

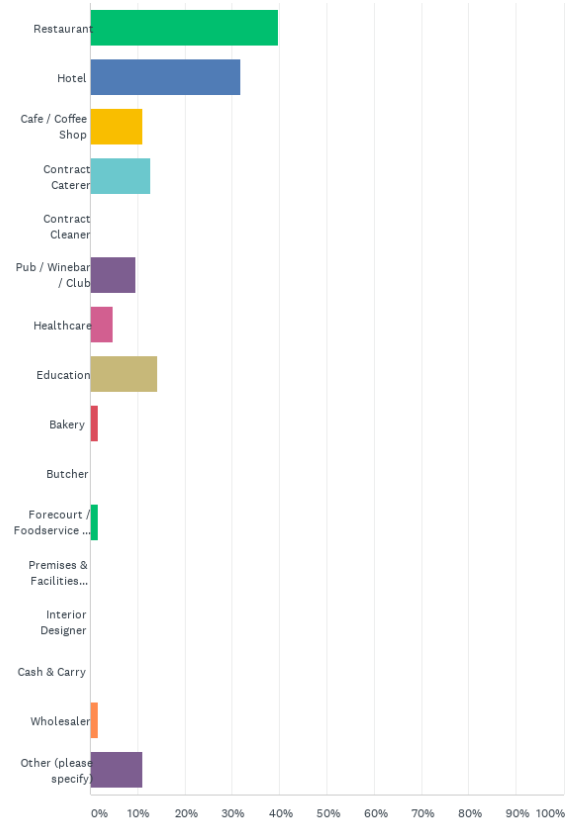


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

APRIL 2021

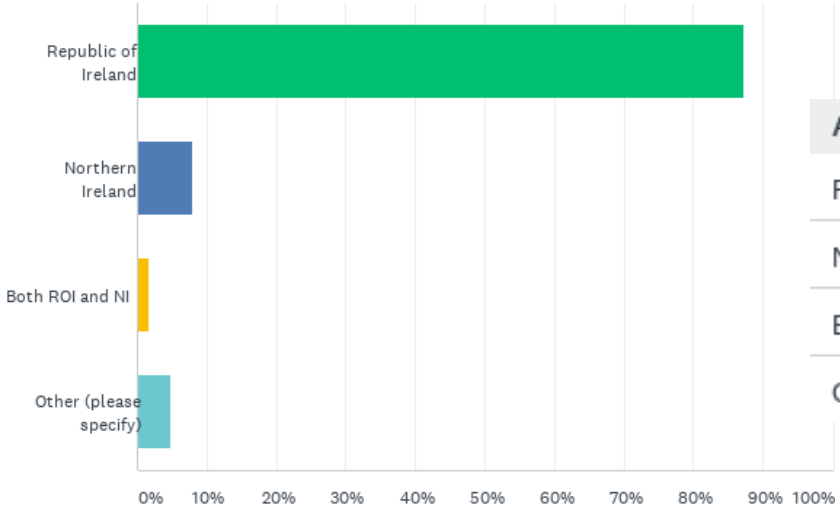


Q1: What Sector Category do you operate in?



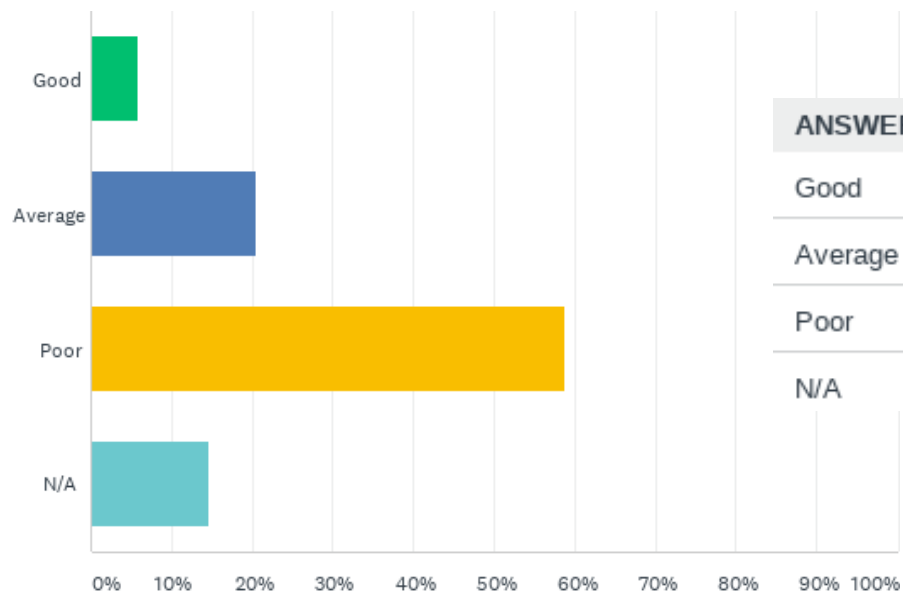
ANSWER CHOICES	RESPONSES
Restaurant	39.68%
Hotel	31.75%
Cafe / Coffee Shop	11.11%
Contract Caterer	12.70%
Contract Cleaner	0.00%
Pub / Winebar / Club	9.52%
Healthcare	4.76%
Education	14.29%
Bakery	1.59%
Butcher	0.00%
Forecourt / Foodservice in Retail Setting	1.59%
Premises & Facilities Management	0.00%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	1.59%
Other (please specify)	11.11%

Q2: What jurisdiction do you operate in?



