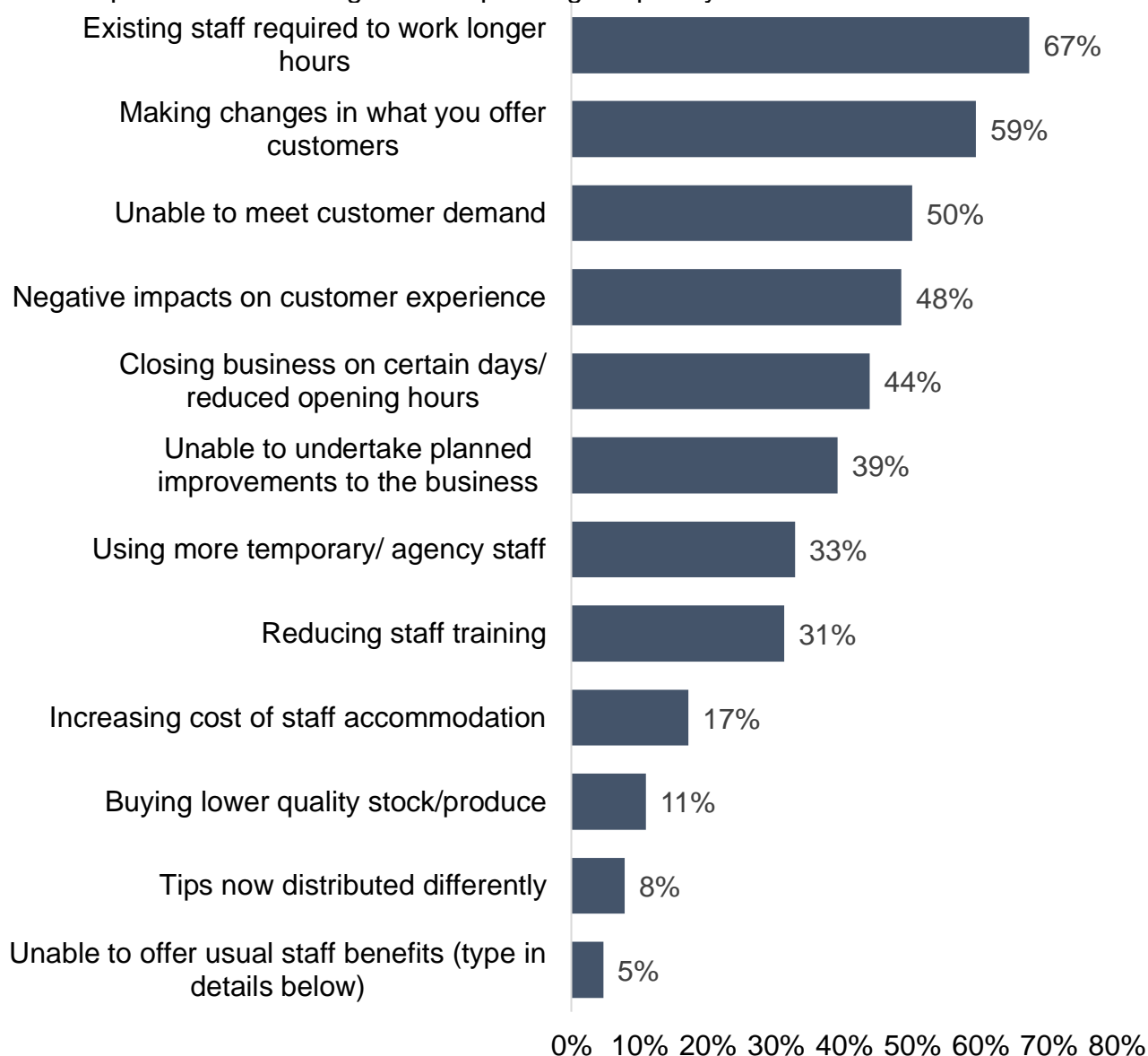
Q10 Which of the following factors, if any, have contributed to your problems recruiting staff?

Recruitment challenges caused knock-on problems for many businesses. For instance, as shown in Figure 28, 67% of businesses stated that existing staff were required to work longer hours.

Other common 'knock on' impacts included the need to change what was offered to customers, a negative impact on the quality of customer experience, reducing opening hours and having to cancel or postpone plans to improve the business.

Responses varied by business location with those based in rural or remote rural locations more likely to state that staff shortages were contributing towards the increased cost of staff accommodation (33%).

Figure 28 – Impact of staff shortages on responding hospitality businesses



Base: Businesses experiencing recruitment challenges (n=64)
 Multiple responses could be provided so results total more than 100%.
 Q11 How are staff shortages affecting your business?

4.4 Pay

The Fair Work Convention's Fair Work Framework calls for all workers to be paid at least the Real Living Wage. 44% of businesses taking part in the survey stated they were accredited Real Living Wage employers, and 71% stated that everyone working in business was paid the Real Living Wage or more.

However, 29% of businesses stated that some staff were currently *not* paid at this level.

When asked why this was the case, responses largely related to the costs of paying at this level not being affordable to the business in the face of rising costs (mentioned by 9 of 18 businesses responding), or that staff were aged under 18 (mentioned by 6 of 18 businesses responding).

Responses included the following:

"Affordability and lack of employee experience."

"Customers cannot accept increased prices."

"Have not had the opportunity to address this due to all our other costs rising."

"Our industry runs on a net profit margin of 5-6%. To pay the real living wage will cost us £45,000 per year. That's more than we have in profit."

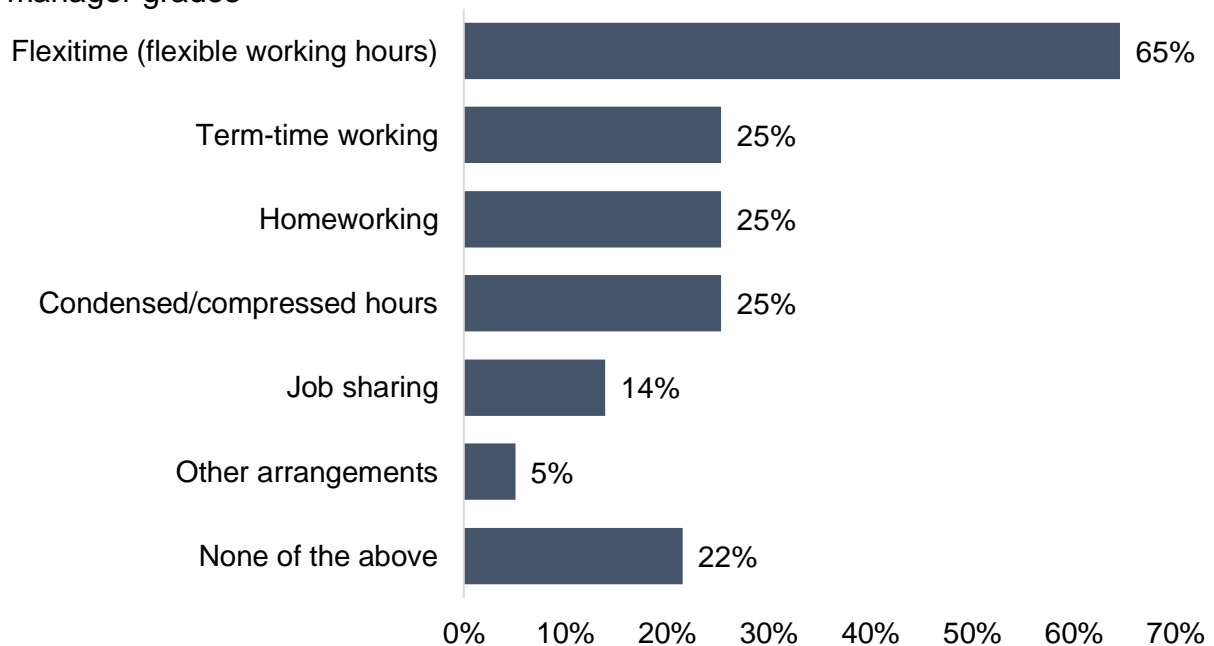
"Variations in age, skill & performance levels and the variety of jobs all play a factor."

"We have staff under 18 that cannot legally carry out all tasks required. Soaring costs. Focusing on survival."

4.5 Hours and benefits

78% of businesses offered one or more of the flexible working arrangements shown in Figure 29 to workers below senior manager grades. The most prevalent form of flexibility offered was flexible working hours (65%), while smaller percentages offered the other arrangements such as term-time working (25%), homeworking (25%), condensed hours (25%) or job sharing (14%).

Figure 29 – Flexible working arrangements available to workers below senior manager grades



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

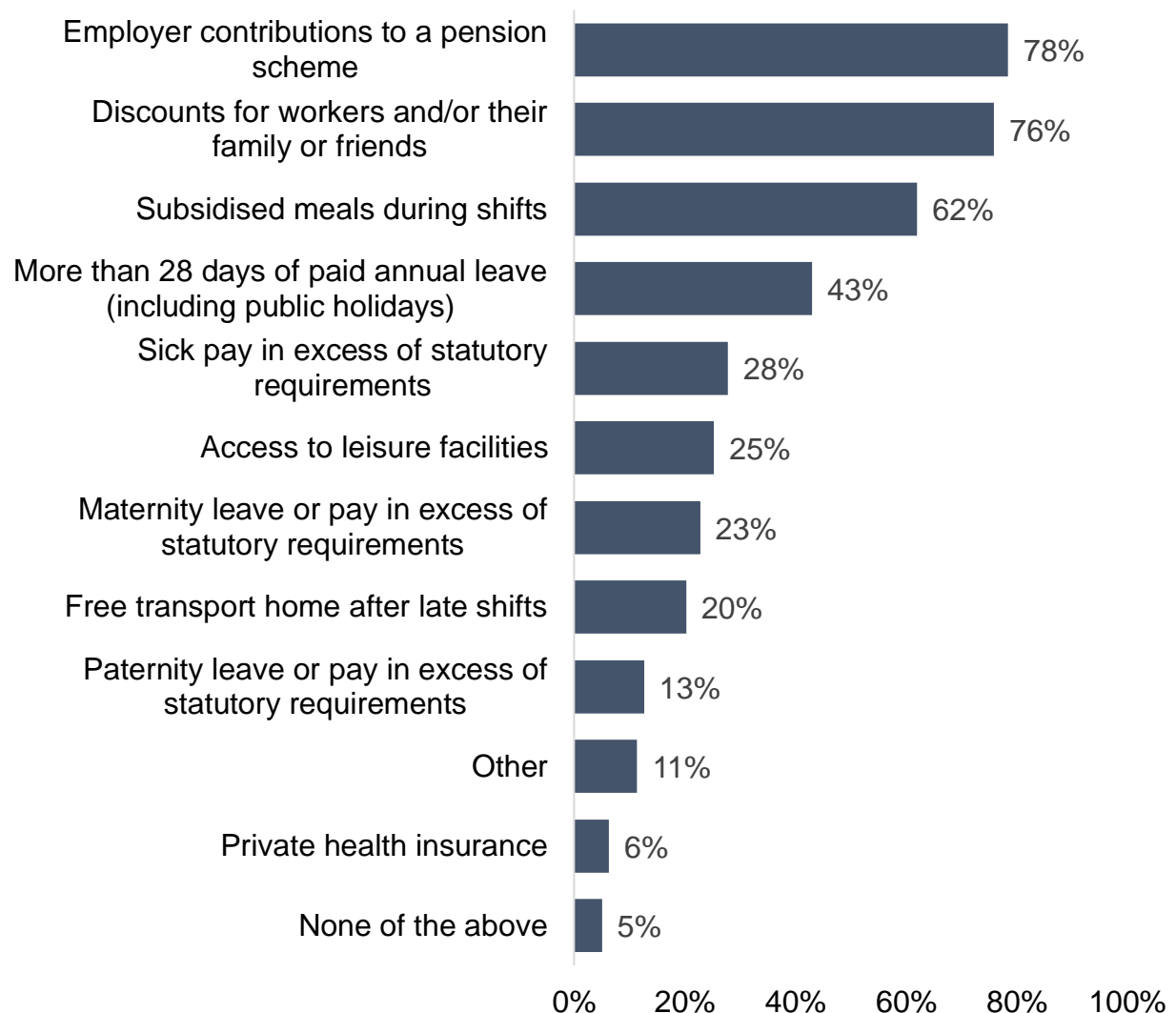
Q16 Thinking of workers below senior manager grades, which of the following flexible working arrangements, if any, are available?

As shown in Figure 30 overleaf, businesses were also asked to specify which non-pay terms and conditions were offered to their staff.

While the most commonly offered benefit was employer contributions to a pension scheme, offered by 78% of responding businesses, this benefit is a statutory requirement so it is notable that 22% of those responding *did not* select this option.

The other options selected by the majority of businesses were discounts for workers and their friends/ family (76%) and subsidised meals (62%). However, fewer offered any other benefits - just under a quarter offered maternity leave in excess of statutory requirements (23%) and around half this proportion offered paternity leave in excess of statutory requirements (13%). Also, 20% offered free transport to staff after late shifts.

