

Accommodation and food service activities - Evidence from the European Survey of Enterprises on New and Emerging Risks (ESENER)

Summary

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Executive Summary

The Accommodation and Food and Beverage Services (AFBS) sector covers a wide range of different sectors including hotels, pubs, cafés, restaurants, contract caterers in various industrial and commercial premises, fast-food takeaways and bistros. The AFBS sector plays an important role within the European Union (EU) economy not only as a source of wealth and jobs but also as a creator of growth opportunities in other sectors. According to Structural Business Statistics (Eurostat),¹ in 2019 the sector generated more than €593,309 million in turnover and €252,367 million value added. Despite the increasing presence of big hotel chains and franchises and the success of fast-food restaurants, more than 98% of enterprises are microenterprises employing 10 employees or fewer, where many enterprises are family run and self-employed.

The AFBS sector had in 2021 a total of 7.8 million jobs in the EU-27, with a significant loss of 1.6 million jobs due to the COVID-19 pandemic and related restrictions to social activity (European Labour Force Survey).² The AFBS sector is characterised by a high presence of women, young workers and migrants, as well as atypical employment (temporary/seasonal and part-time work), no written employment contracts, non-standard, irregular long/short working time and the presence of low levels of employer-paid training (CEHAT, 2011; EFFAT, 2020; ELA, 2021; Eurofound, 2014, 2016; Hassard et al, 2020; Warsaw, 2011).

The main occupational safety and health (OSH) risks in the AFBS sector include repetitive hand or arm movements, risk of accidents with machines, exposure to heat/cold/draught and, finally, risk of slips/trips/falls. AFBS sector workers are also confronted with important psychosocial risks that superpose to other OSH risks, including continuous contact with customers and clients and high workload and time pressure (stress) to meet tight deadlines at peak times. However, only 15% of AFBS sector establishments suggest that psychosocial risks are more difficult to address than other risks. The AFBS sector can be characterised as a relatively dangerous sector due to the high number of accidents, although the majority of these accidents are non-fatal. Most common health outcomes refer to a high presence of musculoskeletal disorders (MSDs), skin and respiratory problems, cuts and lacerations, and burns and scalds. Work-related stress and 'burnout syndrome' are also relatively present.

Approximately 71% of the EU-27 AFBS sector establishments regularly carry out workplace risk assessments, where this share is slightly below the EU-27 average for all sectors (75%). This share increases with establishment size and it shows remarkable disparities among Member States. Approximately half of AFBS establishments suggest that these risk assessments are contracted to external providers, and 88% suggest having documented their risk assessments in written form. By way of contrast, three out of 10 sector establishments do not regularly carry out risk assessments, where the most frequent reason for not conducting such risk assessments is that risks are already known. The smallest AFBS establishments are particularly sensitive to the lack of necessary expertise for doing these risk assessments. Several interviewed experts warn about the risk that these risk assessments are conducted by 'obligation', where follow-up measures are not implemented.

The most recurrent practice taken by AFBS establishments to deal with OSH risks is the provision of equipment to lift and move heavy work, followed by the reduction of working hours for people with health problems, regular breaks for people in uncomfortable positions and the rotation of tasks to reduce repetitive movements. The most extended measure taken to prevent psychosocial risks refers to allowing employees to take more decisions on how to do their job, followed by other measures such as the possibility of reorganising their work in order to reduce job demands/work pressure or the provision of confidential counselling for employees. These preventive measures are more present among larger establishments.

Two out of three AFBS establishments regularly arrange medical examinations to monitor the health of employees, where this percentage is one of the lowest in comparison to other sectors. Fifty-seven per cent of AFBS establishments used the services of an external provider to support them in their health and safety tasks in the last three years, again one of the lowest in comparison to other sectors. Employers are not clear in many cases about the type of external services they really need to hire to comply with OSH legislation, and how much it is reasonable to spend on these. The most popular types

¹ See <https://ec.europa.eu/eurostat/web/structural-business-statistics/overview>

² See <https://ec.europa.eu/eurostat/web/lfs/overview>

of organisations AFBS establishments resort to for obtaining health and safety-related information are contracted health and safety experts, the labour inspectorate and insurance providers.

