



FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

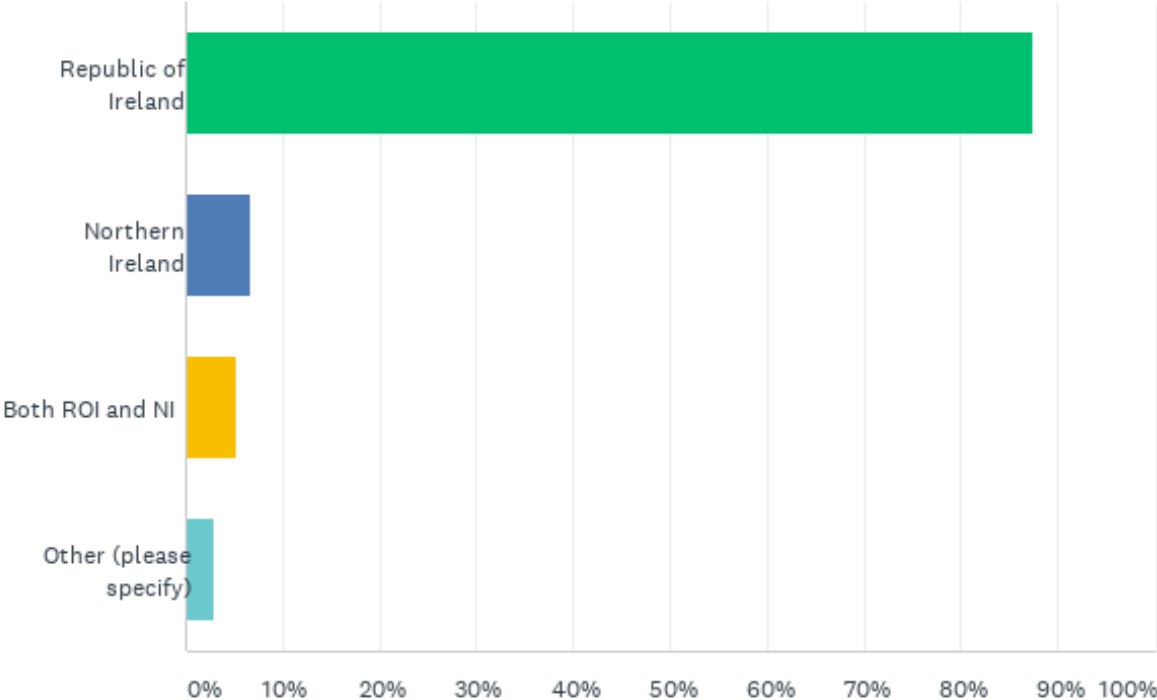
NOVEMBER 2020



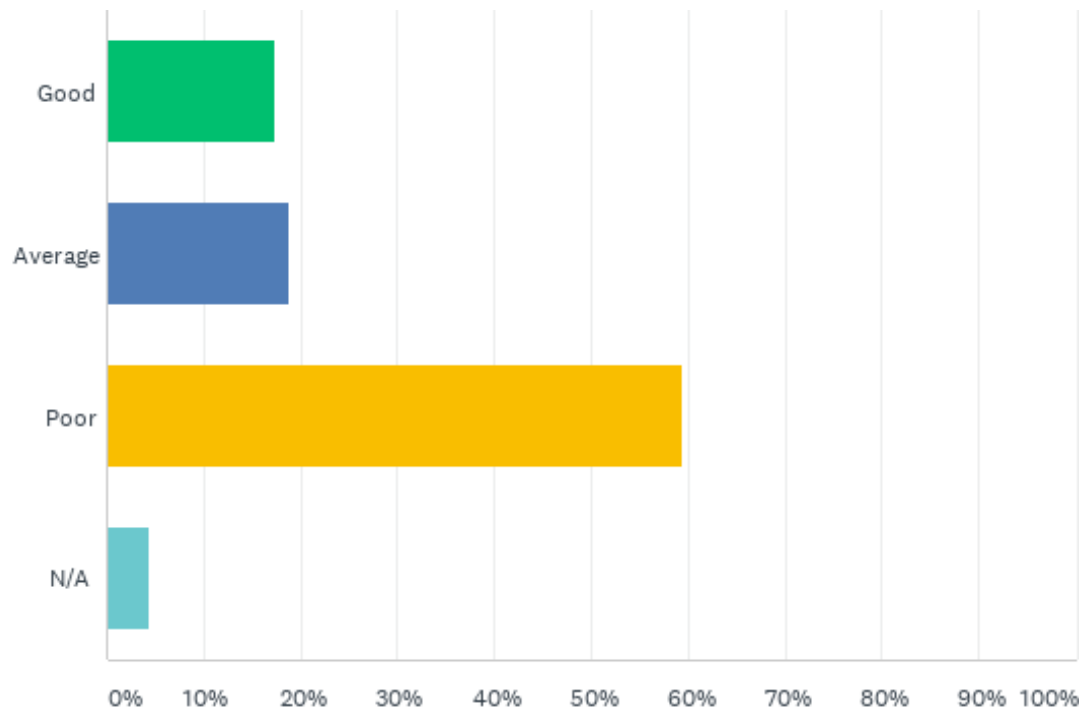
Q1: What Sector Category do you operate in?

ANSWER CHOICES	RESPONSES
Restaurant	36.76%
Hotel	26.47%
Cafe / Coffee Shop	8.09%
Contract Caterer	14.71%
Contract Cleaner	0.00%
Pub / Winebar / Club	11.03%
Bakery	2.21%
Butcher	0.00%
Forecourt / Foodservice in Retail Setting	0.74%
Premises & Facilities Management	2.21%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	0.74%
Other (please specify)	18.38%

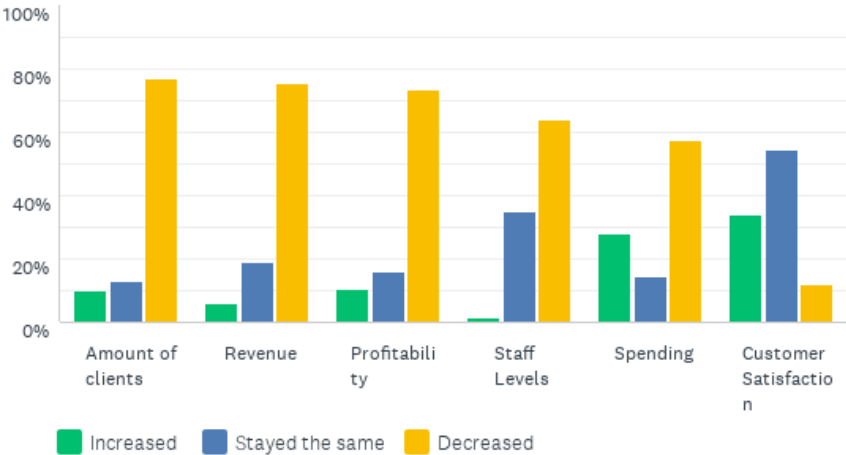
Q2: What jurisdiction do you operate in?



