



LTC Wellbeing Research

Wellbeing at Work - What a Difference a Year Makes

Delivered by

KAM

A 360 understanding one year on

Here's what we did:

- etc* Online survey of 501 current or recent (last 6 months) FOH and BOH employees and head office/management within the licensed hospitality industry (including pubs, bars and breweries)
 - etc* Qualitative interviews with 6 senior level HR people within the licensed hospitality industry
- New for 2026**
- etc* 2 focus groups with HO teams, GMs, licensees and franchisees



So, how's everybody doing out there?

2 in 3 pub/bar industry employees admit to having suffered 'challenges' over the last 12 months*

*very slight improvement vs last year but a lot of work still to do

Some people are much more likely to be suffering than others

Q. In the last 12 months, have you experienced challenges or issues with any of the following? – this is the % who ticked one of them



Health



Housing



Mental Health



Financial



Work



Family & Relationship



Sleep

Percentage who have experienced one of these challenges or issues in last 12 months

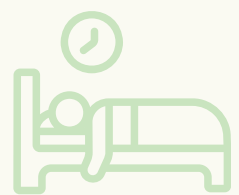
66% On average

81% 35 - 44 year olds

94% people who identify as neurodiverse

What are the most common personal challenges that our teams are facing?

Q. In the last 12 months, have you experienced challenges or issues with any of the following? – this is the % who ticked one of them



29% said sleep



22% said mental health



22% said financial



19% said health



16% said family



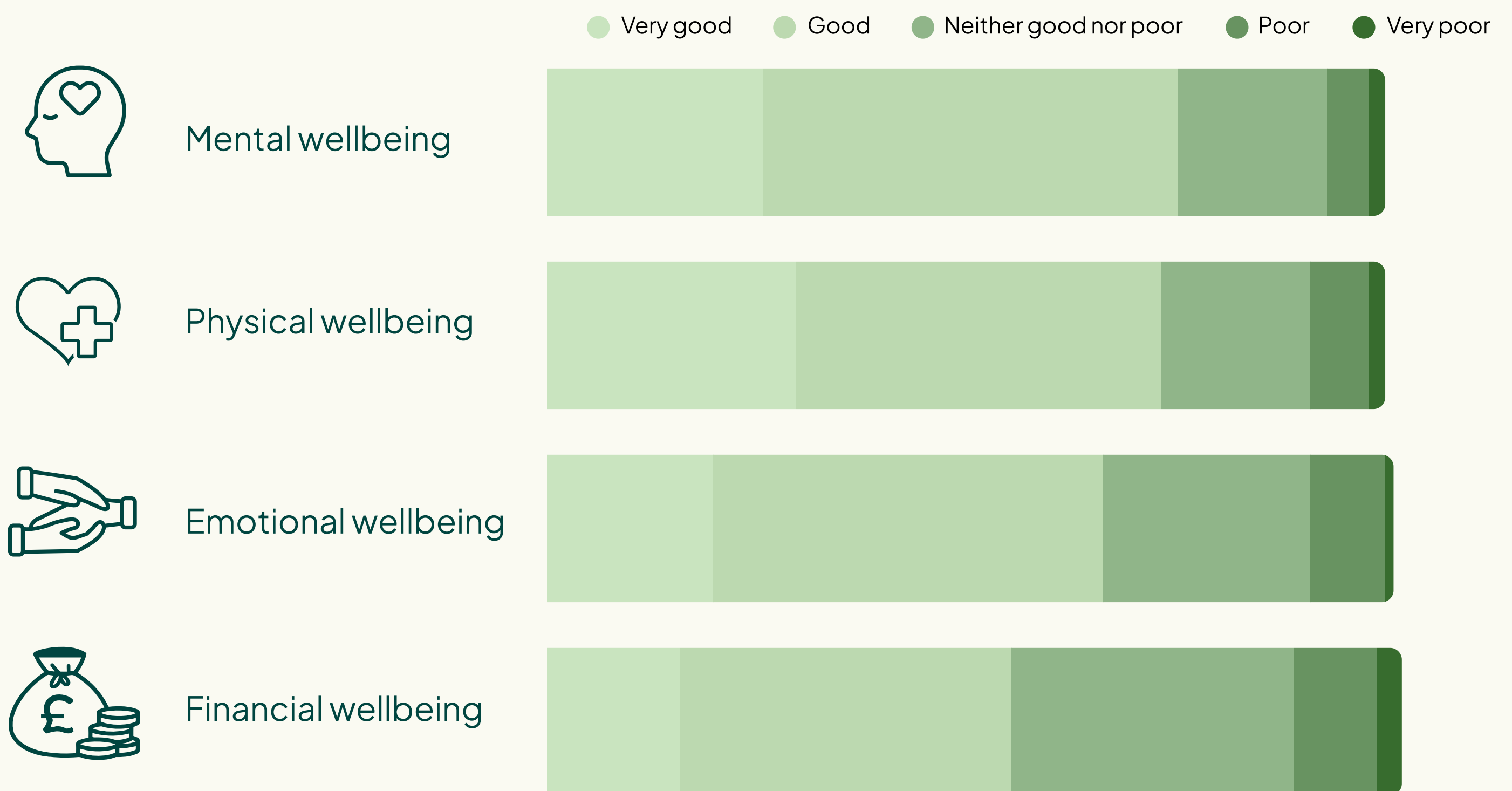
14% said work



7% said housing

How do our employees currently rate their overall wellbeing while at work?

