



Insights on Hospitality Recovery

Monthly Analysis Report – December 2020

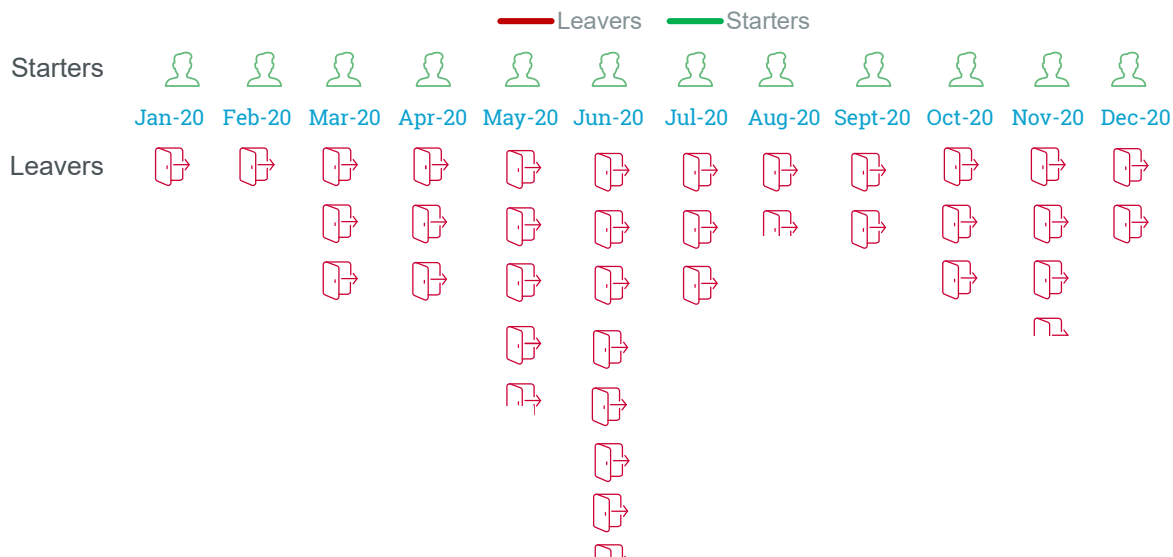
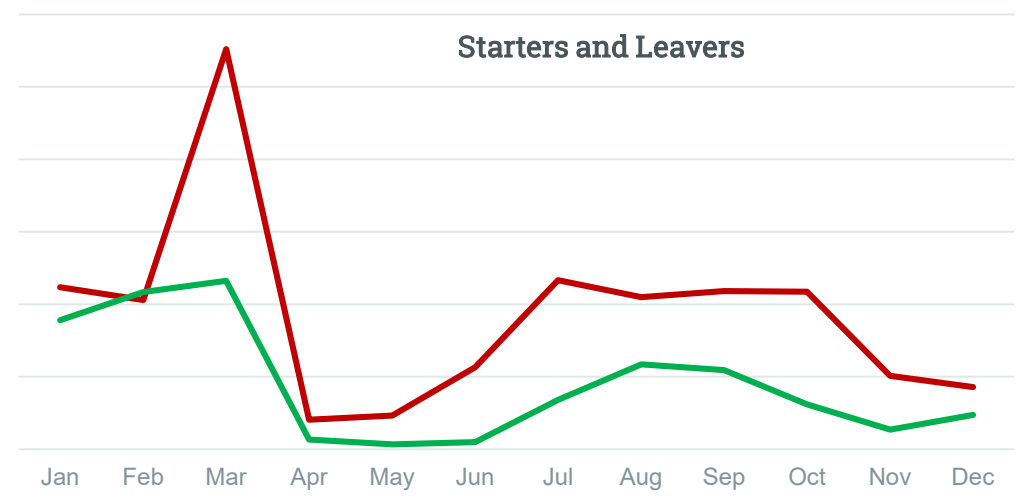


