

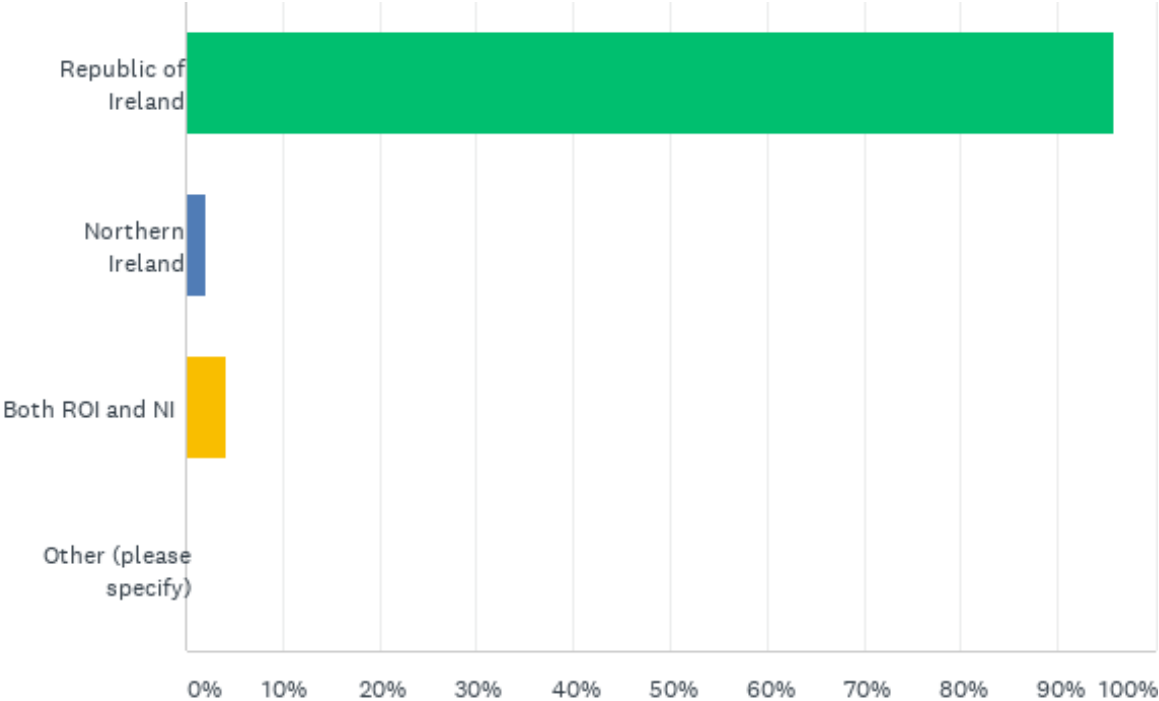


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

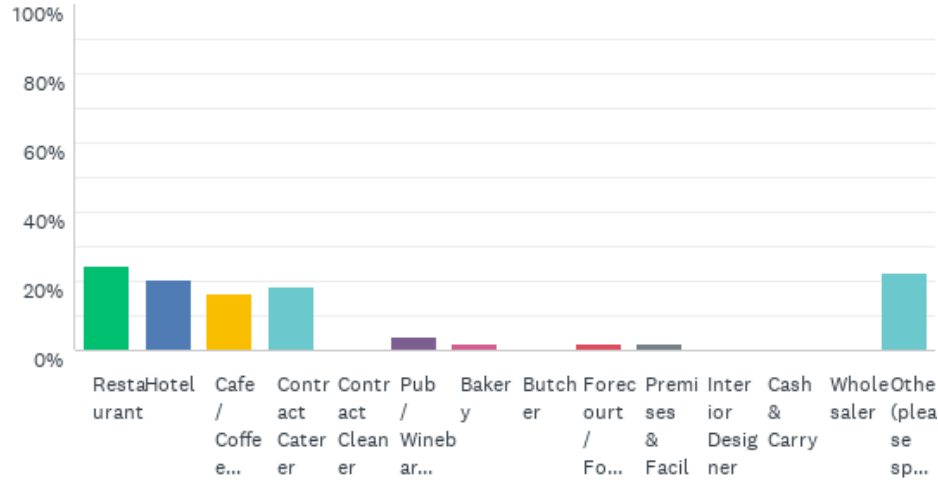
OCTOBER 2020



Q2: What jurisdiction do you operate in?

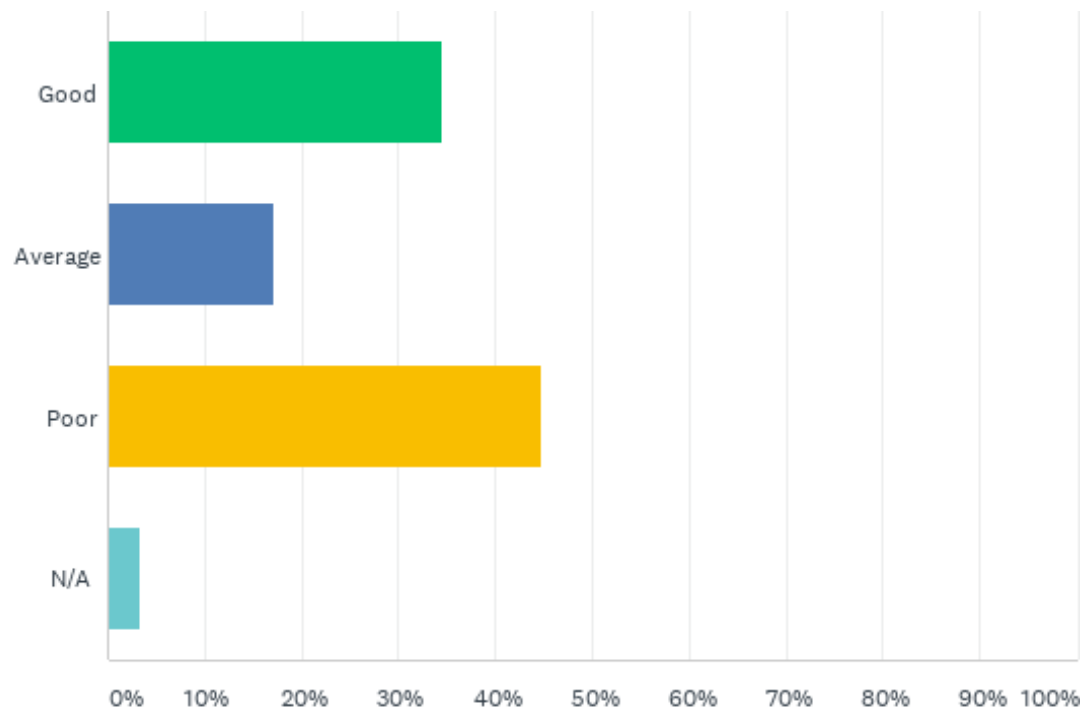


Q1: What Sector Category do you operate in?