Q. How would you rate your overall wellbeing at work currently (mental, physical, financial and emotional)?



29%

Of our employees feel their current working conditions don't allow them to perform at their best

‘Financial pressure is the root driver of poor mental wellbeing

According to the employers we spoke to...

“Financial concerns increase stress levels, which in turn negatively impact mental health.”

Employer

“Financial wellbeing is a big concern for our teams... From the weekly food shop to being able to afford a mortgage.”

Employer

In a nutshell, too many of our teams don't feel supported enough

22% Of employees feel their current workplace doesn't actively promote a culture of wellbeing

22% Of employees don't feel their employer values the wellbeing of staff as much as customer service and operational efficiency

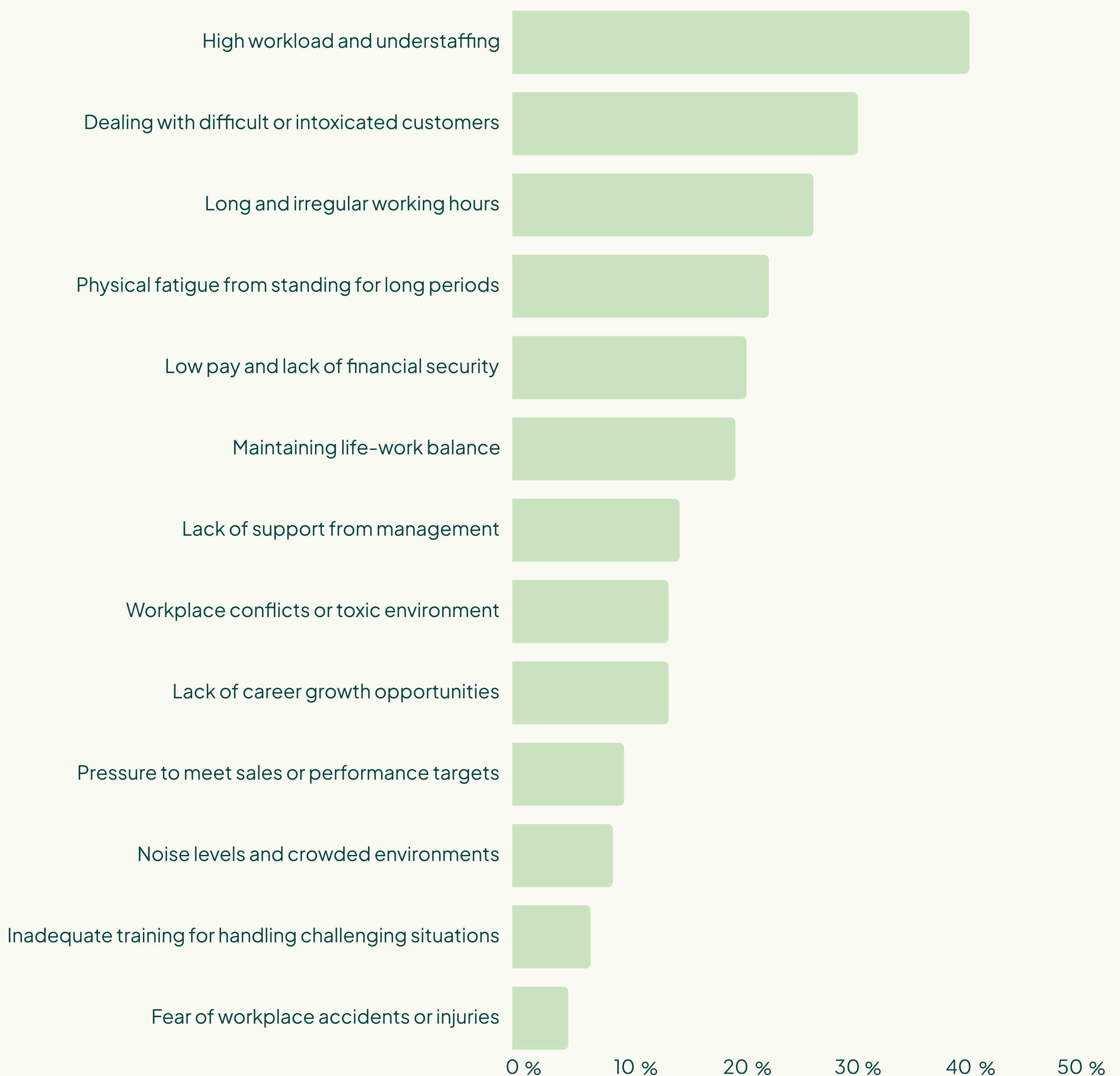
2 in 3 employees admit to feeling stressed or overwhelmed at work 'regularly or occasionally'

Much higher for those with neurodiversity at 41%



What are the main causes of pressure in your workplace, according to employees?