ANSWER CHOICES	RESPONSES
Republic of Ireland	87.30%
Northern Ireland	7.94%
Both ROI and NI	1.59%
Other (please specify)	4.76%

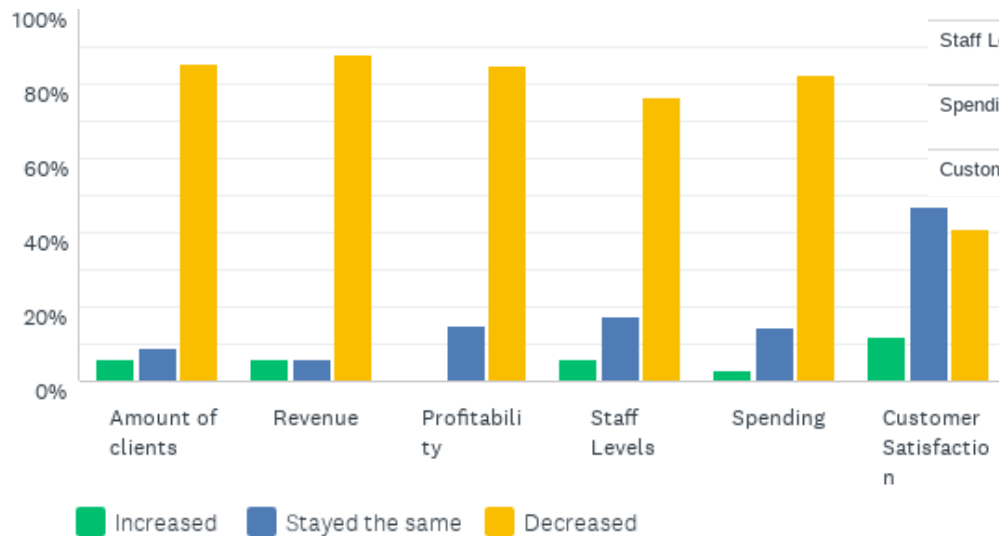
Q3: How would you describe the overall performance of your business over the LAST 6 months?



ANSWER CHOICES	RESPONSES
Good	5.88%
Average	20.59%
Poor	58.82%
N/A	14.71%

Q4: Please indicate the performance of your business for each of the criteria below over the LAST 6 months:

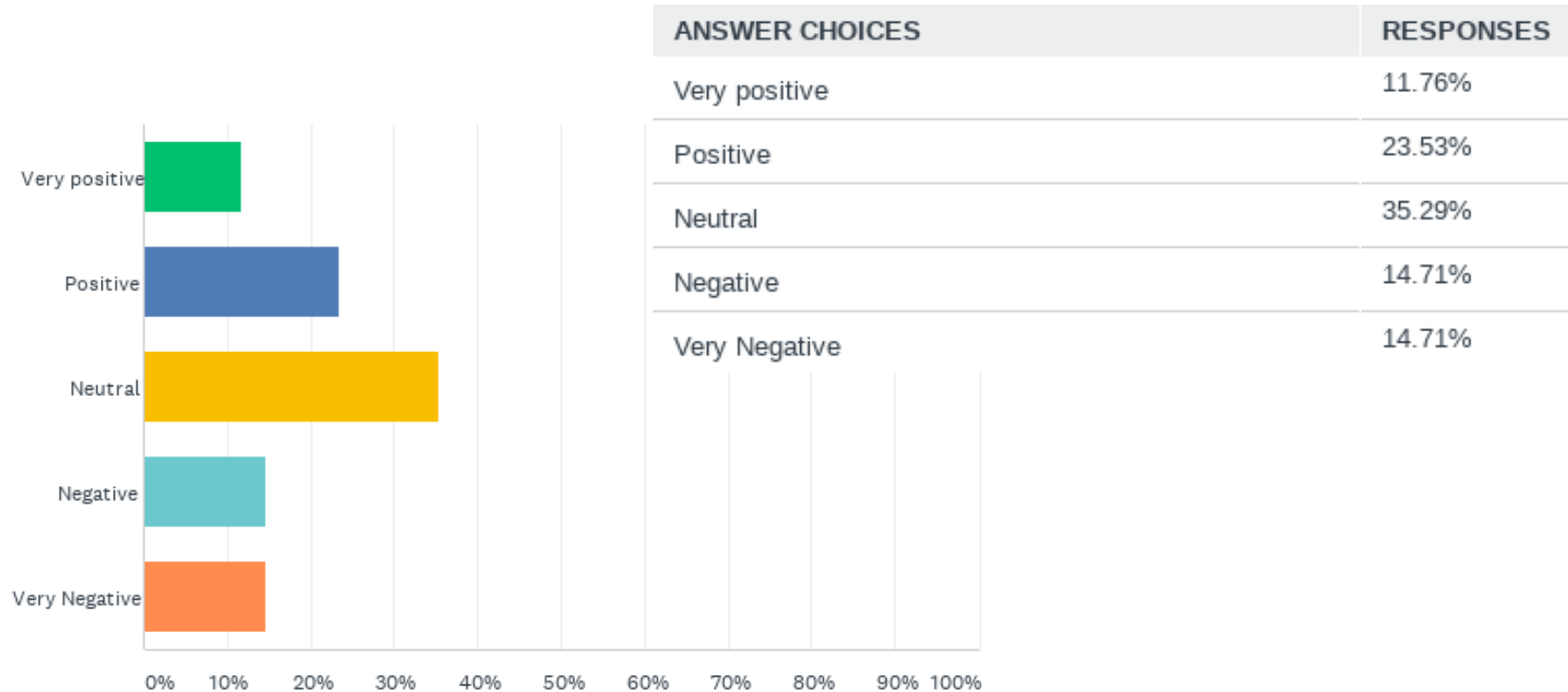
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	5.88%	8.82%	85.29%
Revenue	6.06%	6.06%	87.88%
Profitability	0.00%	15.15%	84.85%
Staff Levels	5.88%	17.65%	76.47%
Spending	2.94%	14.71%	82.35%
Customer Satisfaction	11.76%	47.06%	41.18%