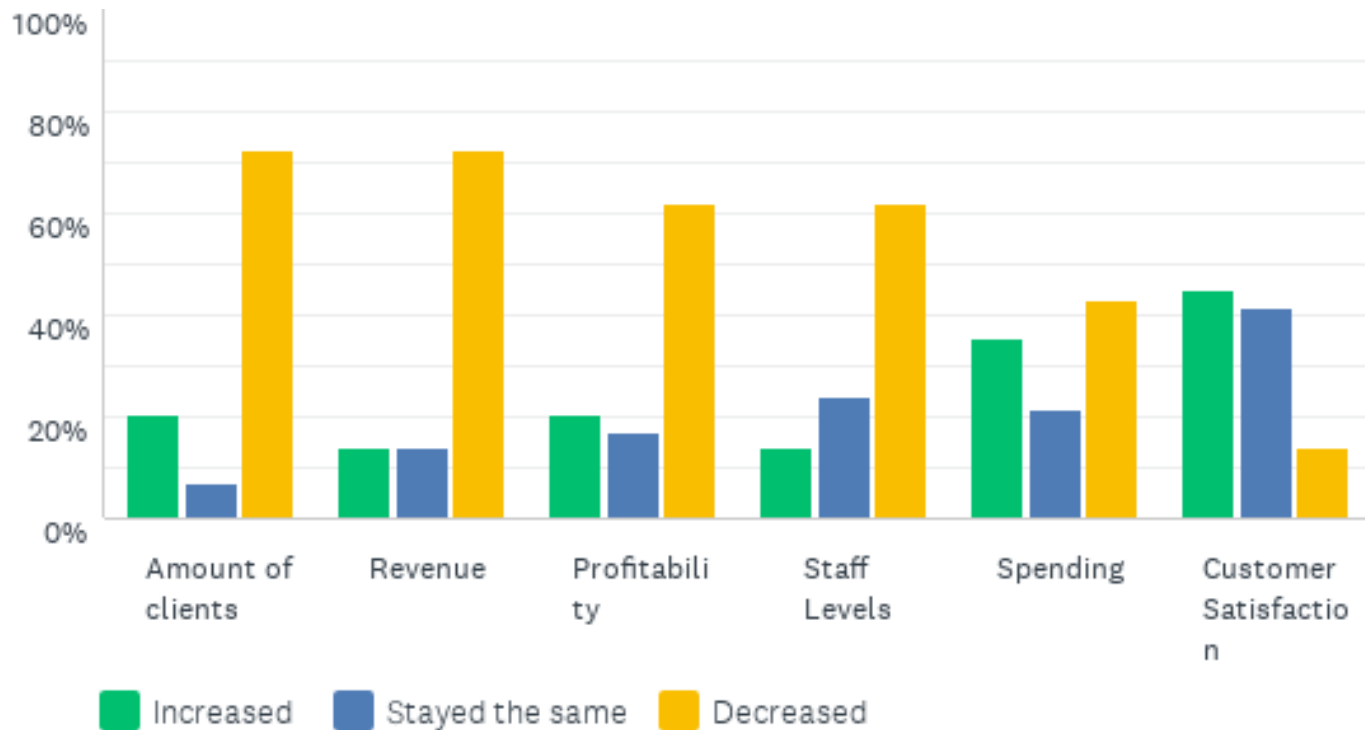


ANSWER CHOICES	RESPONSES
Restaurant	24.49%
Hotel	20.41%
Cafe / Coffee Shop	16.33%
Contract Caterer	18.37%
Contract Cleaner	0.00%
Pub / Winebar / Club	4.08%
Bakery	2.04%
Butcher	0.00%
Forecourt / Foodservice in Retail Setting	2.04%
Premises & Facilities Management	2.04%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	0.00%
Other (please specify)	22.45%

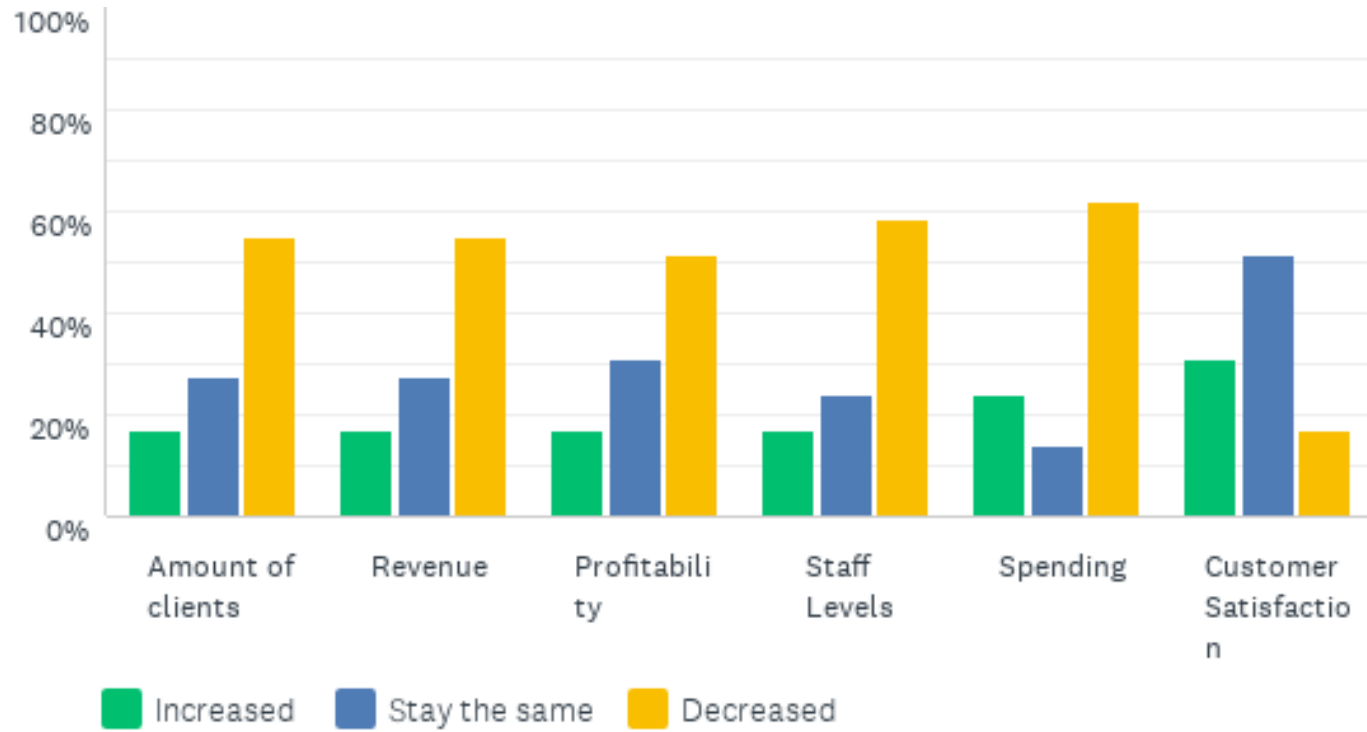
Q3: How would you describe the overall performance of your business over the LAST 6 months?