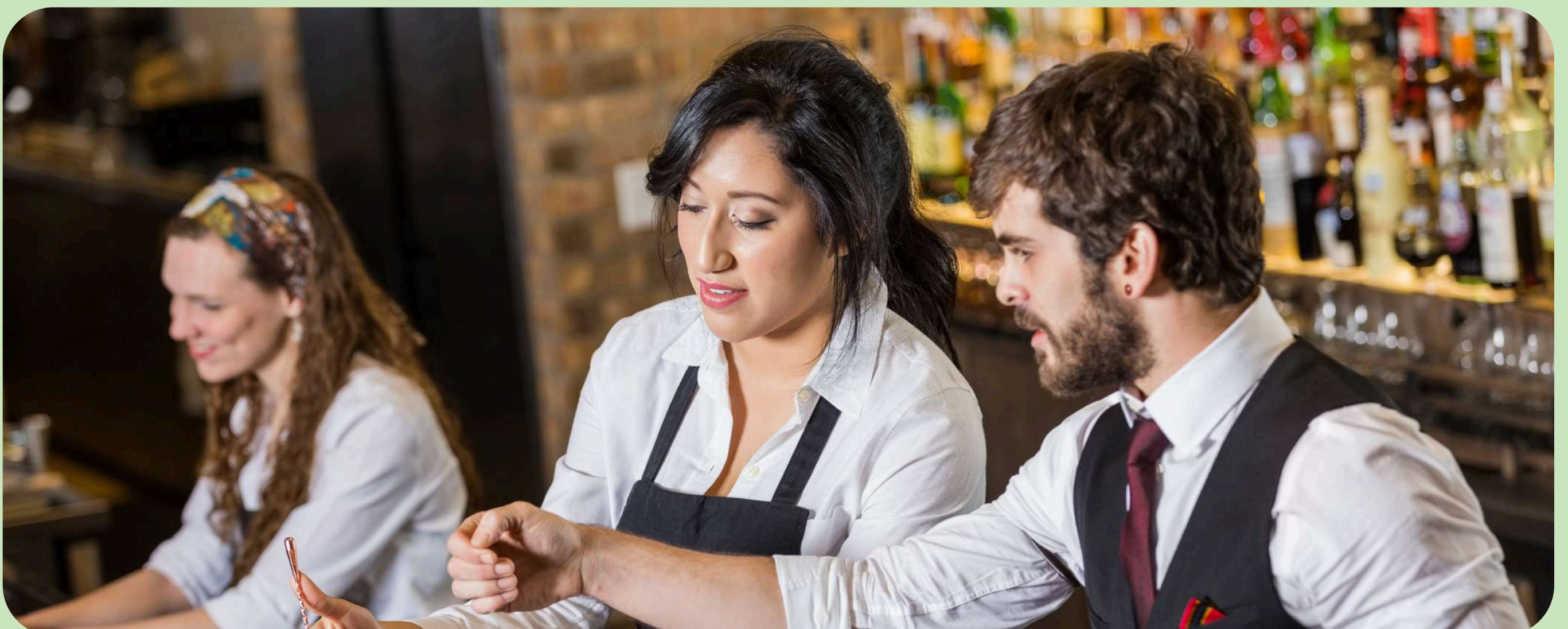
Q. In the past month, what factors most affected your ability to work at full capacity?



Is work place wellbeing really having that much impact on productivity and service?

Those who regularly feel stressed / overwhelmed at work are...

- etc* less likely to feel their current working conditions allow them to perform at their best
- etc* less likely to have the energy & focus to do their job well
- etc* taking more sick days than those who don't
- etc* higher rates of presenteeism (at work but not fully effective/working at their best)



Of the employees we spoke to...

Wellbeing is seen as directly commercial, not just cultural

“We see it immediately in retention rates and customer experience.”

