Home Office as a Result of the Covid-19 Pandemic and Its Implications for the Sales Strategies of the German Hospitality Industry

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Abstract. Based on a publication in the *Handelsblatt*, this paper analyses the significance and consequences of the home office obligation in Germany as a strategy to prevent the COVID-19 pandemic. For this purpose, the first relevant publications are analysed for findings and evidence using the method of a systematic literature review. New knowledge will be contrasted and examined for research gaps. In the current discussion, there is interdisciplinary agreement that the hospitality industry will be one of the most negatively affected. Another disruptive trend has been identified. Home office workplaces will continue to exist in the future and will have a lasting impact on our working world. Therefore, restaurants have to reach or replace the lunch business and the business customers by means of new sales strategies. Here, mainly take-away solutions and digital sales by means of software-optimised processes are under discussion. Omni-channel distribution for take-away and pick-up meals is the future. The current research on digital distribution comes mainly from Asia and must be derived for the European market, especially the German market, and its compatibility confirmed.

Keywords: COVID-19 Pandemics, German Hospitality Industry, Home Office.

JEL classification: *G33, O44, Z3*

1   Introduction

The COVID-19 pandemic is considered already the most serious economic threat to tourism since the Great Recession of the 1920s. [1–8] Current research identifies a variety of drivers for disruptive processes within the tourism industry. Predominantly, a trend towards even more sustainable and radically ecological measures is identified. The debate is going so far that there is even discussion of a war over the future of tourism. Leading scientists argue about the question of growth and responsibility for destinations and their ecological and social environment. [9–14] Another issue in the current discussion is the impact on the future challenges in tourism and its subordinate economic sectors, such as gastronomy. [15–19] How do measures to contain the pandemic, including long-term behavioural changes on the part of consumers, affect the hospitality industry and restaurants? The starting point for these considerations is a recent article in the Handelsblatt. There, a survey of the 40 largest DAX companies and 10 large family businesses is conducted to find out how the companies intends to continue to handle the home office. The result: despite the end of the legal home office obligation, most offices remain closed. Among the reasons given were the high infection rates. [20] Following on from the thesis that homeworking will remain a long-term trend even after the pandemic and that it will merely serve as a catalyst, several questions arise for the future of urban restaurant businesses. What impact does the absence of business customers have on the lunch business and what sales strategies can be used to counteract this? How will value creation in restaurants develop in the future in relation to the takeaway and delivery business and which strategic approaches pursued during the pandemic are also relevant for the post-COVID-19 years?

2   Literature review – the current status of science and practice

2.1   Home office as a result of pandemic response

The significance of the home office and its consequences for the catering industry are controversially discussed. In the public media as well as in the first scientific studies, there are expected positive as well as negative externalities that affect the market. The observations and discussions are correspondingly contrary. In their study on the long-term consequences of the COVID-19 pandemic for the German economy commissioned by the IAB, [21] show positive developments for home offices and video conferences. However, they interpret the development for the hospitality industry in general and in the long term up to 2040 critically and identify here the sector most negatively affected. The first reports of the consulting firm pwc, especially for England, but also for Germany, show negative economic developments due to the home office regulations.[22, 21, 23, 24] The pwc study by [22] is one of the first papers to address the topic under investigation. It originates from England and analyses the economic consequences of the home office in the United Kingdom with the use of a survey and secondary statistical data from public offices. The authors conclude that the British GDP would be 15.3 billion pounds lower with the continued use of home office jobs. One scenario with and one without home office is simulated. A distinction is made