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

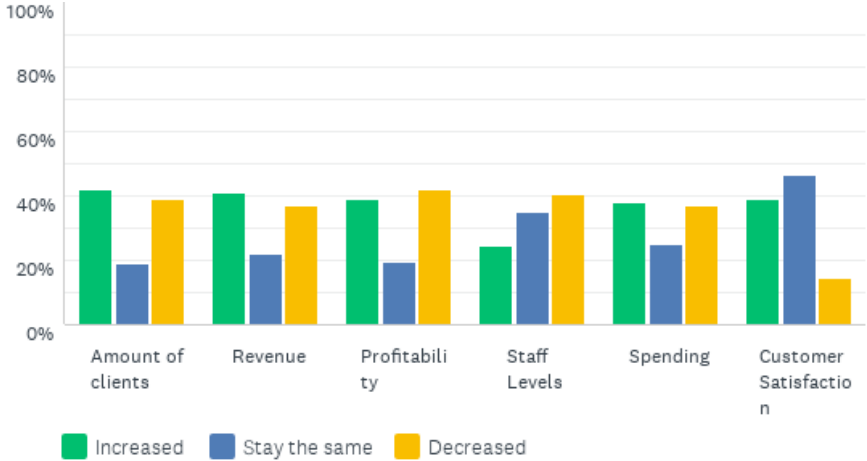


Q4: Please indicate the performance of your business for each of the criteria below over the LAST 6 months:



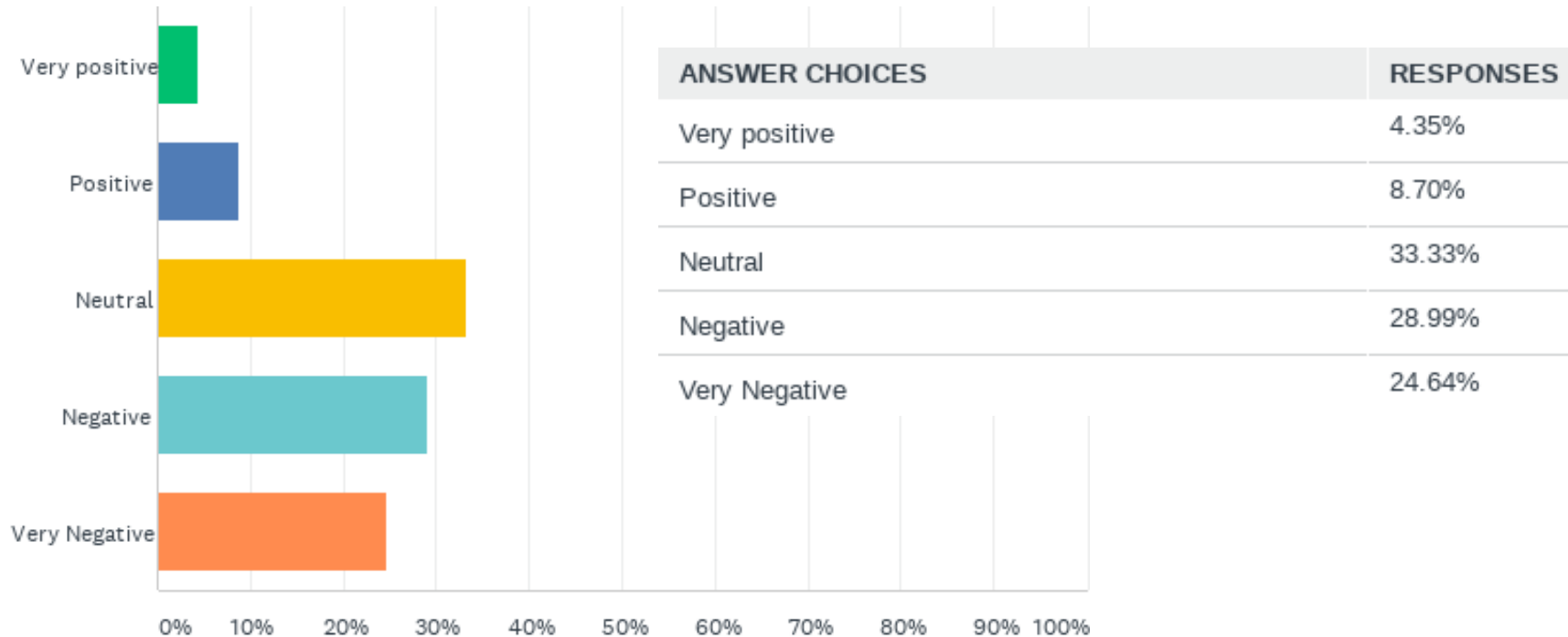
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	10.14%	13.04%	76.81%
Revenue	5.80%	18.84%	75.36%
Profitability	10.29%	16.18%	73.53%
Staff Levels	1.45%	34.78%	63.77%
Spending	27.94%	14.71%	57.35%
Customer Satisfaction	33.82%	54.41%	11.76%