Starters and leavers

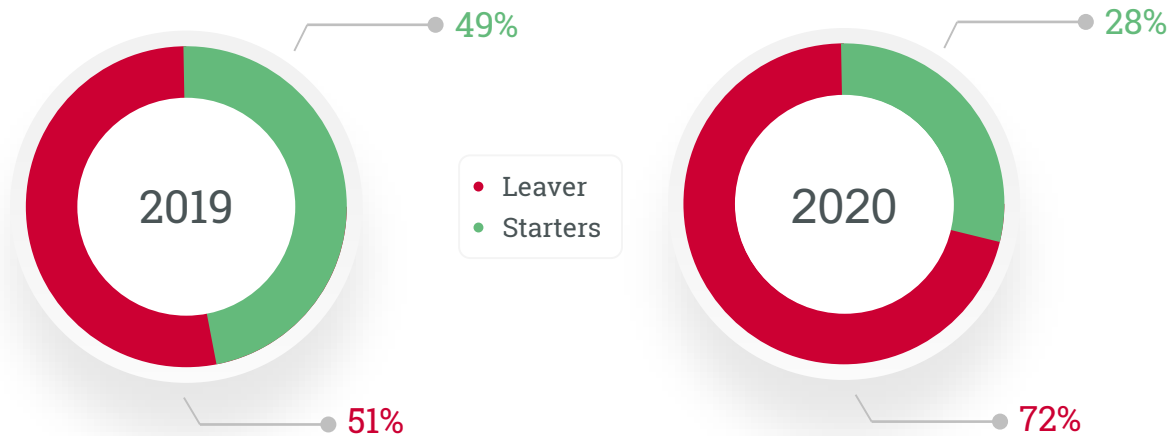
- Employee headcount has fallen 28% vs 12 months ago. This equates to around 660,000 jobs in hospitality being lost in the last 12 months. We have however seen the fewest job losses since May, indicating that the continuation of the furlough scheme is helping to protect and preserve a portion of jobs in the marketplace.
- Sector recruitment continues to stagnate, dropping by 43% compared to August - October 2020 levels. This indicates that operators are holding formation and had enough headcount within their business to meet demand levels during the festive period, most probably looking to use the flexible furlough scheme as oppose to recruiting seasonal team members as would have happened in previous years.