between direct effects and indirect effects. In the case of direct effects, the gastronomy and stationary retail trade are affected, among others, which have to accept a loss of turnover due to the absence of business customers. Implied consequences, according to the study, could be a migration of gastronomy and stationary retail to the residential areas of large cities. Based on the data situation and the subject of the study, it applies to large cities and the ecosystems defined here that have formed around the large office complexes.[22] The fact that initial reports and press releases refer to this study and derive direct effects for the German market must therefore be viewed even more critically.[25, 24] It is undisputed that there can be negative effects, especially in the urban areas. However, to derive the same expectations directly from the English study must be considered critical. The fact that there has been a push towards digitalisation is seen as positive. In their Ifo Institute research, [26] describe the pandemic-driven shift from face-to-face work to home office as "...involuntarily one of the most extensive social experiments...".[26] As in the public media, reference is made of survey results evidencing a general majority satisfaction with the home office in this case. [24, 26, 20, 27, 23, 25] The first papers listed in Q1 journals have also been published in this research field. For example,[28] examine how home office use affects the relationship between couples with children. For this purpose, they distinguish between married and unmarried couples and the age of the children. Ultimately, the results of the study are along the same lines as those of [21] who examined the German labour market regarding home office and its consequences. Both studies assume a long-term trend that will define the hybrid working world. In contrast to the studies of pwc, [28] also show the consequences of working at home for relationships, whereas the positive effects outweigh the negative ones.[28, 21, 22] Similar results have already been published by US researchers. In their survey of 50,000 working Americans, they concluded that they would not like to give up their home office. After all, six percent would quit directly if they gave up home office working hours and look for an alternative job with a home office offer. Another 36 per cent of the recipients would continue to work, but at the same time look for a new job with home office possibilities.[29] Thus, the study is cited in the first papers as an initial trend and is also partially confirmed. There are currently no scientific surveys or evaluations of the extent to which German employees would change their employer if the home office were abolished. Only the most important German business newspaper, the Handelsblatt, has conducted a survey on home office among the 40 DAX companies and 10 large family businesses. The findings show that many will cautiously open their offices and that home office will continue to be possible for all of them. The research also assumes that a more than 25 percent of all future workplaces will be in hybrid form. The authors thus quote and confirm the current Ifo study on home office.[20]

Regarding the first papers found, it should be mentioned that the papers, as well as the press reports, refer to the first study on home office effects by the consulting firm pwc from 2020.[30–32, 22, 23, 27, 25] This study by [22] will be followed by a more recent one in 2021 that refers specifically to the German market. Evidence is also given here according to a correlation in terms of results, structure, and interpretation. [23] also find an increasing willingness and demand for more home office and an emerging shift towards a hybrid working environment. An increase in weekly home office time

from two to three days is assumed. In the survey, 78 percent of the recipients state that they want to spend more time in the home office.[22–24]

2.2   Sales strategies in the current discussion

In the current discussion, working from home is seen as a driver for digital communication and new sales channels between restaurants and customers. In addition to distribution channels via multi-channel distribution, the first studies analyse packaging issues from an ecological and economic point of view and the communication of hygiene standards as sales-promoting measures.[33, 34] The study concludes that there is a significant correlation between the number of menus sold with and without a hygiene label. In the take-out business, the study found that communicating sustainable and regular cleaning and disinfection measures increased sales by around 45 units per day, and in the delivery business, sales increased by around 30 per cent.[35] Also from South Korea is the research by [16], which analyses the omnichannel distribution of restaurants for the takeaway and delivery business and proposes a multichannel strategy that is optimised by applying a software solution (API). Both papers show that for the South Korean market, multi-channel distribution and sophisticated digital solutions are the only way forward. In this context, ordering, payment, and communication must be bundled into digital applications and packaged in the most user-friendly way possible. The biggest risks for the companies in both works are the high costs, once of the packaging and once of the ordering via third-party providers, so-called sales partners, who charge fees for their services. There is also an ongoing increase in the take-away business and there is a growing demand for digital delivery, communication, and payment services. One prominent representative to be mentioned here as a third-party provider or platform is *"Delivery-Hero"*. [4–7, 35, 22, 23, 31, 17] Scholars analyses that with the help of API, the costs of sales platforms can be reduced if it is possible to encourage customers to sell directly, i.e. if it is possible to encourage regular customers in particular to order and pay via their own platform (website or app).[16] Another study that confirms the increasing demand for online food ordering and delivery and refers to the Chinese market using game-theoretic approaches (Stackelberg model), they analyse the question of choosing the optimal distribution strategy from the restaurant's point of view.[34] The paper does not directly address the home office issue, but indirectly through the analysis of the approach of online food ordering and the increasing delivery business that has already been elaborated here. Especially the question of whether it makes more sense from the provider's point of view to use the delivery service of the third-party provider or to organise it himself is an elementary part of the corporate strategy. A distinction is made in this case between the *Self-Logistic-Strategy (SS)* and the *Platform-Logistic-Strategy (PS)*. With the SS, the restaurant delivers itself after purchase and payment processing via the platform, and with the PS, this is handled as a service of the platform, but at higher costs. In addition to the costs, it is also about the negative environmental impact that the delivery business demonstrably exerts. Additional negative environmental impacts are exerted by the packaging materials, and these are to be avoided from the point of view of the environment and the customers. [34, 16] The finding of the work is that both platform providers and restaurants influence each other's prices.

