

Hotelier MIDDLE EAST
HR CAPITAL
REPORT 2017

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BY LOUISE OAKLEY

THE HOTELIER MIDDLE EAST HR CAPITAL **REPORT 2017**

1. Abstract

The second annual *Hotelier Middle East Human Capital Report* is designed to explore the issues, challenges and opportunities facing hospitality professionals responsible for the hotel industry's most important asset – its people.

As the hotel pipeline in the Middle East continues to grow, with 159,127 rooms under contract as of September 2016 according to STR Global, representing a 14.8% increase over the previous year, so too does the workforce. More staff than ever are needed to deliver the service and product guests expect.

The *Hotelier Middle East Human Capital Report 2017* seeks to establish the state of the industry, by identifying what skills are most in demand, which positions are the hardest to fill, how to tackle recruitment and retention and how to protect a company's investment in its people.

The report is based on the *Hotelier Middle East HR Leaders Survey 2017*, an 'invite only', online survey targeting mid-to-senior-level human resources professionals working in the Middle East hospitality industry. Learning and development managers, senior in-house trainers, HR managers and directors, and heads of talent and recruitment were also eligible to complete the survey, which was in circulation from July to September 2016.

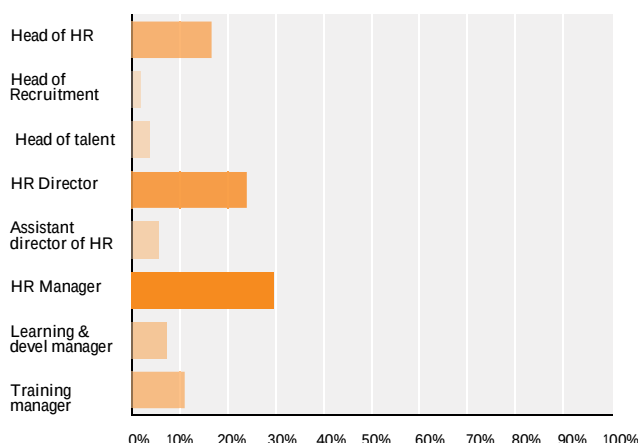
The survey findings have been discussed with leading hospitality human resource professionals, with a balance of experts in regional roles and on property, as well as third party consultants, previously HR directors themselves. The highlights of these 16 interviews are included in the *Hotelier Middle East Human Capital Report 2017*.

2. Respondent profile

Of the 54 HR professionals that participated in the *Hotelier Middle East HR Leaders Survey*, 72% worked for international hotel brands, 13% worked for regional chains, 11% worked for brands local to their country and 4% worked for independent hotels. Fifty-eight percent worked on-property, 20% held multi-property or complex roles and 22% were in corporate positions, half of these in either regional or area offices and half in global or head offices. All respondents worked at manager level or above, either in HR roles or more specifically, learning and development, training and recruitment. Forty-seven percent of respondents were at director or head of department level.

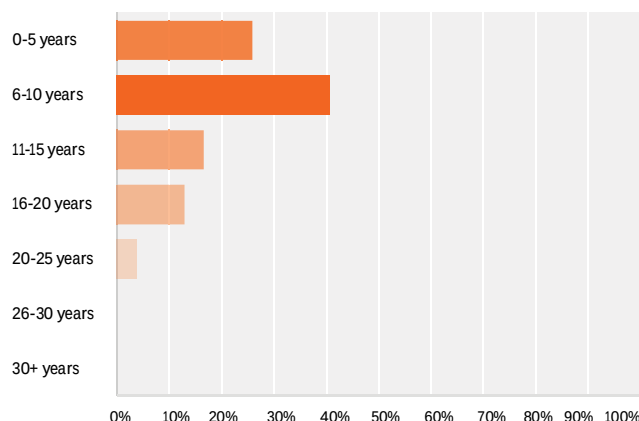
The backgrounds of our respondents were mixed. Fifty-nine percent said they had only worked in HR within the hospitality industry, meaning 41% have experience in an HR capacity outside of the hotel business. The largest proportion of respondents (41%) have six to 10 years' experience in hospitality HR; 17% have 11-15 years' experience; 13% have 16-20 years' in

Q1) What is your job title?



Answer Choices	Responses
Head of HR	17%
Head of Recruitment	2%
Head of Talent	4%
HR Director	24%
Assistant director of HR	6%
HR Manager	30%
Learning and Development Manager	7%
Training Manager	11%

Q2) How long have you worked in hospitality HR?



Answer Choices	Responses
0-5 years	26%
6-10 years	41%
11-15 years	17%
16-20 years	13%
20-25 years	4%
26-30 years	0%
30+ years	0%

the business and 4% have between 20 and 25 years. Twenty-six percent, however, possibly bringing a fresh perspective, have up to just five years in hospitality HR. Overall, that's more than 500 years' combined experience behind the results of the *Hotelier Middle East HR Leaders Survey*.

As is to be expected considering market dynamics, 80% of respondents were based in the UAE. The remaining 20% work in Oman, Saudi Arabia, Jordan, Lebanon, Egypt, Turkey and India.

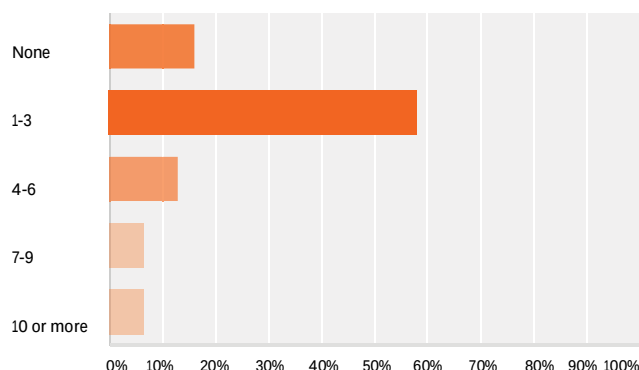
The vast majority of respondents (58%) said their organisation operates fewer than 10 hotels in the Middle East. Of the rest, 13% said their company had 11-20 hotels in the region, 10% had 21-30 hotels, 6% had 41-50 hotels and 13% worked for organisations with 51-60 hotels in the Middle East.

The number of staff employed by the companies varied greatly, but 67% of respondents worked for organisations employing fewer than 3,000 staff. At the other end of the spectrum, one respondent said their company employed more than 30,000 people in the Middle East.

Studying the rate of growth that the respondents forecast for their organisation, the majority (58%) expected their company to open up to three hotels over the next 12 months and 6% said they thought their company would open more than 10 hotels. In-line with this, 61% believed their company will need to

“THE LARGEST PROPORTION OF RESPONDENTS (40%) SAID THAT ‘COMPENSATIONS/PAY’ HAD THE SINGLE MOST IMPORTANT IMPACT ON EMPLOYEE MOTIVATION AND HAPPINESS.”

Q3) How many additional properties does your organisation plan to operate in the next 12 months in the Middle East?



Answer Choices	Responses
None	16%
1-3	58%
4-6	13%
7-9	6%
10 or more	6%

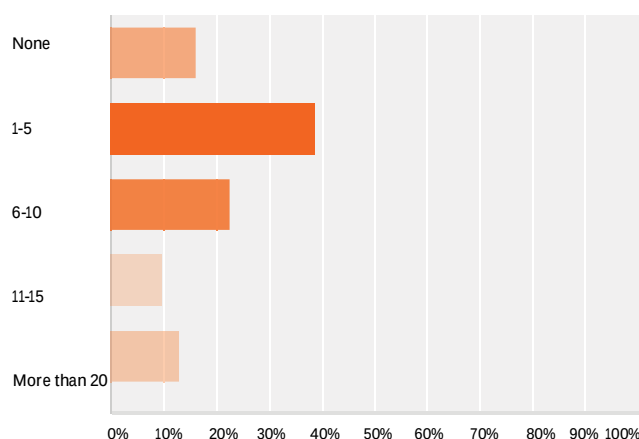
recruit up to 500 people within the next year. Three percent of respondents said their company would seek to recruit 2,751-3,000 staff in the next 12 months and another three percent said their company was recruiting upwards of 5,000.

This means that 42% of respondents believe staff numbers in their organisation will grow by 0-5% over the next 12 months; 23% think they will grow by 6-10%; 16% predict growth of 21-25%; and one respondent expects staff to grow by more than 50%.

Looking further ahead, 13% of respondents expect their organisation to add more than 20 operational properties by 2020. Of these, three quarters of the respondents were from regional chains in the UAE, with just 25% from international brands.

With regards to the staff needed to support these pipelines, results showed that numbers varied from 1,500 staff to 5,000, depending on the brand. One respondent in Oman who said their company would be opening five hotels by 2020, said he expected 10,000 staff to be recruited across these new properties.

Q4) How many additional properties does your organisation plan to operate in the next four years?



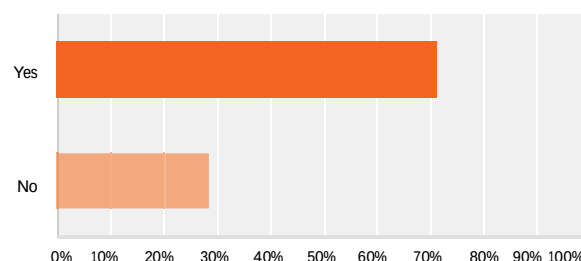
3. Market sentiment

Taking the temperature of the 2016 marketplace and findings showed that the respondents had mixed views. Nearly three quarters (71%) said their company was positive about the hospitality outlook and the remaining 29% were negative.