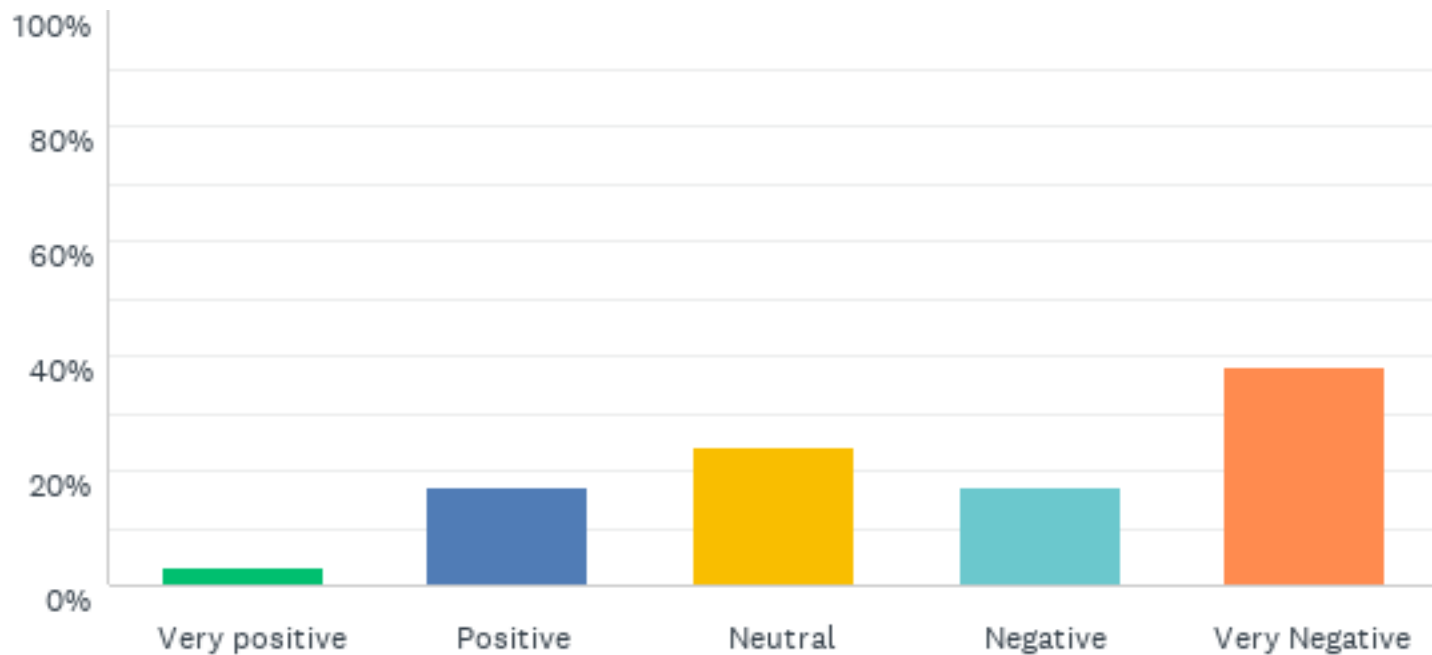
Q4: Please indicate the performance of your business for each of the criteria below over the LAST 6 months:



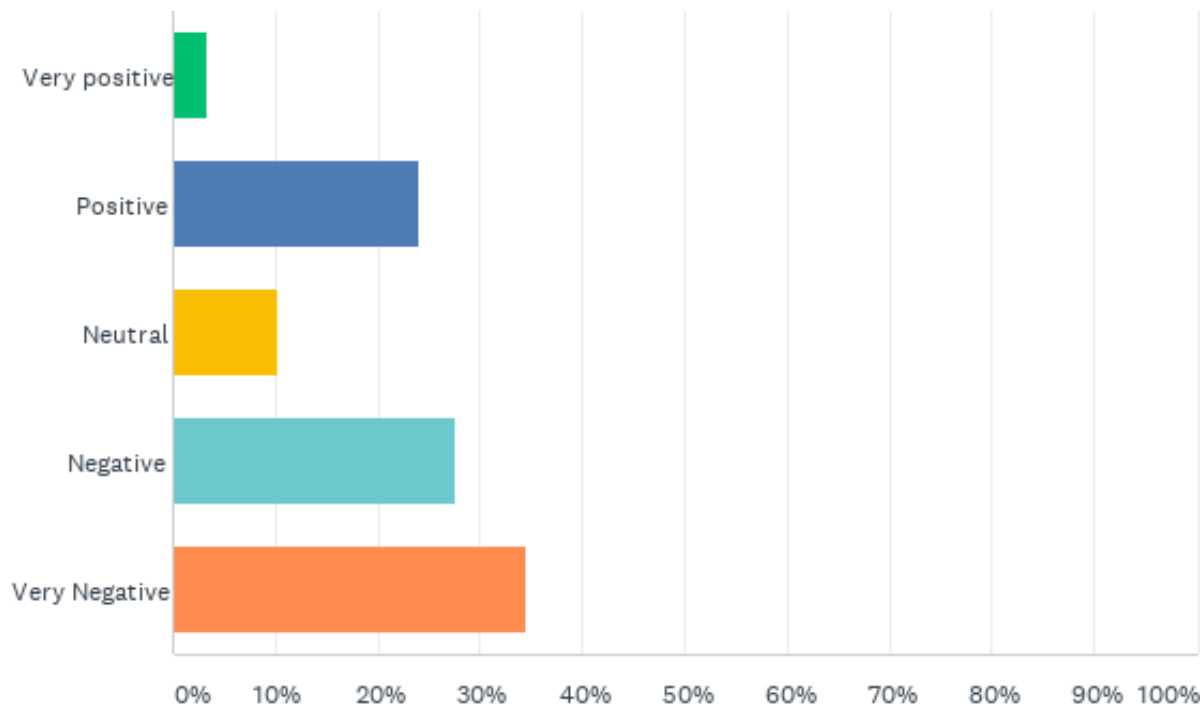
Q5: Please indicate the EXPECTED performance of your business for each of the criteria below over the NEXT 6 months:



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



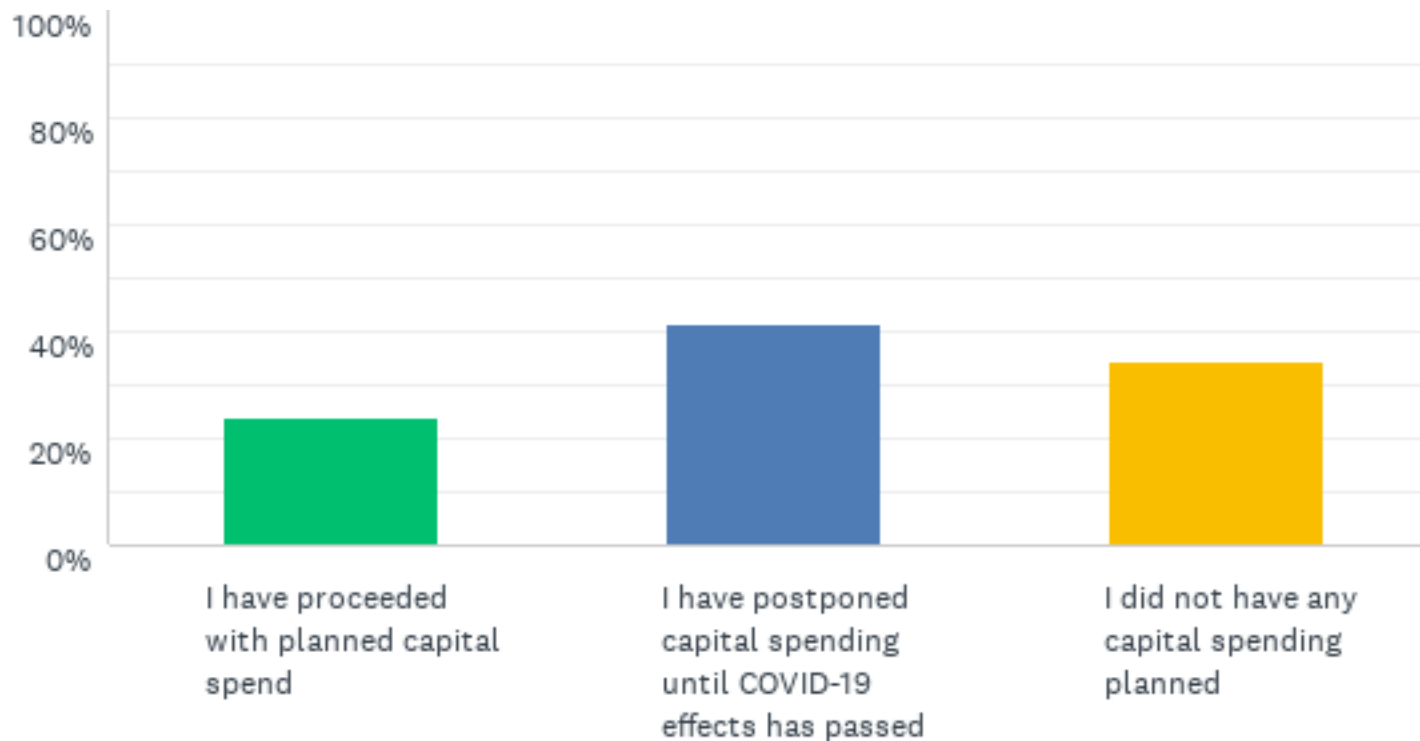
Q7: What is your attitude to the direction of the industry over the COMING CHRISTMAS period?



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



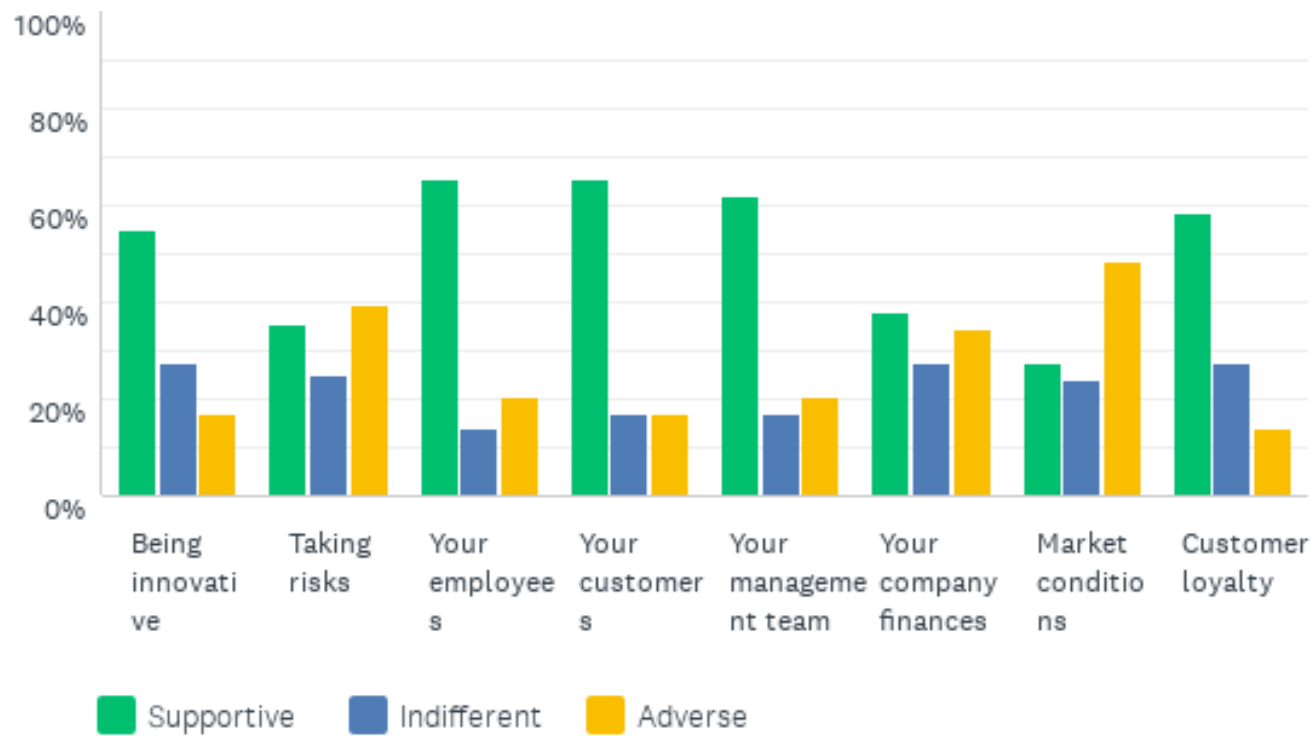
Q9: How has COVID-19 effected your planned capital expenditure on catering / foodservice equipment ?