Another recent paper examining restaurant survival strategies during and after the COVID-19 pandemic is that of [33] which looks at the US market using analysis of the *Darden Restaurants group* of restaurants and derives strategies accordingly. From this, the authors derive the survival strategies, which can be summarised as follows:

- **&Stabilise the operating business:** This is defined as focusing on the online take-out business and limiting advertising expenditure for the in-house business to avoid overcrowding when reopening.
- **Financial recovery:** Reduction in capital investment and marketing expenditure. Due to the reduced number of competitors and consumers' pent-up demand, a positive outlook can be expected.
- **Revenue generation:** Focus on optimising the take-away business and the social distances in the dining rooms that will remain in the future.
- **Staff and employment structure:** Pay cuts for senior staff and benefits for staff to limit migration and have sufficient staff ready for reopening.
- **Marketing:** Decline of classic TV advertising. New marketing mix with stronger focus on social media.[33]

The deduced strategies of the *Darden restaurants* can be compared with other results and thus serve as a basis for future research. A further work found on this is a study by the consulting firm *McKinsey & Company*. Scholars have identified the following future sales strategies and trends for the European restaurant industry:

- **Changing customer behaviour in terms of food and lifestyle:** negative effects of the home office, especially for urban restaurants in metropolitan areas. However, these can also include opportunities, such as the increased demand for take-away food, especially via online ordering. These show an 80 per cent increase in Europe for lunch in April, May and June 2020.

- **Growing digital orders and delivery business:** This study also identifies a long-term trend like the work above.[33–35, 17]

- **Improving the dining experience:** In-house guest stays will be driven by a greater need for space (social distancing) in the future. Private guest areas and higher service quality are seen as future drivers. The source used for this by [17] is an Open Table evaluation.
- **Optimised food offering:** Vegan and sustainable products are the future. However, this statement needs to be critically examined. Papers considered above has shown that companies put profitability in the supply business before sustainability.[17, 34]
- **Added value for the money paid:** According to the McKinsey study, customers in Germany and Spain will expect a higher level of service and corresponding added value for the money they pay.
- **Increasing interest for meal kits:** Another trend identified by the study and influencing restaurant sales are so-called meal kits. These are self-prepared menus that are prepared in a self-explanatory way and sent in compact boxes including cooking instructions.
- **Dark kitchens:** Also known as "delivery-only kitchens", this concept is characterised by a pure kitchen. It prepares food for takeaway or delivery for

several different restaurant concepts. All of them originate from one kitchen and can be distributed via different websites or brands. This way, the customer can order several different concepts from one kitchen (which does not appear itself) without knowing it. These concepts are less staff-intensive and make efficient use of the kitchen's capacity.[17]

The findings of [17] are consistent in most aspects with the studies from Asia and the USA, as discussed above. The work of [36] can help to verify the findings. In a representative survey conducted between Julie and October 2020, they asked 7,613 US-American recipients about their changed behavioural patterns due to the influence of the COVID-19 pandemic and the expectation that they would continue to do so after the pandemic. Among other things, they are asked about the areas of home office and dining out. The most important finding of the work is the increase in home office or teleworking. In this case, 26 percent of the respondents say that they expect this in future. A full 70 per cent of the recipients for whom teleworking is a new experience report the same or even increased productivity. Therefore, the work confirms the trend towards home office like the previously cited surveys. Restaurants are seen as being among the most affected, which also confirms the previous statements. For example, the respondents state that they will reduce their planned turnover in restaurants (measured by planned visits) by 20 per cent. Unfortunately, it is not clear from the study whether this is compensated for by deliveries or take-away sales. Only the increasing demand for online grocery shopping in general suggests this.[36]

3   Principles and objectives

The clear formulation of a work objective based on the research question is one of the basic requirements for applying an SLR.[37, 38] The author derives the research question from a first representative study by the *Handelsblatt* for the home office application in Germany. Here it is stated that a large proportion of the DAX corporations and largest family businesses surveyed will retain this working model despite the end of the home office obligation.[20] This circumstance raises the question for the author:

(RQ)   How is the increased use of home office workplaces as a measure of the COVID-19 pandemic changing the daily business of German restaurants and their sales strategies for the lunch business?

The following sub questions can be identified based on the current discussion:

(RQ 1.1) How is the willingness of employees to continue to work from home after the crisis? Is it desired and should it be defined as a long-term development?