Forty-three percent of respondents said their organisation has had to reduce headcount for the next 12 months. Unsurprisingly, all of these respondents were among those with a negative market outlook.

Half of the reductions in staffing (50%) were made via attrition or the removal of newly budgeted positions (16%). Only two re-

Q5) Is your organisation or your hotel positive about the overall hotel business outlook in the Middle East over the next 12 months?



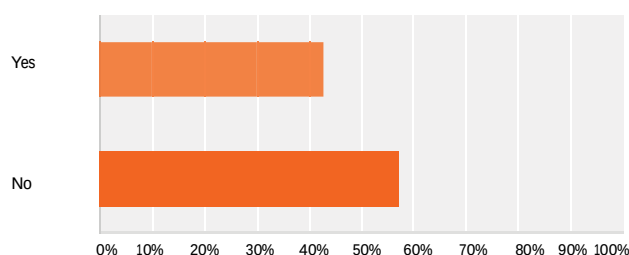
spondents said their company had made actual redundancies.

Eighty-three percent of respondents from organisations that had actively reduced headcount said their hotel had implemented a recruitment freeze in 2016, with half of them unsure as to when the ban would be lifted. Looking at the entire respondent pool, nearly two thirds (64%) said their firm had a recruitment freeze for 2016.

The survey asked respondents to decide who they thought held the power in 2016: the job hunter, or the recruiter. In other words, is there an abundance of jobs providing freedom of choice and increased bargaining room for the job seeker, or, are limited numbers of roles, better knowledge and business practice when recruiting people, giving control to the HR professional?

The results showed that 64% of respondents feel the power sits with the recruiter, while 36% believe it belongs to the job seeker.

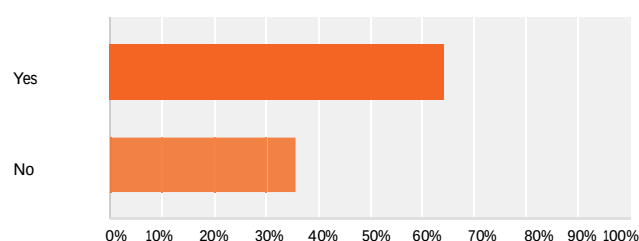
Q6) Has your organisation or your hotel had to reduce headcount for the next 12 months?



Answer Choices	Responses
Yes	43%
No	57%

EIGHTY PERCENT OF RESPONDENTS SAID THAT TRADITIONAL HOTELS ARE AT RISK OF LOSING STAFF TO MORE MODERN INDEPENDENT HOTEL BRANDS OR OTHER AREAS OF HOSPITALITY.

Q7) Has your firm or hotel implemented a recruitment freeze in 2016?



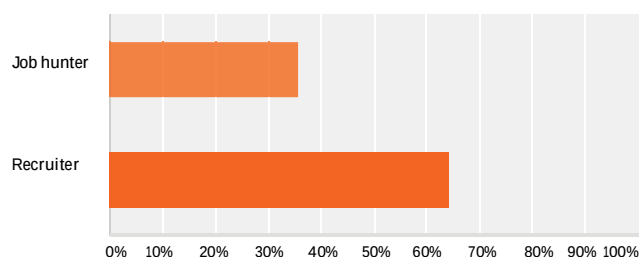
Assistant director of human resources for Anantara the Palm Dubai, Maila Severino, said this result is to be expected due to the current volatility felt in the marketplace.

“Most of the hotels are experiencing [an] unstable market and therefore, it will come to a point where we need to do damage control through redundancy. There are more job hunters now-days than recruiters,” asserted Severino.

Amber Zaki, director of human resources at Taj Dubai, said the power ratio depended on the job category and level.

“What we see now in the F&B area, is that the job hunter holds more power. There is such demand that F&B professionals (service and culinary) with limited experience are being recruited for roles, for which previously they would have needed much more experience for. However, in many other areas, the power is very much with the recruiter,” said Zaki.

Q8) Who holds the power in 2016: the job hunter or the recruiter?



Answer Choices	Responses
Job hunter	36%
Recruiter	64%

Karim Maataoui, HR & training manager at Media One Hotel Dubai, said it depends on the quality of the job hunter and recruiter in question.

“It’s a mixture of both. Some recruiters (especially those with a high value brand) hold more power and can afford to pay more and provide additional perks, but also give a sense of belonging and pride to job hunters,” said Maataoui.

“Job hunters still hold power as they continue to show less loyalty and are more prone to leave one job to join another, even sometimes for a slight increase, as they are continuously eager to learn different things.

“Overall, the best of both job hunters and recruiters hold the power and in the future. The rest will have to work harder, train more and care more to attract and retain talent,” said Maataoui.

The balance can also vary according to market specifics, observed Koray Genckul, senior director of human resources, Middle East, Africa and Turkey, Hilton Worldwide, who oversees 16,000 people across 58 hotels and is in charge of the strategy to recruit a workforce to operate an additional 78 hotels in the pipeline.

“From Hilton’s perspective, recruitment opportunities vary regionally. In regions where there are fewer hotel openings, our efforts are more limited, and in [areas] with a larger hotel presence, we experience preferable recruitment processes due to the large workforce present,” said Genckul.

4. Skills gap or attitude problem?

When asked which hospitality skills were most in demand, the respondents voted equally for sales and F&B operations, followed by culinary and then general management. The survey revealed that the hardest role to fill was that of sales & marketing director, followed by executive chef. Meanwhile, the most difficult levels of role to fill were mid-management and management, with 62% of respondents selecting one of these two categories.

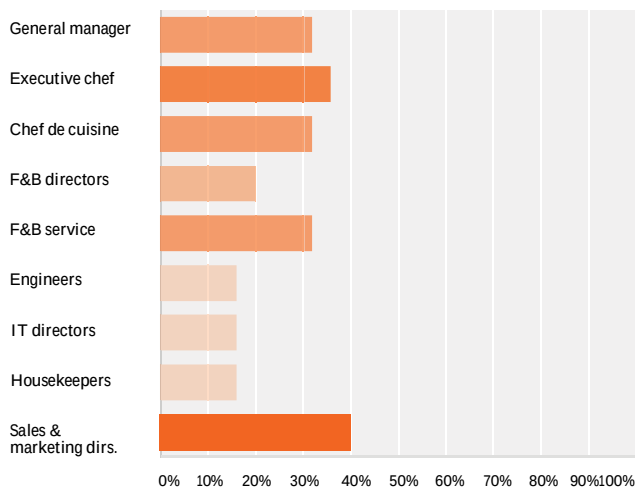
Maataoui said culinary roles are “the hardest to fill due the technical skills required and the high demand in the market compared to other jobs”.

Schalk van der Merwe, director of human resources, Khalidiya Palace Rayhaan by Rotana, agreed. “It is difficult to find people for senior positions in F&B service in order to meet the requirements of the relevant outlet and cuisine. They should have the business ‘savvy’ to come up with unique ideas, marketing suggestions and promotions.”

Nabil Samuel, vice president human resources at TIME Hotels, who is responsible for 600 staff with another 1,000 to

FORTY-THREE PERCENT OF RESPONDENTS SAID THEIR FIRM HAD TO REDUCE HEADCOUNT FOR THE NEXT 12 MONTHS.

Q9) Which roles are hardest to fill?
(Respondents selected multiple answers)



Answer Choices	Responses
General manager	32%
Executive chef	36%
Chef de cuisine	32%
F&B directors	20%
F&B service	32%
Engineers	16%
IT directors	16%
Housekeepers	16%
Sales & marketing directors	40%

be recruited by 2020, said that sales and marketing and culinary roles were challenging from a recruitment perspective because of the ever-evolving technical nature of these disciplines.

“Digital marketing is a concept that perhaps five years ago was not particularly high on the agenda of sales and marketing professionals. However, now it is an integral part of their role and therefore they require an improved skill set. For a chef, sustainability, waste management and food colour coding has become a part of everyday life. Therefore, a knowledge of these practices is a must,” said Samuel.

At Mövenpick Hotels & Resorts, VP human resources Middle East and Asia, Frances Smith is responsible for 7,900 employees in the region, expected to increase to 11,800 in-line with the company’s 2020 strategy. Smith said: “It is harder than ever to find and recruit quality employees who meet the skills requirement for their position.”

“Finding skilled staff for the kitchen and engineering teams is becoming more and more [of] a challenge every day. Not only do they need the technical skills, they also need to fit with the culture of the company,” added Smith.

At Hospitality Management Holdings (HMH), which employs

2,000 staff with another 1,000 to be recruited by 2020, director of HR & training Liz Regan also identified revenue management as a challenging role to fill, from a corporate office perspective.

While some skills are more difficult to recruit for than others, this doesn’t necessarily pose a larger challenge overall; it depends whether recruiters prioritise technical skills or personal attitude and, as Smith pointed out, whether candidates align with the company’s brand values.

According to the *Hotelier Middle East HR Leaders Survey*, nearly two thirds (65%) of respondents said ‘the right attitude’ was the hardest attribute to find, compared to 35% who said it was ‘technical skill’.

Van der Merwe said getting the balance between skills and attitude was the biggest challenge in hospitality recruitment.

“There is a lot of competition for candidates with great qualities and skills. To hire the correct candidate for your brand with the right attitude can be challenging,” he observed.

Smith added: “We encourage our managers to look for people with impeccable attitude, and train them in the skills required once hired. We focus on finding talent that fits our organisation and shares our values for quality, reliability and care.”