Q5: Please indicate the EXPECTED performance of your business for each of the criteria below over the NEXT 6 months:

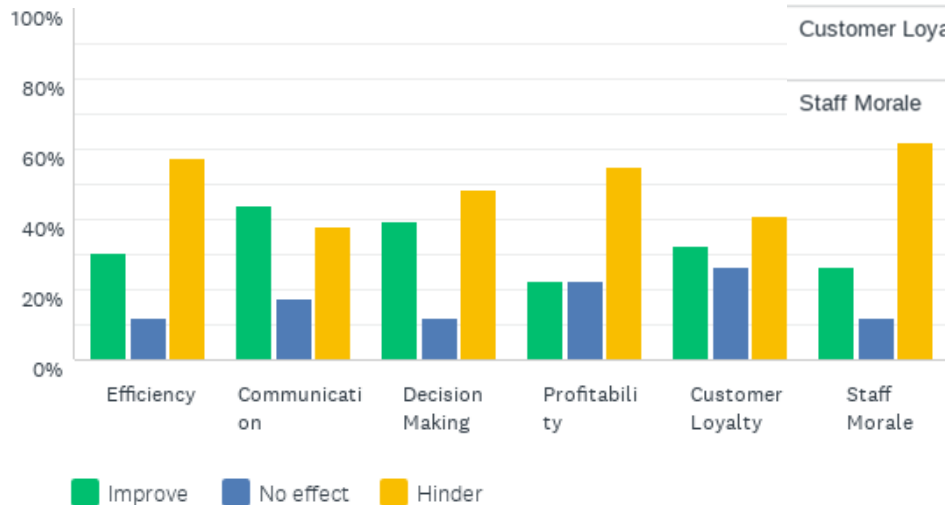


Q6: What is your attitude to the direction of the industry over the NEXT MONTH?

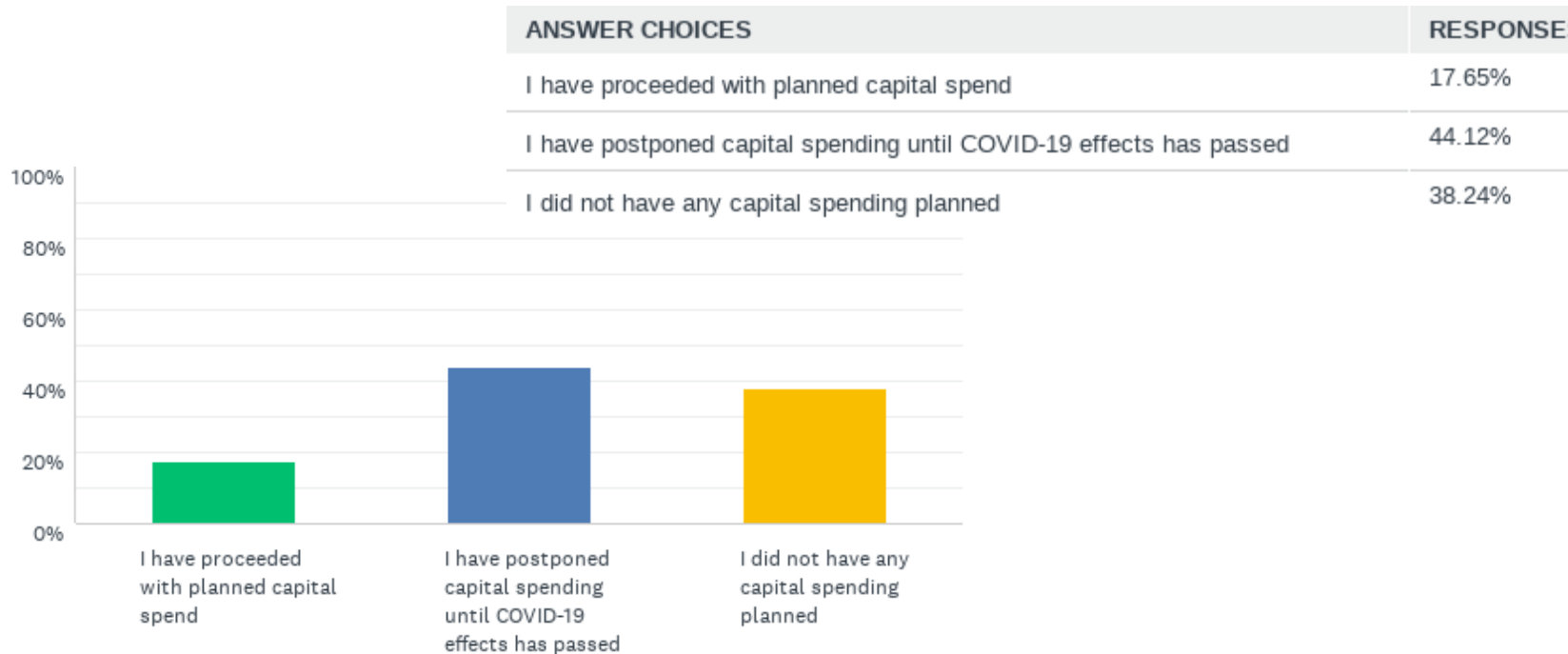


Q7: How do you feel the current conditions will effect the following areas of your business?