(RQ 1.2) How are the German restaurants reacting to this development and which specific sales strategies are being used?

(RQ 1.3)   How successful are these strategies at the present time?

These serve to answer the research question in a structured and step-by-step manner. In addition, corresponding research gaps should be revealed and inspire future work. In the following, the research question and the sub questions will be delimited to apply a methodologically permissible SLR.

The objective of the paper is to provide a structured overview of scientific results already published in leading journals and recognised German studies on the German restaurant and hotel market. The effects for the German market are specifically sought and critically discussed with the aim of uncovering further research gaps and deriving recommendations for action for science and practice. The overriding research question is: *how the sales strategies for the German restaurant industry will adapt or change because of the increasing use of home offices as a measure to control the COVID-19 pandemic?* In the chosen approach of the SLR, it is of elementary importance to define the research objectives concretely and to align them according to the methodology of the research. The following objectives are pursued and considered in the research:

1. Critical presentation of the public discussion and significance of the topic.
2. Structured analysis of the scientific literature on the subject and its presentation.
3. Identify gaps in research based on the literature analysis.
4. Derive initial recommendations for science and practice from the literature identified.

The four research objectives listed here address the chosen methodology of SLR.[39]

4 Methodology – systematic literature review

This paper follows the approach of SLR, as does previously cited work on research within the hospitality industry.[15, 40–42] Although this process is predefined and defined as an ongoing process. Keywords are adapted and the results are expanded using backward and forward search and targeted searches are carried out for findings.[37] In the first step, the search engine *google.de* is searched for the terms: *„Homeoffice und Restaurants"*, *„Homeoffice und COVID-19 Pandemie"* and *"Homeoffice Pflicht"*. Also via the science site *google.scholar.de* for the English-language terms: *„home office and hospitality"*, *„home office and restaurant"* and *„home office and sales strategy for restaurants"*. The first procedure serves as an approximation of the terminology and a general overview of the topic before searching the scientific database web of science with targeted and defined keywords.[43] In total, the first narrative search on the free web produced 15 articles. The first stage of the search produced the following keywords for the following downstream search in web of science: *„home office and hospitality"*, *„home office and restaurant"*, *„home office and sales strategy for restaurants"* and, *"remote work and hospitality (restaurant; sales strategy for restaurants)"*. The work of pwc is found using backward search from the citations of the press reports.[43, 38, 37] Similarly, for identified papers, the Forward Search is also used to search for further papers by the authors or institutions that could be relevant to the topic. In the case of the pwc publication on the English market from 2020 (which was found with the backward search), this leads to the hit on the latest work by pwc, on the German market.[22, 23, 27, 24] The following table shows the results of the second stage of the SLR review process.

Table 5. Web of Sience results list by keywords.

No.	Keywords	Results	Relevance for further review	Relevant papers minus previous-ly found papers	Search date
1	home office and hospitality	11	1	1	21.04.2022
2	home office and restaurant	22	2	2	21.04.2022
3	home office and sales strategy for restaurants	0	0	0	21.04.2022
4	remote work and hospitality	3	2	2	21.04.2022
5	remote work and restaurant	3	3	2	21.04.2022
6	remote work and sales strategy for restaurants	0	0	0	21.04.2022
7	sales strategy for restaurants	31	5	5	21.04.2022
8	home office or remote work	12.464	2	2	21.04.2022
9	home office or remote work (hospitality)	22	3	0	21.04.2022
10	home office or remote work (restaurant)	3	1	0	21.04.2022
	Total	**12.559**	**19**	**14**	