Figure 30 – Non pay terms and conditions provided to workers below senior manager grades



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

Q17 Thinking of workers below senior manager grades, are workers entitled to any of these non-pay terms and conditions?

4.6 Training and development

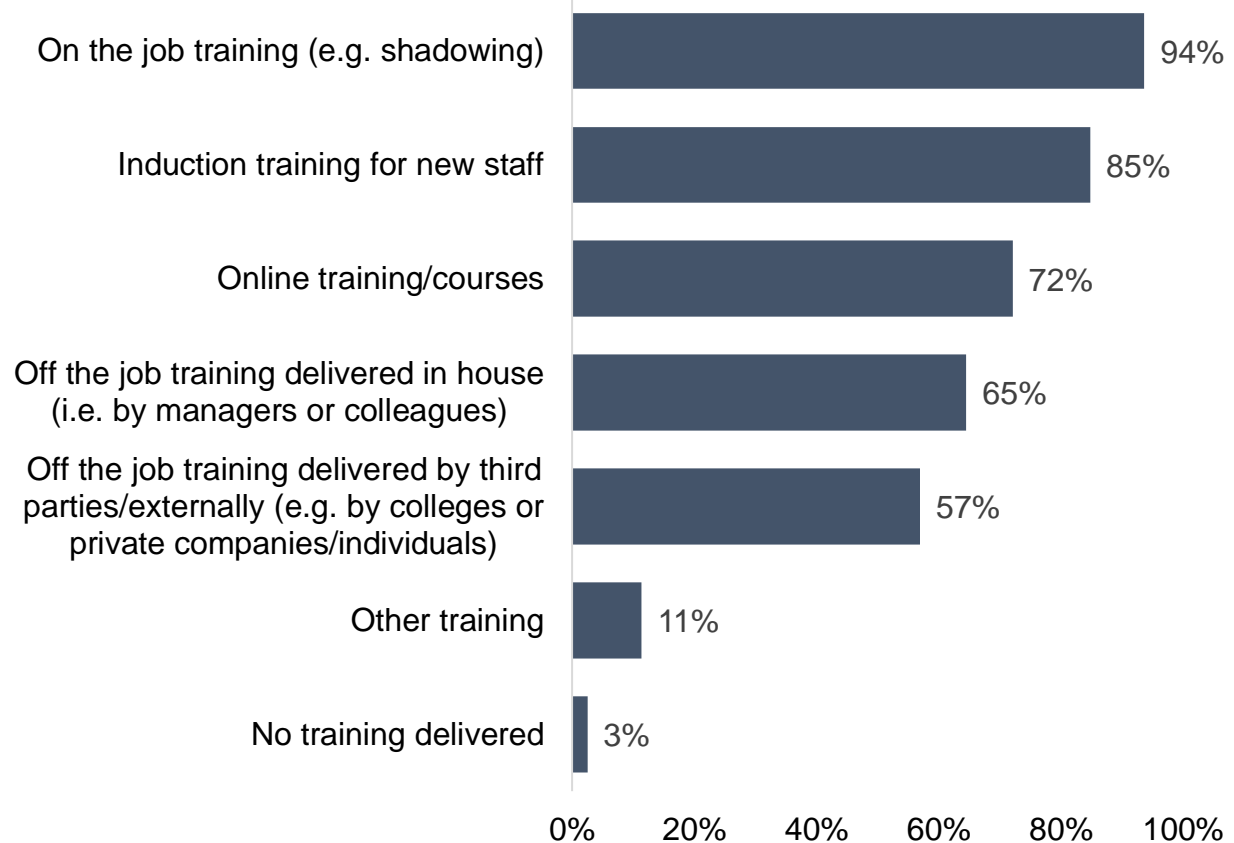
4.6.1 Delivery of training

As shown in Figure 31, the majority of businesses deliver on the job training (94%) and induction training for new staff (85%) and almost 3 in 4 deliver training via online courses (72%).

While 65% of businesses stated that off the job training was delivered in house, almost as many (57%) used third/ external parties. 44% delivered a mix of both in house and third party off the job training.

Comparing results by business type, while 15% of businesses did *not* offer induction training for new staff, this increased to 38% amongst those businesses with fewer than 10 staff.

Figure 31 – How responding hospitality businesses deliver training



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

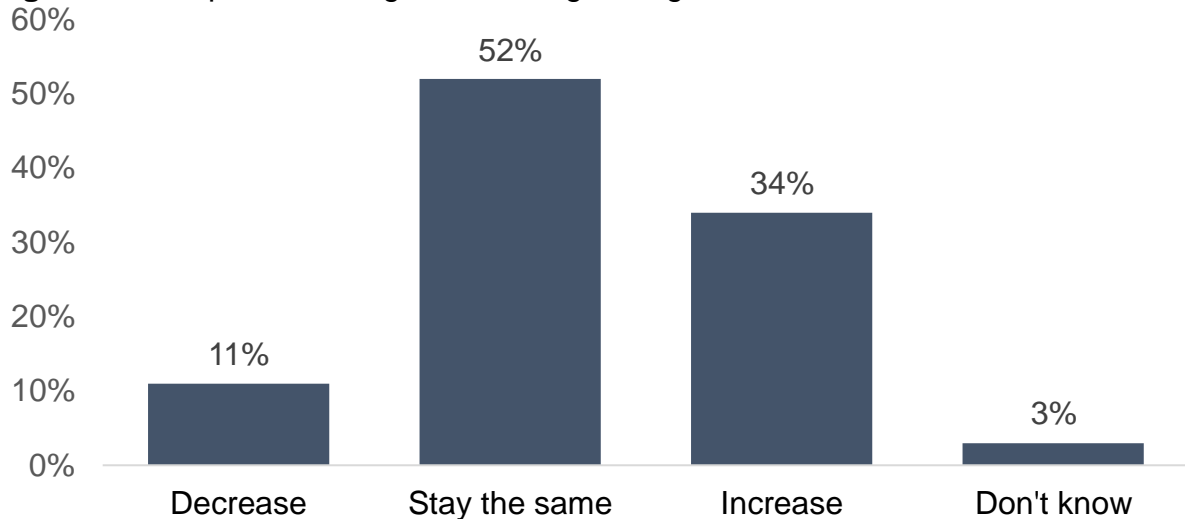
Q18 In which of the following ways do you deliver training to your workforce/management?

53% of businesses taking part in the survey stated that they had a budget for training beyond mandatory training, such as health and safety. This was more likely to be the case amongst hotels, but less likely amongst pubs and bars (69% and 33% respectively).

4.6.2 Future training plans

52% of businesses expected the amount of training they arranged or funded for staff during the next 12 months to remain the same as during the last 12 months, 34% expected this to increase, while 11% expected this to decrease.

Figure 32 – Expected changes in training arranged or funded over next 12 months



Base: All businesses (n=79)

Q20 Do you expect the amount of training you arrange or fund for staff to increase or decrease over the next 12 months?

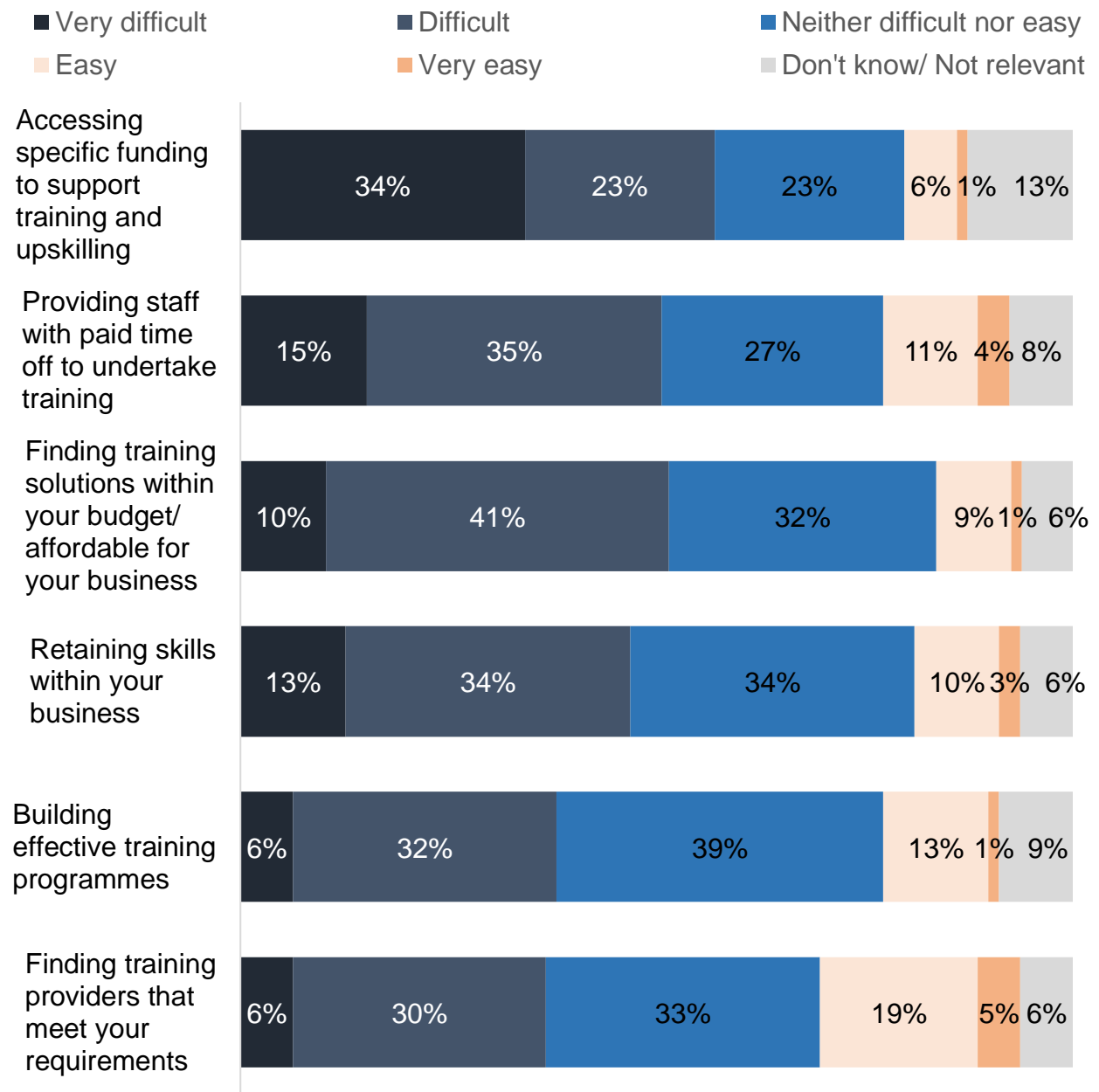
4.6.3 Challenges faced when delivering training

Businesses were asked to rate their experiences in relation to delivering training and retaining skills.

As shown in Figure 33 overleaf, 57% rated 'accessing specific funding to support training and upskilling' as either very difficult or difficult, while 50% rated 'providing staff with paid time off to undertake training' as very difficult or difficult and 51% rated 'finding training solutions within your budget/ affordable for your business' as either very difficult or difficult.

'Retaining skills within your business' was also rated as very difficult or difficult by 47% of businesses.

Figure 33 – Challenges faced by responding hospitality businesses when delivering training/ retaining skills



Base: All businesses (n=79)

Q21 In general, how easy or difficult are the following for your business when it comes to delivering training?

Asked to provide more details, businesses provided comments further illustrating the challenges of staff shortages and funding when organising training. A selection of the comments provided are as follows:

“Because of staff shortages we cannot offer the same amount of training as we used to. We’ve also had to stop offering additional training outside our business, courses and hospitality related scholarships are off the table just now as we have no time or money.”

“Getting staff the time off to attend training. Already short staffed so hard to find time.”

“Staff needed on floor and added cost of paying staff overtime and training costs. We have a vision to deliver but it is challenging.”

“Workforce development fund being slashed hasn’t helped. Also, as this fund is/was available, training providers have been known to increase prices.”