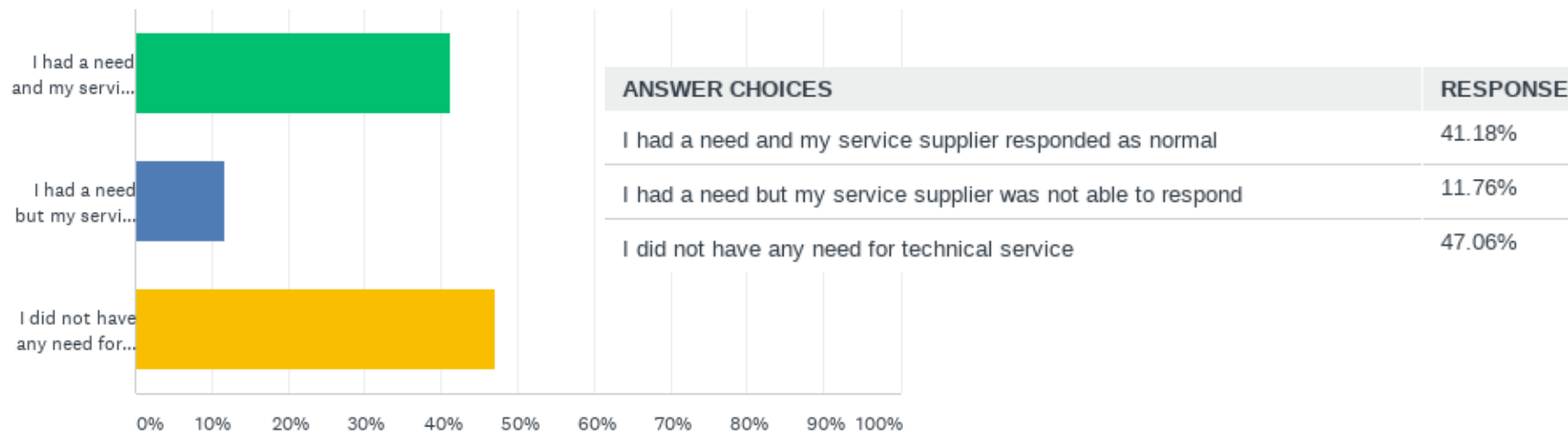
	IMPROVE	NO EFFECT	HINDER
Efficiency	30.30%	12.12%	57.58%
Communication	44.12%	17.65%	38.24%
Decision Making	39.39%	12.12%	48.48%
Profitability	22.58%	22.58%	54.84%
Customer Loyalty	32.35%	26.47%	41.18%
Staff Morale	26.47%	11.76%	61.76%



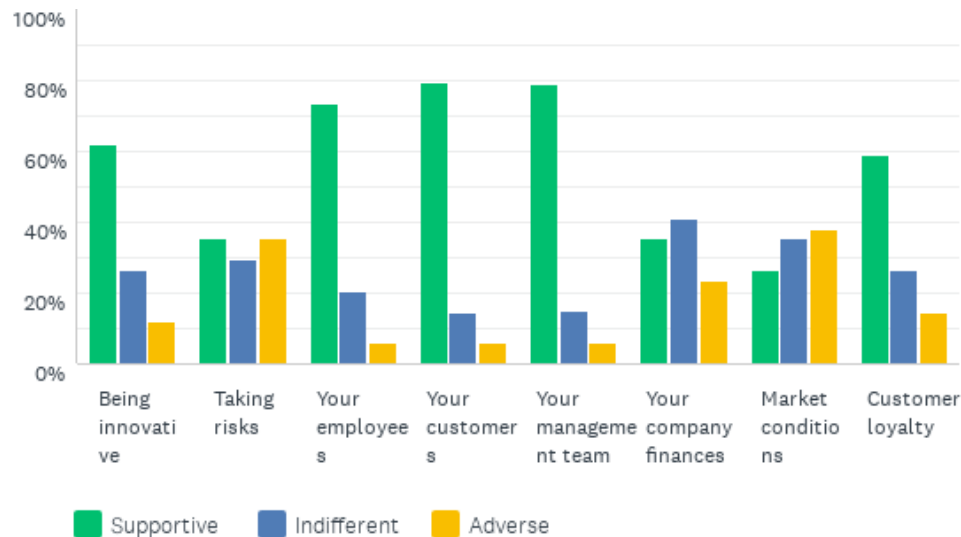
Q8: How has COVID-19 effected your planned capital expenditure on catering / foodservice equipment ?



Q9: Have COVID-19 restrictions effected your technical service supplier ability to service your catering equipment?

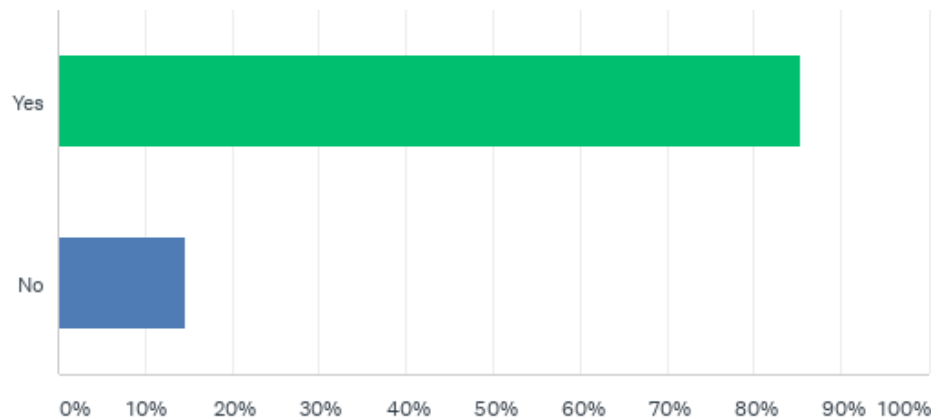


Q10: In the current climate, what is your attitude (right now) to the following?