With the limitation to the publication periods from 2020 to 2022, 31 hits were generated. Five of these remain for further analysis. In sub-section number seven, the search term is accordingly limited to "home office or remote work" and generalised. This generated 12,464 hits. However, this must be further categorised as too large as a sample.[37] Therefore, the search is refined by the keyword's "hospitality" and "restaurant" in the extended filter (numbers nine and ten).[43, 38] The results found, however, are already recorded in the previous searches and thus do not add to the sum of results. A total of 14 papers enters the third stage of the search. Then these are analysed for their qualitative significance in answering the research question.[37] According to Figure one, the 14 abstracts of the papers found now have to be analysed and their relevance for the further evidence-based analysis of the content examined.
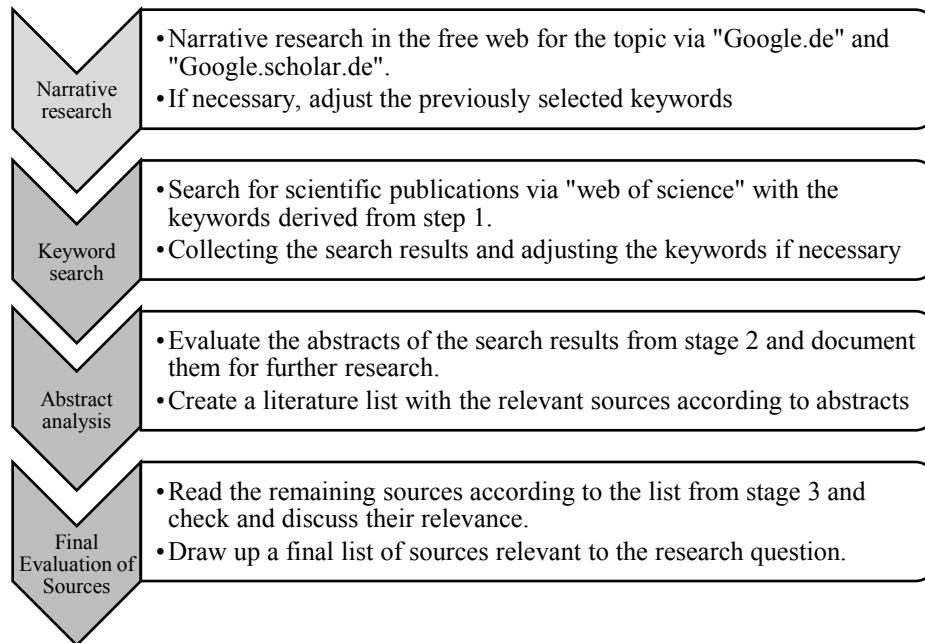
Narrative research	• Narrative research in the free web for the topic via "Google.de" and "Google.scholar.de". • If necessary, adjust the previously selected keywords
Keyword search	• Search for scientific publications via "web of science" with the keywords derived from step 1. • Collecting the search results and adjusting the keywords if necessary
Abstract analysis	• Evaluate the abstracts of the search results from stage 2 and document them for further research. • Create a literature list with the relevant sources according to abstracts
Final Evaluation of Sources	• Read the remaining sources according to the list from stage 3 and check and discuss their relevance. • Draw up a final list of sources relevant to the research question.

Fig. 7. Research design SLR.

5 Results

5.1 Home office as a long-term post-pandemic trend and influencing factor for the hospitality industry

The literature found in the current discussion is consensual in the sense that home office as a working model of the future is a durable consequence of the COVID-19 pandemic. [26, 21, 23, 36, 20, 29] It can also be assumed that the hybrid working world will emerge from the pandemic as an all-encompassing trend.[36, 21, 44] Initial work and surveys from the USA also show that employees are aggressively demanding a hybrid working world. For example, only 58 per cent are willing to return to work completely and forego telework without resistance. Slightly more than six percent want to quit directly if hybrid work is not possible after the pandemic and almost 36 percent would look for a new job with a corresponding work model in the medium term.[29] The extent to which these results, which are representative of the USA, can also be applied to the German labour market must be viewed critically. However, the first current studies found here show similar tendencies. In particular, the study by pwc highlights that the new hybrid working world and at least two to three days of home office per working week can also be expected in Germany.[23] The studies are consistent across all areas of investigation, whether in the USA, the UK or Germany - the hospitality industry, along with the stationary retail trade and transport companies, is the most negatively affected. Thus, the first sub-question of the research question posed is:

(RQ 1.1) How is the willingness of employees to continue to work from home after the crisis? Is it desired and should it be defined as a long-term development?
to be answered clearly in the affirmative. Both practice and the first scientific papers and statistical figures from the federal offices and labour market research show that the home office will remain in the long term. This applies to the European market as well as the American and English markets. Sub-questions RQ 1.2 and RQ 1.3 are answered below. These refer specifically to the sales strategies of the restaurants. Finally, the research question is addressed.