4.7 Employee voice

4.7.1 Staff meetings and influence on decisions

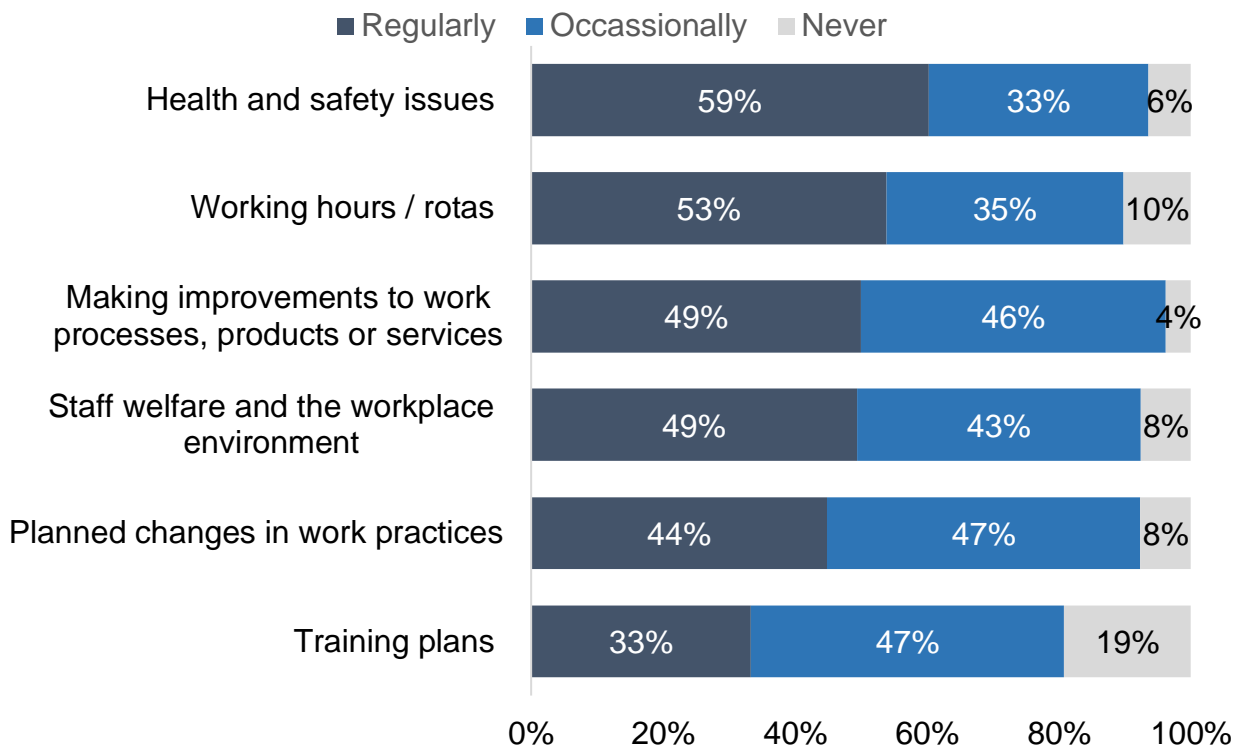
56% of businesses responding to the survey have a staff association or dedicated staff network(s) that support staff to have a say in their working conditions.

As shown below, when asked whether they hold meetings where staff can express their views and influence the outcome of particular issues, most businesses regularly or occasionally held meetings relating to health and safety issues and working hours/rotas.

In contrast, meetings were less likely to be held regarding training plans, with just a third of businesses meeting about this on a regular basis.

Consulting staff on health and safety is a requirement of the [Health and Safety at Work Act](#), so it is notable that 6% of businesses stated that they never hold staff meetings on this topic.

Figure 34 – How often hold staff meetings to allow staff to express views and influence outcomes



Base: All businesses (n=79)

Q27 Do you hold meetings where staff can express their views and influence the outcome of the following issues?

Businesses were also asked how influential staff could be on management’s decisions at meetings. Most businesses stated that staff could have an influence with 39% indicating that staff could be ‘very influential’ while 56% stated that they could be ‘fairly influential’.

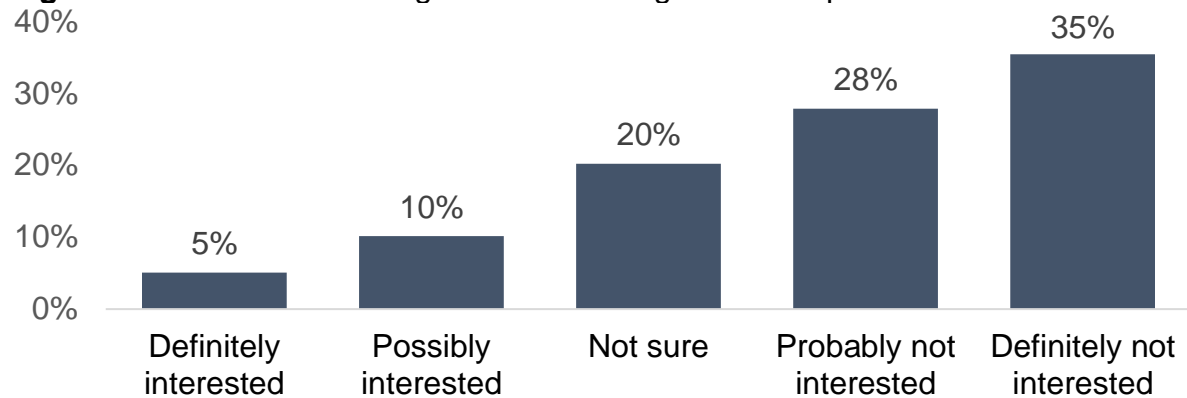
4.7.2 Relationships with trade unions

10% of businesses taking part in the survey stated that they consult with trade unions to enable staff to have a voice in their working conditions. This was more likely to be the case amongst larger businesses employing 50 or more staff (20% consulted with trade unions).

Similarly, when asked if they have a regular working relationship with any trade unions, the majority stated that they didn’t (91%), while 3% had a recognition agreement with trade unions recognised to negotiate on behalf of their members, and 5% stated that unions met regularly with staff but there was no recognition agreement.

All businesses were asked if they were interested in having closer working relationships with trade unions. As shown below, 15% stated that they were ‘definitely’ or ‘possibly’ interested, while 63% were probably or definitely not interested.

Figure 35 – Interest in having a closer working relationship with trade unions



Base: All businesses (n=79)

Q25 Would your business be interested in having a closer working relationship with trade unions?

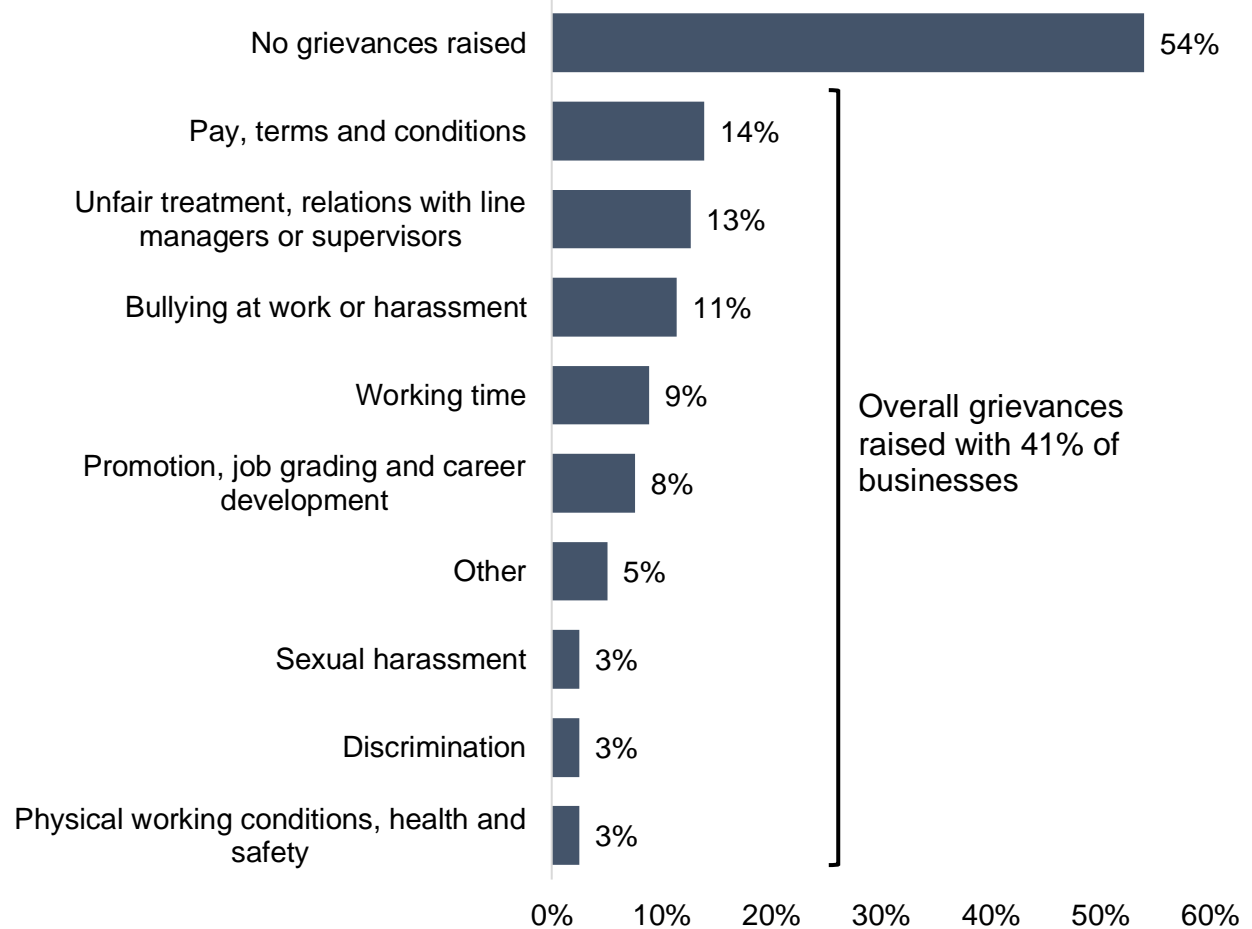
4.8 Grievances and disciplinary procedures

4.8.1 Grievances

By law, all businesses must have a [grievance procedure](#) and share it with staff. As such, it is interesting to note that only 89% of business taking part in the survey reported having a formal procedure for dealing with individual grievances raised by employees. 9% stated that they did not have a formal procedure and 3% didn't know.

As shown overleaf, the most common types of grievance dealt with in the last year related to pay, terms and conditions (14%), unfair treatment and relations with managers (13%) and bullying/ harassment at work (11%). 54% stated that no grievances had been raised in the last year.

Figure 36 – Types of grievance, if any, raised in last year



Base: All businesses (n=79)

Multiple responses could be provided so results total more than 100%.

Q30 Which of the following types of grievances, if any, have been raised in the past year whether through a procedure or not?

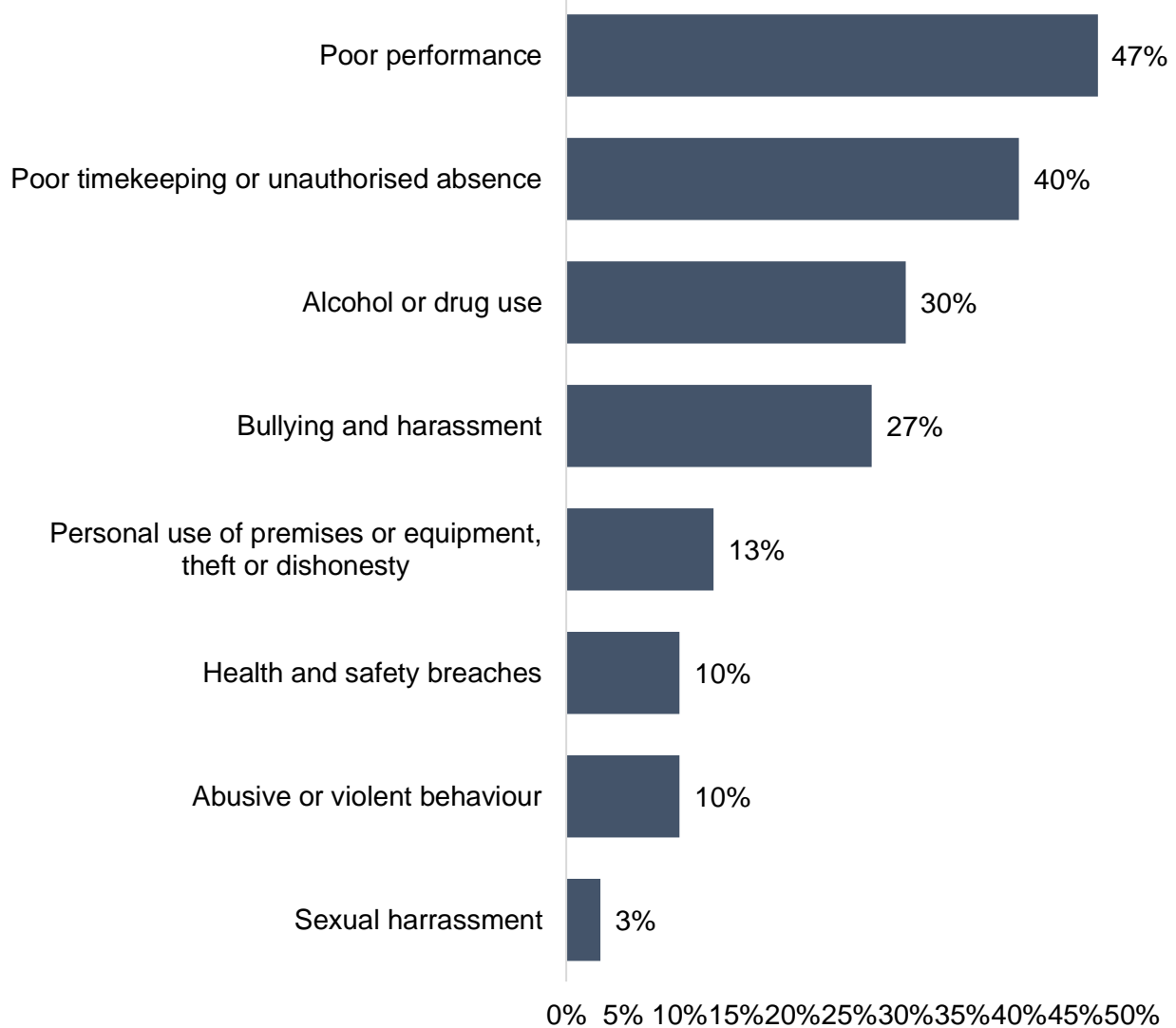
4.8.2 Discipline and dismissals

91% of participating businesses have a formal procedure for dealing with discipline and dismissals other than redundancies.