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

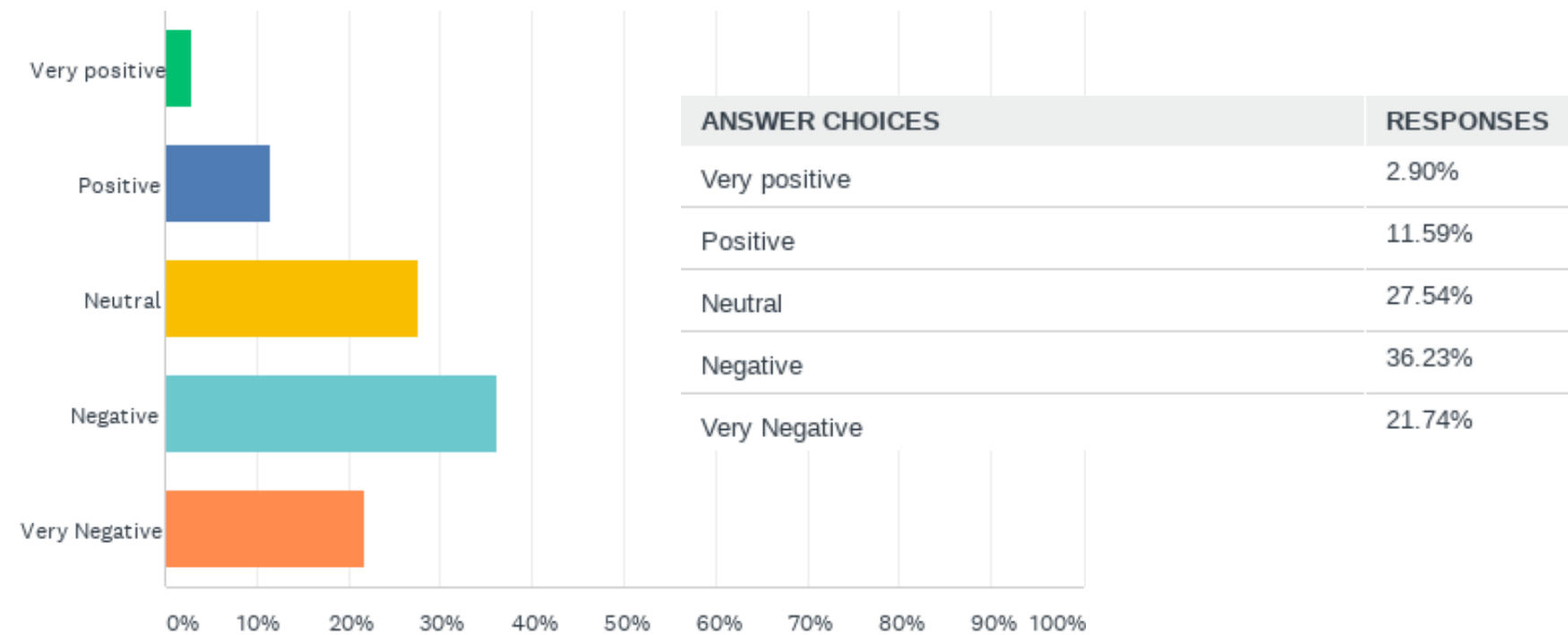


	INCREASED	STAY THE SAME	DECREASED
Amount of clients	42.03%	18.84%	39.13%
Revenue	41.18%	22.06%	36.76%
Profitability	38.81%	19.40%	41.79%
Staff Levels	24.64%	34.78%	40.58%
Spending	38.24%	25.00%	36.76%
Customer Satisfaction	39.13%	46.38%	14.49%

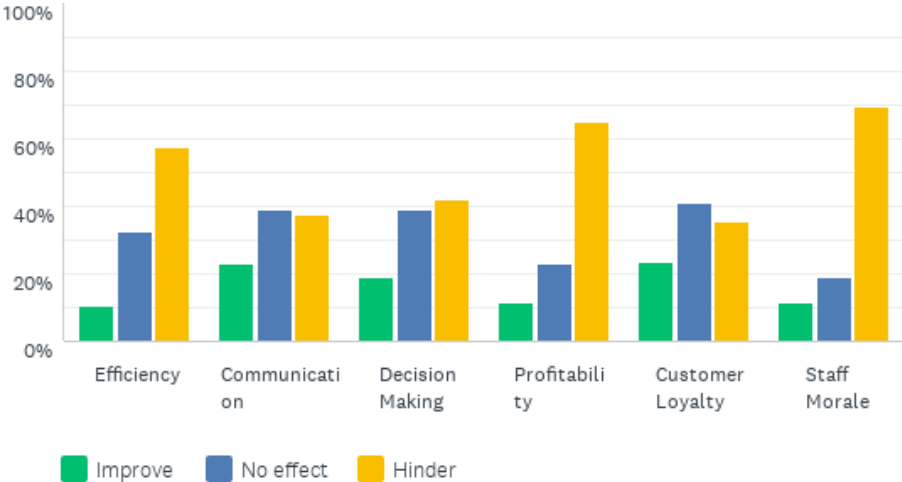
Q6: What is your attitude to the direction of the industry over the NEXT MONTH?



Q7: What is your attitude to the direction of the industry over the COMING CHRISTMAS period?

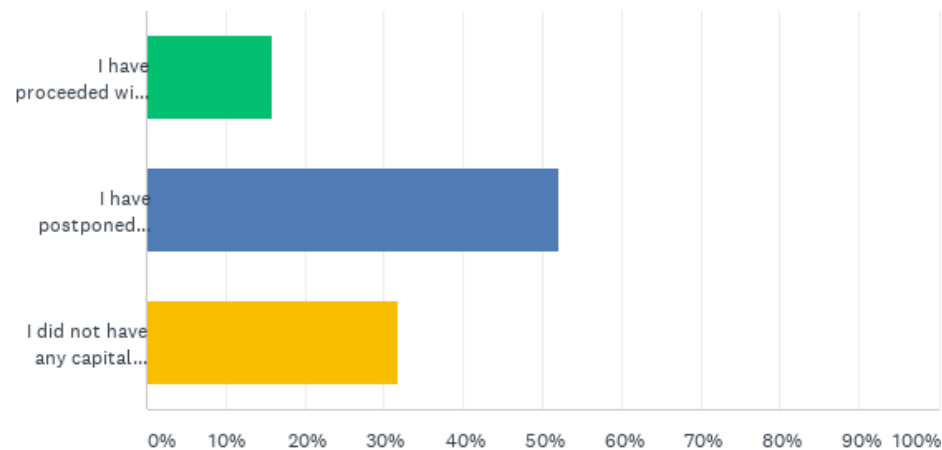


Q8: How do you feel the current conditions will effect the following areas of your business?



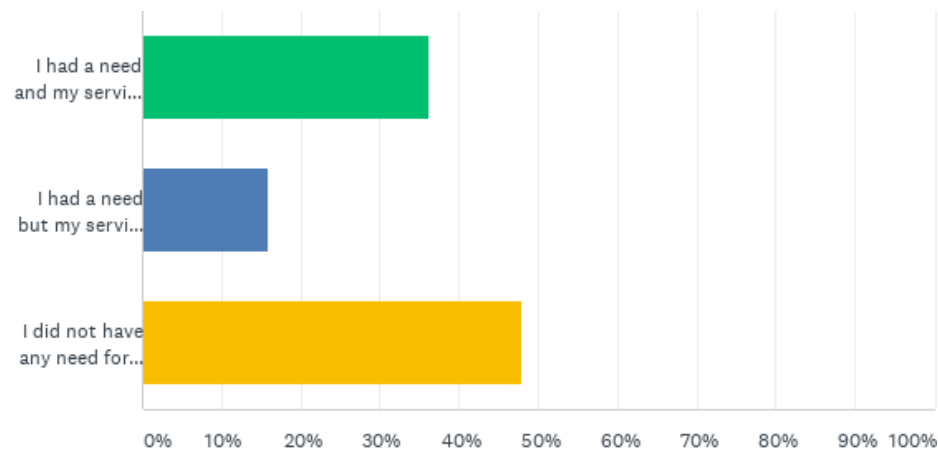
	IMPROVE	NO EFFECT	HINDER
Efficiency	10.29%	32.35%	57.35%
Communication	23.19%	39.13%	37.68%
Decision Making	18.84%	39.13%	42.03%
Profitability	11.59%	23.19%	65.22%
Customer Loyalty	23.53%	41.18%	35.29%
Staff Morale	11.59%	18.84%	69.57%

Q9: How has COVID–19 effected your planned capital expenditure on catering / foodservice equipment ?