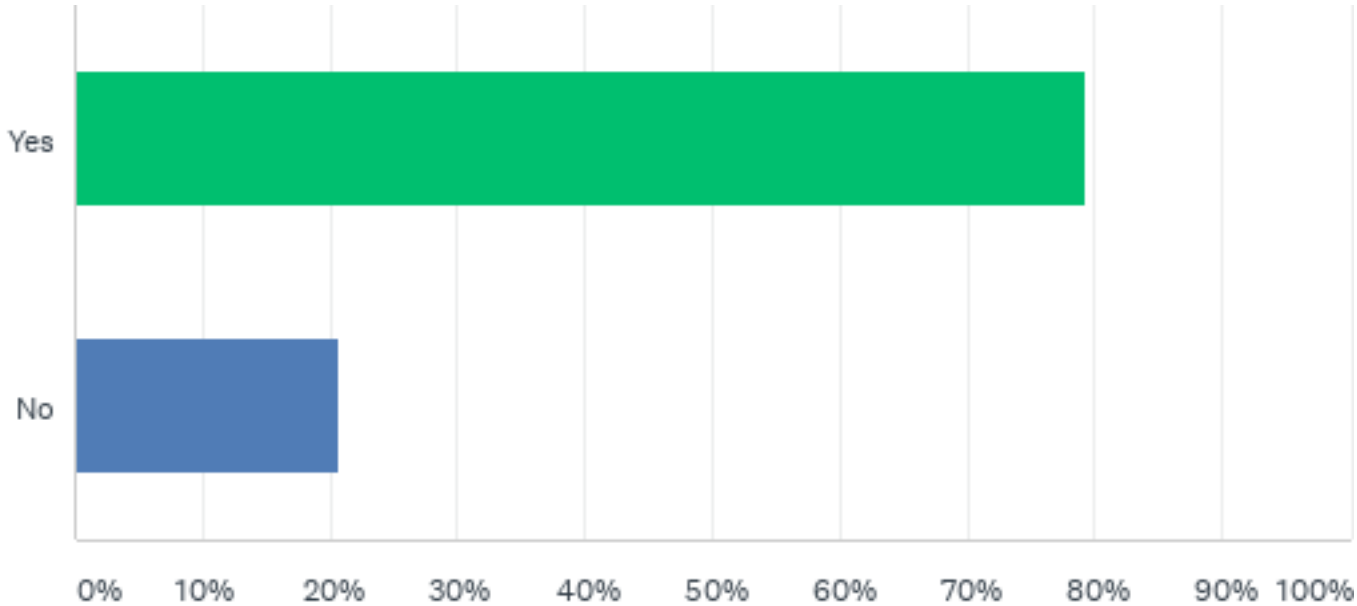
Q10: Has COVID-19 restrictions effected your technical service supplier ability to service your catering equipment?



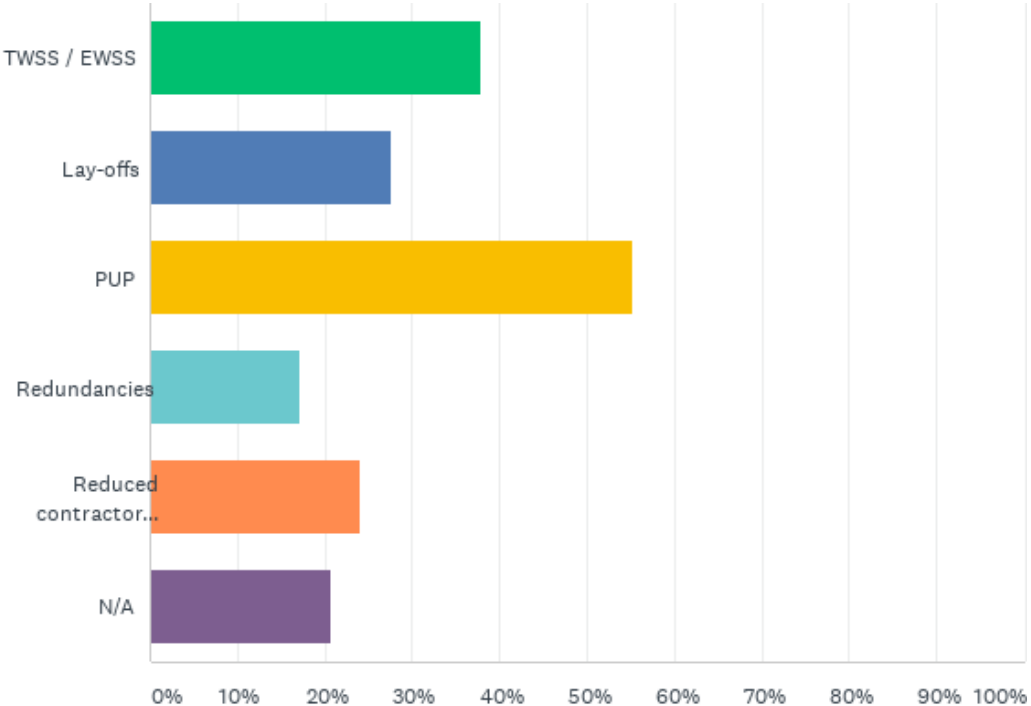
Q11: In the current climate, what is your attitude (right now) to the following?



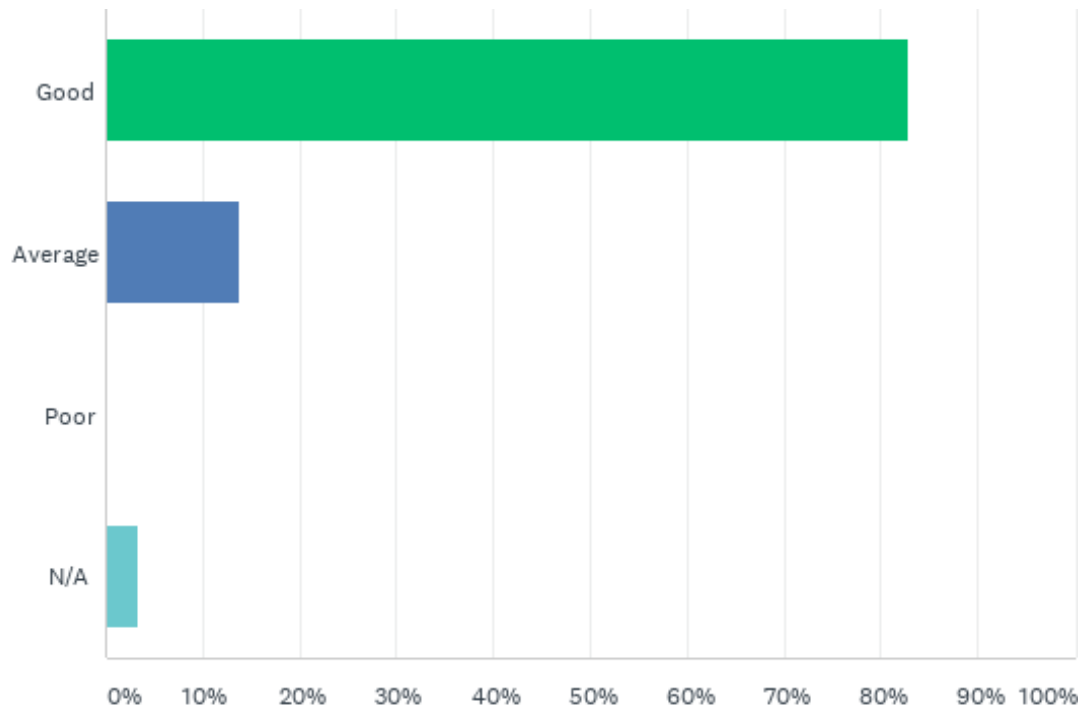
Q12: Have you had to reduce your workforce due to current trading conditions?