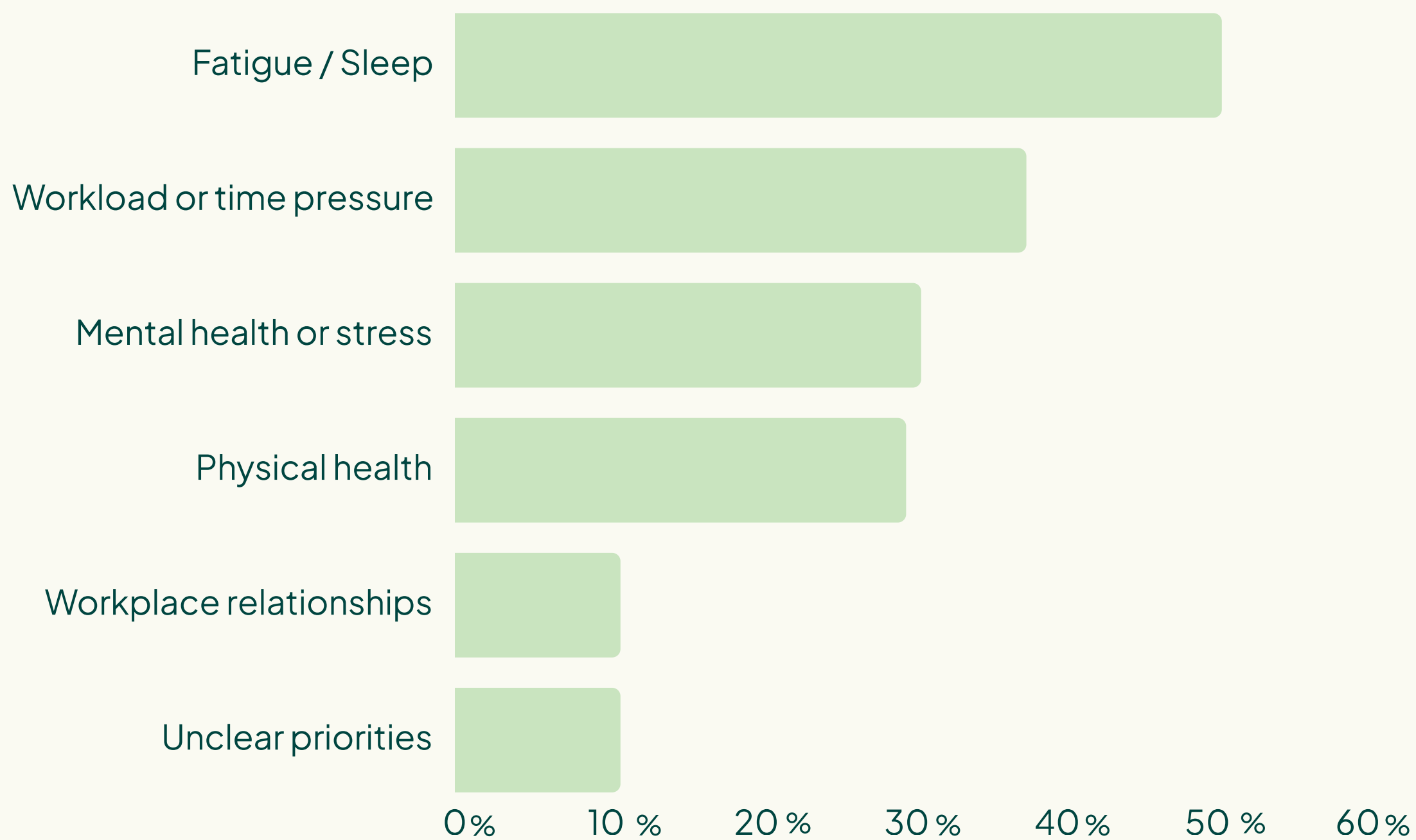
Employer

“A stressed team member simply can’t provide good customer service.”

Employer

What are the factors preventing employees from working at full capacity?

Q. In the past month, what factors most affected your ability to work at full capacity?



No.1 Fatigue or lack of sleep

1 in 4 employees say sleep disruption has affected their ability to function effectively at work

48% say work-related stress has affected their sleep in the last 3 months

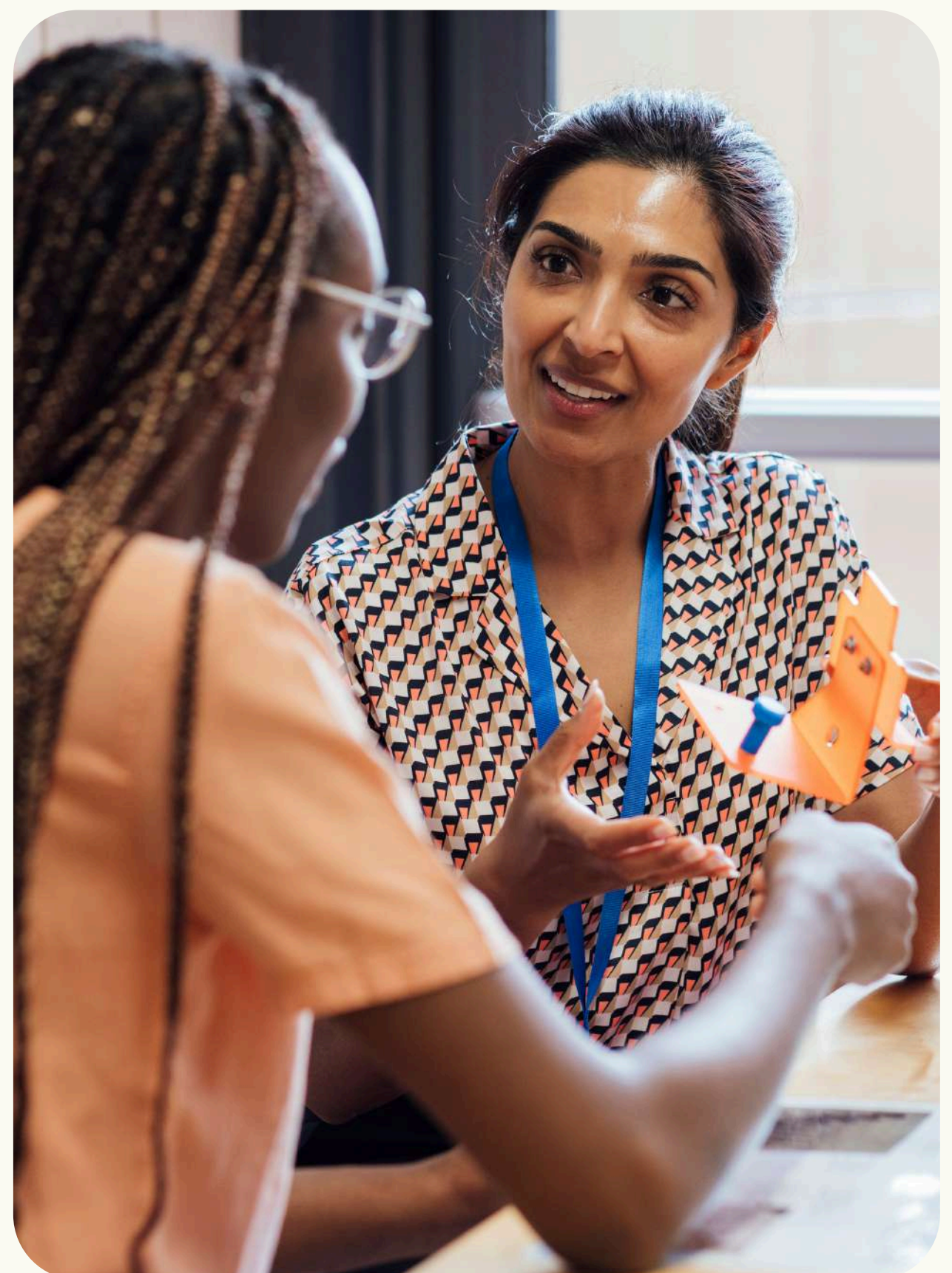
How many of our workforce identify as neurodiverse in our sector?