ANSWER CHOICES	RESPONSES
I have proceeded with planned capital spend	15.94%
I have postponed capital spending until COVID-19 effects has passed	52.17%
I did not have any capital spending planned	31.88%

Q10: Have COVID-19 restrictions effected your technical service supplier ability to service your catering equipment?



ANSWER CHOICES	RESPONSES
I had a need and my service supplier responded as normal	36.23%
I had a need but my service supplier was not able to respond	15.94%
I did not have any need for technical service	47.83%

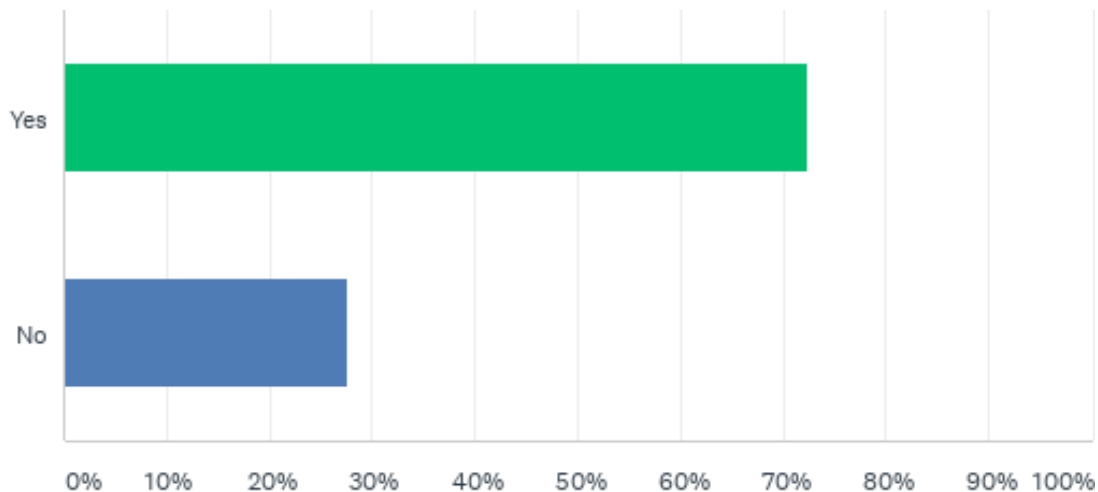
Q11: In the current climate, what is your attitude (right now) to the following?



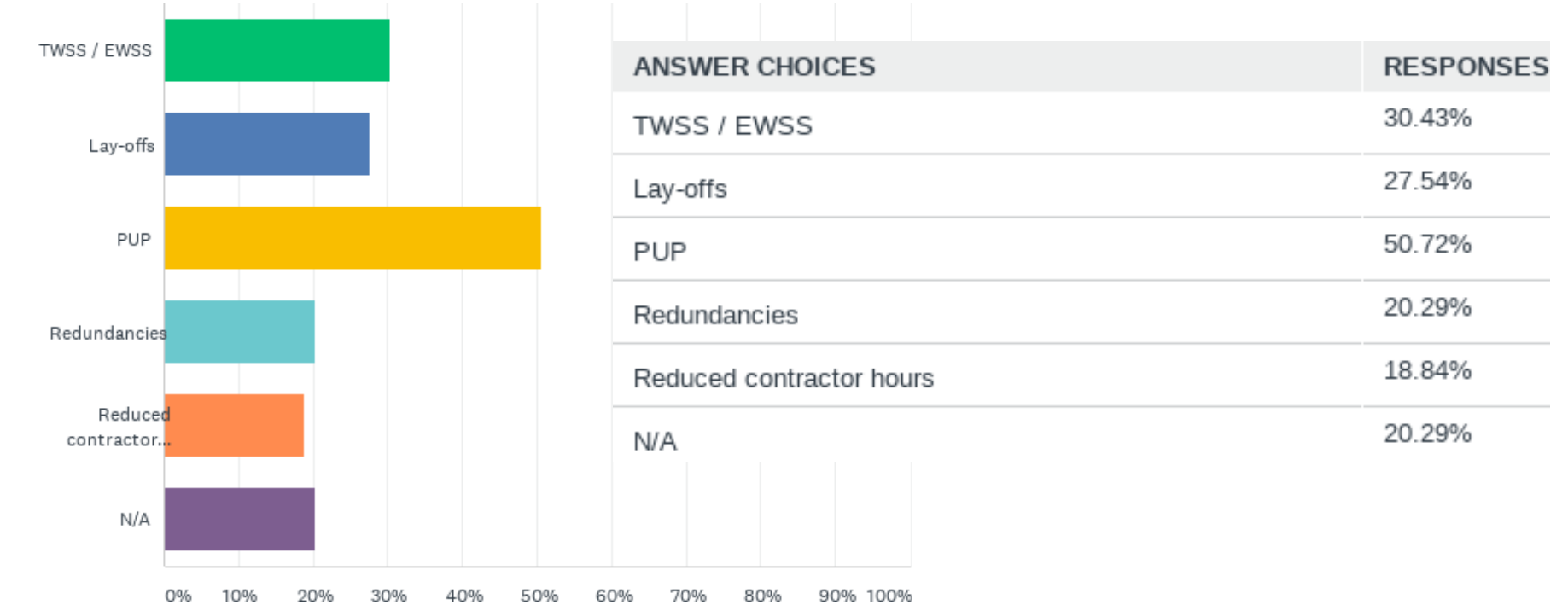
Q11: In the current climate, what is your attitude (right now) to the following?

	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	55.07%	27.54%	17.39%
Taking risks	43.48%	23.19%	33.33%
Your employees	56.52%	26.09%	17.39%
Your customers	59.42%	28.99%	11.59%
Your management team	63.77%	20.29%	15.94%
Your company finances	27.54%	31.88%	40.58%
Market conditions	17.39%	31.88%	50.72%
Customer loyalty	56.52%	30.43%	13.04%