Establishments where health and safety issues are regularly discussed at top level are more likely to have formal procedures in place to prevent psychosocial risks and take more measures to prevent such risks. Larger establishments and enterprises, especially those belonging to international groups such as international hotel chains, are particularly committed to OSH issues (for instance, in terms of regular discussion of OSH issues in staff or team meetings or at the top level of management). In this last case, 56% of AFBS establishments suggest that OSH issues are regularly discussed at the top level of management (seven out of 10 in the case of the larger establishments), where this average percentage is one of the lowest in comparison to the rest of sectors.

OSH training activities are often difficult to be organised among AFBS establishments for several reasons, including the difficulties derived from managers/workers taken out of work during training, the lack of resources or the knowledge to hire quality external OSH training experts, and high labour turnover and seasonality of work (all these problems are more acute among smaller enterprises). Approximately three out of four AFBS establishments with 20 or more employees provide training on how to manage health and safety in their teams to team leaders and line managers, where a similar percentage provide training during work time to help health and safety representatives to perform their health and safety duties. Up to 81% of the AFBS establishments exposed to chemical or biological substances have offered training on the use of dangerous substances to their employees and 79% of all establishments on emergency procedures. Meanwhile, 70% of AFBS establishments exposed to lifting or moving heavy loads have offered training on how to lift and move heavy loads, the same percentage for those total establishments that have offered training on the proper use and adjustment of working equipment.

The evolution in time of OSH management practices in the AFBS sector shows an increase in the share of AFBS establishments that have introduced general health promotion measures intended to raise awareness about healthy nutrition or preventing addiction practices, as well as an increase in the share of establishments with 20 or more employees that have introduced different measures to prevent psychosocial risks, particularly in relation to reorganisation of work to reduce job demands and work pressure. The share of AFBS establishments with more than 50 employees that have procedures in place to support employees returning to work after a long-term sickness absence has experienced an upward trend from 2009 onwards.

The main drivers for addressing health and safety in AFBS establishments are two, namely the fulfilment of existing legal obligations and the wish to avoid fines from labour inspectorate authorities. Labour inspectorates play a key role not only in driving compliance and fulfilment of existing OSH legislation but also in providing useful advice about how to successfully deal with and improve existing OSH management practices within AFBS establishments.

Fifty-eight per cent of the EU-27 AFBS establishments have been visited by the labour inspectorate in the last three years (64% according to the ESENER 2014 results), where this percentage is the highest among the different sectors considered and probably explained by the fact that, for instance, the hotel, restaurant and catering (HORECA) sector (along with construction and cleaning) is among the sectors with the highest rates of undeclared work.³

The most important difficulties AFBS establishments are confronted with in addressing health and safety issues are the complexity of existing legal obligations, the lack of time/staff to deal with these issues and existing paperwork. Some of the consulted experts underline that the AFBS sector is often more concerned with HACCP rules⁴ and food safety chain inspections than OSH regulations and inspections.⁵ Smaller AFBS establishments are particularly sensitive to the difficulties generated by paperwork and the complexity of legal obligations in comparison to larger establishments.

³ See <https://www.ela.europa.eu/en/undeclared-work>

⁴ HACCP (Hazard Analysis and Critical Control Points) is a management system in which food safety is addressed through the analysis and control of biological, chemical and physical hazards from raw material production, procurement and handling to manufacturing, distribution and consumption of the finished product.).

⁵ Previous research indicates that HACCP contributes not only to internal improvement in the prevention of occupational risks but also that, through some control and prevention measures taken by OSH services, food safety is improved as well (<https://doi.org/10.1016/j.foodcont.2012.06.030>).