38% stated that disciplinary action had been taken in their workplace in the past year. This ranged from 6% of businesses with less than 10 employees to 80% of those with 250 or more employees.

As shown in Figure 37, amongst these businesses the most common reasons for taking disciplinary actions were poor performance (47%) and poor timekeeping/unauthorised absence (40%).

Figure 37– Reasons for taking disciplinary actions in last year



Base: Businesses which have taken any disciplinary action in the past year (n=30)

Multiple responses could be provided

Q32 What were the reasons for taking disciplinary action in the past year?

4.9 Overall views on working in hospitality

4.9.1 Is your business a good business to work for?

97% of businesses taking part in the survey believed that, all things considered, their business was a good business to work for.

When asked to explain their answer some of the responses provided included the following:

“Excellent retention rates, great team spirit/atmosphere, great customer feedback re customer service. Our employees tell us that in review sessions and open staff meetings.”

“Family business served the community and its people for 50 years. Lots of customers children work for us. We have had staff spanning 3 generations. This is our barometer for how well we are doing. Our people support us.”

“We understand that our people are the key to the success of our business. Therefore, we do all we can to look after our team in the best way we can. Our number one business objective is to be one of Scotland’s best employers and an exemplar for Fair Work in Hospitality.”

“We are all hard working, and team players who never want to see staff struggle always looking for best possible outcome for the staff to try and keep business afloat.”

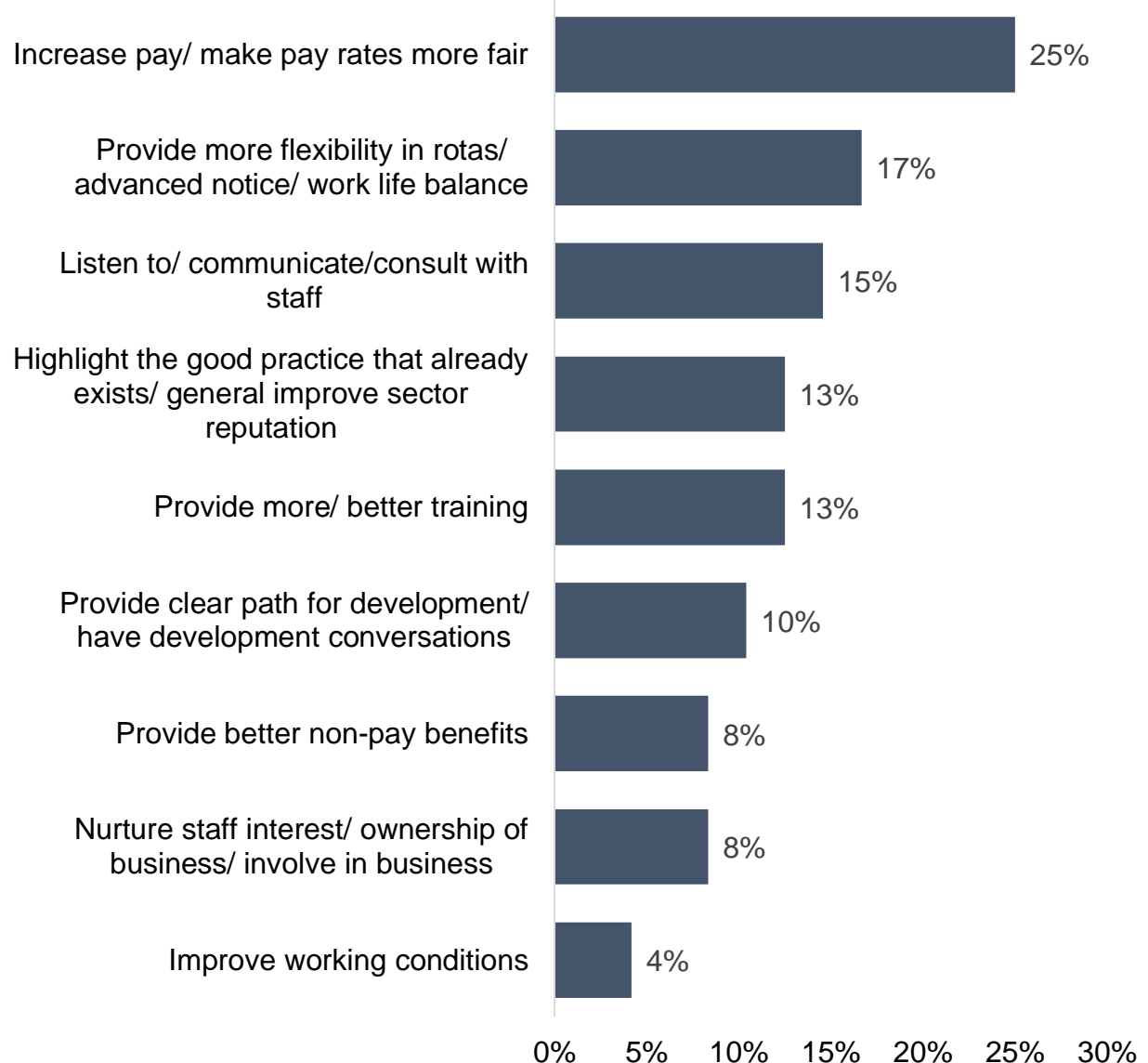
“We are a better business than we have ever been. We listen and we act. There are huge financial challenges that we are still working through and team requests don’t take account of the other pressures facing the business. It’s a hard act to juggle. But without our team we don’t have a business.”

4.9.2 How hospitality employers can make the sector a more attractive career choice

A further open question invited businesses to provide their views on how to make the sector more attractive.

As shown below, the most common responses related to increasing pay, providing more flexibility in hours/rotas and listening/ communicating better with staff.

Figure 38 – Responding businesses’ views on what employers can do to improve working relationships and make sector more attractive



Base: All businesses providing a response (n=48)

Note: Question was asked in an open-ended format with responses then categorised into the above common themes. A single respondent may have referenced multiple themes.

Q35 What do you think hospitality employers can do to improve working relationships and make the industry a more attractive career choice for employees?

Some of the detailed comments provided by businesses are included below:

“Actively listen to staff and respond to ideas and suggestions. Pay a minimum of the Living Wage. Ensure working conditions are as good as you can make them. Ensure that staff know they’re valued; that all jobs within the business are essential and make sure that any interpersonal staff issues are dealt with, and don’t sour the atmosphere. Having hospitality as an active career choice is a difficult goal, because the industry has a bad reputation for long/unsocial hours, bullying, low pay.”

“Allow more money generated by the business to come back to the business for trading improvements etc. Cut VAT to 10% as in Europe and 10% of turnover would be available to invest.”

“Be open to staff input, be open to more formal discussion and negotiation on working conditions, find ways to support professional development opportunities (lobby government to support funded opportunities).”

“Better pay, benefits and access to training, however rising costs are extremely prohibitive of this.”

“Involve team members in the business, encourage them to take ownership of the area they work in. Make sure that development conversations lead to outcomes from activity. Work in partnership with schools, apprentices and colleges. Work on parents and teachers to change their perception of the industry into a first choice career, recognising the varied skills the industry represents - engineering, finance, sales & marketing, entrepreneurship, HR - not just cooking, serving and cleaning. It’s a great place to work, an opportunity to grow interpersonal skills that last a lifetime.”

“Need to improve working hours in relation to a balanced work-life approach rather than working every weekend type environments.”

“Problems start with colleges giving unrealistic idea of working in hospitality. Also, we are taxed to the hilt leaving no reserves to reward great staff in order to keep them.”

“Stop expecting employees to work long hours, it’s not sustainable for the employee nor good for customer service. Look at fixed days off with 2 days off together.”

“We have no profits to pay for anything. Reduce our NDR’s, reduce VAT and we’ll be able to offer so much more.”

“We are not very good at highlighting the good practice that already exists.”

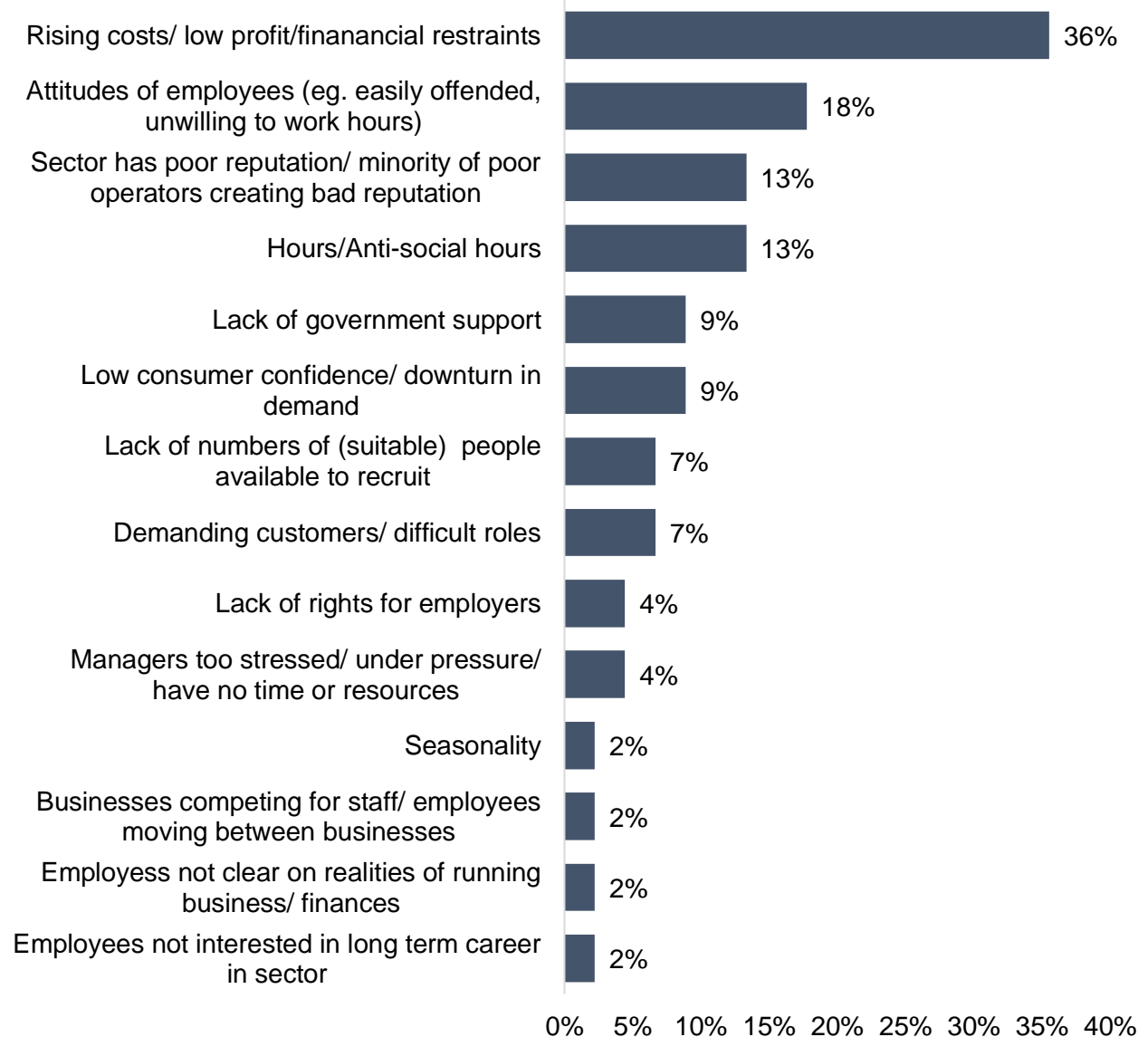
“Be allowed the time and money to do it. Get involved. There is so much great work already being done that can be piggy backed on. Communication of what is available is key.”

4.9.3 Barriers facing hospitality employers seeking to make the industry more attractive

Businesses were also asked to provide their views on the barriers making it harder for employers to make the sector more attractive. As shown below, rising costs and financial restraints were by the far the most common themes in responses.

Other commonly mentioned barriers were the attitudes of employees, the poor reputation held by the sector and the necessity to work anti-social hours.

Figure 39 – Responding businesses views on the barriers facing employers seeking to improving working relationships and making the industry more attractive



Base: All businesses providing a response (n=45)

Note: Question was asked in an open-ended format with responses then categorised into the above common themes. A single respondent may have referenced multiple themes.

Q36 What are the barriers facing employers to improve working relationships and make the industry a more attractive career choice?

Some of the comments provided by businesses are included below:

“Currently all the cost challenges and staff shortages are the biggest barriers.”

“Extremely high running costs mean that higher wages, incentives etc. are very difficult to build into the business.”