145,600 or 14 % of employees in our sector identify as neurodiverse (mirrors UK as a whole)

*Assuming 1,040,000 employees in the UK pub, bar & brewing industry (Source: BBPA)

Five most commonly identified neurodivergent conditions:

- etc Autism
- etc ADHD
- etc Learning difficulties
- etc Learning disabilities
- etc Dyslexia



How do our neurodiverse colleagues experience the workplace?

1 in 9 don't feel their current working conditions allow them to perform at their best

etc more likely to feel 'stressed / overwhelmed'

etc more likely to have suffered with;

- mental wellbeing
- physical wellbeing
- financial wellbeing
- housing issues



What's the cost of not prioritising employee wellbeing?

The impact of sick days remains relatively unchanged vs last year:

(Based on the research ie. employee recollection)

£306 million

Annual cost of sick days to the beer & pub industry p.a.**

3

The average no. of sick days per employee p.a. in the sector

(v UK ave of between 4-7 days**, BUT hospitality has lots of part-time shift workers)

£295

Annual 'direct' cost per employee.

(Based on minimum wage only & not considering lost revenue, low productivity etc.)*

*Based on 8-hour shift @ £12.71 per hour (NLW) = £101.68

**Assuming 1,040,000 employees in the UK pub, bar & brewing industry (Source: BBPA)

***Multiple sources give different figures. ONS says 5.7 days in 2022.

33% of sick days can be linked to mental wellbeing in the last 12 months

83% of sick days taken by pub/bar industry employees are due to physical wellbeing

Of the employers we spoke to...

Employers agree mental wellbeing is impacting their businesses

“We’re seeing an increase in long term sickness cases related to mental health”

Employer

“Absence is primarily driven by stress and mental health pressures”