5.2 Sales strategy after the home office compulsory

How will the sales strategies of restaurants change after the end of the home office obligation in Germany (19.03.2022) [45] and what long-term measures and strategies remain for the sector? Accordingly, the following research question can only be answered to a limited degree. *(RQ 1.2): How are the German restaurants reacting to this development and which specific sales strategies are being used?* The literature found has a wide range of results around the digitalisation of distribution and the use of take-away business models up to the delivery business. The first Q1 publications analyse the topic on the market in South Korea. In summary, the following strategies can be derived from the initial work:

- Increasing use of API software to enable smart and cost-reducing multi-channel distribution of meals via online platforms.[16]

- Use of online platforms for distribution and their delivery services, as well as broad supply management across as many suppliers as possible to reach a large proportion of potential customers.[34]

- Visible and transparent communication of sustainable hygiene measures in restaurant operations on the food packaging. As well as the use of ecological packaging materials and reusable packaging.[34, 35]

In general, it can be observed that, due to the hybrid work models, the take-away and delivery business will be an integral part of future sales strategies, especially in urban areas.[34–36, 33, 16] The extent to which these are promising for German companies and how they are elaborated in detail can only be derived from the works cited here. Only the *McKinsey* study has worked out initial approaches, but these must first be examined for their representativeness. In addition to the measures found above, the following trends can be derived from the study:

- Increasing importance of so-called ghost kitchen concepts: These can function as independent businesses or expand existing restaurants and thus show an additional sales channel and utilise the existing kitchen infrastructure.[17]

- More space and privacy for the guests on location: Due to social distancing, customers will continue to place more value on space and privacy in on-site restaurants in the future.[17, 36, 33]

- Eating habits and consumer behaviour will increasingly focus on sustainable, organic, and vegan products. The range of products on offer must expand in quality and variety to this end.[33, 17]

- The use of social media advertising will gain in importance.[33, 17]

Regarding the last sub-question *RQ 1.3 (How successful are these strategies at the present time?)*, the present study is not able to elicit any results. No studies have been published on this yet. Thus, another research gap for future work can be pointed out here. Finally, the research question asked *(How is the increased use of home office workplaces as a measure of the COVID-19 pandemic changing the daily business of German restaurants and their sales strategies for the lunch business?)* can be answered in the steps taken above. Only the success of the sales strategies identified and their general validity for the German market cannot be answered based on current research. This identifies a further research gap, which is the central task of an SLR.[37]

6   Discussion, conclusion, and recommendations

This paper aims to review the current scientific discussion and public perception on the topic of home office after the COVID-19 pandemic and the implied consequences for the German restaurant industry and its sales strategies. For this purpose, the SLR is used to search for initial findings in a methodical, structured, and evidence-based manner.[37, 46, 43, 38] Due to the novelty of the topic and the relevance of the COVID-19 pandemic, which at the time of writing is in its fifth epidemic wave and is overshadowed by the emerging Ukrainian conflict, the current public press will also be included in the analysis. It is becoming evident that home office workplaces will remain in the long term even after the pandemic and that the new hybrid working world will prevail on the German and international labour markets.[26, 21, 36, 23, 29] One consequence of the pandemic and the increase in home working is the growing demand for takeaway food, both for self-pick-up and delivery. The first detailed work on these issues deals with the South Korean and Chinese markets. The extent to which these results also apply to Germany now needs to be investigated further. Initial studies by consulting firms confirm the results from Asia for the German and European markets. The success of such sales models and software solutions cannot yet be determined for the German market. There are only the cited studies from Asia and the USA. However, there are some similarities.[16, 34, 23, 17]

Further research is needed to elaborate on the findings and to gain corresponding insights for the German and European market. With the help of the research question three future fields of research can be identified:

1. Are the identified sales strategies from the Asian and American studies redundant for the German market and what are the differences?

2. What positive and negative effects will the hybrid working world have for urban gastronomy in Germany?

3. Which success factors can be identified for the German restaurant industry in the strategies presented?

In addition, the differentiated opinions on opportunities and threats of the home office working world and its implied consequences for the hospitality industry become clear. Besides the currently observed negative effects, experts see increasing positive externalities of the development, especially on the future digital distribution and the pick-up and delivery business.[45, 31, 20, 32, 23] In order to critically classify the method used, it should be noted that, as with all literature research, no completeness can be guaranteed. Particularly in the case of new research topics and questions, new knowledge can be published within a very short time and may supplement or even refute the knowledge gained.[43, 37] The number of relevant papers found is also very low compared to leading reviews of the research field, at five papers. This may be due, among other things, to the novelty and topicality of the topic. The chosen structured approach of the SLR method can enable subsequent work to build on this.[39, 46]

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