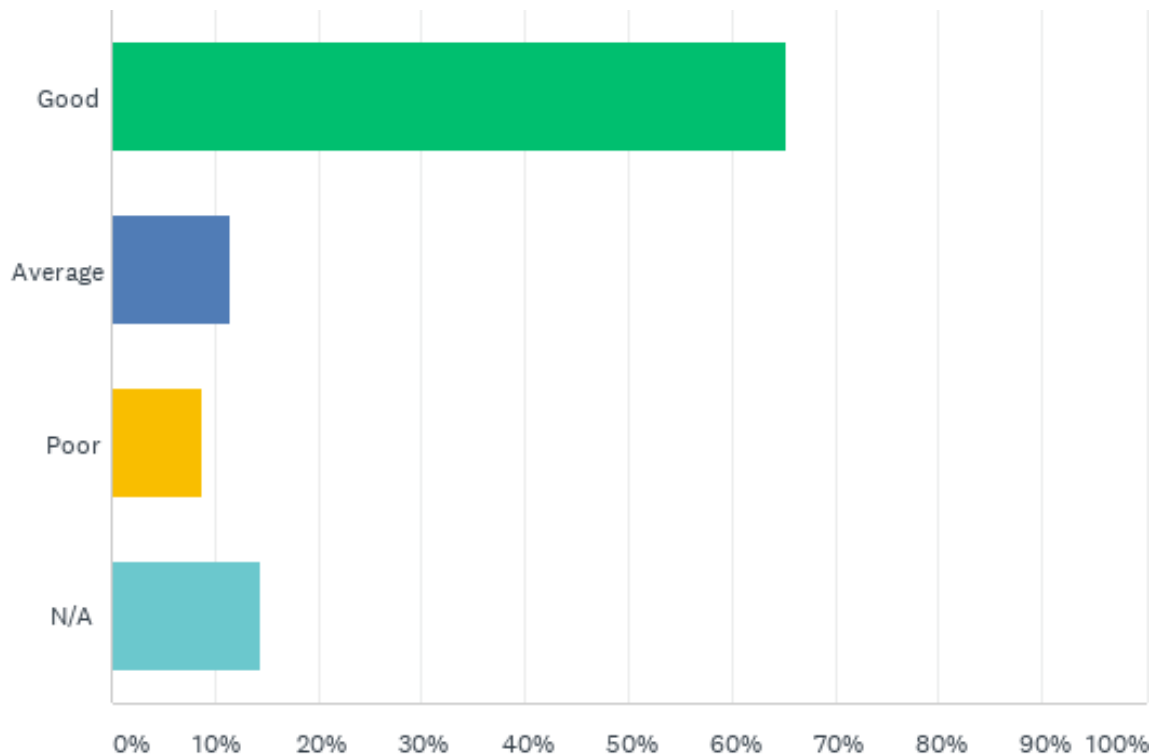
Q12: Have you had to reduce your workforce due to current trading conditions?



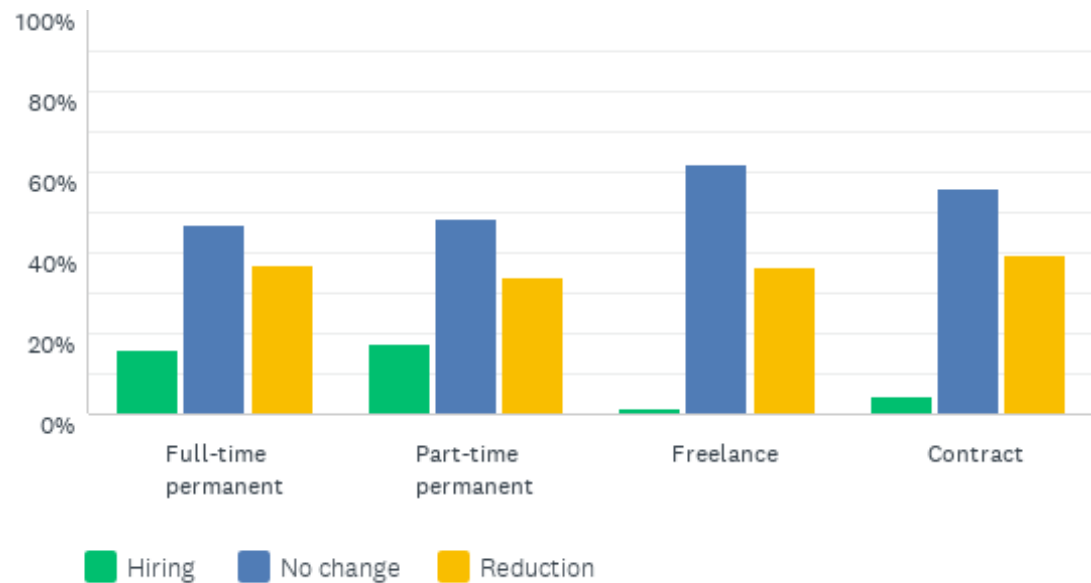
Q13: If you have had to reduce or implement supports for your workforce, what mechanisms have your implemented to assist with this?



Q14: How would you describe the overall performance of your team over the last 6 months?

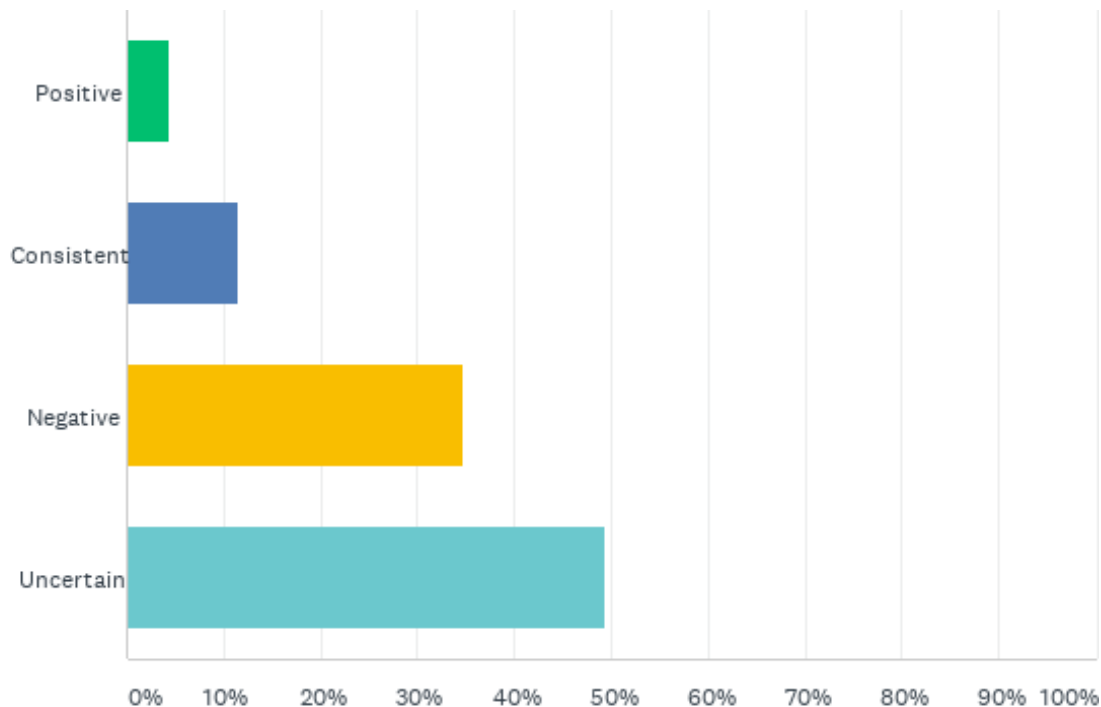


Q15: What are your current hiring plans for each type of staff?