“Hospitality business are operational at times most people would prefer not to be in work, evenings, weekends, holidays so pay and conditions need to be the best they can be, flexibility in rotas can impact on choice of employer, self-rostering is not common. The Industry does not have the same high regard in UK as elsewhere and regarded as low skilled, that perception needs to change and that starts with employers valuing their teams and telling them so.”

“Hospitality is a hard industry for businesses to succeed in with anti-social working hours for many workers. Many external factors influence managers intentions and capacity to focus on their people.”

“I don’t know, furlough seems to have sedated the workforce and people feel they don’t need to work now or should be able to pick and choose shifts. Any industry that relies on weekend work struggles.”

“Limited cash, increased overheads all mean a squeeze on finances. Commonly terms & conditions are the only gripe - we have solved this by paying above the market rate, but still struggle to retain staff due to long hours.”

“More work is needed by all hotels to promote the industry more and get better PR for the great industry that we are.”

“Quality, health and safety and due diligence not being followed by the few, ruining it for the many, giving the sector the stigma. Those who are offering a good service and experience are not being given the credit and support.”

“Right now, income levels are difficult and this is the primary hindrance to improving staff wages. Everything in hospitality feels like a crisis, and it’s very difficult to get out of fire-fighting mode to focus on longer-term issues.”

“Staff who don’t want to work hard. Hospitality is hard and it’s difficult to recruit people who are not afraid to work hard and or see the job as beneath them.”

“Managers themselves are stressed and under pressure - they rarely have time to sit back and think about how they can develop their own teams or themselves.”

5 Cross cutting themes

This chapter takes the findings from the two surveys to provide a summary of the opinions provided by workers and businesses in relation to a number common themes as follows:

- Hours
- Training
- Relationships (including grievances)
- Employee voice

These themes have been selected as both surveys included relevant questions, providing perspectives from both the business and workers.

When comparing the findings from each survey, it should be noted that the degree of 'overlap' is limited, i.e. workers who took part in the workers survey were not necessarily employed by the businesses that took part in the business survey. However, considering the experiences of workers in hospitality alongside the views of employers helps us discern useful insights into how perceptions of the sector can vary between employers and workers.

5.1 Hours

Working hours was identified as a key issue in the surveys by both businesses and workers. For businesses, issues focused around ensuring sufficient staff availability to cover the hours of work needed, while for workers, receiving appropriate and predictable hours are essential to support both work life balance and an adequate standard of living.

71% of businesses reported problems with staff recruitment and that the most common 'knock on' impact of these issues was existing staff being required to work longer hours (referenced by 67%).

Also, while the majority of businesses (78%) stated that they offered one or more types of flexible working hours some cited staff shortages as a factor making it harder to implement these policies.

When businesses were asked for their view on what employers in the hospitality sector can do to make the sector more attractive, while the largest percentage mentioned pay, improving hours was the second most commonly provided response.

Hospitality workers responding to the survey expressed fairly negative views in relation to their working hours with only around half providing positive ratings for the following aspects:

- the overall number of hours they work per week (55% very or quite satisfied),
- the predictability of hours (53% very or quite satisfied),
- the suitability of hours to fit with personal life (53% very or quite satisfied) and
- the amount of notice given when hours were set (51%).

Amongst those who were not satisfied with the number of hours they worked per week (28%), about half felt that they worked too many hours, and almost as many felt that they did not work enough hours (53% and 44% respectively).

Related, 28% of all workers stated that they regularly worked unpaid overtime and 29% stated that they never or only 'sometimes' received breaks.

Reflecting these concerns, when asked what one thing they would like to change about their working hours, the most common responses related to having more consistency and predictability in working hours (19%) and being allowed more paid breaks (11%).

"I want to work my contracted hours. I don't even get that. I was promised more than my contract in the summer."

"My working hours depend on the staff - many times we are understaffed so we have to work more hours, no breaks and cover more sections and jobs."

"Split shifts are torturous, working from 7:30-16:00 then 19:00-21:00 for turndown and having to be back in work the next day sometimes as early as 7am feels inhumane."⁵

Reflecting these general concerns amongst employees, issues relating to hours were the most common area raised by those employees who had challenged their employer about their rights at work (41% of those raising issues had concerns over hours, shift patterns or breaks).

5.2 Training

The vast majority of businesses responding to the survey stated that they delivered staff training. This was most often delivered on the job (94%), while 65% delivered training off the job, most often in-house by managers or colleagues.

However, possibly reflecting the commercial challenges faced by many businesses in the hospitality sector, only 53% of businesses had a budget for delivering training beyond mandatory requirements such as health and safety, and only 1 in 3 held regular meetings with staff to discuss training plans.

While 34% would like to increase the amount of training they deliver in future, the challenging operating environment makes this difficult for many. 57% of businesses stated that finding funding support for training was difficult, and 47% stated that high levels of staff turnover were making it difficult to retain skills.

Also, some reported that staff shortages made it difficult to dedicate time to training while rising costs made it harder to pay staff for time spent receiving training.

⁵ This constitutes a breach in working time regulations which require a rest of at least 11 hours between shifts.

“Due to shortage of staff being able to dedicate time to training is often not a priority.”

“Staff needed on floor and added cost of paying staff overtime and training costs. We have a vision to deliver but it is challenging.”

The worker perspective on training was fairly negative with only 65% of hospitality workers indicating that they felt that they had received enough training to do their job well. This decreased to half of those working in the sector while studying (49%).

When training took place was also identified as a potential issue for some employees, with 31% stating that training took place outside of paid work time. Those working in cafés and restaurants and those working in the sector while studying were the most likely to state that this was the case (43% and 44% respectively).

5.3 Relationships and grievances

As explained in Section 4.8, 89% of businesses reported that they have a procedure for dealing with grievances raised by employees, despite all businesses being required to have a procedure for this.

46% of businesses stated that any grievances had been raised in the past year. The most common grievances related to pay/ terms & conditions. However, after that, top grievances related to unfair treatment/relationships with line managers and bullying or harassment at work.

This resonates with the workers survey, where 17% of workers responding rated their relationship with managers as entirely or mainly negative and 22% of employees stated that they had experienced bullying or harassment from managers.

Notably, only around a third of those who had experienced bullying or harassment from managers had reported these issues. Reasons provided for not raising these issues included lack of anyone independent to report the issues to, and low expectations on action being taken to address the problem.

“Managers were aware, would joke about it after. If you weren’t OK with it, you’d become a problem.”

Women were the most likely to report experiencing issues with the bullying or harassment, most often related to their sex. People in younger age groups were also more likely to have experienced bullying or harassment from managers, with this most often related to their sex or age.

Notably, despite most businesses stating that they have grievance procedures in place, only 36% of those who experienced bullying or harassment from managers reported the issues and, amongst those who did report the issues, just 5% felt that they were dealt with effectively.

Reflecting this finding, amongst the 38% of businesses that had taken any disciplinary action during the past year, in the vast majority of cases this was for poor performance or poor timekeeping/unauthorised absence while a much smaller percentage of cases related to either abusive or violent behaviour (10%) or sexual harassment (3%).

5.4 Employee voice

Businesses responding to the survey had a largely positive perspective on levels of engagement with employees. 68% stated that they regularly hold meetings with staff where they can express their views. This figure is not dissimilar to the 62% of workers who responded stating that their voice and opinion are heard at work.

However, there is a more significant discrepancy when considering how influential or impactful worker voice is. While the vast majority of businesses stated that the staff's views expressed can be very or fairly influential on management decisions, just 42% of workers believe their voice is taken into account in management decisions.

Additionally, 16% indicated that despite having concerns about their rights, they had chosen to not to raise these with their employer and instead put up with the problem or left their job.

The survey results suggest that relationships with managers may create an obstacle for some employees when it comes to having effective voice in the workplace. Only 56% rated their relationship with managers as entirely or mainly positive, while 22% had personally experienced bullying or harassment from managers.

A further obstacle is the lack of engagement with trade unions; only 10% of businesses currently consult with unions to enable staff to have a voice, and only 15% are interested in having a closer relationship with unions.

6 Comparing key groups of interest

A key characteristic of the hospitality sector is its diversity both in terms of the types of businesses operating within the sector and the people employed. The results of the survey reflect this diversity with significant differences in the responses provided by those in different demographics and with different experiences of the sector. The following tables and commentary describe some of these variations with a focus on differences by sex, age, business location (urban versus rural), whether working in the hospitality sector is considered to be a career and business type worked for.

Analysis has also been undertaken to compare the views of other important groups identified in the survey, including people in ethnic minorities and migrant workers. However, smaller sample sizes amongst these groups mean that differences are less likely to be statistically significant so findings are not included in the sections below.

6.1 Variations by sex

A number of the key results obtained from women and men are compared below.

Overall women have a poorer experience of fair work across a number of areas. For instance, women responding to the survey were less likely to receive pay if off sick or to have received health and safety training in the last 12 months. Women were also less likely than men to work on a full-time basis.

However, women were more likely than men to have experienced bullying or harassment, in particular in relation to their sex or social class.

Table 5 – Comparison of results by sex

NOTE: statistically significant differences are highlighted in bold and flagged with an [s]

	Women (n=126)	Men (n=103)
Role/ experience in sector		
See hospitality as career	54%	61%
Time in sector:		
- Less than 5 years	38%	33%
- 5 to 10 years	25%	13%
- Longer	37%	54%
Hours and contract		
Contracted hours:		
- Full time (35+ hrs per week)	44%[s]	63%[s]
- Part time (<34 hrs per week)	16%	12%
- No guaranteed/zero-hours	21%	14%
- Variable hours but guaranteed minimum	15%	7%
No written contract	15%	9%
Paid at or above Real Living Wage	63%	83%
Receive any pay if sick	44%[s]	60%[s]
Receive paid annual leave	80%	87%
Training		
Received health and safety training in last 12 months	60%[s]	76%[s]
Received other training in last 12 months	55%	62%
Relationships at work and voice		
% experienced any bullying or harassment in last 12 months from:		
- Customers	31%	27%
- Co-workers	18%[s]	5%[s]
- Managers	28%	17%
Reported issues of bullying or harassment	42%	50%
What bullying or harassment related to:		
- Your sex	21%[s]	7%[s]
- Your age	14%	9%
- Your social class	11%[s]	4%[s]
- Being a migrant worker	2%	4%
Have opportunities for voice and opinion to be heard at work	60%	67%
Overall evaluation		
Whether would recommend employer	57%	65%
Whether would recommend hospitality sector	48%	43%

6.2 Variations by age

A number of the key results obtained from younger people aged 16 to 34 are compared with those aged 35 or over below. These age bands have been used to provide large enough sub-samples to allow for statistically significant comparisons to be made.

In general, survey respondents aged under 35 were less likely to see hospitality as their career and they were more likely to be working on a zero-hour or variable hours contract. Younger people were also somewhat more likely to be paid less than the Real Living Wage and to have experienced bullying or harassment from customers or managers. Just 34% would recommend the hospitality sector as a career.

Table 6 – Comparison of results by age

NOTE: statistically significant differences are highlighted in bold and flagged with an [s]

	Aged 16-34 (n=123)	Aged 35+ (n=74)
Role/ experience in sector		
See hospitality as career	45%[s]	77%[s]
Time in sector:		
- Less than 1 year	13%[s]	1%[s]
- 1 to 5 years	44%[s]	7%[s]
- 6 to 10 years	25%[s]	15%[s]
- Longer	18%[s]	77%[s]
Hours and contract		
Contracted hours:		
- Full time (35+ hrs per week)	35%[s]	73%[s]
- Part time (<34 hrs per week)	14%	11%
- No guaranteed/zero-hours	30%[s]	5%[s]
- Variable hours but guaranteed minimum	18%[s]	4%[s]
No written contract	16%	8%
Paid at or above Real Living Wage	59%[s]	85%[s]
Receive any pay if sick	41%[s]	61%[s]
Receive paid annual leave	80%	86%
Training		
Received health and safety training in last 12 months	59%[s]	77%[s]
Received other training in last 12 months	54%	64%
Relationships at work and voice		
% experienced any bullying or harassment in last 12 months from:		
- Customers	41%[s]	22%[s]
- Co-workers	20%	9%
- Managers	34%[s]	8%[s]
Reported issues of bullying or harassment	40%	53%
What bullying or harassment related to		
- Your sex	24%[s]	4%[s]
- Your age	21%[s]	1%[s]
- Your social class	11%[s]	3%[s]
- Being a migrant worker	4%	3%
Have opportunities for voice and opinion to be heard at work	50%[s]	74%[s]
Overall evaluation		
Whether would recommend employer	51%[s]	70%[s]
Whether would recommend hospitality sector	34%[s]	58%[s]

6.3 Variations by physical or mental health condition

There are also a number of notable variations in experiences of the sector reported by people with a physical or mental health condition or illness. Members of this group are less likely to be employed full time and more likely to have a zero-hour contract.

Also, a somewhat higher percentage of people in this group had experienced bullying or harassment from customers, co-workers or managers.