Employer

Poor mental wellbeing

can still be linked to

>1.2 million

'sick days' p.a. in our sector

=

... 'directly' costing employers

£122 million

*vs 1.5m sick days and £146m last year



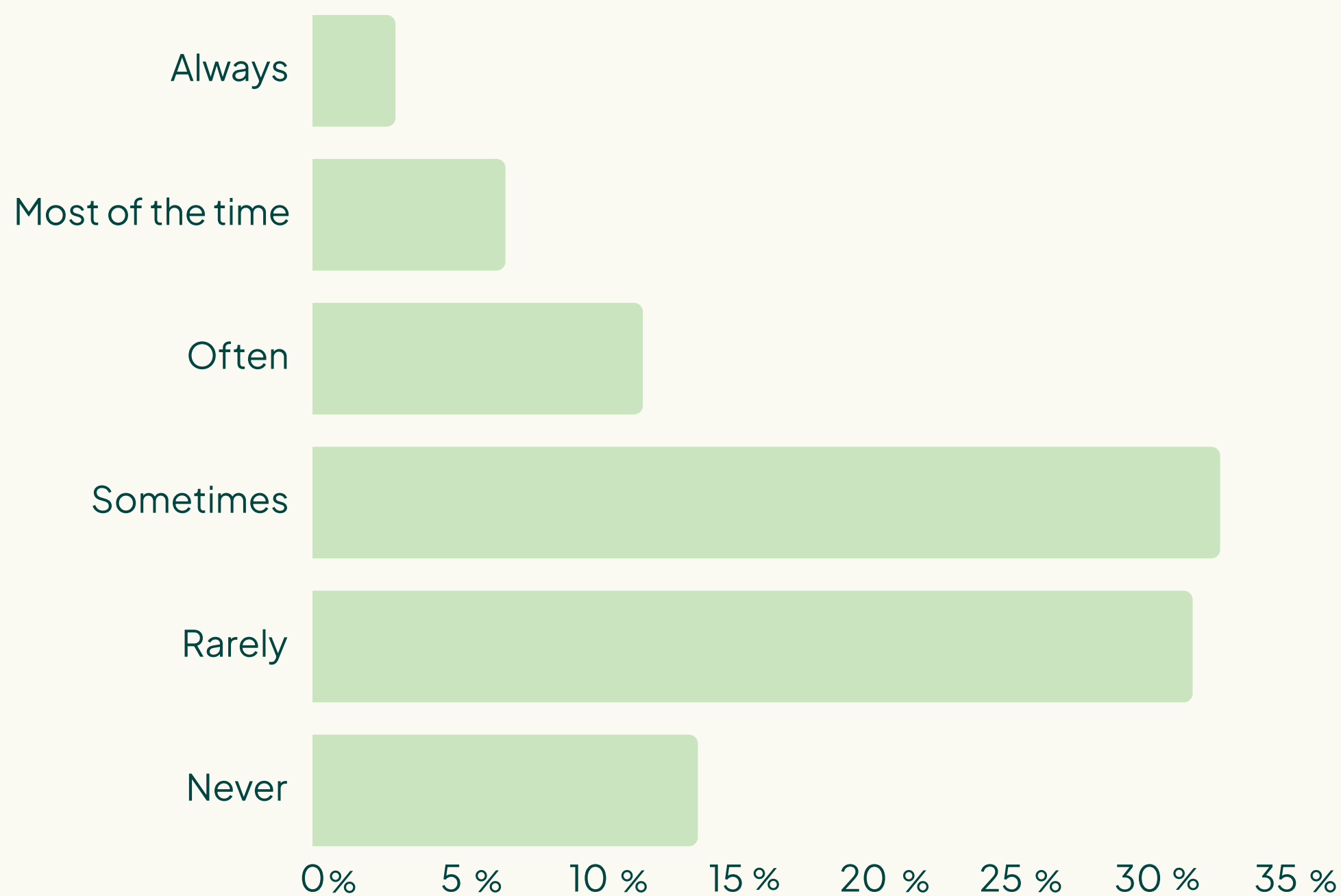
Data Gap

There's a positive cultural shift within hospitality businesses toward acknowledging mental health absence but also inconsistency in measurement

Most still do not track it consistently or at all

The invisible cost of poor employee wellbeing is still going strong

In the past month, how often did you feel you were 'present' at work but not fully effective or working at your best?



Poor employee wellbeing:

- lta* Lower productivity
- lta* Lower team morale
- lta* Higher staff turnover
- lta* Poor customer service

Say hello to presenteeism

No. of 'days lost' in terms of productivity due to working while in poor mental or physical health:

Absenteeism

3

lost work days per employee
p.a. due to 'sick days'.

= 3.1 million

lost work days p.a.
for our sector.

+

Presenteeism

43

per employee p.a.
due to 'presenteeism'*

(nb. UK average figure, not industry specific)

= 44.7 million

additional lost work days p.a.
in terms of productivity for our
sector.

*Source: *IPPR – 'Healthy industry, prosperous economy' July 2024 & Vitality – 'Britain's Healthiest Workplace Report'.

1-in-10 employees say they're 'not fully effective' and/or 'not working at their best' either all or most of the time

What's the opportunity if we get employee wellbeing right?

Reducing sick days by just 1 per employee/yr

= **£100 million saved**

+

Reducing presenteeism by just 10%

= **4.5 million additional work days p.a.**

(in terms of productivity)

*Source: <https://www.ippr.org/media-office/revealed-hidden-annual-cost-of-employee-sickness-is-up-30-billion-since-2018>

Data Gap

Majority of employers we spoke to still don't track sick days or presenteeism or their impact on the business, despite increased conversations about this within the industry

According to employer research average sick days = 5 days per employee per year, only 7 out of 11 tracked and some only track after day 4 when SSP kicks in. Only 2 employers track the cost of sickness to their business.

Most employees are 'fairly' satisfied with the current level of support.

Is 'fairly satisfied' enough for us?

20%

are 'VERY satisfied' with the level of mental health / stress management support available (39% are 'satisfied') slight decline vs last year

32%

think their workplace 'definitely' actively promotes a culture of wellbeing (46% say 'somewhat') slight improvement vs last year

58%

say mental health and/or stress management support available in their workplace (lowest for 55 years + at 49%) no improvement vs last year

Of the employers we spoke to...