Employees: Starters & Leavers

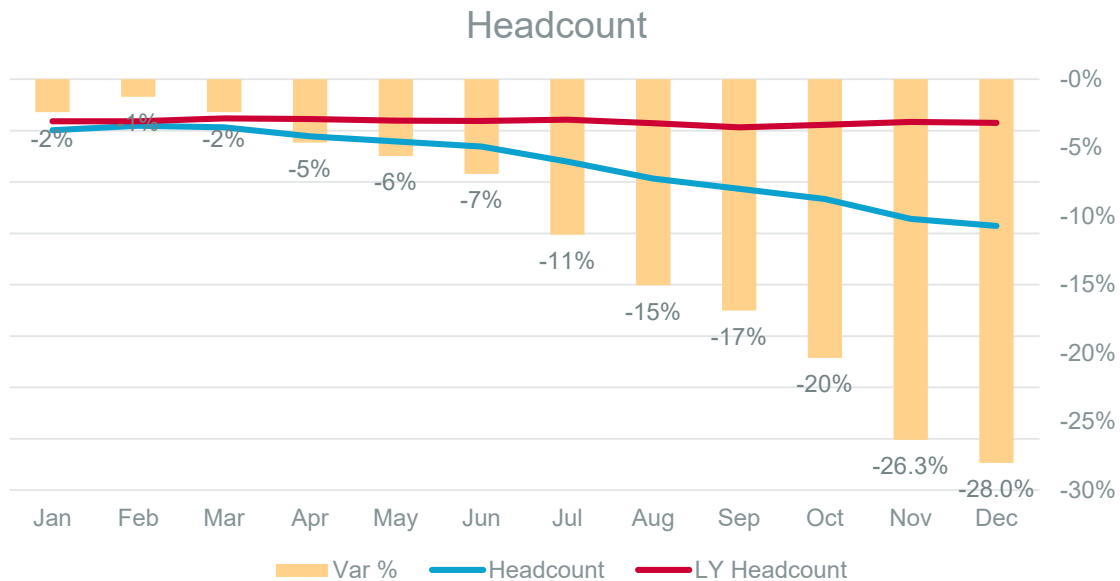
Starters and Leavers



Starters & Leavers



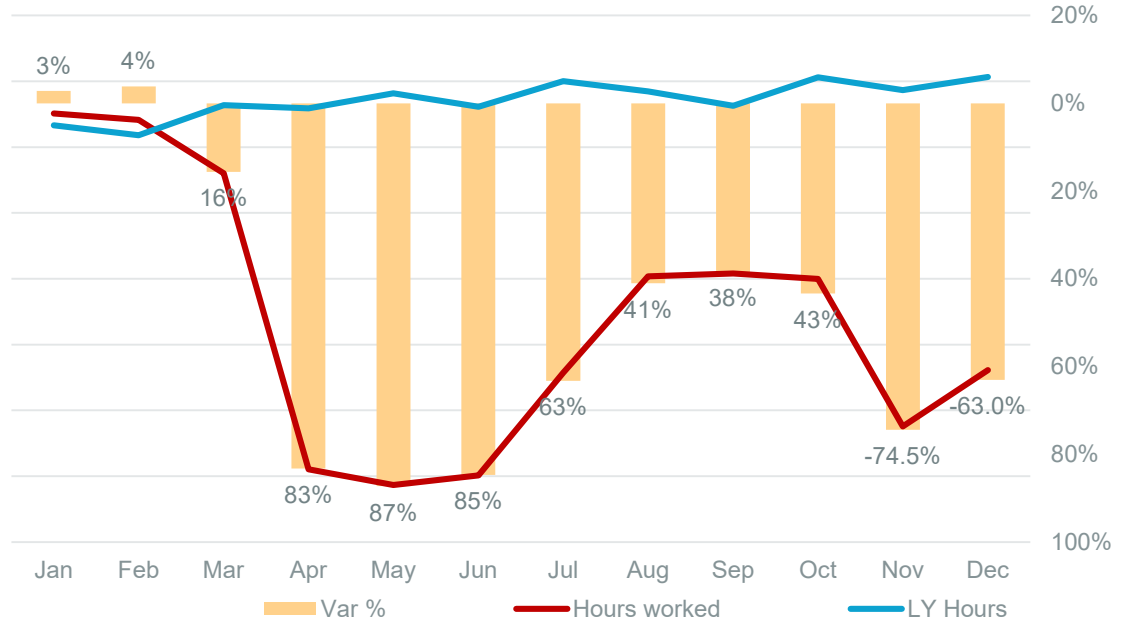
Headcount vs Last Year



Scheduling

Actual Hours Worked

Hours Worked (in millions)



Scheduling

- The number of hours worked in December 2020 was 63% down on hours worked a year ago. This is a marked increase against November 2020 where hours worked was 75% lower than November 2019.
- This market increase is 49% greater than the number of hours worked in November, signifying how the transition from the second national lockdown into the revised tiered system enabled operators to briefly capitalise, where possible, on festive trading.

Planning For The Future: Data Driven Decision Making

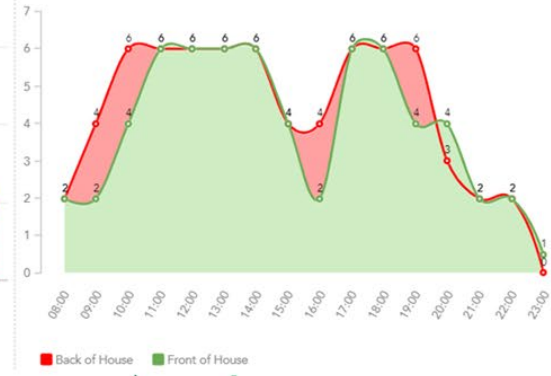
New Transactions / Staff Members



Wifi Events Histogram



Hours Scheduled by Area



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