5. Recruitment trends

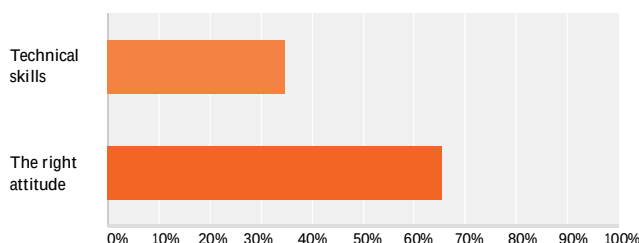
In 2016’s atmosphere of sustained financial pressure many hotels are retaining control of the recruitment process. According to the survey, 42% of respondents are opting to manage recruitment in-house, and 8% are prioritising their company LinkedIn profile as the main recruitment channel.

Thirteen percent used recruitment agencies, 8% relied on industry referral and 29% used advertising. Assuming these methods find the right person for the role, that’s not necessarily the end of the process. Forty-two percent of respondents said ‘ensuring the offer is good enough for the right candidate’ was actually more of a challenge than finding the right candidate in the first place.

So, how do hotel companies market themselves in order to attract the right candidate and once they’ve found the ideal person, how do they make sure the package on offer is enough to encourage them to accept the role?

Directly targeting young people is one strategy and the respondents revealed they had different ways of approaching this, from LinkedIn job adverts, social media posts and partnerships with hotel schools, through to promoting development op-

Q10) What is hardest to find; technical skills, or the right attitude?



Answer Choices	Responses
Technical skills	35%
The right attitude	65%

“64% SAID THEIR FIRM HAD A RECRUITMENT FREEZE FOR 2016.”

"WHETHER IT'S A DIRECT APPLICATION, VIA A COMPANY WEBSITE, JOB PORTAL OR THROUGH A RECRUITMENT AGENCY, THE OVERWHELMING SILENCE REGARDING THE STATUS OF YOUR APPLICATION IS DEAFENING."

opportunities and growth paths, offering more money and better benefits. However, one respondent said this had the negative impact of "just increasing the power of job hunters", forcing hotel chains to go head to head for the best candidates.

Several respondents cited the overall brand promise and awareness of their company as a major draw for young people, with efforts ongoing to 'build a good name in the market'.

Fathuma Hamziya, director of human resources at Radisson Blu Hotel Dubai Deira Creek, commented: "People wanting to join a company for its brand and value presence is far more powerful than any other reason".

Overall, just as the majority of respondents were positive about the industry outlook, so too were they positive about the recruitment outlook specifically. Eighty percent of respondents said they were positive about the outlook over the next two to three years – despite the thousands of staff yet to be recruited.

While some cited Expo 2020 in UAE and the FIFA World Cup in Qatar in 2022 as reasons behind their optimistic outlook, others saw this from another perspective, worrying that as more hotels are developed ahead of these events the hunt for the right candidates is getting tougher.

One area in which the respondents revealed a challenge was that of visas. According to the survey, 62% said that visa restrictions against some nationalities had negatively impacted recruitment in 2016.

As a result, respondents said they would be looking to recruit more people from either Europe, Eastern Europe, Africa, South East Asia or South America, with one respondent saying they would be focused on recruiting people already employed elsewhere in UAE.

Amit Puri, complex director of human resources at The Westin & Le Meridien Hotel Bahrain City Centre, said he has noticed new hurdles emerge "as traditional recruitment markets like India, Sri Lanka and the Philippines dry up, as the

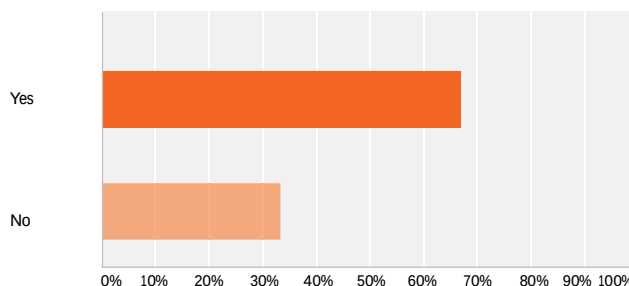
economies of these countries boom. With the savings potential from wages earned for jobs overseas diminishing due to rising costs in the region, many hospitality professionals are inclined to stay at home, as they no longer see the potential to earn and save more in the Middle East," observed Puri.

Another challenge, identified by Regan at HMM, comes from within the industry. "A key concern is the ability of all parties to manage expectations. I don't think enough is being done to achieve this, particularly at junior level positions. Throw in the 'Y' and 'millennial' generations and we have a soup.

"I also believe that how we recruit staff reflects badly on the hospitality industry. Whether it's a direct application, via a company website, job portal or through a recruitment agency, the overwhelming silence regarding the status of your application is deafening," Regan observed.

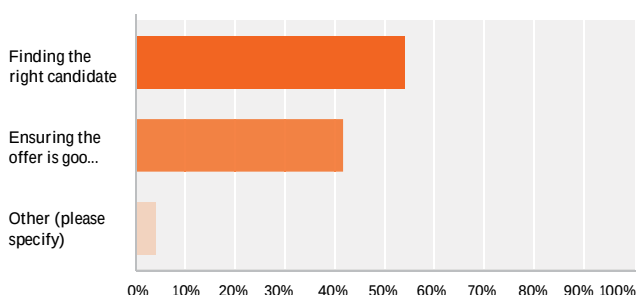
"Considering that we work in hospitality which is defined by

Q12) Are you positive about the recruitment outlook for the Middle East hospitality over the next 12 months?



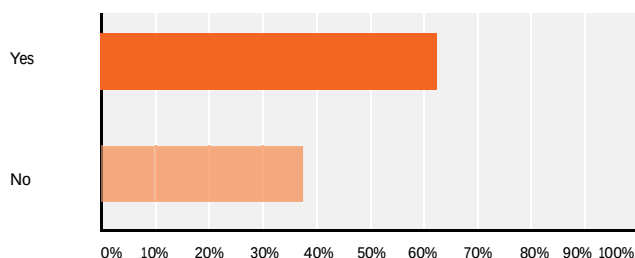
Answer Choices	Responses
Yes	67%
No	33%

Q11) What is the biggest challenge in recruitment?



78% OF RESPONDENTS ACKNOWLEDGED THAT DECLINING ROOM RATES HAD IMPACTED THE AMOUNT OF SERVICE CHARGE.

Q13) Have visa restrictions prohibiting certain nationalities from working in the Middle East hampered recruitment in 2016?



the ‘friendly... entertainment of guests, visitors, or strangers, this is an appalling situation and will inevitably result in a declining number of suitable applicants and irreparable damage to reputations.

“We would never dream of ignoring an email from a guest, so why are we ignoring CVs from applicants? Don’t we have the vacancy? That applicant could also have been a guest in the past, though it’s doubtful they will be again in the future.”

With tourism to Middle East countries on track to reach close to 65 million by 2020, and the hundreds of thousands hotel rooms under contract and yet to be signed, Regan raises a good point. The hospitality industry must surely do everything in its power to be seen as an attractive employer to people of all backgrounds, education and training.

At the same time, however, Assia Riccio, founder of Evolvin’ Women in Hospitality, Differently and the former group L&D manager for Jumeirah Restaurant Group, warned of another risk factor in the hospitality recruitment mindset.

“The biggest challenge is to stop the never-ending spiral that the increase in salary has generated over the last few years,” asserted Riccio.

“I believe people with specific skills should be paid accordingly. I also think that the salary strategy to retain employees has not only spoiled our junior level employees, but also damaged their career progression. The industry is tough at entry level with low salaries and long hours. It is the nature of the business. When people want to move, instead of offering more money or a promotion, they should be encouraged to develop before stepping up. The challenge in recruitment is to move away from this mindset where everything revolves around promotions and more money, which most of the time are given to people who are not ready for it.”

At Rotana, corporate vice president of human resources, Joseph Abu Yaghi, who is responsible for a workforce of 13,000

“IT IS DIFFICULT TO FIND PEOPLE FOR SENIOR POSITIONS IN F&B SERVICE IN ORDER TO MEET THE REQUIREMENTS OF THE RELEVANT OUTLET AND CUISINE.”

employees that will grow to 21,500 by 2020, also observed the high expectations of candidates for quick progression.

“People that are coming to the market are very career driven, but they are very impatient. People expect to join the organisation and progress faster with their career than what we would have seen 10 or 15 years ago. How are we going to cater to this development that is expected from us as an organisation to attract this pool of talent? That is one of the major challenges,” said Yaghi.

He added that some companies were offering senior positions to people that were half way through their management training, so keen are they to recruit high potential candidates.

“We want people to have a sense of belonging. If you look at someone who has been with the organisation for 15 years, you say ‘wow’,” commented Yaghi as it is so rare these days.

6. The money pot

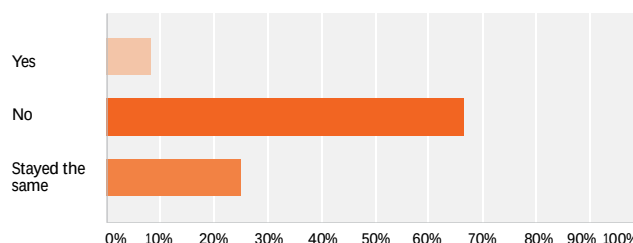
Two thirds of respondents in the HR Leaders Survey believed their recruitment budget was of an ‘average’ level for the industry, with 17% saying it was ‘not enough’. Budgets generally did not increase in 2016 and most people forecast having a similar budget in 2017. Although an optimistic 25% of respondents believed it would increase.