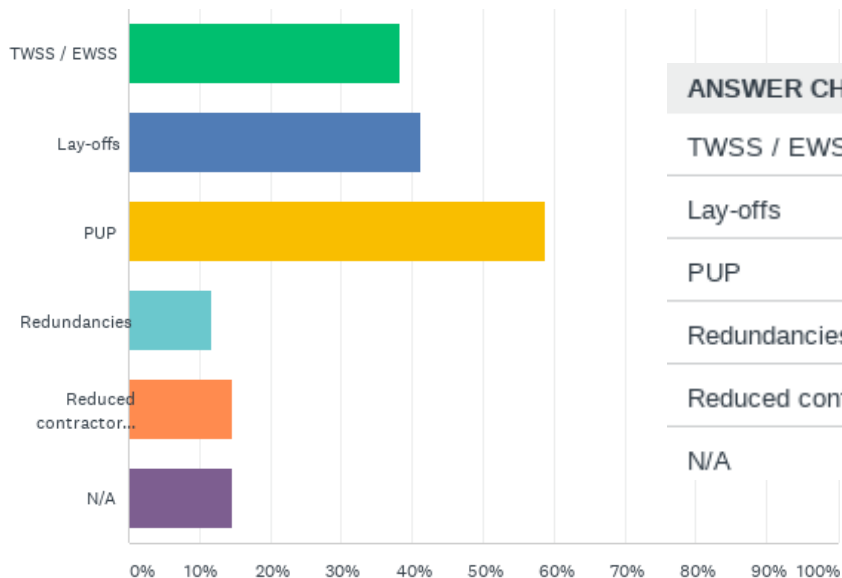
	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	61.76%	26.47%	11.76%
Taking risks	35.29%	29.41%	35.29%
Your employees	73.53%	20.59%	5.88%
Your customers	79.41%	14.71%	5.88%
Your management team	78.79%	15.15%	6.06%
Your company finances	35.29%	41.18%	23.53%
Market conditions	26.47%	35.29%	38.24%
Customer loyalty	58.82%	26.47%	14.71%

Q11: Have you had to reduce your workforce due to current trading conditions?



ANSWER CHOICES	RESPONSES
Yes	85.29%
No	14.71%

Q12: If you have had to reduce or implement supports for your workforce, what mechanisms have your implemented to assist with this?