Support is broad and improving but often fragmented

**“We have Mental Health
First Aiders across the
business.”**

Employer

**“We have an app to support
from sleep to stress
management.”**

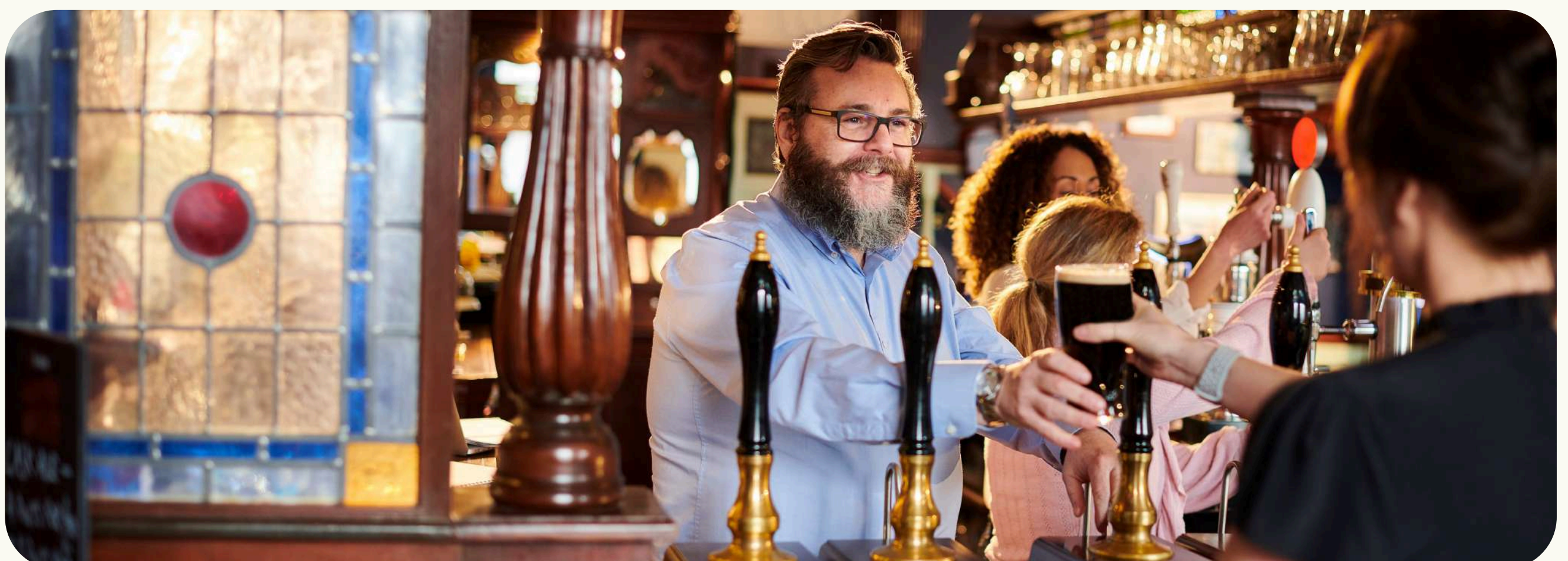
Employer

**“We have flexible tools to
manage finances to aim to
reduce financial stress.”**

Employer

What improvements do teams want in terms of mental and physical wellbeing support?

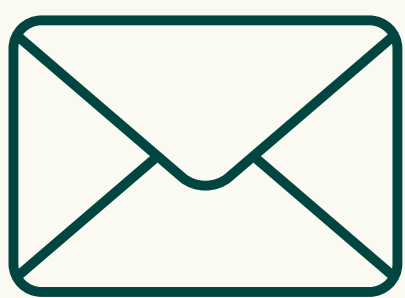
- etc* **1. Better communication & awareness**
Clearer information on available support, regular check-ins, and more open conversations about wellbeing.
- etc* **2. More support & access to resources**
Greater access to wellbeing programmes and dedicated support personnel.
- etc* **3. Flexibility & work-life balance**
Flexible hours, more time off (including mental health days), and improved scheduling to prevent burnout.
- etc* **4. Stronger management support & culture**
More empathy, active listening, and better-trained managers who prioritise wellbeing.



Communication is key

37% are contacted by colleagues/management outside of working hours at least weekly

Our teams say they can be contacted by colleagues and/or management outside of working hours by:



55%
Email



55%
WhatsApp



44%
Text

18% rate the communication between staff and management regarding wellbeing initiatives available as excellent

44% rate the communication between staff and management regarding wellbeing initiatives available as good

What can employers do to address the impact of poor wellbeing at work?

Employee Assistance Programmes are available but not necessarily utilised.

No change vs last year

36% say their employer offers an 'Employee Assistance Programmes'



98% know how to access it



51% have used it (Lowest for 55yr+)



29% are not sure if their employer offers & Employee Assistance Programmes or not

(Lowest for 55yr+)

Of the employers we spoke to...