When it comes to funds to support important training, the majority of respondents (55%) said training budgets for 2016 are forecast to be below those of 2015. As a percentage of total revenue, the average training budget is 2%, although responses varied between 0.5% and 5%.

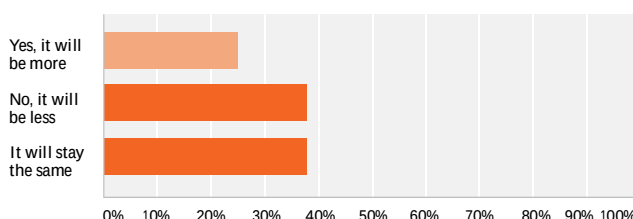
Although online training is increasingly cited as a trend in the hotel business, half of respondents reported that less than 10% of the overall training budget was spent on online courses or digital resources. Just one company allocated 51-60% of the budget to internet-based training.

Training is rarely outsourced, according to the survey, except for specialist subjects. Training priorities were fairly evenly spread, although the most popular was operations (73%) followed by company standards (64%), perhaps reflecting the

Q14) Has your recruitment budget increased in 2016?



Q15) Are you expecting an increased recruitment budget in 2017?



"THE MOST COMMON REASON FOR PEOPLE VOLUNTARILY LEAVING AN ORGANISATION, ACCORDING TO THE SURVEY, WAS TO SEEK HIGHER PAY ELSEWHERE (56%)."

importance of brand values in retaining and motivating staff.

As expected in the hospitality business, 94% of respondents said their organisation followed a strict salary structure, defined by grade and spanning departments. Sixty-one percent said their company operated a minimum wage system in the Middle East. Rather worryingly, however, 72% of respondents said their salary grade system needed a review. Reasons given for this largely revolved around bringing grades and remuneration in-line with market trends in order to be able to attract more talent, though a handful also cited the need to be more accurate and fair internally.

General salary increases were not made in 2015/16, according to the *HR Leaders Survey* – 78% of respondents said

their company did not grant pay rises in the last 12 months. Of those that said their company did not make general salary increases, 50% of respondents expect their organisation will do so over the next 12 months, but 50% did not expect salary increases in 2017.

They were also equally split when it came to whether management bonuses were paid. Looking back at the entire sample 56% believed that eligible management will achieve their bonuses in 2016.

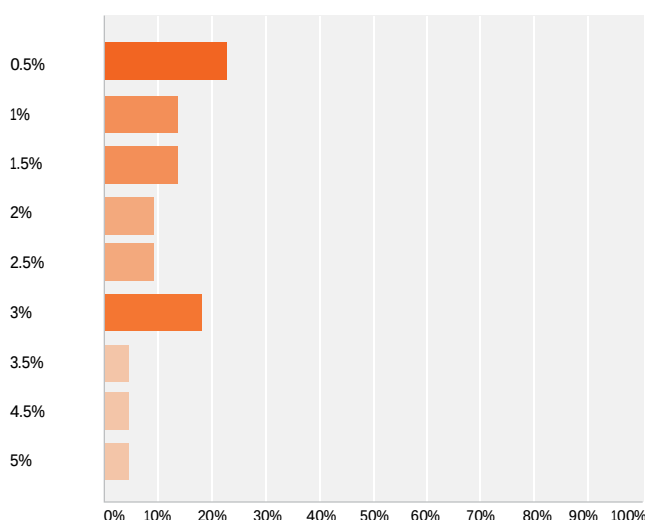
According to the survey, 61% of organisations offered a standard annual pay increment to all employees, which equates to anywhere between a 1-10% percentage increase. The average increase was 3.1%.

Data gathered by the *HR Leaders Survey 2016* indicated the modal average monthly salary range (including housing and travel allowance) for hotel general manager positions is between US\$15,001 and \$17,500 per month. Looking at basic only, and the average monthly GM Salary range is between US\$10,001 and \$12,500, though for two companies it was in excess of US\$20,001-\$22,500 per month.

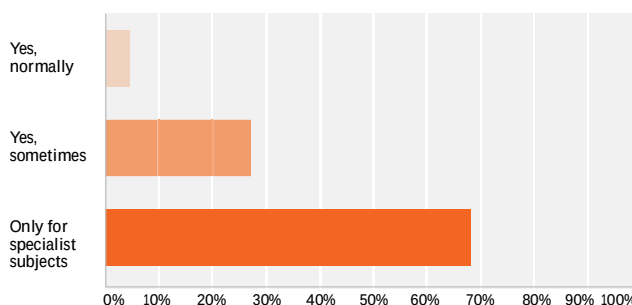
For other top grade positions, those on the executive committee or other directors, the basic monthly salary range was considerably less, with 48% of respondents selecting the US\$2,500-5,000 bracket and 22% of respondents opting for US\$5,001-7,500 per month. For manager grade positions the results varied greatly, although nearly half of respondents (46%) again selected the US\$2,500-5,000 per month bracket.

The results were clearer when referring to assistant manager positions, with 61% of respondents reporting that basic month-

Q16) As a percentage of total revenue, how much is your organisation or your hotel's training budget.



Q17) Do you outsource training?



Answer Choices	Responses
Yes, normally	5%
Yes, sometimes	27%
Only for specialist subjects	68%
No, never	0%

"SEVENTY-EIGHT PERCENT OF RESPONDENTS ACKNOWLEDGED THAT DECLINING ROOM RATES HAD IMPACTED THE AMOUNT OF SALARY SERVICE/OPERATIONS STAFF TAKE HOME BECAUSE OF REDUCED SERVICE CHARGE."

"I'VE NEVER BEEN WITNESS TO ANY COMPANY WHO ACHIEVED SUSTAINED SUCCESS WITHOUT HAVING HR AS A MAJOR PILLAR OF COMPANY STRATEGY."

ly salary for mid-level positions was between US\$1,000-2,500 per month.

Junior positions, such as co-ordinator, were broadly split, but 78% said these roles earned less than US\$2,000 per month basic salary. The most common monthly basic salary for entry-level roles was US\$250-\$500, as selected by 72% of respondents. No respondent said entry level pay was less than US\$250.

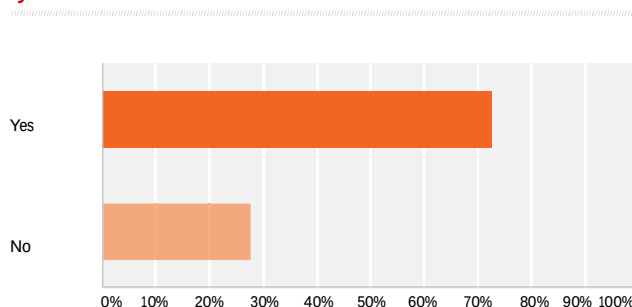
One of the biggest concerns in 2016 when it comes to the salaries of frontline staff is the impact that declining ADRs will have on service charge payments. With service charge based on guest spend, unfortunately, staff have been negatively impacted in 2016.

Seventy-eight percent of respondents acknowledged that declining room rates had impacted the amount of salary service/operations staff take home because of reduced service charge. Of these, 14% said their organisation planned to financially compensate their staff for the drop in service charge payments.

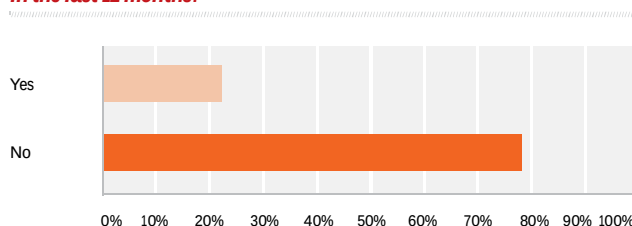
Another concern is the issue of pay freezes, with 39% admitting their company had implemented a pay freeze during 2016 or during periods of the year.

Ultimately, in Middle East hospitality, junior staff are motivated by money and are inclined to move jobs and company for as

Q18) Do you think your salary structure or salary grade system needs a review?



Q19) Did your organisation make general salary increases in the last 12 months?



little as AED50 per month. With benefits packages competitive from chain to chain it's the salaries that stand out.

As Puri said: "The need for salary, growth, job security or benefits depends on your stage [of life] at that point of time. Having said that, I believe the take-home salary is a key element which influences an employee's decision to stay or move with a competitor in the Middle East, as the benefits remain more or less the same in the hospitality industry."

Hamziya, on the other hand, said that "salary does not always win. Additional benefits, living and working environment, safety and security, welfare and development are key to retaining the best talents", she said.

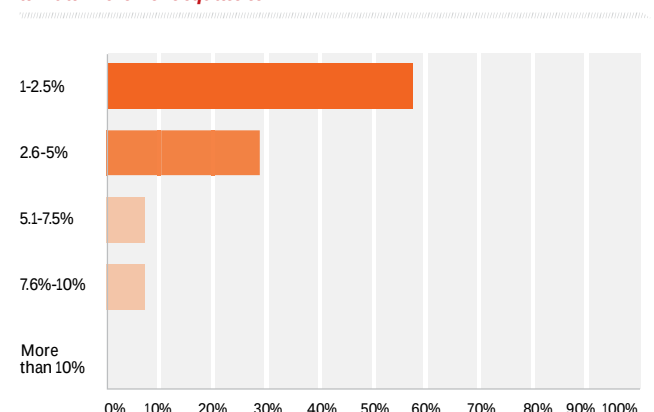
7. Tools for retention

According to the *HR Leaders Survey*, the average annual staff turnover rate is 16%. As already addressed, the survey and interviews revealed significant challenges in finding people with both the right skills and the right attitude. For some though, this must surely be a deal breaker, with "recruiting the right person in the first place" deemed to be the core factor in staff retention. Forty percent of respondents believed this had more of an impact than any amount of training or mentoring.