ANSWER CHOICES

RESPONSES

TWSS / EWSS

38.24%

Lay-offs

41.18%

PUP

58.82%

Redundancies

11.76%

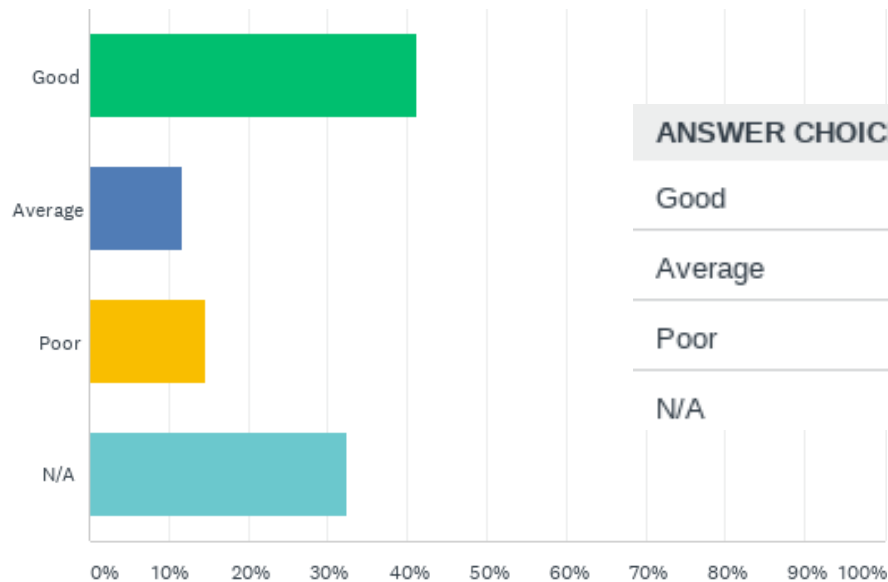
Reduced contractor hours

14.71%

N/A

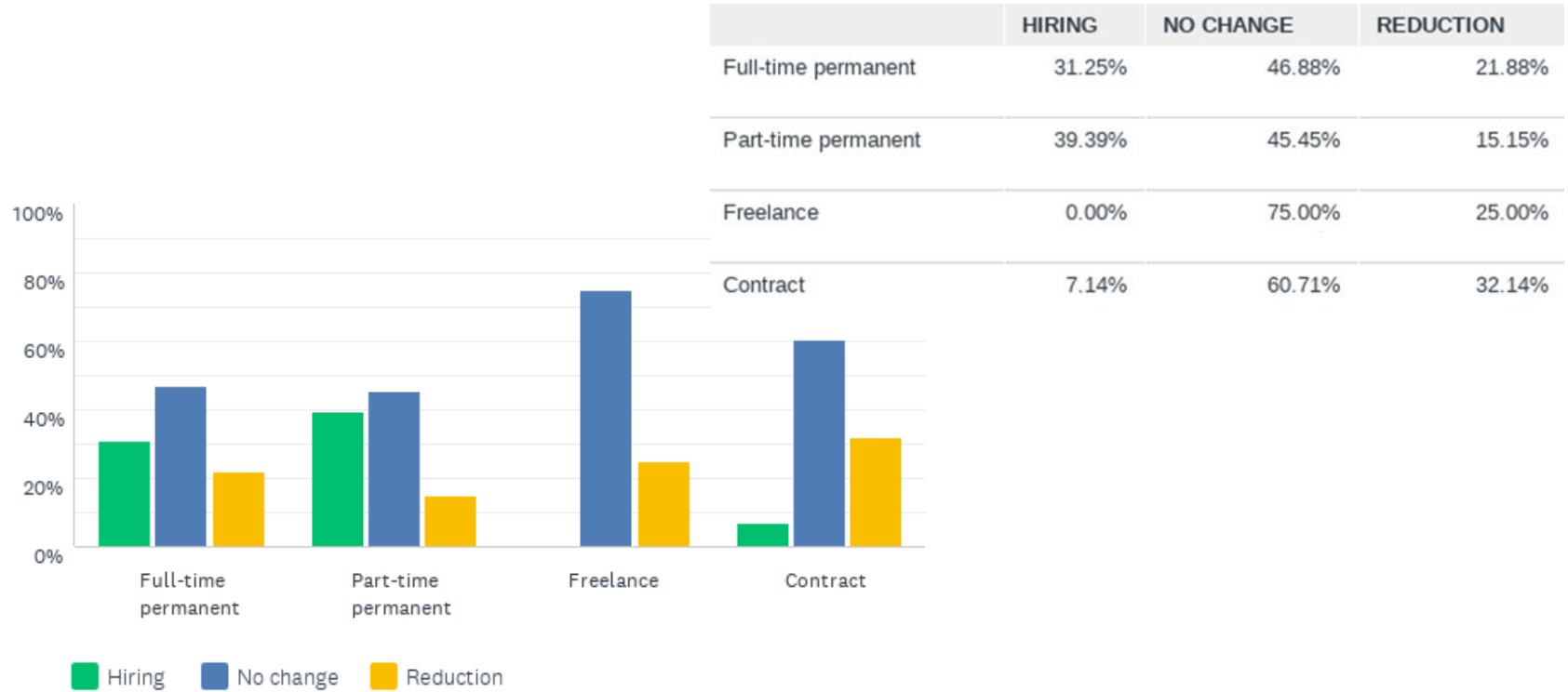
14.71%

Q13: How would you describe the overall performance of your team over the last 6 months?

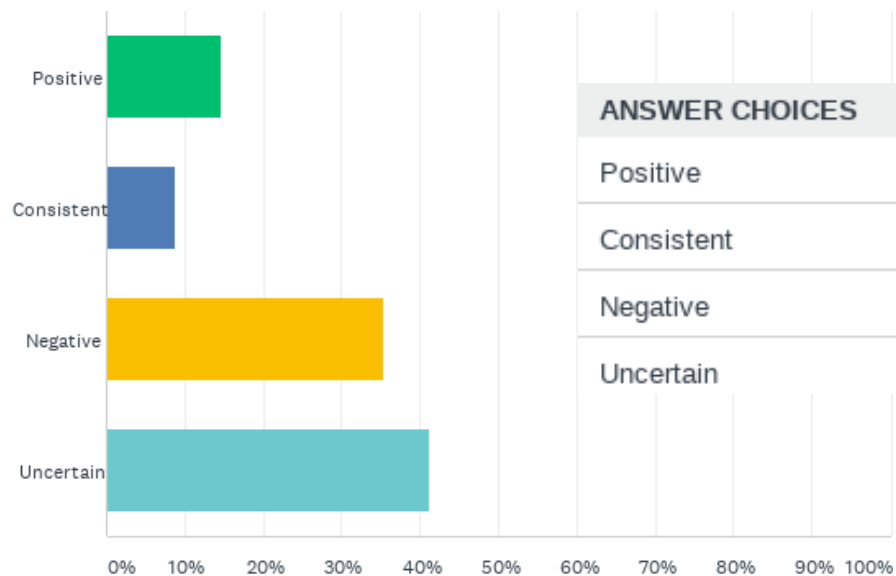


ANSWER CHOICES	RESPONSES
Good	41.18%
Average	11.76%
Poor	14.71%
N/A	32.35%

Q14: What are your current hiring plans for each type of staff?



Q15: How would you describe your overall perception of the hospitality sector right now?