Engagement with EAPs often only happens at crisis point

“There’s a stigma around seeking support, particularly mental health”

Employer

“Perception is that support is for serious issues only”

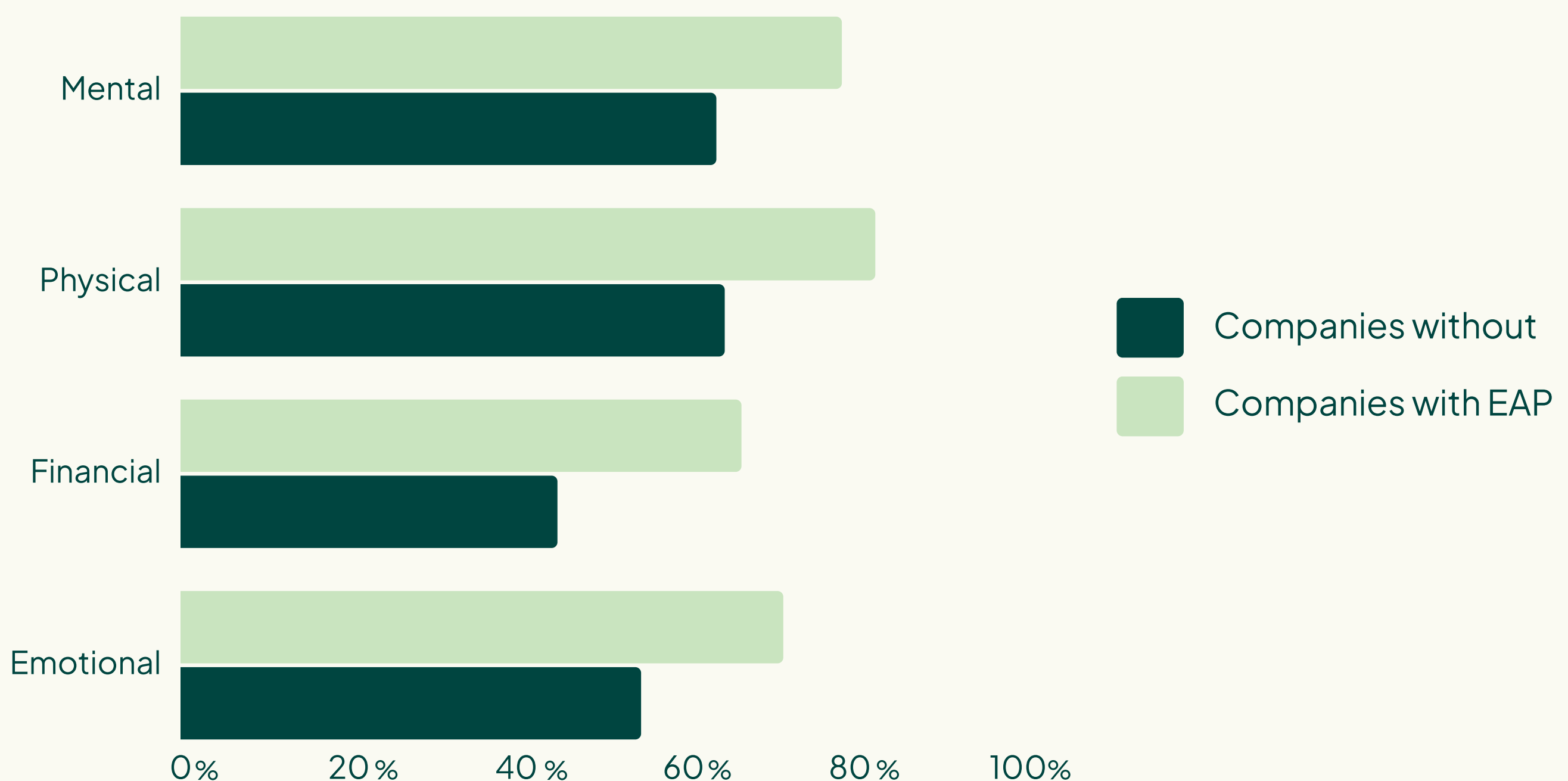
Employer

“The barrier is still around making employees aware”

Employer

An Employee Assistance Programme can have a significant impact

% who rate their current wellbeing at work as 'very good' or 'good'



Employers agreed usage of Employee Assistance Programmes could and should be much higher.

Data Gap

Majority of employers still don't access any data from their Employee Assistance Programmes.

If done well, the potential return on investment on Employee Assistance Programmes is clear

The positive impact an EAP has on employee wellness can reduce absenteeism by between 3-16%*

*'Improvement of a comprehensive multi-site work-site health promotion' - Aldana S.G.



For every £1 spent,
employers gain £5.26

This doesn't include the potential impact an EAP could have on 'presenteeism'

Find out how much poor wellbeing is costing your business, and how much you could save

LTC Wellbeing Calculator



Which areas of wellbeing support do our teams think would most benefit them?

Q. What topics would you like to see covered in a wellbeing-focused event or conference for the hospitality sector?



The good news

According to the employees we spoke to, their future focus is shifting from reactive to preventative and cultural change

Key Take Outs:

Sleep is the biggest barrier to working at full capacity

29% of employees reported sleep challenges

1 in 4 say sleep disruption affects their ability to function effectively at work

48% say work-related stress has affected their sleep in the last three months

46 days equivalent lost per employee, per annum due to poor employee wellbeing (absenteeism + presenteeism)

Data gaps remain significant:

- etc* Number of sick days
- etc* Mental health-related absence
- etc* EAP usage and effectiveness
- etc* Employee feedback
- etc* Presenteeism



With special thanks to

KAM

If you'd like to work with KAM, you can get in touch at
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