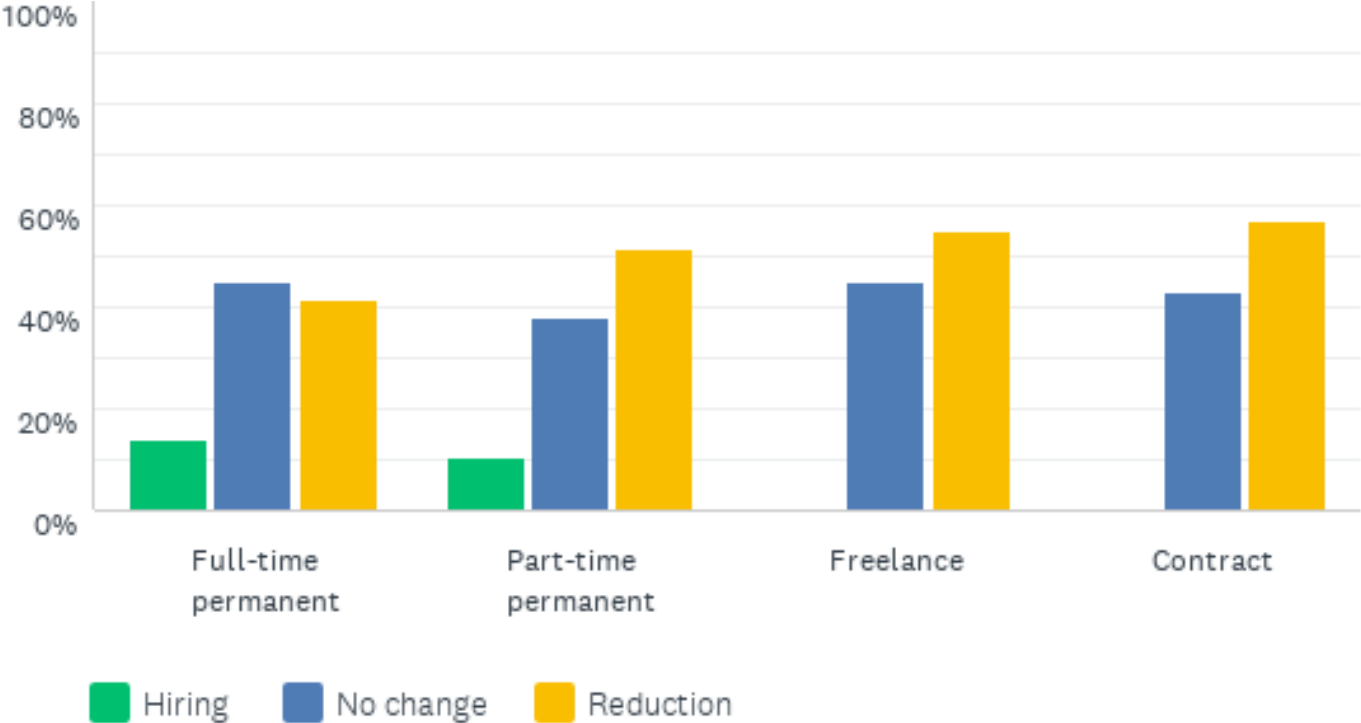
Q13: If you have had to reduce or implement supports for your workforce, what mechanisms have you implemented to assist with this?



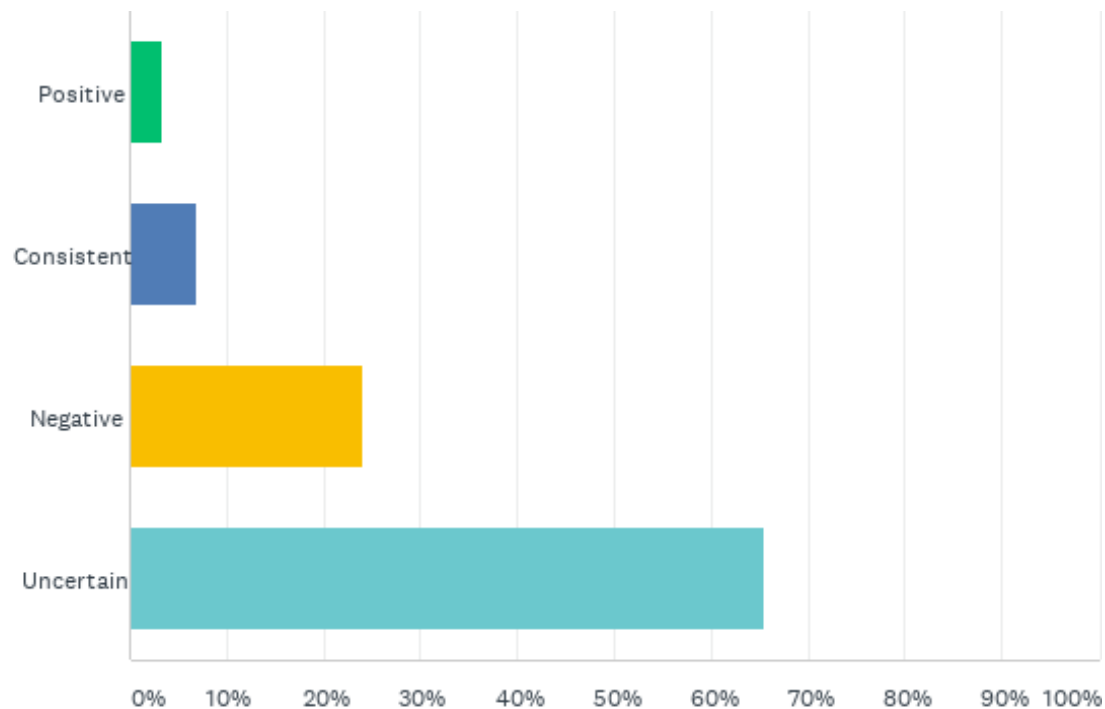
Q14: How would you describe the overall performance of your team over the last 6 months?



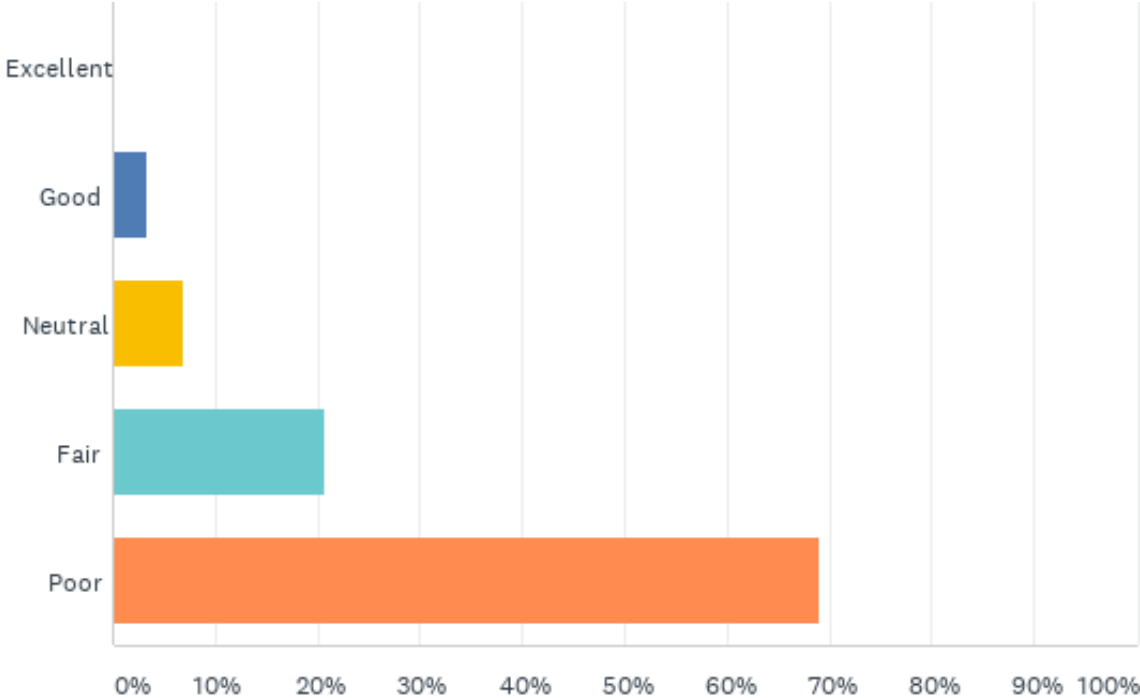
Q15: What are your current hiring plans for each type of staff?