Indeed, when asked about the most important tools in retaining talent, not a single respondent identified training. A 'personalised approach' was the preferred method selected by 45% of respondents, followed by salary increases and mentoring schemes. In another question, 60% of respondents said they had introduced mentoring programmes to appeal more to millennials.

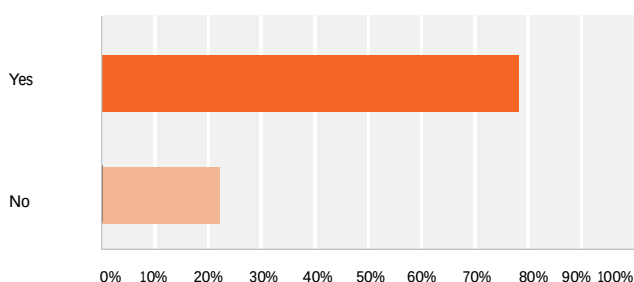
So, what factors motivate people, or is it dependent on each individual and each situation? Respondents were asked to rate 12 factors and their impact on motivation, from a minimum impact to maximum. As graph 25 shows, all were weighted fairly equally overall.

Q20) If your organisation offers a standard annual pay increment to all employees, what percentage increase does this annual increment equate to?



Answer Choices	Responses
1-2.5%	57%
2.6-5%	29%
5.1-7.5%	7%
7.6-10%	7%
More than 10%	0%

Q21) Have declining room rates impacted the amount of salary service/operations staff take home because of reduced service charge?



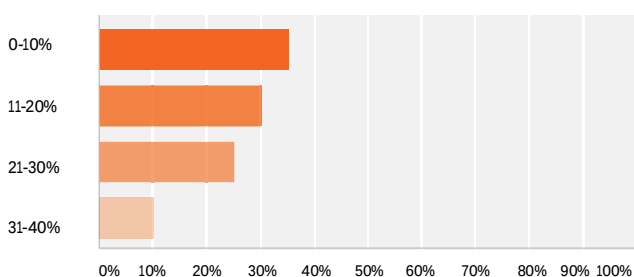
Answer Choices	Responses
Yes	78%
No	22%
Total	

A few items stand out: 55% of respondents said 'respectful treatment of employees at all levels' had maximum impact, 55% of respondents said 'continued professional development' had maximum impact; and 45% said 'relationship with immediate supervisor' had maximum impact. Sixty-five percent of respondents said 'trust and transparency between management and employees' had a high impact on motivation.

When asked to choose a single factor that has the most important impact on employee motivation and happiness, however, the results were telling. Here, it comes down to money. Two out of five respondents (40%) said 'compensation/pay' had the single biggest impact on employee motivation and happiness. Second in the ranking was 'respectful treatment of employees at all levels', so establishing two-way respect is clearly important.

In hospitality, compensation is often split into two broad strands – basic salary and benefits. For 44% of respondents the benefits part of the packages offered by their organisation exceeded basic salary. Thirty-three percent of respondents believe their company's 'staff accommodation or accommodation allowance' was their most attractive benefit, followed by 'discounted hotel rates across the organisation'.

Q22) What's your annual staff turnover rate?



Answer Choices	Responses
0-10%	35%
11-20%	30%
21-30%	25%
31-40%	10%

"NEARLY THREE QUARTERS OF RESPONDENTS SAID THAT IMPORTANT HR DECISIONS WERE MAINLY MANAGED AT PROPERTY LEVEL, WHILE 27% SAID THAT HOTEL HR STRATEGY WAS DICTATED BY CORPORATE OR REGIONAL OFFICE."

Half of all respondents believe their benefits package to be in line with the competition. However, just over half (56%) believe their staff accommodation is 'good enough' and 33% said it 'could be improved'.

The survey revealed that the hotel industry is still offering enticing packages, with 61% of respondents believing that workers will join a company because it has a great benefits package, even if the basic salary is slightly slower than that of competitors.

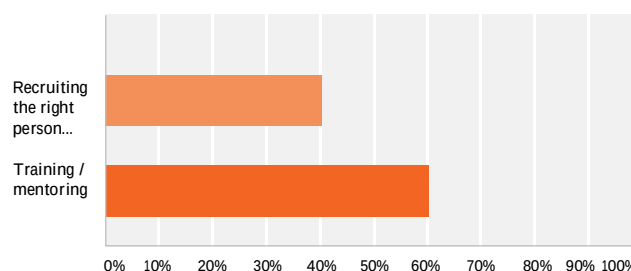
The real issue, however, is the changing nature of competition 2016. The vast majority of respondents are worried they will lose staff to other brands in the broader hospitality industry. A significant 80% of respondents said that traditional hotels are at risk of losing staff to modern independent hotel brands or other areas of hospitality, such as independent restaurants and theme parks, which also have large development pipelines in the Middle East.

The consultants we spoke with agreed.

"It's a massive risk. It's a huge risk. It's a huge cost to a company as well," said Alan Simpson, founder and director at Think On and formerly VP talent management at Jumeirah Group.

"If they do lose people, the recruitment costs alone are huge. This is where it frustrates me – they don't balance [between] learning and development and employing people. Oh 'we hav-

Q23) What's more important when it comes to staff retention?



Answer Choices	Responses
Recruiting the right person in the first place	40%
Training / mentoring the person recruited	60%

en't got any money, we can't spend money on training', but we'll happily spend a fortune on recruiting someone. Why wouldn't you invest the money in training and not have to spend the money on recruitment? Keep the people there!"

As managing director of Purple Hospitality, Lynne Bellinger said, money can be a big draw: "Some of the independent restaurants are paying far higher than the traditional hotels and the number of these restaurants is on the rise.

"For senior hotel roles benefits play a key role, especially those such as schooling, perhaps business class tickets, housing allowance etc, but for the less senior roles, cash is king. Saying that, some hotels and restaurants are known for paying a higher percentage of the service charge to their employees. This is definitely a draw once it becomes an established practice."

Hotel HR professionals are not convinced that independent hotel brands or restaurants pose such a threat.

"Generally, candidates that are attracted to independent F&B have a different profile than that of hotel staff. Independent hotels can offer a job. Traditional hotels can more easily offer a career," said Mövenpick's Smith.

Zaki at Taj Dubai believed that the lure of independent restaurants and hotels is driven by the fact that "such places seem to be more willing to take a chance on a young leader as opposed to a traditional hotel, which will place a premium on experience".

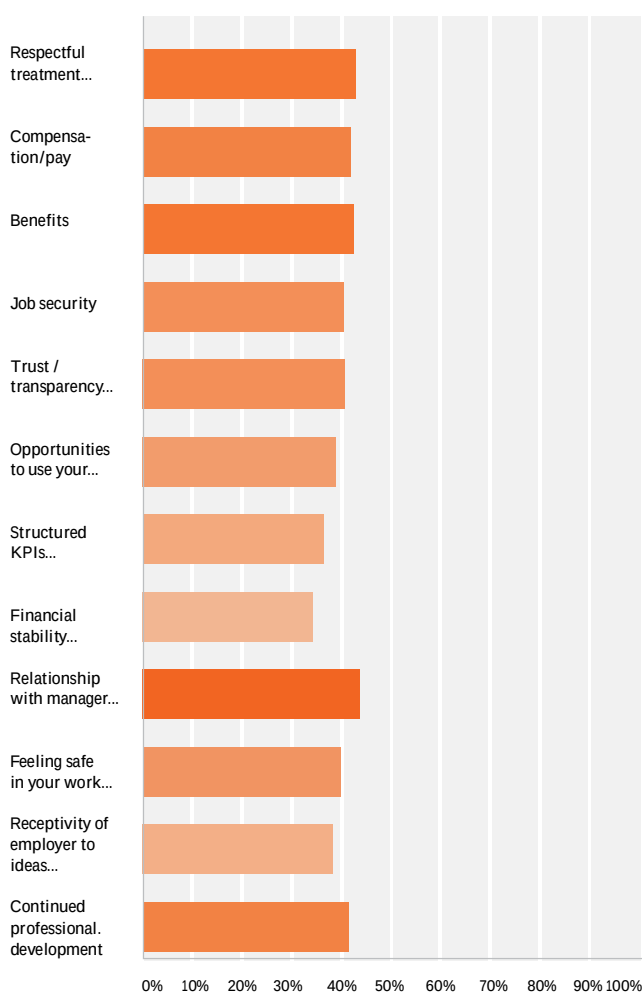
"Those young professionals who find traditional hospitality too conservative or stifling, have lots of options in the market in independent outlets. Quite often the packages offered are better than in a hotel, in addition to affording them the opportunity to

be creative and flex their leadership muscles".