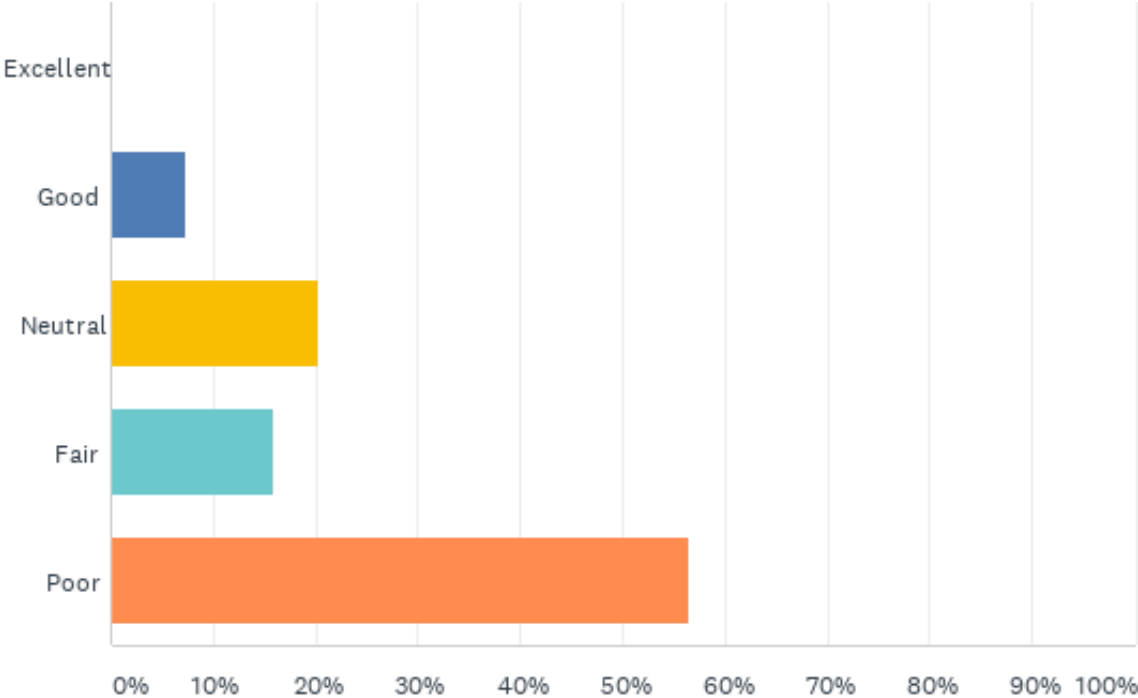


	HIRING	NO CHANGE	REDUCTION
	16.18%	47.06%	36.76%
Part-time permanent	17.65%	48.53%	33.82%
Freelance	1.52%	62.12%	36.36%
Contract	4.55%	56.06%	39.39%

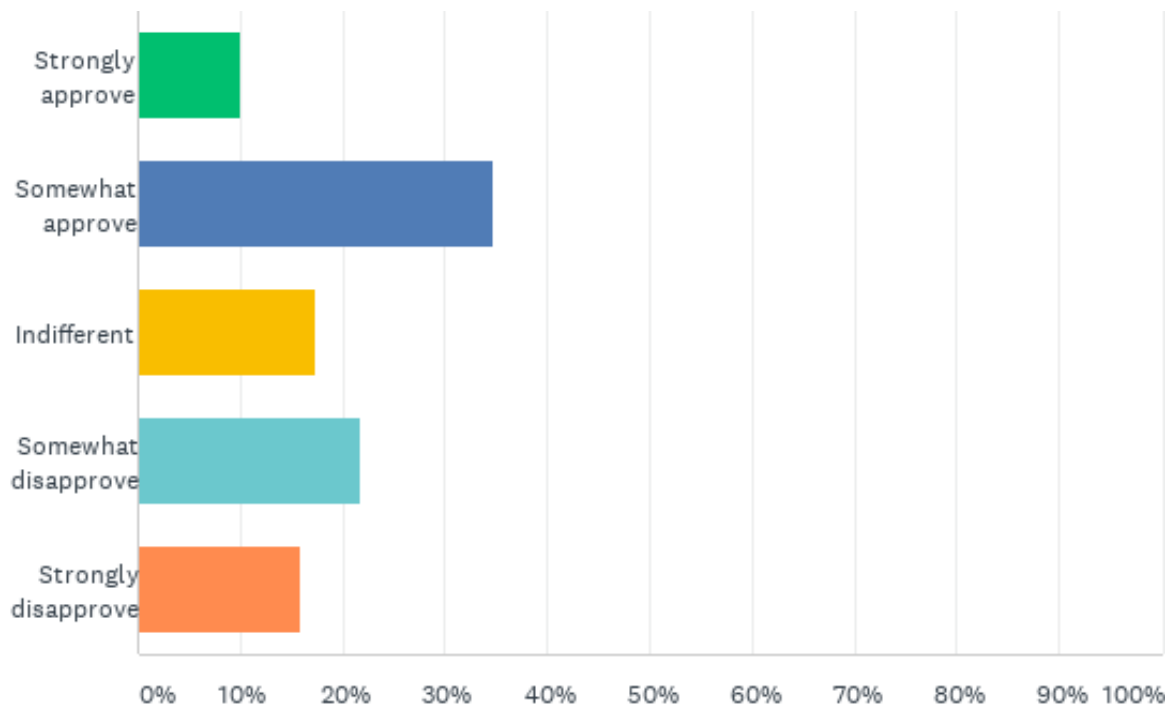
Q16: How would you describe your overall perception of the hospitality sector right now?