ANSWER CHOICES

Positive

Consistent

Negative

Uncertain

RESPONSES

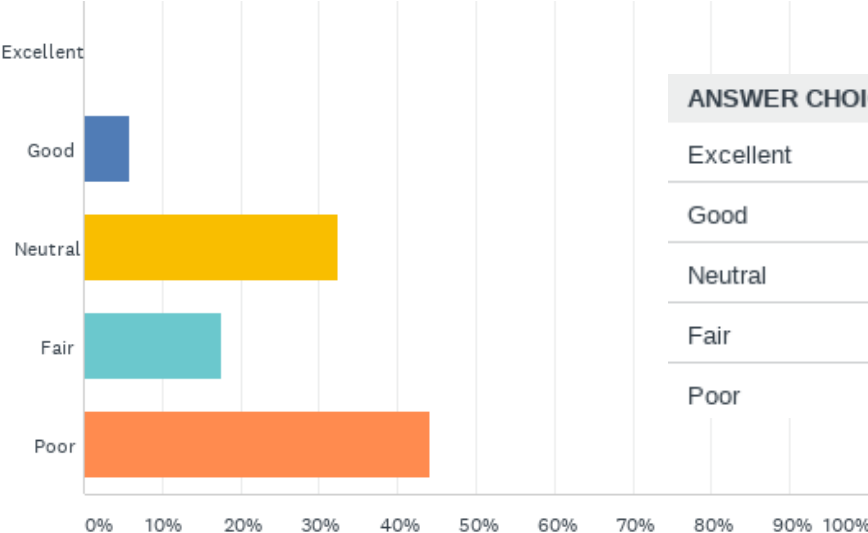
14.71%

8.82%

35.29%

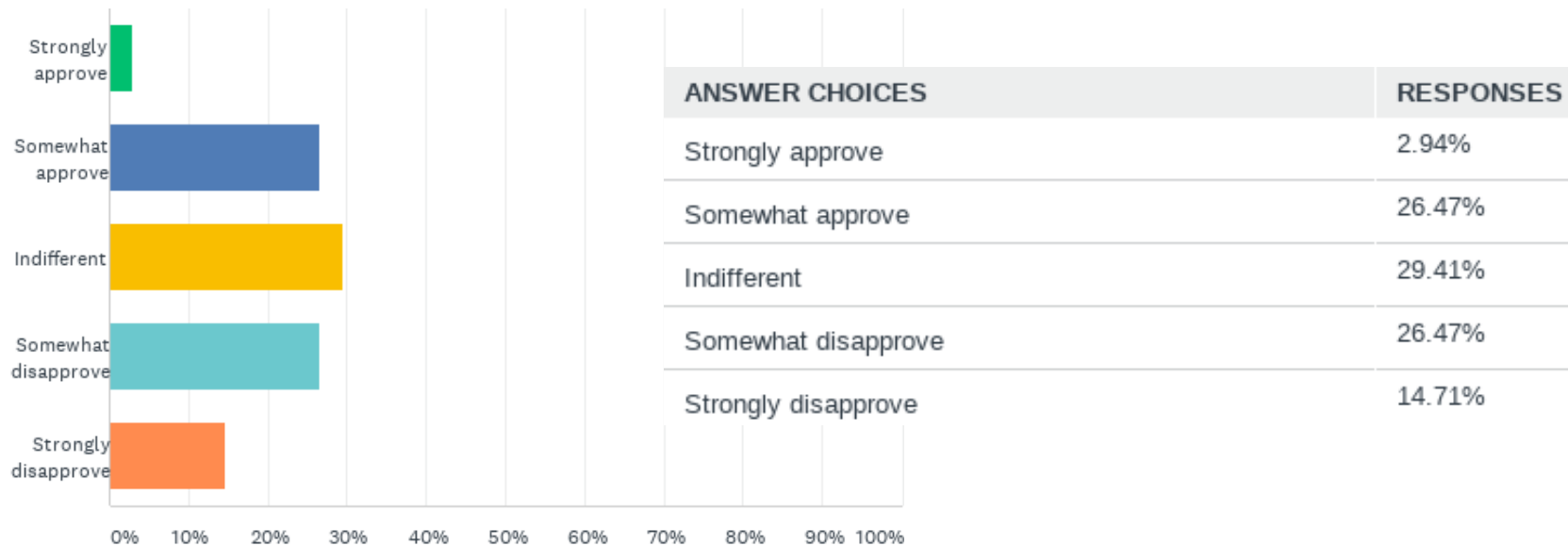
41.18%

Q16: What is your opinion of the current economic climate?

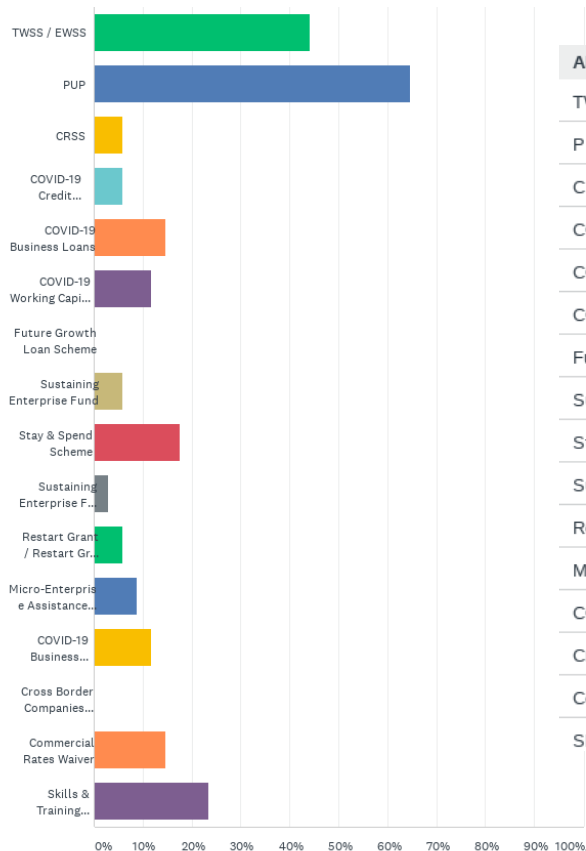


ANSWER CHOICES	RESPONSES
Excellent	0.00%
Good	5.88%
Neutral	32.35%
Fair	17.65%
Poor	44.12%

Q17: Do you approve or disapprove of the way the current government is operating?

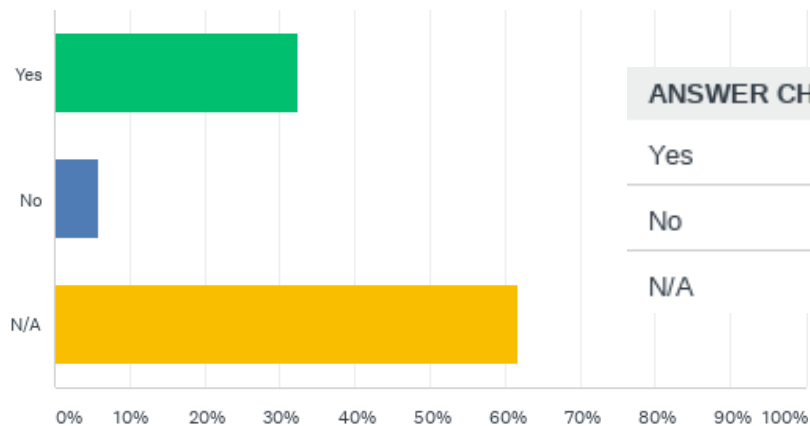


Q18: What if any Government supports have you availed of in the LAST 6 months?