Table 7 – Comparison of results – those with a physical or mental health condition or illness Vs those with no conditions

NOTE: statistically significant differences are highlighted in bold and flagged with an [s]

	Any physical or mental health condition or illness (n=79)	No physical or mental health condition or illness (n=155)
Role/ experience in sector	46%	63%
See hospitality as career		
Time in sector:		
- Less than 1 year	9%	9%
- 1 to 5 years	37%	23%
- 6 to 10 years	19%	21%
- Longer	35%	47%
Hours and contract		
Contracted hours:		
- Full time (35+ hrs per week)	37%[s]	60%[s]
- Part time (<34 hrs per week)	11%	14%
- No guaranteed/zero-hours	29%[s]	14%[s]
- Variable hours but guaranteed minimum	16%	8%
No written contract	16%	12%
Paid at or above Real Living Wage	62%[s]	78%[s]
Receive any pay if sick	40%[s]	59%[s]
Receive paid annual leave	79%	88%
Training		
Received health and safety training in last 12 months	56%[s]	73%[s]
Received other training in last 12 months	48%	65%
Relationships at work and voice		
% experienced any bullying or harassment in last 12 months from:		
- Customers	41%[s]	25%[s]
- Co-workers	23%[s]	9%[s]
- Managers	39%[s]	14%[s]
Reported issues of bullying or harassment	47%	49%
What bullying or harassment related to:		
Your sex	27%[s]	10%[s]
Your age	22%[s]	8%[s]
Your social class	18%[s]	6%[s]
Disability	8%[s]	0%[s]
Have opportunities for voice and opinion to be heard at work	46%[s]	72%[s]
Overall evaluation		
Whether would recommend employer	42%[s]	71%[s]
Whether would recommend hospitality sector	30%[s]	54%[s]

6.4 Variations by those who see hospitality as a career vs temporary

Two groupings of workers were of particular interest to the Inquiry: those who are more transitory workers (particularly those working in hospitality just to earn extra money) and those who see hospitality as a longer term career. The Inquiry Group wanted to understand if there are significant differences in the experiences of fair work between the two and the results show there are.

As shown in Table 8 overleaf, those working in hospitality as a career were much more likely, than those working to earn extra money/while studying, to have worked in the sector for longer, to have a full time contract, to be paid at or above the Real Living Wage or to have received Health and Safety training.

However, those working in the sector to earn extra money/while studying were much more likely, than those who saw their job as a career, to have experienced bullying or harassment from customers or managers.

Table 8 – Comparison of results – those working in sector for extra money or while studying Vs those who see sector as a career

NOTE: statistically significant differences are highlighted in bold and flagged with an [s]

	Working in hospitality to earn extra money/ while studying (n=55)	See hospitality as career (n=141)
Role/ experience in sector		
Time in sector:		
- Less than 1 year	18%[s]	5%[s]
- 1 to 5 years	49%[s]	16%[s]
- 6 to 10 years	20%[s]	17%[s]
- Longer	13%[s]	62%[s]
Hours and contract		
Contracted hours:		
- Full time (35+ hrs per week)	9%[s]	73%[s]
- Part time (<34 hrs per week)	25%[s]	9%[s]
- No guaranteed/zero-hours	44%[s]	8%[s]
- Variable hours but guaranteed minimum	18%[s]	6%[s]
No written contract	16%[s]	8%[s]
Paid at or above Real Living Wage	38%[s]	89%[s]
Receive any pay if sick	29%[s]	70%[s]
Receive paid annual leave	67%[s]	92%[s]
Training		
Received health and safety training in last 12 months	56%[s]	74%[s]
Received other training in last 12 months	44%	67%
Relationships at work and voice		
% experienced any bullying or harassment in last 12 months from:		
- Customers	49%[s]	23%[s]
- Co-workers	18%	11%
- Managers	38%[s]	16%[s]
Reported issues of bullying or harassment	34%	55%
What bullying or harassment related to:		
Your sex	31%[s]	11%[s]
Your age	22%[s]	9%[s]
Your social class	18%[s]	5%[s]
Being a migrant worker	11%[s]	-
Have opportunities for voice and opinion to be heard at work	33%[s]	71%[s]
Overall evaluation		
Whether would recommend employer	45%[s]	68%[s]
Whether would recommend hospitality sector	36%	52%

Further analysis of these results suggest that some of these variations may be related to the length of time someone has been working in hospitality with experience of fair work appearing to be strongest when workers see their job as a career *and* have been in the sector longer.

6.5 Urban vs rural variations

A comparison of differences in responses amongst people working in businesses in rural and small town location with those working in large towns or cities was also undertaken.

A smaller number of differences were identified than for other variables included earlier in this section. However, the following variations were statistically significant:

- A larger percentage of those working in business in rural or small town locations were employed on a full time basis – 68% compared with 44% in city and large town businesses.
- A larger percentage of those working in rural or small town location were paid at or above the Real Living Wage – 79% compared with 69% in city and large town businesses.

6.6 Variations by business type

Comparing responses amongst those working for different types of business also illustrates some notable differences as illustrated in Table 9. This comparison includes workers in the following groupings of business types:

- Bars and pubs – includes those working for public houses, pub restaurants, nightclubs and wine bars
- Cafés and restaurants – includes those working for cafés, restaurants and fast food outlets
- Hotels – includes those working for 1-3 star hotels and 4-5 star hotels.

Sample sizes for respondents working for other types of hospitality business are too small to allow separate analysis.

As shown in Table 9 overleaf, those working in hotels were most likely to have worked in the sector for more than 10 years and to see hospitality as a career.

In contrast, those working in bars and pubs were more likely to have a zero-hour contract and to not receive the Real Living Wage.

Furthermore, while 85% working for hotels had received health and safety training in the last 12 months, the percentage was just 45% amongst those working for bars and pubs.

Those working in cafés and restaurants were the least likely to recommend either their employer or the hospitality sector.

Table 9 – Comparison of results by business type

NOTE: statistically significant differences are highlighted in bold and flagged with an [s]

	All workers (n=245)	Bar or pub workers (n=38)	Café or restaurant workers (n=95)	Hotel workers (n=67)
Role/ experience in sector				
See hospitality as career	58%	50%[s]	52%[s]	72%[s]
Time in sector:				
- Less than 1 year	9%	16%	6%	6%
- 1 to 5 years	28%	39%	34%	24%
- 6 to 10 years	20%	21%	25%	9%
- Longer	43%	24%[s]	35%[s]	61%[s]
Hours and contract				
Contracted hours:				
- Full time (35+ hrs per week)	52%	32%[s]	47%[s]	73%[s]
- Part time (<34 hrs per week)	13%	16%	18%	10%
- No guaranteed/zero-hours	19%	42%[s]	18%[s]	6%[s]
- Variable hours but guaranteed minimum	11%	5%	14%	7%
No written contract	13%	37%[s]	12%[s]	7%[s]
Paid at or above Real Living Wage	72%	53%[s]	65%[s]	90%[s]
Receive any pay if sick	53%	39%	44%	60%
Receive paid annual leave	85%	71%[s]	87%[s]	90%[s]
Training				
Received health and safety training in last 12 months	67%	45%[s]	60%[s]	85%[s]
Received other training in last 12 months	58%	39%	55%	67%
Relationships at work and voice				
% experienced any bullying or harassment in last 12 months from:				
- Customers	30%	47%	28%	18%
- Co-workers	13%	24%	14%	7%
- Managers	22%	34%	27%	13%
Reported issues of bullying or harassment	47%	52%	36%	50%
What bullying or harassment related to				
- Your sex	15%	34%	16%	6%
- Your age	13%	24%	11%	9%
- Your social class	7%	8%	9%	6%
Have opportunities for voice and opinion to be heard at work	62%	55%[s]	52%[s]	76%[s]
Overall evaluation				
Whether would recommend employer	60%	53%[s]	49%[s]	75%[s]
Whether would recommend hospitality sector	45%	47%[s]	34%[s]	58%*

7 Conclusions

The Scottish hospitality sector is extremely diverse, encompassing a wide range of different types of businesses and employing a diversity of demographic groups, with working arrangements varying from those pursuing a full-time career to those working on a more transitory basis, potentially part time whilst studying or to supplement their income.

While the survey aimed to capture this diversity within the sector, when the profile of those who took part was compared with data on the overall sector, there are higher levels of response from certain types of businesses. This includes those that pay the Real Living Wage and workers employed on a full-time basis and those earning more than the Real Living Wage.

These variations suggest that those workers who took part in the survey may have better experiences of the sector than the norm, and that the businesses that responded may be more committed to fair work practices than the average.

As such, if anything, the results presented in this report may paint a more positive picture of fair work in Scotland than the reality.

Many workers have a positive experience working in hospitality

Notwithstanding the potential positive skew within the sample responding to the survey, it is important to note that many of the workers taking part in the survey provided positive feedback on their overall experiences. Indeed, over half (60%) would recommend their employer, and 45% would recommend the overall sector.

Positive feedback was provided by many workers in relation to key areas related to fair work. For example, 65% felt that they had received sufficient training to do their job well, 54% stated that pay was always stable and predictable, 56% were satisfied with their hours and 54% were satisfied with their work life balance.

Some workers have less positive experiences

However, for many workers, experiences working in the hospitality sector are less positive with issues raised around a number of key areas relevant to fair work - including flexibility and predictability of hours, fairness in pay, insufficient training, poor relationships with managers, and challenges around communications and voice mechanisms.

It is notable that experiences of poor practice are much more prevalent amongst certain groups of workers including women, younger people, people with a long term health condition or disability, and those working in hospitality to earn extra money or while studying.

These differences are especially notable in relation to experiences of bullying and harassment at work, with women more than three times more likely than men to have experienced issues with co-workers, and those aged under 35 more than four times as likely, as older workers, to have experienced issues with managers.

A challenging environment for businesses

With increasing energy bills and supplier costs, nearly all businesses in the sector are experiencing significant cost pressures leaving limited reserves for investment in staffing.

Over two-thirds of businesses (71%) are facing recruitment challenges and over half (53%) are experiencing high levels of turnover. This is creating a vicious circle for the sector with hospitality's poor reputation seen as one of the primary factors creating recruitment issues. Yet many businesses report that the main 'knock-on' impact of staffing shortages is existing staff having poorer experiences, required to work longer hours and less likely to receive the training they need to develop. Given the pressures on staff it is unsurprising that around half (47%) state that retaining skills within their business is difficult.

Employee and employer perspectives differ

A comparison of the feedback provided by workers and businesses taking part in the survey has illustrated discrepancies between the views of each group.

Differences exist in areas such as training, where the vast majority of businesses state that they deliver training - yet around a third of workers feel that they have not received sufficient training to do their job well.

There are also different views in relation to employee voice, with the vast majority of businesses stating that staff can express their opinions and these views can be influential on management decisions - yet less than half of workers (42%) believe that their voice is taken into account by their employer.

A further potentially concerning finding is the view expressed by around a fifth of businesses that employee attitudes are one of the biggest challenges for hospitality employers seeking to make the industry more attractive. In feedback provided by these respondents, specific references included a view that staff were often unwilling to work the hours expected or could be too easily offended. These views suggest a lack of the shared goals and mutual respect which are important in creating the positive workplace culture required to retain and motivate staff.

Additionally, a majority of employers felt that they provided a good place to work, yet both workers and employers have reported practice in the surveys that raise concerns about the consistency of application of statutory minimum standards, including grievance procedures, access to basic employment rights like pensions, annual leave, sick pay and on rest breaks between shifts.

What workers want is generally clear

When workers were asked what they would like to see changed to improve their experience of working in the hospitality sector, some of the suggestions may be relatively straightforward and achievable for employers. The most common suggestions include greater consistency in hours, more access to breaks and improved communications between staff and management.

However, other challenges will require significant focus for employers across the sector to address, for example those relating to workplace culture such as the high incidence of bullying and harassment as well as those requiring greater financial investment such as improving pay and providing more training.

Addressing the challenges

The evidence presented here will be used by the Fair Work Convention's Hospitality Inquiry Group, alongside other evidence, to form recommendations to the hospitality industry and to Scottish Government.

8 Appendix – Copies of questionnaires

FAIR WORK CONVENTION - SURVEY OF HOSPITALITY SECTOR WORKERS AND EMPLOYEES QUESTIONNAIRE

TEXT DISPLAYED ON FIRST PAGE OF SURVEY LINK, AFTER RESPONDENTS CLICK ON LINK ON GENERAL SURVEY WEBPAGE:

Scotland's hospitality sector - workforce opinions

Thank you for taking time to complete this important survey.

This survey is for anyone working in the hospitality sector in Scotland.

We are keen to understand what it is like to work in the sector and to hear about your experiences and opinions on how things could be made better.

This survey is being conducted by independent market research company JRS on behalf of the Fair Work Convention in accordance with the Market Research Society Code of Conduct. Your participation is anonymous and all of your responses will be treated as confidential. Only aggregated data will be reported.

First, please answer the following questions about where you work.

1) Where do you normally work?

SINGLE CODE

Scotland

England

Wales

Elsewhere in UK

Outside of the UK – **SCREEN OUT WITH “We’re sorry but unfortunately you do not meet the qualifications for this survey. Thank you for your time.”**

2) Which of the following best represents the nature of the business where you work?