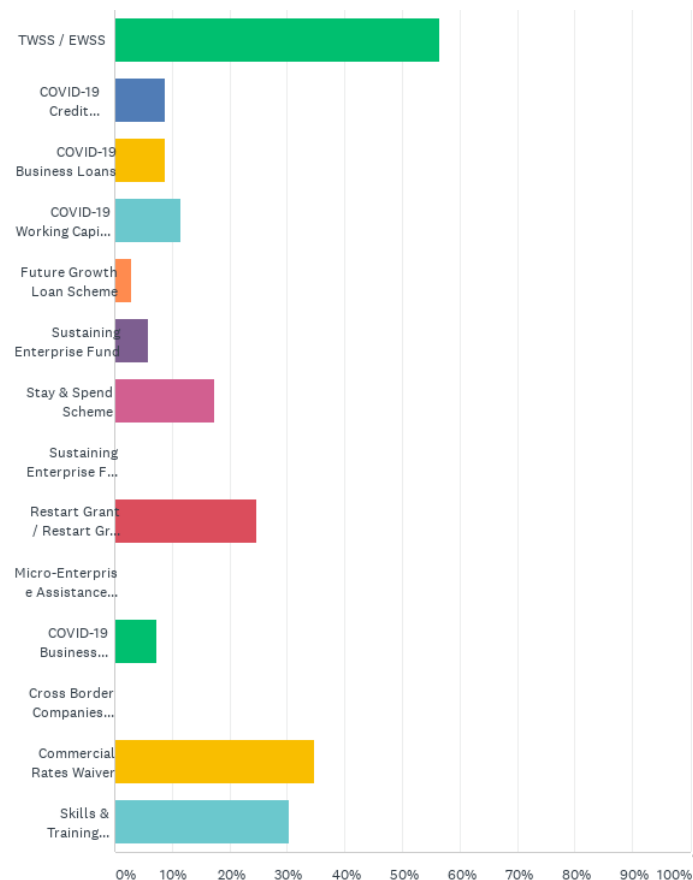
Q17: What is your opinion of the current economic climate?



Q18: Do you approve or disapprove of the way the current government is operating?

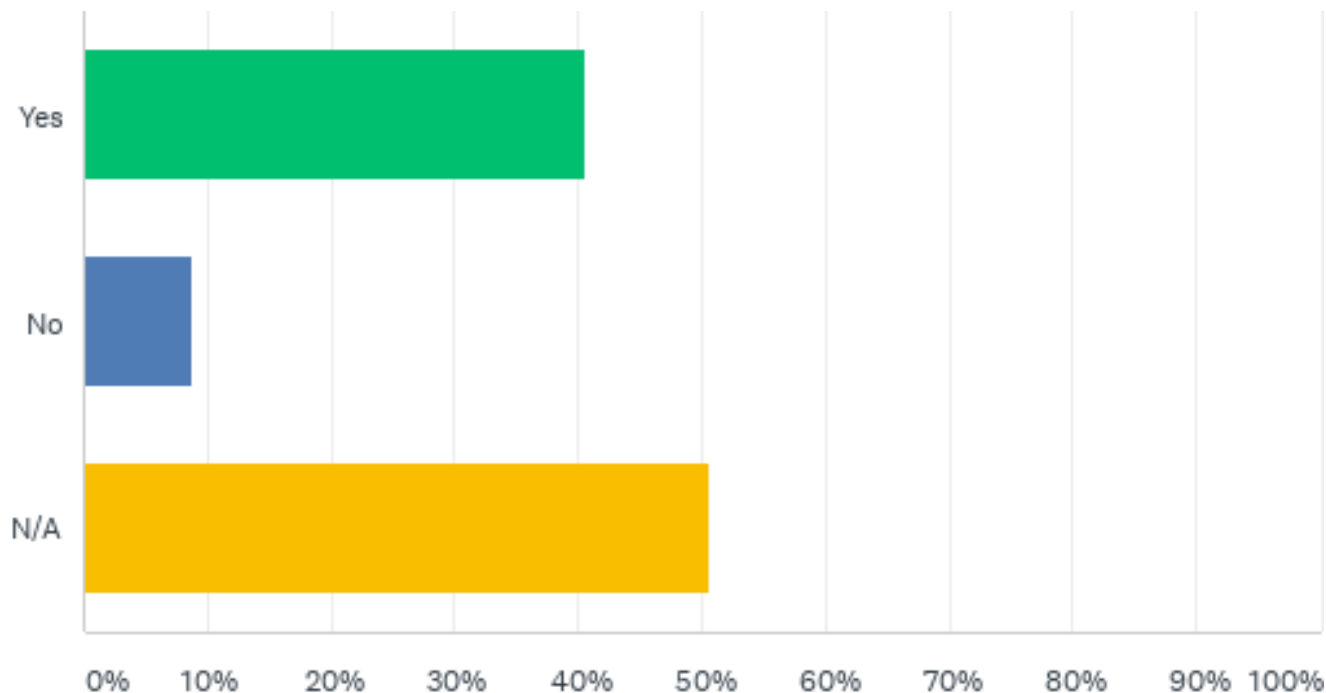


Q19: What if any Government supports have you availed of in the LAST 6 months?

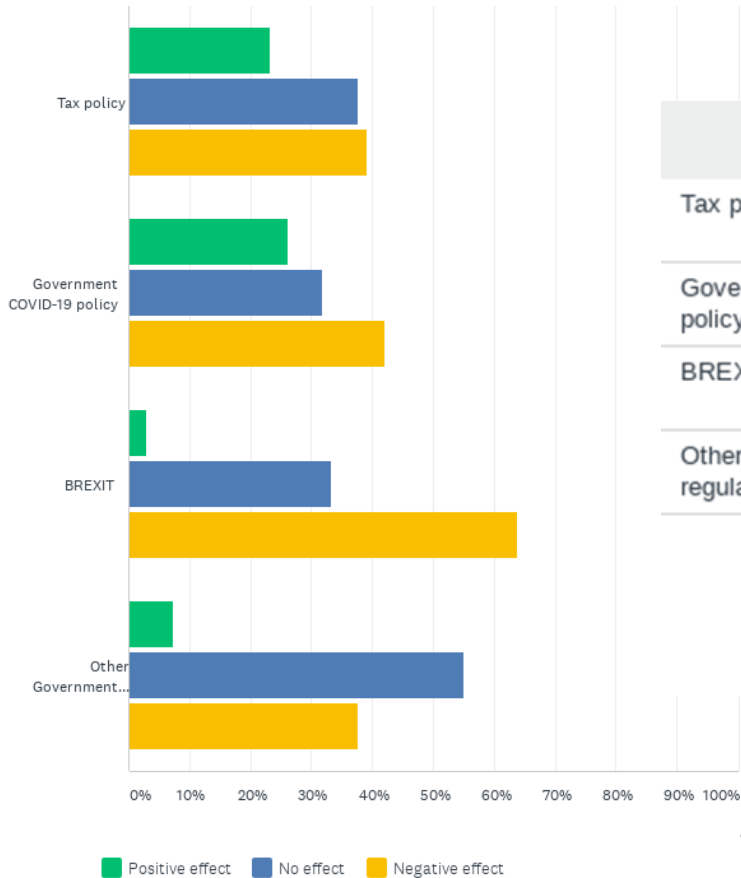


ANSWER CHOICES	RESPONSES
TWSS / EWSS	56.52%
COVID-19 Credit Guarantee Scheme	8.70%
COVID-19 Business Loans	8.70%
COVID-19 Working Capital Scheme	11.59%
Future Growth Loan Scheme	2.90%
Sustaining Enterprise Fund	5.80%
Stay & Spend Scheme	17.39%
Sustaining Enterprise Fund for Small Enterprise	0.00%
Restart Grant / Restart Grant Plus	24.64%
Micro-Enterprise Assistance Fund	0.00%
COVID-19 Business Financial Planning Grant	7.25%
Cross Border Companies Emergency Business Solutions	0.00%
Commercial Rates Waiver	34.78%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	30.43%

Q20: If you have not yet availed of any Government supports, do you plan to look at these options in the NEXT 6 months?