ANSWER CHOICES	RESPONSE%
TWSS / EWSS	44.12%
PUP	64.71%
CRSS	5.88%
COVID-19 Credit Guarantee Scheme	5.88%
COVID-19 Business Loans	14.71%
COVID-19 Working Capital Scheme	11.76%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	5.88%
Stay & Spend Scheme	17.65%
Sustaining Enterprise Fund for Small Enterprise	2.94%
Restart Grant / Restart Grant Plus	5.88%
Micro-Enterprise Assistance Fund	8.82%
COVID-19 Business Financial Planning Grant	11.76%
Cross Border Companies Emergency Business Solutions	0.00%
Commercial Rates Waiver	14.71%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	23.53%

Q19: If you have not yet availed of any Government supports, do you plan to look at these options in the NEXT 6 months?



ANSWER CHOICES

Yes

No

N/A

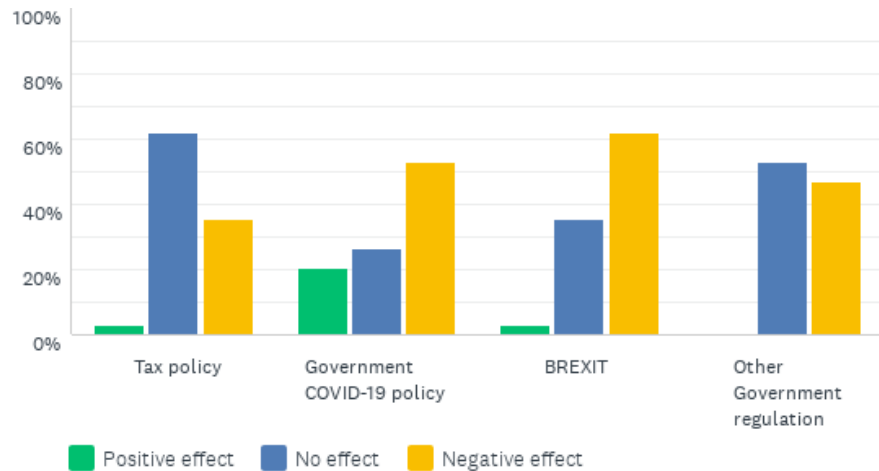
RESPONSES

32.35%

5.88%

61.76%

Q20: In the NEXT 6 months do you expect the following issues to have a positive effect, no effect or a negative effect on your business?

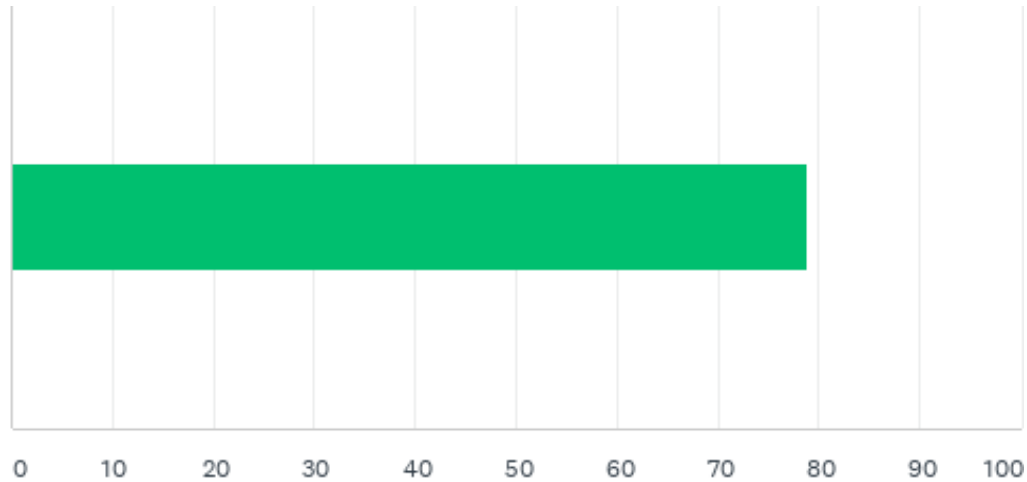


	POSITIVE EFFECT	NO EFFECT	NEGATIVE EFFECT
Tax policy	2.94%	61.76%	35.29%
Government COVID-19 policy	20.59%	26.47%	52.94%
BREXIT	2.94%	35.29%	61.76%
Other Government regulation	0.00%	52.94%	47.06%

Q21: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment?

- More training better uniforms
 - Appraise the effects of customer safety and confidence looking to the future of the industry. Slow the opening until majority are vaccinated.
 - Joined up innovative action packed strategy laying foundations for good progressive business
 - Encouraging young chefs to go to college on a day release course or evening course
 - So many trained and skilled workers have left. It is forcing the industry to look at more transient work force model, which is not sustainable. Businesses will struggle greatly for chefs or professional staff to work evenings, nights, weekends etc. if and when a normal comes. I will be taking my opportunity to leave the hospitality and service industry. The government are looking down their noses at the workers on the ground, and don't see the industry as a profession.
 - Reduce VAT
 - No indication of when sit in Dining will resume.
 - Lobbying for more supports and to retain vat.
 - Open colleges and universities.
 - If the information on reopening and rules for reopening could come in advance of opening that would be great.
 - Government assisted training systems to help replace skilled staff who will not return to this industry.
 - Offer assistance- voucher scheme with immediate benefits to people like the UK.
 - Hospitality vouchers
-

Q22: To what extent do you think the current working environment has affected your mental health and the mental health of your team?



ANSWER CHOICES

AVERAGE NUMBER

79

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