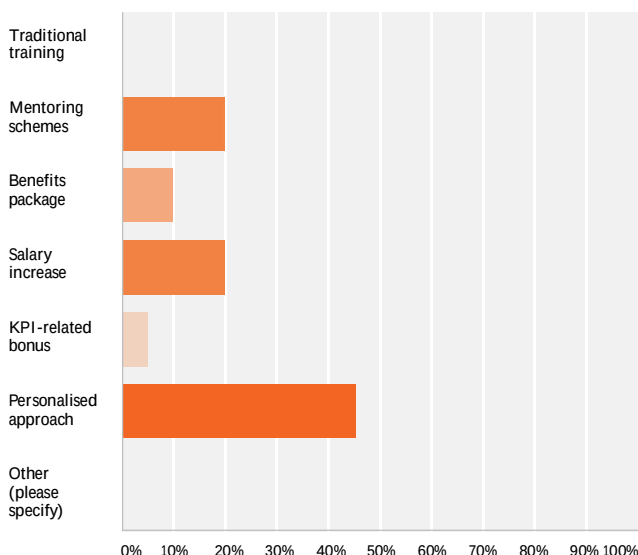
Severino at Anantara believes that the power of certain hotel brands can outweigh the more attractive salaries offered by independents.

"We are confident that there are more staff who are looking for the brand name and reputation in the market and, despite competition with modern hospitality, I strongly believe that there is better career development in a traditional chain of hotels than a stand-alone modern hospitality brand," said Severino.

Q25) What motivates an employee?



Q24) Which is the most important tool you use to retain talent?



Answer Choices	Responses
Traditional training	0%
Mentoring schemes	20%
Benefits package	10%
Salary increase	20%
KPI-related bonus	5%
Personalised approach	45%
Other (please specify)	0%

"THERE WILL ALWAYS BE TIME TO FOCUS ON YOUR COLLEAGUES' WELLBEING – THAT SHOULD BE THE FIRST PRIORITY OF ANY HR PROFESSIONAL."

Q25) What most motivates an employee? (Continued)

	Has minimum impact on motivation (1)	Has a low impact on motivation (2)	Has an average level of impact on motivation (3)	Has a high impact on motivation (4)	Has maximum impact on motivation (5)	Weighted Average (score out of 5)
Respectful treatment of all employees at all levels	0%	0%	25%	20%	55%	4.30
Compensation/pay	0%	0%	25%	30%	45%	4.20
Benefits	0%	0%	15%	45%	40%	4.25
Job security	0%	0%	25%	45%	30%	4.05
Trust / transparency between employees and management	0%	5%	5%	65%	25%	4.10
Opportunities to use your skills and abilities at work	0%	0%	35%	40%	25%	3.90
Structured KPIs and performance-related bonus	0%	10%	35%	35%	20%	3.65
Financial stability of the company	5%	10%	45%	15%	25%	3.45
Relationship with immediate supervisor	0%	0%	10%	45%	45%	4.35
Feeling safe in your work environment	5%	0%	15%	50%	30%	4.00
Receptivity of employer to your ideas	5%	0%	25%	45%	25%	3.85
Continued professional development	5%	0%	25%	15%	55%	4.15

8. In the firing line

In a guest facing industry, where most individuals have a direct impact on customer perception and company performance, measuring performance is critical. There are several ways to do this, but the hospitality industry is fairly traditional in its approach.

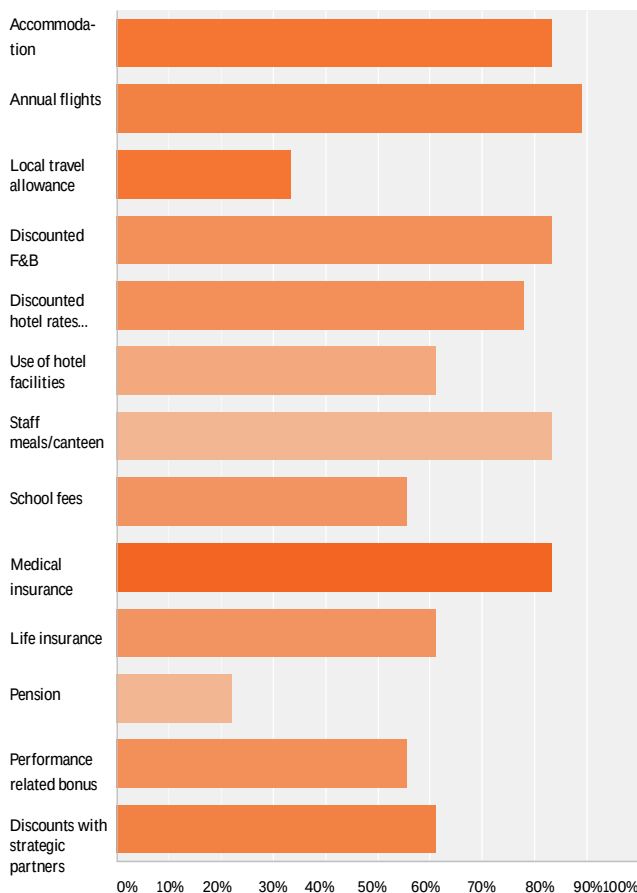
Let's start with the basics – probation periods and performance management via appraisals and KPIs. Forty-four percent of respondents said that 91-100% of employees pass their probation. Staff appraisals are conducted either once every six months or once a year, according to the survey, although 23% of respondents admitted it was “merely necessary paperwork” rather than being something meaningful used for career development.

The majority thought staff cared about their appraisals but, while 91% of respondents said that they set KPIs for staff, only 59% of respondents said they were “confident that every member of staff knew their KPIs”, indicating a serious communication disconnect between managers and staff. There is little point in setting targets without engaging staff with these goals.

Frequent dismissals and resignations are a reality for HR professionals in the Middle East. Two thirds of dismissals are for ‘poor performance’ and one third are for ‘gross misconduct’, according to the survey. Forty-one percent of respondents said that 21-30% of their HR department's time was occupied with dealing with people leaving the company.

The most common reason for people voluntarily leaving an organisation, according to the survey, was to seek higher pay elsewhere (56%).

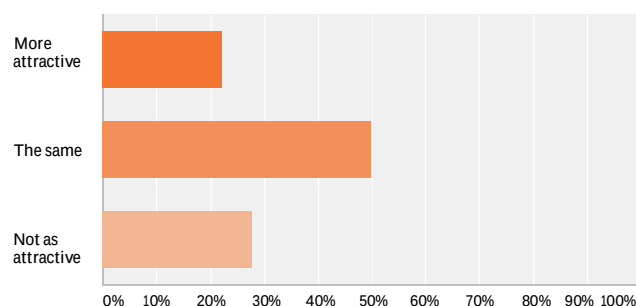
Of those companies that conduct exit interviews, 27% said the results were read by the company CEO or hotel GM (as relevant), the HR director/HR team, the department director/manager and

Q26) What benefits do you offer?

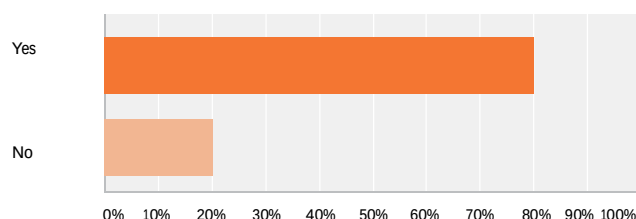
Q26) What benefits do you offer? (Continued)

Answer Choices	Responses
Accommodation or accommodation allowance	83%
Annual flights	89%
Local travel allowance	33%
Discounted F&B	83%
Discounted hotel rates across the organization	78%
Use of hotel facilities	61%
Staff meals/canteen	83%
School fees	56%
Medical insurance	83%
Life insurance	61%
Pension	22%
Performance related bonus	56%
Discounts with strategic partners	61%

Q27) Do you think your company's benefits package is more or less attractive than your competitors?



Q28) Are traditional hotels at risk of losing staff to more modern independent hotel brands or other areas of hospitality, such as independent F&B, leisure parks.



the individual's line manager. The person most likely to read the exit interviews was the HR director, while 11% admitted that they believed no-one in their company read exit interviews, instead saying "it's paperwork".

It's not just at the end of the recruitment process, however, that people don't read important documents. Speaking to the experts about what happens when staff have left their business, it is worrying to hear that the proper use of references seems to have dropped.

Yaghi admitted that his team were contacted less and less frequently for references. While there are restrictions on what an official referee can say, Simpson said he was surprised that people don't talk to each other in the market the way they used to.

"I don't think people use references enough," said Simpson. "Officially, all you can give is a letter saying that someone worked

for you between these dates and state their final job title. But, the city [Dubai] is small, people should be calling people, asking: 'Did this person work for you and how were they?' It's just dangerous."

9. HR strategy

How much time an HR director is able to dedicate to HR strategy is dependent on several factors: whether there is a separate function for recruitment, a dedicated department for training, the number and quality of resource available within the team and the attitude of the leadership towards HR. Is HR viewed, as has historically been the case, as the 'hiring and firing' department? Or, does management believe that HR brings value to company strategy and decisions?

It also depends on the individual themselves – the HR manager or director in question. Are they passionate about creating an environment that staff want to work in and delivering company values that motivate and engage people? Or, are they concerned with numbers and payroll, and making sure the job in hand is done, but nothing more?

Van de Merwe said: "It all boils down to proper planning and scheduling your day".

"There will always be time to focus on your colleagues' wellbeing – that should be the first priority of any HR professional. You have to set a target for your property and department and work towards achieving this," he said.

Nabil Samuel from TIME Hotels, and Mövenpick's Smith, agreed. "In my opinion employees look for employers that can support their future career and development plans. As an employer this is something we're keen to highlight. If an HR professional isn't doing this, quite frankly they're not doing their job and will undoubtedly miss out on the best candidates," said Samuel.