Q21: 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	23.19%	37.68%	39.13%
Government COVID-19 policy	26.09%	31.88%	42.03%
BREXIT	2.90%	33.33%	63.77%
Other Government regulation	7.25%	55.07%	37.68%

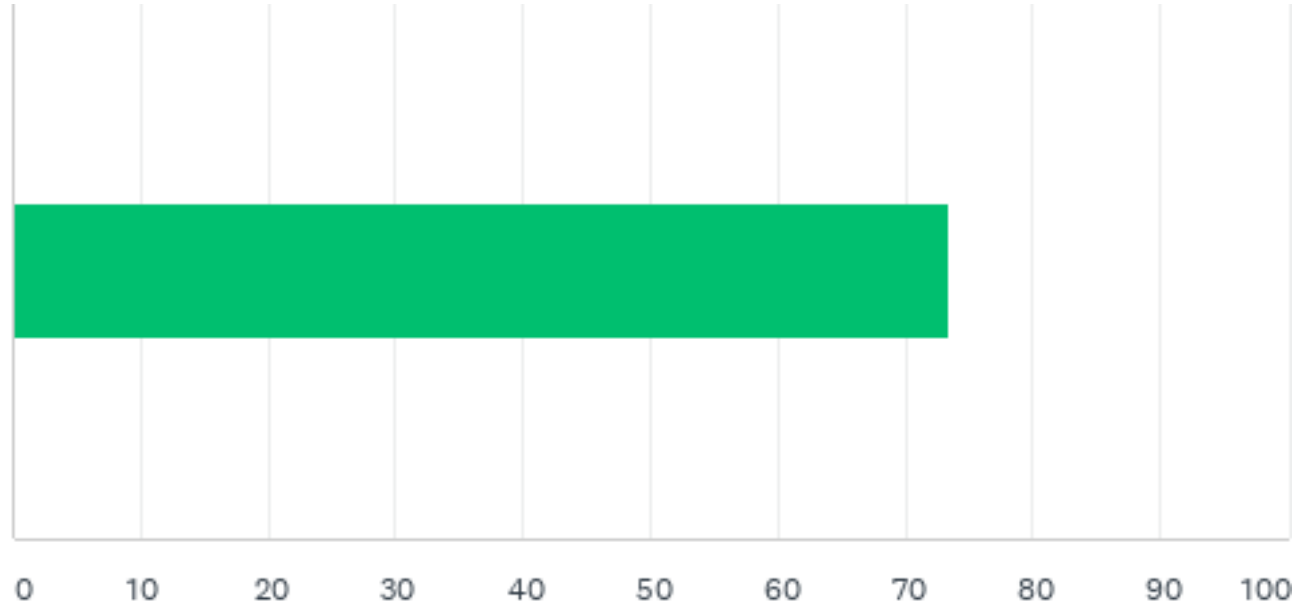
Q22: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment??

- Reduce tax
- offering supports such as packaging solutions, showing techno innovation, showing mechanical innovation, energy innovations, environmental innovation, training
- Never have so don't expect it to change, any help they do is to benefit owners not staff in my opinion
- More understanding for hospitality staff. Low paid industry where employees bear the brunt of every government decision, long hours , hard work , uncertainty around job stability and it's all used as a cash cow for government, and local authorities. Too many rates such as parking , FOG , charges for outside tables when only outside dining allowed etc.
- Clear guidance and notice given before mention of reopening.
- RAI and LVA have done a lot to support the industry.
- Funding
- We need a representative body for catering service suppliers, private and location services. They fall into different categories and the issues with the CRSS have highlighted this
- Highlight the government funding packages And help those companies get funding.
- Common sense
- More support. To be kept in the loop if what is going on in the background.
- More discussion with stake holders
- On going online training
- Ensuring safe working environment
- Lower VAT Rates

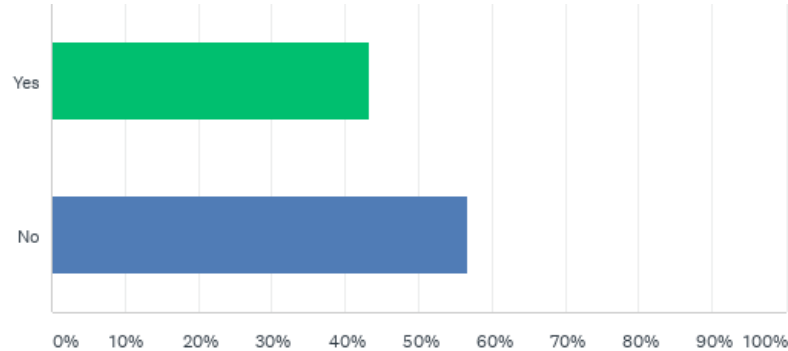
Q22: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment??

- Airline catering is not or has not been discussed despite being an industry worth millions and hiring thousands
- I would like to see them lobby for some support to re open my business as my staff have been able to avail of the pup scheme but as myself and my partner are over 66 there is no assistance available to us
- I don't want assistance
- Be consistent
- Make decisions faster
- Try & be more positive
- Ensure qualified chefs are paid a proper rate of pay
- Clarity and Openness to a difficult time for the Foodservice Industry
- FAIR PAY FOR YOUNG WORKERS THEY ARE WORKING TWICE AS HARD AND ARE AT MORE RISK THEN THOSE IN OFFICE OR WORKING FROM HOME JOBS! WHY ISNT THIS DISCUSSED——>>30-45k FOR OFFICE WORKERS AND LESS THEN 30k FOR SOME HEAD CHEFS!!!YOU WONDER WHY THE INDUSTRY IS DECLINING!!!!TALK TO THE RECENT GRADUATES MAYBE! SHOW SOME ACKNOWLEDGEMENT INSTEAD OF EVERYDAY CORRUPTION YOU SUPPORT,BE UNIQUE!!

Q23: NEW QUESTION* To what extent to you think the current working environment has affected your mental health and the mental health of your team?



Q24: NEW QUESTION* Would you be interested in attending a webinar on Mental Health issues in the Foodservice Sector?



Comments on specific areas of Mental Health you would like to see covered:

- stressors attributed to lack of work/not enough work
- Coping with stress.
- Stress
- No comment necessary as I feel if we get back to work the negative effects will soon change
- Anxiety/ stress
- Mindfulness

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