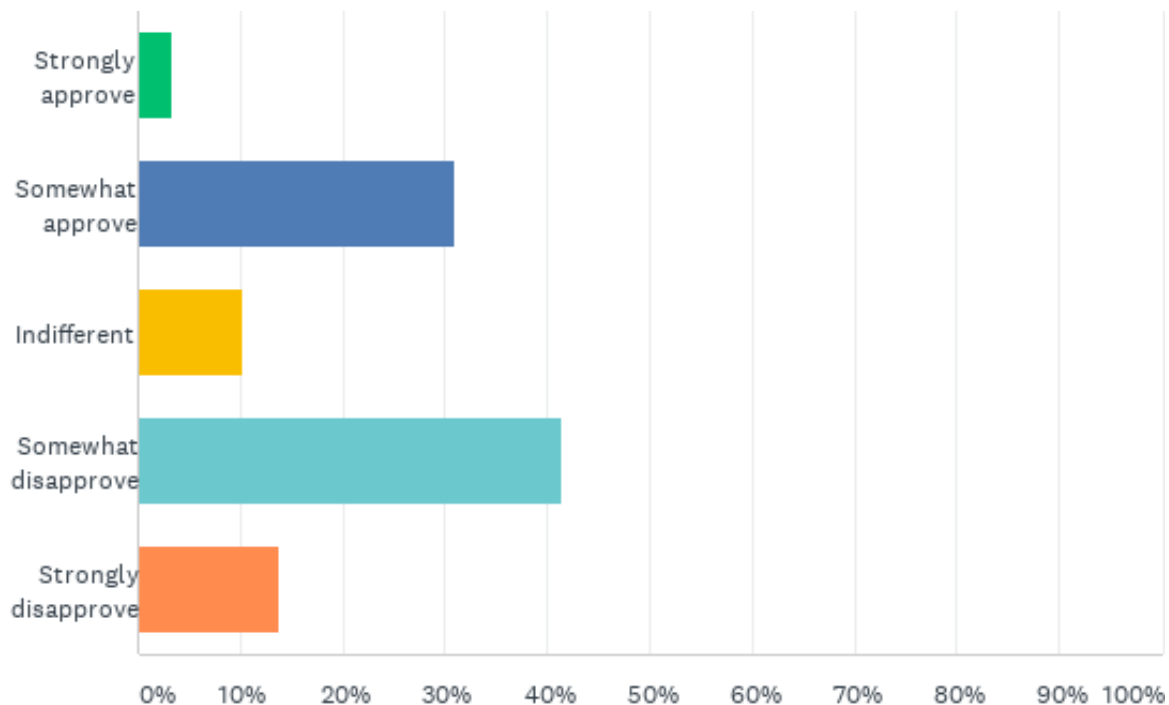
Q16: How would you describe your overall perception of the hospitality sector right now?



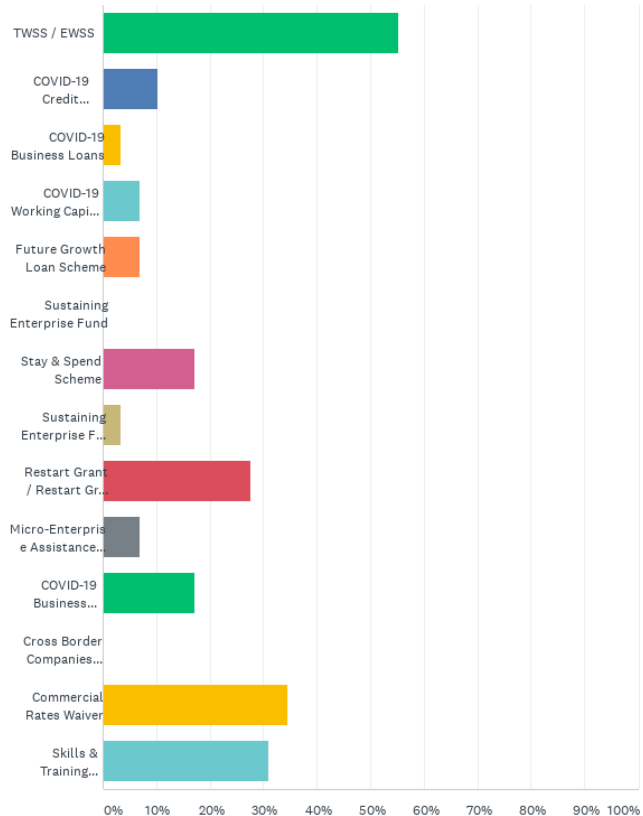
Q17: What is your opinion of the current economic climate?