If you work for more than one hospitality business, complete the questionnaire in relation to your main job (i.e. the place where you work most often)

SINGLE CODE

Food court/fast food

Public house/pub restaurant

Restaurant

Wine bar

Café
Night club
Hotel (1-3 stars)
Hotel (4-5 stars)
Events/conference venue
Entertainment /sporting venue
Takeaway (including mobile)
Catering
Other hospitality business **(TYPE IN)**
I don't work for a hospitality business – **SCREEN OUT WITH “We’re sorry but unfortunately you do not meet the qualifications for this survey. Thank you for your time.”**

**3) Choose the option that best describes how you view your job in hospitality.
SINGLE CODE**

I see this as my career
I am working in hospitality to earn some extra money (while also working somewhere else)
I am working in hospitality while studying at university or college
I am working in hospitality to supplement my retirement income
I am working in hospitality because it fits with my caring requirements
Other
Don't know

4) Considering the whole organisation that you work for, approximately how many employees are there?

If you aren't sure provide your best estimate

SINGLE CODE

Less than 10
10 to 49
50 to 249
250 to 999
1,000 or more
Don't know

5) Which of the following best describes your role within the business?

SINGLE CODE

Accounts
Administrative role
Bar staff
Barista
Cleaner
Conference / Banqueting

Customer care/ Customer service
Facilities management
General Manager

Head Chef/Sous chef or other chef
Housekeeping
Human Resources/recruitment manager
Kitchen porter
Marketing/PR/Communications manager
Operations manager
Other kitchen staff
Other management role
Receptionist
Serving/waitering staff
~~Sous chef~~
Spa/ beauty therapy
Other (**SPECIFY**)
Don't know/ not applicable

6) Do you line manage any other staff?

Yes
No
Don't know

7) For how long, roughly, have you worked in the hospitality sector in total?

Include your current role and any previous employment

SINGLE CODE

Less than 6 months
6-12 months
1-2 years
3-5 years
6-10 years
More than 10 years
Don't know

8) How many hospitality businesses have you worked for in that time?

If you aren't sure provide an estimate

TYPE IN ANSWER

The next few questions relate to your contract.

As in the previous section, if you work for more than one hospitality business, complete these questions in relation to your main job

9) Which of these best describe your situation at work?

SINGLE CODE

Employed by a business
Paid a salary or wage by an agency
Working through a mobile app (e.g. Stint)
An apprentice
Self-employed
Paid through an umbrella company / payroll company
Other
Don't know

**ASK Q10 AND Q11 IF EMPLOYEE/ VIA AGENCY OR APP/ APPRENTICE/
PAYROLL COMPANY:**

10) What type of employment contract do you have?

SINGLE CODE

Permanent/open-ended
Fixed term
Temporary / Seasonal
An apprenticeship or other training scheme
No written contract
Other
Don't know

11) What are your basic or contracted hours each week in your job at this workplace? Exclude any paid or unpaid overtime.

SINGLE CODE

Full time (35 or more hours per week)

Part time (less than 35 hours per week)

No guaranteed hours/zero-hours

Variable hours, but with a guaranteed minimum number of hours (e.g. 16 hours)

Don't know

IF SELF EMPLOYED AT Q9 ASK Q12:

12) Which of these statements applies to how you work?

Select those that apply

MULTICODE

I set my own hours and I am not closely monitored

I use my own equipment

I do not have to wear branded uniform

I am not subject to performance management or disciplinary procedures

I can work with as many companies as I choose

I take time off when I want

None of the above

Don't know

The next few questions go into more detail on pay and hours.

13) Is your hourly pay at or above the real Living Wage? (currently £9.90 per hour)

SINGLE CODE

NOTE: £9.90 TO BE UPDATED TO £10.90 ON 14TH MAY

Yes

No

Don't know

DO NOT ASK Q14 AND Q15 IF SELF EMPLOYED

14) If you are off sick, do you receive sick pay?

SINGLE CODE

Yes - paid full salary

Yes – paid partial salary

Yes – paid statutory sick pay (£109.40 per week)

No – do not receive any sick pay

Don't know

15) Do you receive paid annual (holiday) leave?

SINGLE CODE

Yes

No

Don't know

16) Is your pay stable and predictable?

Select all of those that apply

MULTICODE

Yes, always

No, because my hours vary

No, I am sometimes sent home unpaid

Other (**SPECIFY**)

Don't know

17) Do you receive a share of customer tips?

SINGLE CODE

Yes

No – tips are not shared / you do not receive a share– **SKIP TO Q20**

No – because customers don't usually leave tips – **SKIP TO Q20**

Don't know – **SKIP TO Q20**

18) Is it clear to you how tips are shared in your workplace?

SINGLE CODE

Yes

No

Don't know

19) Does your employer take a deduction from tips?

SINGLE CODE

Yes

No

Don't know

20) Thinking about your current employment, how satisfied are you with the following aspects?

	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Quite dissatisfied	Very dissatisfied	Don't know/ not applicable
Overall number of hours you work per week						
Predictability of your hours (e.g. you work a consistent work pattern)						
Sufficient notice of hours (e.g. rotas set with sufficient notice)						
Suitability of your hours to fit with your personal/ family life						
Flexibility of your working arrangements (e.g. you can request to change your hours at short notice)						

IF QUITE OR VERY DISSATISFIED WITH OVERALL NUMBER OF HOURS AT Q20 ASK Q21

21) You stated that you are not satisfied with the total number of hours you work each week? Is this because you are asked to work...

SINGLE CODE

Too many hours?

Not enough hours?

Don't know/ prefer not to say

22) Do you work overtime/ above your contracted hours?

SINGLE CODE

Yes

No

Don't know

IF YES AT Q22 ASK Q23:

23) Is the overtime you work...

SINGLE CODE

Paid?

Unpaid?

A mix of paid and unpaid?

Don't know

IF WORK PAID OVERTIME AT Q23 ASK Q24:

24) How many hours of paid overtime do you usually work per week?

If you aren't sure please give your best estimate.

TYPE IN

IF WORK UNPAID OVERTIME AT Q23 ASK Q25:

25) How many hours of unpaid overtime do you usually work per week?

If you aren't sure please give your best estimate.

TYPE IN

26) Do you receive breaks?

SINGLE CODE

Yes always

Most of the time

Sometimes (e.g. when it is not busy)

Never

Don't know/ not relevant

27) If you could change one thing about your working hours, what would it be?

TYPE IN

The next few questions go into more detail on training and development.

Thinking about your current role....

28) Do you feel that you have received enough training to be able to do your job well?

SINGLE CODE

Yes

No

Don't know

29) Have you received health and safety training in the last 12 months (e.g. fire safety, food hygiene)

SINGLE CODE

Yes

No

Don't know

30) Have you received any other training during the last 12 months, either paid for or organised by your employer?

SINGLE CODE

Yes

No

Don't know

IF ANY TRAINING UNDERTAKEN AT Q29 OR Q30 ASK Q31:

31) When was the training undertaken?

Select all of the options that apply

MULTICODE

In paid work time

In personal time with some/ all hours paid for/ reimbursed

Unpaid in personal time

Had to use annual leave (holiday)

Another time (**SPECIFY**)

Don't know

32) Which of the following qualifications, if any, do you already have or are you working towards?

MULTICODE

A Degree in a hospitality or related subject (e.g. tourism, hotel management)

A Degree in another subject

An HNC or HND in a hospitality or related subject

An HNC or HND in another subject

Other qualification in a hospitality or related subject

Apprenticeship in hospitality or related area

None of the above

Don't know

The next section relates to relationships at work. If you'd prefer not to answer any of the questions please select the 'prefer not to say' option and move to the next question.

33) In general, how would you rate the relationships you have with the people you encounter at work?

	Entirely positive	Mainly positive	A mix of positive and negative	Mainly negative	Entirely negative	Don't know/ not applicable	Prefer not to say
Customers							
Co-workers							
Managers							

34) During the last 12 months, have you personally experienced bullying or harassment from any of the following people at work?

MULTI CODE

Yes, from Customers

Yes, from Co-workers

Yes, from Managers

No, none of the above

Don't know/ not applicable

Prefer not to say

35) During the last 12 months, have you witnessed any of your co-workers being bullied or harassed at work?

MULTI CODE

Yes, from Customers

Yes, from Co-workers

Yes, from Managers

No, none of the above

Don't know/ not applicable
Prefer not to say

IF YES PERSONALLY EXPERIENCED ANY AT Q34:

36) Was any of the bullying or harassment you personally experienced from customers, co-workers or managers related to any of the following?

MULTI CODE. RANDOMISE ORDER

Your age
Disability
Gender reassignment
Your marital status or civil partnership
Being pregnant
Your race
Your religion or belief
Your sex
Your caring responsibilities
Being a refugee
Being a migrant worker
Your social class
Your accent
Other
None of the above
Don't know
Prefer not to say

IF YES EXPERIENCED AT Q34 OR WITNESSED AT Q35:

37) When you personally experienced or witnessed these issues, did you report them? (e.g. to a senior co-worker, HR department or employee representative)

SINGLE CODE

Yes
No
Don't know
Prefer not to say

IF YES AT Q37:

38) Did you feel like the issues were effectively dealt with after you reported them?

Select the most appropriate option

SINGLE CODE

Yes – dealt with effectively
No – dealt with but ineffectively
No – not dealt with at all
Don't know
Prefer not to say

IF NO AT Q37:

39) Why did you not report these issues?

TYPE IN

40) Do you have opportunities to have your voice and opinions listened to at work?

SINGLE CODE

Yes

No

Don't know

Prefer not to say

41) Do you feel your voice, and the collective voice of your co-workers, is taken into account when decisions are made?

SINGLE CODE

Yes

No

Don't know

Prefer not to say

PAGE BREAK

ASK ALL

42) Have you ever had to challenge your employer about your rights at work (e.g. breaks, pay, hours, holidays, time off)?

SINGLE CODE

Yes

No

Don't know

Prefer not to say

IF YES AT Q42 ASK Q43:

43) If you can, please give further details on the occasion(s) when you had to challenge your employer.

TYPE IN

IF NO AT Q42 ASK Q44:

44) You said that you've never had to challenge your employer about your rights whilst working in the hospitality sector.

Which of the following statements best describe why this is the case – select any of the options that apply to you.

MULTICODE

I've always felt happy that I received everything I was entitled to

I didn't want to challenge my employer

I was happy enough to put up with it

I referred issue to my union rep

I chose to leave the job

Other reasons (**SPECIFY**)

Don't know

Prefer not to say

45) All things considered, would you recommend your employer to family or friends as a good place to work?

SINGLE CODE

Yes

No

Don't know

46) If you'd like to, type in further details to explain your answer.

TYPE IN

47) All things considered, would you recommend the hospitality sector to family or friends as a good place to work?

Yes

No

Don't know

Finally please answer the following questions about you and where you work.

All of the responses you give are anonymous and will be treated as confidential.

If you would rather not to answer any questions select the 'prefer not to say' option

48) Which of the following best describes where you work?

SINGLE CODE

City centre
City suburbs/ environs
Large town
Small town
Rural
Remote rural/ island
Prefer not to say

ASK IF Q1=SCOTLAND

49) In which local authority is the place you work?

SINGLE CODE. DROP DOWN MENU

Aberdeen
Aberdeenshire
Angus
Argyll and Bute
Clackmannanshire
Dumfries and Galloway
Dundee
East Ayrshire
East Dunbartonshire
East Lothian
East Renfrewshire
Edinburgh
Falkirk
Fife
Glasgow
Highland
Inverclyde
Midlothian
Moray
Na h-Eileanan Siar
North Ayrshire
North Lanarkshire
Orkney
Perth and Kinross
Renfrewshire
Scottish Borders
Shetland
South Ayrshire
South Lanarkshire
Stirling
West Dunbartonshire
West Lothian
Don't know/ prefer not to say

50) In addition to working in hospitality do you have any of the following other responsibilities?

MULTICODE

Carer of pre-school child/children
Carer of primary school child/children
Carer of secondary school child/children
Carer of disabled child/children
Carer of disabled adult (18 and over)
Carer of older person/s
None of the above
Prefer not to say

51) Are you a member of a trade union?

SINGLE CODE

Yes
No
Don't know/not relevant/
Prefer not to say

52) What is your age?

TYPE IN

Prefer not to say

53) What is your sex?

SINGLE CODE

Male
Female
Prefer to describe in another way
Prefer not to say

54) Do you consider yourself to be trans, or have a trans history?

Trans is a term used to describe people whose gender identity is not the same as their sex registered at birth

SINGLE CODE

Yes
No
Prefer not to say

55) What is your sexual orientation?

SINGLE CODE

Bisexual
Gay

Heterosexual/ Straight
Not known
Prefer to self-describe
Prefer not to say

56) Are you a migrant worker?

By this we mean someone who has come to the UK from abroad to work

SINGLE CODE

Yes
No
Don't know/ prefer not to say

57) Do you have a physical or mental health condition or illness lasting or expected to last 12 months or more?

SINGLE CODE

Yes
No
Don't know/ prefer not to say

58) Which of the following, if any, impacts on your ability to undertake day to day activities?