"Strategy and review of practices is definitely a major focus for HR professionals. If we are not doing this, then who is? Strategy for HR is like revenue for the director of sales or cost control for the director of finance," Smith added.

When asked how much time they were able to dedicate to HR strategy, policies, staff wellbeing and improvements, nearly three quarters of respondents to the *HR Leaders Survey* said it equated to less than 50% of their time. Twenty-seven percent of respondents said they spent between 11 and 20% of their time on strategy. Sixty percent did not believe they had enough time to deliver an HR strategy that fostered staff retention.

Surprisingly then, 87% of respondents said they felt that HR directors played a key role in overall company/ hotel strategy, although judging by the earlier responses, this result may be more of a reflection of aspiration than reality. Still, 67% said they believed it was 'critical' that an HR strategy engaged staff with the overall company vision.

Samuel said: "HR directors play a major role in company strategy as they identify the necessary skills and attributes required to do the job – they also protect the investment made into employees. Talent retention is another important factor of the job as it has a major bearing on the future success of the company.

"I've never been witness to any company that achieved sustained success without having HR as a major pillar of company strategy."

Nearly three quarters of respondents said that important HR decisions were managed at property level, while 27% said that hotel HR strategy was dictated by corporate or regional office.

Whether hotel owners also had input varied, with the majority of respondents observing that their ownership was “quite involved” with senior recruitment decisions, remuneration and strategy, etc.

One approach that could allow more time to focus on strategy is the use of software to help streamline basic processes and procedures. Sixty percent of respondents said they used workforce analytics, normally employed by companies to provide insights for effectively managing employees in-line with business goals. Maataoui said having such systems in place is “becoming increasingly obligatory”.

Puri said: “Workforce analytics improved the value of our source data, allowing HR professionals to create a complete picture of our workforce, giving the executive team critical information necessary to make decisions that drive business success.”

Bellinger revealed some key statistics from her research into workforce analytics: companies with a highly engaged workforce experience a 19.2% growth in operating income; engaged companies grow profits up to three times faster than their competitors; and highly engaged employees are 87% less likely to leave the organisation.

“How can you engage a workforce when you are flying by the seat of your pants?” asked Bellinger. “Workforce analytics can help organisations to develop and improve recruiting methods, make general and specific hiring decisions, and keep the best workers with the company. It’s imperative in my opinion, but sadly companies do not want to invest.”

Independent associate HR consultant Donatella Fumagalli agreed, but warned that to be effective, workforce analytics

“56% BELIEVE THEIR STAFF ACCOMMODATION IS ‘GOOD ENOUGH’ AND 33% SAID IT ‘COULD BE IMPROVED.’”

must be implemented in a meaningful way. There is no point collecting data for the sake of it.

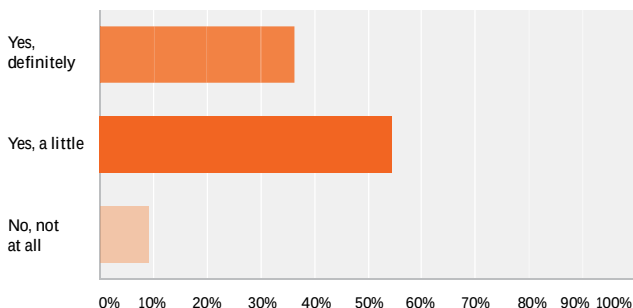
“I believe workforce analytics can be a valuable asset to HR professionals as they can optimise the management of the workforce from recruitment to training and retention. This is particularly true and applicable to larger and global organisations where workforce analytics becomes an enterprise tool,” said Fumagalli.

“However, [you need] to know how to use the tool, how to input the data for accuracy so that the output can assist [in making] meaningful day-to-day and strategic decisions. Otherwise the information can become confusing, meaningless and counter-productive.”

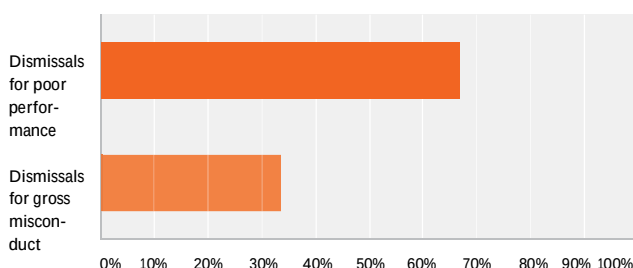
The experts *Hotelier Middle East* interviewed agreed that HR directors should contribute to company and hotel strategy, with smart talent management, innovative retention policies and intelligent payroll systems the markers of a forward thinking HR department. However, many believed that the paperwork generated by hotel HR departments – as required by the organisation’s management, legal and financial teams – still dominated allocation of resources.

Zaki said: “What is important is for the HR department not to be dismissed as purely administrative. Unfortunately, in many traditional environments, the role of HR in the overall strategy is not considered.”

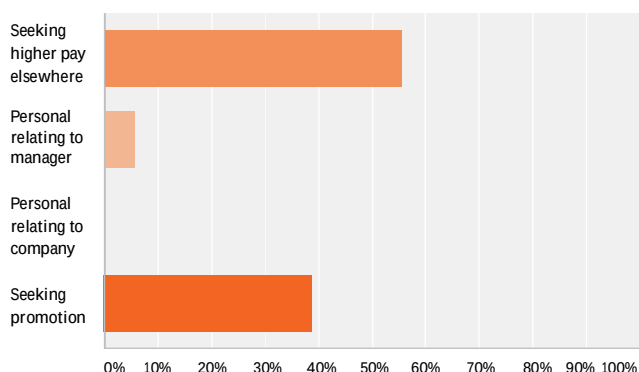
Q29) Do staff care about their appraisals?



Q30) What's the most common type of dismissal?



Q31) What is the most common reason for staff voluntarily leaving the company?



Her biggest concern for the future of the HR professional is that this stereotype doesn't change, with the role ultimately being "made redundant through being dismissed as another paper-pushing job".

Smith said that, while at Mövenpick Hotels & Resorts, HR shares an equal voice with sales, finance, revenue and operations, she "has seen companies where HR is treated as the administrators and guardians of paperwork".

Regan said there should be "no reason" to be swamped by paperwork in 2016. "There's a lot of paperwork because no one has questioned the purpose of it. There are a multitude of HR management systems out there and it's a matter of choosing the best model for your business in order to optimise all HR processes. I also believe that HR professionals need to prioritise what is important in their business and partner with all the other department heads in relation to sharing HR related responsibilities," said Regan.

The challenge, however, is that not all HR professionals are qualified for this.

"Many HR professionals lack the understanding of people culture and therefore are not involved in the overall company strategy. They are seen as a supportive unit instead of the backbone of the business," said Riccio.

Puri said that to date, she has "seen HR supporting the business strategy when it comes to how staffing relates to strategy and how organisational structure relates to implementing strategy", but believes more could be done by HR leaders.

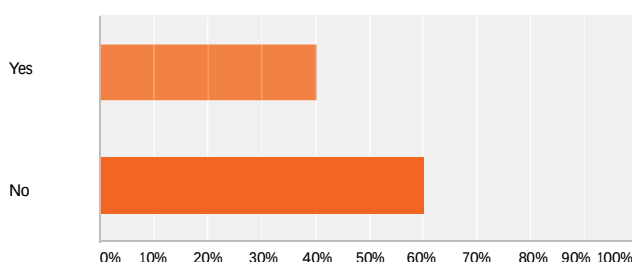
"We can play a more active role in development of company strategy including acquisitions and mergers. I believe the main impact area, which makes HR professionals a strategic partner, is talent management and change management," said Puri.

As Maataoui pointed out, however, it's somewhat of a chicken and egg situation. If the HR director makes more time to strategise, this should help improve engagement and reduce turnover – in turn reducing the time needed to be spent on the hiring and firing procedures and paperwork.

He also said that HR directors need to play a key role in company strategy as they have the power to influence the staff's commitment to this. This is where HR's involvement in internal communications is critical, with 80% of survey respondents saying that they at least "sometimes" supported the marketing team with internal communications, with 13% actually claiming to drive this from HR. Sixty percent were confident that their company's internal communications told staff 'everything they need to know'. Only 13% said it 'kept staff in the dark about most issues'.

Maataoui said: "HR directors understand the workforce and

Q32) Do you have enough people on your team to deliver a HR strategy that fosters staff retention?



"THE BIGGEST CHALLENGE IS TO STOP THE NEVER-ENDING SPIRAL THAT THE INCREASE IN SALARY HAS GENERATED OVER THE LAST FEW YEARS."

can greatly support the overall strategy. HR directors enable the discussion about the people and drive projects that encourage the staff to support the company strategy".