Additional elements influencing OSH management practices include the impact of the COVID-19 pandemic, the digitalisation of activities, the increasing presence of long-term subcontracting/outsourcing practices, the increasing presence of platform workers (particularly in food delivery services), the increasing presence of green practices, several improvements related to technical and organisational changes, an increasing presence of violence from clients and increasing difficulties in finding suitable personnel, exacerbated by the COVID-19 pandemic.

The AFBS sector has a lower presence of formal forms of employee participation in comparison to other sectors. Interviewed experts point out several elements explaining this situation, including frequent changes of staff due to seasonal operation and characteristics of its workforce that render very difficult the possibility to choose a stable person who may act as an employee/OSH representative within the establishment, very small average size of the existing sector enterprises (which are less likely to have formal workers' representation structures and employers are more reluctant to have these formal structures), and a rather limited engagement of workers in OSH management practices (particularly in very small enterprises), well reflected in employees' reluctance to volunteer as health and safety representatives or participate in OSH management issues. Other reasons pointed out include the limited OSH knowledge that some employees' representatives may have (particularly in very small enterprises) and, finally, the reluctance of many AFBS employees to contact trade unions to assist and help them.

Approximately half of the AFBS sector establishments that have formal employee representation structures are characterised by holding regular discussions on OSH issues between employee representatives and the management, with important national differences among Member States. The AFBS sector is characterised by a high degree of informal communication flows between employees and managers on OSH issues.

A number of key policy pointers emerge from this study:

- Place a special policy focus on SMEs and introduce specific ad hoc measures for them, since they are not only less conscious about the existing OSH risks and their consequences but also less inclined to make use of OSH services or introduce remedial activities to deal with these risks.
- Introduce specific awareness-raising activities among AFBS managers and employers to properly value the importance and negative impacts that existing sector-related OSH risks can have on employees and their health. Employers need to understand that health is not an expense but rather an investment.
- Employers have to make sure that everyone in the company has relevant information on existing and new OSH risks as well as on existing measures in place to deal with these risks. Particular groups of workers deserve particular attention, including new recruits (especially if they are young or have no experience), workers changing jobs or taking on extra responsibilities within the company, and migrant workers.
- Increase employee participation in the management of OSH within establishments. For this purpose, trade unions and employer organisations would need to increase their activities among AFBS employees and managers, particularly those in the smallest enterprises.
- Reinforce the key role that sectoral collective agreements have as a key tool to ensure common-level-ground working conditions and OSH standards for the whole AFBS workforce, including those in the smaller establishments.
- Ensure that risk assessments become a real instrument to identify existing workplace-related risk factors but also to prioritise remedial actions to eliminate or control these risks in an iterative process of continuous improvement.
- Increase the role that labour inspectorate services can play, not only in driving compliance and fulfilment of existing OSH legislation but also in providing useful information and advice about how to successfully deal with and improve existing OSH management practices to build up a sound safety culture within AFBS establishments. It is essential that these labour inspectorate services can effectively develop their activities and are appropriately resourced, both in financial and human resources terms.

- Ensure that existing OSH rules and regulations are well disseminated among enterprises, particularly for SMEs. Public authorities, together with trade unions and employers' organisations, can play a very significant role in this respect.
- Link HACCP rules and food safety chain inspections with OSH regulations and inspections as a possible boost to OSH practices within the sector (it is not clear if this solution is feasible and easy to be implemented in (many) Member States and different establishment sizes). This could include a more general integration of OSH management with HACCP and ISO management systems.
- Continue in-depth discussions between governments and social partners to identify emerging changes affecting OSH sector issues (technical changes, digitalisation of activities, new organisational models) and introduce, if needed, remedial solutions. Existing and (likely) future labour shortages within the sector deserve special attention.
- Continue mainstreaming OSH issues into HORECA vocational and tertiary education curricula, so future sector professionals are well acquainted with OSH from the onset of their careers.

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