MULTICODE

Physical impairment, such as difficulty using your arms or mobility issues which means using a wheelchair or crutches
Sensory impairment, such as being blind/having serious visual impairment or being deaf/having serious hearing impairment
Mental health condition such as depression or schizophrenia
Learning disability, such as Down's syndrome
Learning difficulty such as dyspraxia, dyslexia or ADHD
Long standing illness or health condition such as cancer, HIV, diabetes, chronic heart disease or epilepsy
Other
None of these
Prefer not to say

IF YES AT Q57 OR ANY AT Q58 ASK Q59:

59) Has your employer made reasonable adjustments to support you in your work?

SINGLE CODE

Yes, all reasonable adjustments made to support me
Yes, some adjustments made, but there are more I would benefit from
No, I haven't asked
No, my employer refused to make adjustments
Prefer not to say

60) Which of the following best describes your ethnic group or background?

SINGLE CODE

White

Mixed or multiple ethnic groups

Asian, Asian Scottish or Asian British

African

Caribbean or Black

Other ethnic group

Prefer not to say

Thank you very much for taking the time to complete the survey. Please now click on the 'Submit' button below

FAIR WORK CONVENTION - SURVEY OF HOSPITALITY SECTOR EMPLOYERS QUESTIONNAIRE

TEXT DISPLAYED ON FIRST PAGE OF SURVEY LINK, AFTER RESPONDENTS CLICK ON LINK ON GENERAL SURVEY WEBPAGE:

Thank you for taking time to complete this important survey of hospitality businesses operating in Scotland.

We are keen to hear about your workforce, staffing challenges and fair work.

This survey is being conducted by independent market research company JRS on behalf of the Fair Work Convention in accordance with the Market Research Society Code of Conduct. Your participation is anonymous and all of your responses will be treated as confidential. Only aggregated data will be reported.

Firstly, to help us compare responses between businesses of different types and sizes, please answer the following question about your business.

1) Which of the following best represents the nature of your business?

Select all that apply

MULTICODE, RETAIN ORDER

Food court/fast food

Public house/pub restaurant

Restaurant

Wine bar

Café

Night club

Hotel (1-3 stars)

Hotel (4-5 stars)

Events/conference venue

Entertainment/sporting venue

Takeaway (including mobile)

Catering

Other hospitality business **(TYPE IN)**

Not a hospitality business – **SCREEN OUT WITH “We’re sorry but unfortunately you do not meet the qualifications for this survey. Thank you for your time.”**

2) Does your business have any premises/outlets in the following areas?

MULTICODE.

Aberdeen

Aberdeenshire

Angus

Argyll and Bute

Clackmannanshire
Dumfries and Galloway
Dundee
East Ayrshire
East Dunbartonshire
East Lothian
East Renfrewshire
Edinburgh
Falkirk
Fife
Glasgow
Highland
Inverclyde
Midlothian
Moray
Na h-Eileanan Siar
North Ayrshire
North Lanarkshire
Orkney
Perth and Kinross
Renfrewshire
Scottish Borders
Shetland
South Ayrshire
South Lanarkshire
Stirling
West Dunbartonshire
West Lothian

None of the above – business only has premises/outlets outside of Scotland

None of the above - business only has premises/outlets outside of the UK –
SCREEN OUT WITH “We’re sorry but unfortunately you do not meet the qualifications for this survey. Thank you for your time.”

Don't know

3) Which of the following best describes your organisation’s status?

Select all that apply

SINGLE CODE

Public sector
Private sector
Third sector
Other **(TYPE IN)**
Don't know

4) Which of the following best describes your business?

If applicable select more than one option or type in other details

MULTICODE

Part of a large chain (e.g. multiple outlets across UK)
Part of a small chain (e.g. a number of outlets locally)

An independent business (e.g. single outlet, family run business)
 Something else (**TYPE IN**)
 Don't know

5) In which of the following types of location is your business based?

If multiple places, select options reflective of where you have outlets

MULTICODE

City centre
 City suburbs/ environs
 Large town
 Small town
 Rural
 Remote rural/ island
 Don't know

6) Approximately how many staff does your business currently employ?

If you aren't sure provide an estimate.

If this varies over the course of the year please give details of the maximum number of staff positions (e.g. during peak season).

SINGLE CODE

Less than 10
 10 to 49
 50 to 249
 250 to 999
 1,000 or more
 Don't know

Next please answer a few questions regarding challenges your business may be facing at the moment.

7) To what extent, if any, is your business experiencing any of the following problems?

RANDOMISE ORDER OF STATEMENTS	Not a problem at all	A minor problem	A moderate problem	A major problem	Don't know/ Not relevant
Difficulties recruiting staff					
High levels of staff turnover					
Increasing supplier costs					
Increasing energy bills					

Decreasing customer demand					
Customer demand levels exceeding what you can deliver					
Increasing staff costs (e.g. wages)					

8) Please type in details of any other issues affecting your business

TYPE IN. ALLOW TO LEAVE BLANK.

IF ANY DIFFICULTIES RECRUITING STAFF AT Q7 ASK Q9 TO Q12 OTHERWISE SKIP TO Q13

9) Which roles are you finding it difficult to recruit?

Please tick all that apply and type in any others

MULTICODE. RANDOMISE ORDER

- Receptionist
- Administrative role
- Accounts
- Housekeeping
- Cleaner
- Bar staff
- Barista
- Serving/waitering staff
- Head Chef/Sous chef or other chef
- Kitchen porter
- Other kitchen staff
- Facilities management
- Conference / Banqueting
- Spa/ beauty therapy
- Customer care/ Customer service
- General Manager
- Human Resources/recruitment manager
- Operations manager
- Marketing/PR/Communications manager
- Other Management role
- Other roles (**SPECIFY – SPACE AVAILABLE TO ALLOW FOR MULTIPLE ROLES TO BE INPUT**)
- Don't know

10) Which of the following factors, if any, have contributed to your problems recruiting staff?

Tick those which apply and type in others not on the list

MULTICODE. RANDOMISE ORDER

Staff unable to find accommodation or housing
Insufficient number of people available to work
Issues relating to the UK leaving the European Union
A lack of suitably skilled/qualified people
Working in hospitality sector does not appeal
Issues related to Covid 19
Competition from other business sectors
Transport issues (e.g. staff unable to access to transport to reach workplace)
Staff seeking higher pay than you can offer
Staff seeking to work hours you cannot accommodate
Other factors **(SPECIFY)**
No factors are contributing to problems
Don't know

11) How are staff shortages affecting your business?

Tick those which apply and type in others not on the list

MULTICODE. RANDOMISE ORDER

Existing staff required to work longer hours
Closing business on certain days/ reduced opening hours
Unable to meet customer demand
Negative impacts on customer experience
Using more temporary/ agency staff
Making changes in what you offer customers (e.g. reduced menu, more limited services)
Buying lower quality stock/produce
Unable to undertake planned improvements to the business (e.g. refurbishments)
Reducing staff training
Unable to offer usual staff benefits **IF SELECTED:** Please type in details
Increasing cost of staff accommodation
Tips now distributed differently
Other impacts **(SPECIFY)**
No impacts
Don't know

Next please answer some questions about contracts and pay in your business.

12) What type(s) of contractual arrangements are used at your organisation?

Select all of those that apply

MULTICODE

- Permanent/ open ended employment contracts
- Agency workers
- Employing workers via a mobile app (e.g. Stint)
- Apprenticeships
- Self employed contractors
- Employing workers via an umbrella company/ payroll company
- Fixed term contracts (including seasonal)
- Zero-hour contracts
- Annualised contracts
- Other (**SPECIFY**)
- Don't know/ not applicable

13) Are you an Accredited real Living Wage employer?

The real Living Wage is the only UK wage rate which is based on a calculation of the cost of living. Accreditation is available through the Living Wage Foundation.

SINGLE CODE

- Yes
- No
- Don't know

14) Is everyone working in your business, regardless of contract type, currently paid the real Living Wage (£10.90 per hour or above)?

SINGLE CODE

- Yes
- No
- Don't know

IF NO AT Q14 ASK Q15:

15) Why does your business not pay the real Living Wage to everyone?

TYPE IN

16) Thinking of workers below senior manager grades, which of the following flexible working arrangements, if any, are available ?

Select all which apply

MULTICODE

- Flexitime (flexible working hours)
- Term-time working

Job sharing
Condensed/compressed hours
Homeworking
Other arrangements **(TYPE IN)**
None of the above
Don't know

17) Thinking of workers below senior manager grades, are workers entitled to any of these non-pay terms and conditions?

Select all which apply

MULTICODE. RANDOMISE ORDER

Employer contributions to a pension scheme
Private health insurance
More than 28 days of paid annual leave (including public holidays)
Sick pay in excess of statutory requirements
Maternity leave or pay in excess of statutory requirements
Paternity leave or pay in excess of statutory requirements
Subsidised meals during shifts
Access to leisure facilities
Discounts for workers and/or their family or friends
Free transport home after late shifts
Other **(TYPE IN)**
No, none of the above
Don't know

The next few questions relate to training and development.

18) In which of the following ways do you deliver training to your workforce/management?

Select all which apply

MULTICODE

Induction training for new staff
On the job training (e.g. shadowing)
Off the job training delivered in house (i.e. by managers or colleagues)
Off the job training delivered by third parties/externally (e.g. by colleges or private companies/individuals)
Online training/courses
Other training **(SPECIFY)**
No training delivered
Don't know

19) Beyond mandatory training (e.g. health and safety), does your business have a dedicated budget for training?

SINGLE CODE

Yes
 No
 Don't know

20) Do you expect the amount of training you arrange or fund for staff to increase or decrease over the next 12 months?

SINGLE CODE

Increase
 Decrease
 Stay the same
 Don't know

21) In general, how easy or difficult are the following for your business when it comes to delivering training...

RANDOMISE ORDER OF STATEMENTS	Very easy	Easy	Neither difficult nor easy	Difficult	Very difficult	Don't know/ not relevant
Finding training providers that meet your requirements						
Finding training solutions within your budget/affordable for your business						
Building effective training programmes						
Accessing specific funding to support training and upskilling						
Providing staff with paid time off to undertake training						
Retaining skills within your business						

IF ANY OF THE STATEMENTS RATED AT Q21 ARE DIFFICULT OR VERY DIFFICULT ASK Q22:

22) If you can, please give further details on any training needs which are difficult to meet due to these challenges.

TYPE IN

The next few questions relate to unions and employee voice in your business.

23) Does your business consult with trade unions to enable staff to have a voice in their working conditions?

SINGLE CODE

Yes

No

Don't know

24) Does your business have a regular working relationship with any trade unions?

SINGLE CODE

Yes – business has a recognition agreement allowing the trade unions who are recognised to negotiate on behalf of their members

Yes - the unions meet regularly with staff in the workplace but there is no recognition agreement

No

Don't know

25) Would your business be interested in having a closer working relationship with trade unions?

SINGLE CODE. ROTATE ORDER

Definitely interested

Possibly interested

Not sure

Probably not interested

Definitely not interested

Don't know

26) Do you have a staff association or dedicated staff networks that support staff to have a say in their working conditions?

SINGLE CODE

Yes

No

Don't know

27) Do you hold meetings where staff can express their views and influence the outcome of the following issues?

	Yes – regularly	Yes – occasionally	No	Don't know
Planned changes in work practices				
Working hours / rotas				
Health and safety issues				
Training plans				
Staff welfare and the workplace environment				
Making improvements to work processes, products or services				

ASK IF YES REGULARLY OR YES OCCASIONALLY AT ANY OF Q27

28) At these meetings, how influential can staff be on management's decisions?

SINGLE CODE. ROTATE ORDER

- Very influential
- Fairly influential
- Not very influential
- Not at all influential
- Don't know

29) Does your workplace have a formal procedure for dealing with individual grievances raised by employees?

SINGLE CODE

- Yes
- No
- Don't know

30) Which of the following types of grievances, if any, have been raised in the past year whether through a procedure or not?

Select any that apply

MULTICODE. RANDOMISE ORDER

- No grievances raised
- Pay, terms and conditions

Promotion, job grading and career development
Physical working conditions, health and safety
Working time
Discrimination
Unfair treatment, relations with line managers or supervisors (e.g. victimisation)
Bullying at work and harassment
Selection for redundancy
Sexual harassment
Other (**SPECIFY**)
Don't know

31) Does your workplace have a formal procedure for dealing with discipline and dismissals - other than redundancies?

SINGLE CODE

Yes
No
Don't know

31b) Has any disciplinary action been taken in your workplace in the past year?

SINGLE CODE

Yes
No
Don't know

IF YES:

32) What were the reasons for taking disciplinary action in the past year?

Select any that apply

MULTICODE

Poor timekeeping or unauthorised absence
Poor performance
Personal use of premises or equipment, theft or dishonesty
Health and safety breaches
Abusive or violent behaviour
Bullying and harassment
Sexual harassment
Alcohol or drug use
Other (**TYPE IN**)
Don't know

33) Overall, all things considered, do you believe that your business is a good business to work for?

Yes

No

Don't know

34) If you'd like to, type in further details to explain your answer.

TYPE IN

35) What do you think hospitality employers can do to improve working relationships and make the industry a more attractive career choice for employees?

TYPE IN

36) What are the barriers facing employers to improve working relationships and make the industry a more attractive career choice?

TYPE IN

Thank you very much for taking the time to complete the survey. Please now click on the 'Submit' button below

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