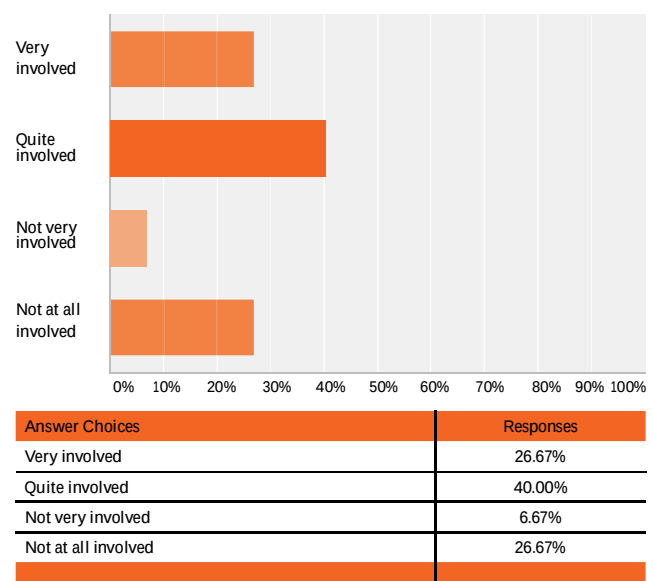
Van de Merwe put it even more simply, bringing it back to budgets. "Payroll is probably the biggest expense. In setting a clear strategy you will be able to work within the budget and achieve so much more with the talent you have," he asserted.

10. Trend watch

As well as shining a spotlight on the current state of the market, *The HR Leaders Survey* and related interviews also highlighted key trends impacting the industry.

For several years now, hotel chains have sought to get behind ambitious nationalisation plans throughout the GCC, designed to bring the local population into the workforce. With such a large pipeline of hotels, this is more important than ever, but it is a topic on which there is little transparency at present. Many companies have programmes in place. Fifty-three percent of survey respondents said they had a nationalisation policy, but the impact of these on the long-term potential of the workforce is yet to be seen.

Q33) How involved is the hotel ownership with HR strategy, senior recruitment decisions, remuneration etc?



In Bahrain, Puri said The Westin & Le Meridien Hotel Bahrain City Centre have “pioneered the localisation programme to develop Bahraini hospitality talent in conjunction with Ministry of Labour and Tamkeen, offering training and employment opportunities to Bahraini nationals with internationally recognised certification from William Angliss”.

In Saudi Arabia, Hilton Worldwide operates the Mudeer Al Mustaqbal Manager of the Future (MOF) programme, which aims to “train and develop Saudi nationals in F&B, front office and housekeeping managerial roles over a two year period”, said Genckul. Hilton also offers various job skills programmes for local team members to improve their on the job skills on an ongoing basis.

It's not just important to attract local talent within the GCC, though. At Rotana, Yaghi said recruiting locals when they enter a market is critical. He recalled the chain's entrance to Sudan, where the operator opened with 80% expatriate and 20% local employees. That has now reversed and the hotel is staffed with 80% Sudanese, a trend Yaghi intends to continue in the Democratic Republic of Congo.

“It's a big responsibility. It's your first show in the country so you want to be sure you get it right,” said Yaghi.

Young people represent another huge segment that experts said the industry needs to do more to attract. According to the Arab Youth survey 2016 (ASDA/A Burson-Marsteller), unemployment is considered one of the biggest challenges in the Middle East by 18-24 year olds. Again, Hilton Worldwide has invested significant resources to create attractive HR propositions for the next generation.

“This is key in our bid to reach our global goal of empowering one million young people across the world by 2019, through various youth initiatives,” said Genckul.

“Our Careers@Hilton Live signature events allow us to promote Hilton opportunities and hotel career tracks for youth in the region, in addition to job shadowing opportunities at hotels. This year across Europe, Middle East and Africa we connected with almost 29,000 young people through the initiative, providing them with the skills, information and opportunities across our business, through more than 350 creative and engaging events.”

Similar headway needs to be made into encouraging more women into the industry with “flexible working hours and

added facilities for new mothers” said Hamziya.

According to the survey, 80% of hotel companies are already looking at this, though it will be quite some time before the gender imbalance at a senior level is addressed.

“Attracting and retaining high potential women in the workforce is a challenge. The work and living environment is not women friendly,” added Hamziya.

A more radical trend that was raised in discussions was the impact of artificial intelligence (AI) on the hospitality industry, sparked by the development of hotels staffed by robots in Japan. Multilingual robots in all guises manage check-in, concierge and luggage services at the Henn-na hotel in Nagasaki, while facial recognition replaces room keys and guest room mini robots look after lighting and temperature controls. The hotel recommends “conversing with the warm and friendly robots” and promises guests a unique experience that will take them “one step into the future”. It's been so successful that operator Huis Ten Bosch plans to open three more Henn-na hotels in Osaka and Tokyo.

It doesn't take long for trends to hit Dubai and in August 2016, it was revealed that the upcoming Rosemount Hotel & Residence is expected to feature robot hosts in its lobby.

According to futurist Claudia Olsson, CEO and founder of Exponential Holding AB, this is just the beginning. The latest developments in wireless communication, artificial intelligence and sensor technology will make robots better and cheaper, so it's only matter of time before robots will become commonplace in hotels.

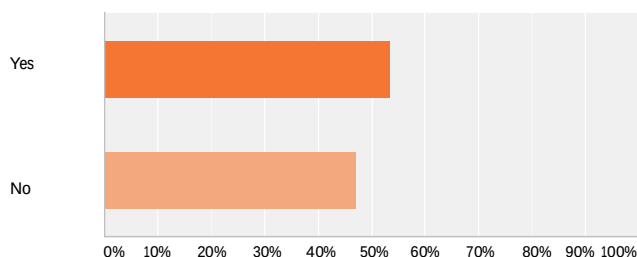
“Service industries like the hotel industry have great potential of developing greater value for clients through technology,” said Olsson. “AI can, for example, benefit customer service industries by handling repetitive tasks more efficiently. Employees will [then] be able to focus more on advanced tasks and customer services.

“AI can also optimise customer experiences by tracking [human] reactions at various stages of the hotel visit. People-literate-technology (PLT) which is integrated in the hotel, as well as augmented reality, which complements the physical space, can heighten the hotel experience,” she said.

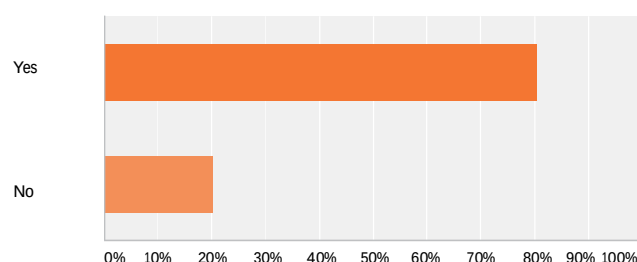
On the issue of what roles AI will replace in hospitality, versus the opportunities it will create, Olsson said AI will handle what are known as the 3D jobs – dirty, dull and dangerous – as well as a large amount of administrative work.

“THE MAJORITY THOUGHT STAFF CARED ABOUT THEIR APPRAISALS BUT, WHILE 91% OF RESPONDENTS SAID THAT THEY SET KPIS FOR STAFF, ONLY 59% OF RESPONDENTS SAID THEY WERE ‘CONFIDENT THAT EVERY MEMBER OF STAFF KNEW THEIR KPIS’, HINTING AT A POTENTIALLY SERIOUS COMMUNICATIONS ISSUE. THERE IS LITTLE POINT IN SETTING TARGETS WITHOUT ENGAGING STAFF WITH THESE GOALS.”

Q34) If based in the GCC, do you have a Nationalisation policy in place?



Q35) Does your company actively favour the progression of women in the workforce with programmes, incentives etc?



“Tasks such as room cleaning, laundry services, restaurant dishwashing, waiting and clearing tables, but also booking and check-in and other more simple and repetitive tasks [could be handled by robots],” said Olsson.

Despite the noise around the trend, and frequent commentary from futurists warning industries to be ready to adapt, the hotel sector still does not perceive much of a direct impact from AI. Only 13% of survey respondents said they were concerned about the impact of AI on their workforce. Sixty-seven percent of respondents said the issue had never been discussed internally.

All the experts Hotelier spoke with were keen to emphasise the personalised, human nature of hotel service that they did not believe could be replaced by any form of automation.

Mövenpick’s Smith said: “In my opinion, artificial intelligence will only impact certain sectors over time. Due to technology, we are experiencing a decrease in the reliance on certain positions. Before a guest visits a new location, it is very easy to Google, Tweet or check on Facebook to get recommendations on where to go. So, the reliance on traditional positions, such as the concierge, is diminishing, especially in business hotels.

“39% OF RESPONDENTS ADMITTED THEIR COMPANY HAD IMPLEMENTED A PAY FREEZE DURING 2016 OR DURING PERIODS OF THE YEAR.”

“We currently implement a web check-in process in several of our hotels around the world. Table service, cleaning and cooking – I think these jobs are safe from our robot friends for the time being,” she said.

11. Conclusions

Hotelier Middle East asked survey respondents and interviewees to honestly reveal their biggest concern for the future of hospitality HR. What’s the issue that most keeps them awake at night?

In these open ended answers, several issues already addressed were emphasised: concerns over the disappearance of personalised services in HR; the negative impact of the reduction of HR to an administrative and operational department, rather than a strategic business unit; and worries over salaries and benefits in a competitive market.

However, the over-riding concerns revolved around two key factors – the recruitment and retention of talent. Everybody is worried about finding talent, attracting talent, securing talent, progressing talent and keeping talent. Engaging employees by fostering a corporate culture they want to work within and facilitating opportunities for job advancement is critical.

As Rotana’s Yaghi said of his main concern: “The workforce is changing a lot, how are we going to retain our colleagues, how are we going to maintain their loyalty in an industry that is evolving very, very fast?”

Answering this will come down to strategy and HR professionals should be planning for post-2020 now. Hospitality is a people business and amid periods of macroeconomic and geopolitical instability in 2016, the industry would be wise to prioritise its most important asset for the future – its people.

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