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

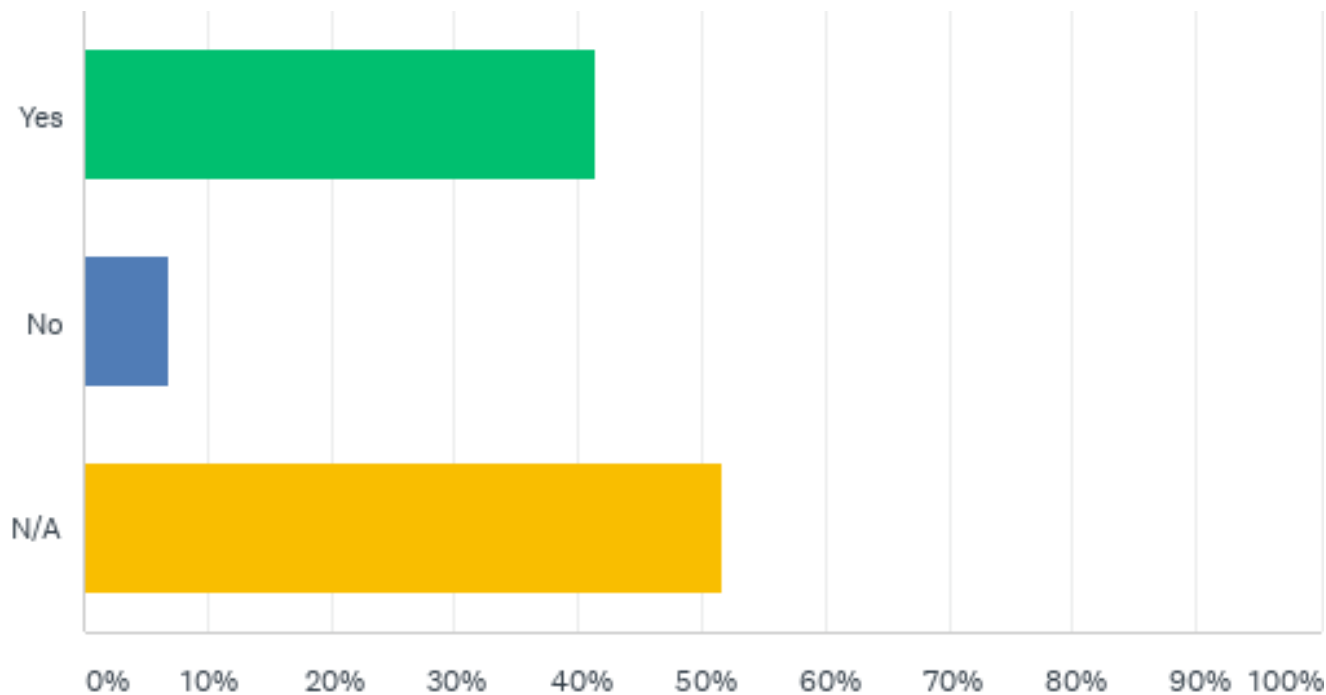


Q19: What if any Government supports have you availed of in the LAST 6 months?

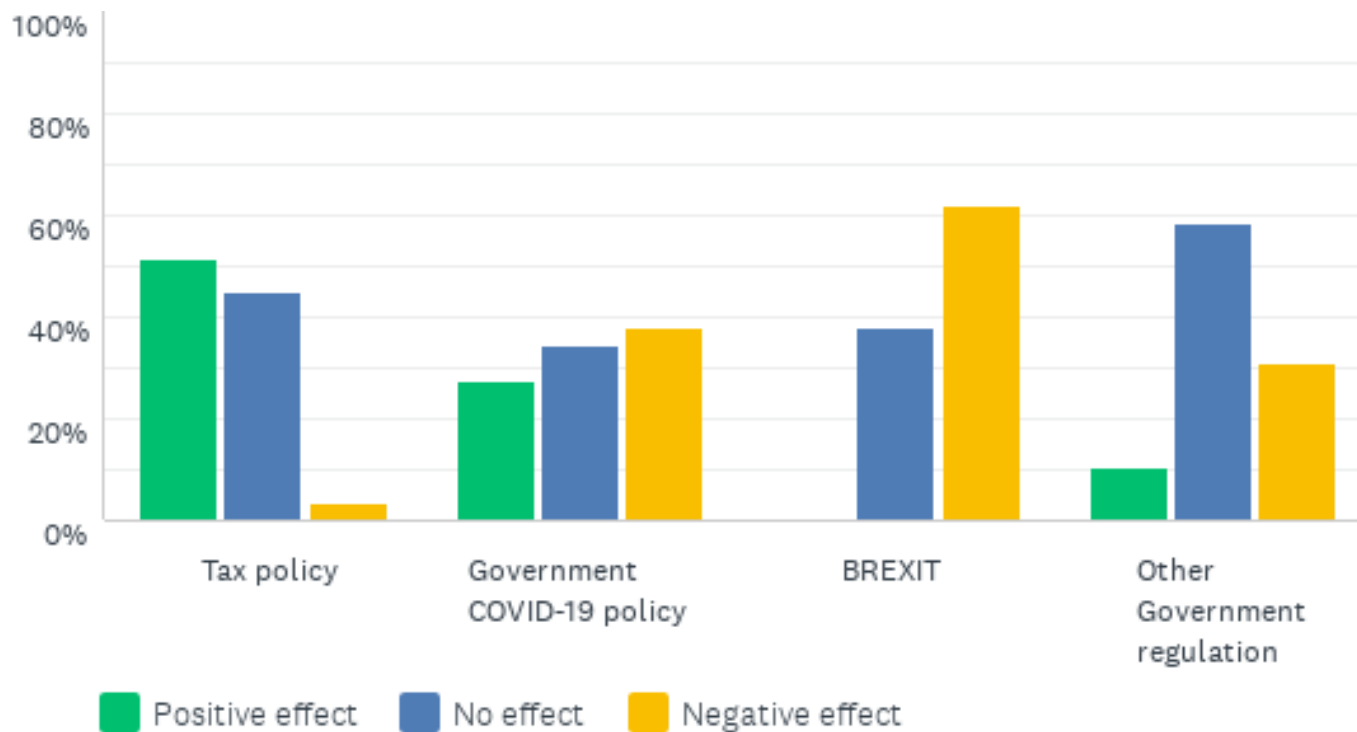


ANSWER CHOICES	RESPONSES
TWSS / EWSS	55.17%
COVID-19 Credit Guarantee Scheme	10.34%
COVID-19 Business Loans	3.45%
COVID-19 Working Capital Scheme	6.90%
Future Growth Loan Scheme	6.90%
Sustaining Enterprise Fund	0.00%
Stay & Spend Scheme	17.24%
Sustaining Enterprise Fund for Small Enterprise	3.45%
Restart Grant / Restart Grant Plus	27.59%
Micro-Enterprise Assistance Fund	6.90%
COVID-19 Business Financial Planning Grant	17.24%
Cross Border Companies Emergency Business Solutions	0.00%
Commercial Rates Waiver	34.48%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	31.03%

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?



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

- Giving more advice on how to pivot. Where's the best options for sustainable packaging Who are others finding the best companies for delivering goods. What are the options for delivering fresh foods What companies are best for, one's stop, graphics, packaging, So many options for websites click n collect etc but so many take a percentage, which are the best options Doing a poll to find out and advising us on the options We are all trying individually why not have a list of all the above, or through chef network buying packaging collectively?
 - Unsure at the moment
 - Helping older operators retire. Helping operators prepare for retirement Helping non viable operations close Consolidation and even deployment of the workforce(like the NBA draft) Improving the business knowledge of operators
 - The industry has contracted greatly. grab and go and functional foods, immune boosting foods and products will become important in the short term environment. Packaging solutions will need to expand and online presence will be important, as we exit the current satiations (social distancing) there will be a need and demand for face to face connections to encourage integrity, and build relations with a product, or company. We are kind of all are back to square one.
 - Be more clear on future
-

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

- making sure all regulations are enforced on an even footing across the industry so we can all come out of this together
- Jobs!
- We are operating in the takeaway and delivery business and we are in a good space, even in this terrible times.
- Continue lobbying for grants funding etc
- Business tightly are getting the support, but what about the valued worker? If on the wage subsidy the employer is holding each employee to higher subsidy of 203 and trying not to go over this, if they are in position to sign on for the other 2 days they may get 80, this is worthless to these middle earners who are generally renters, getting no help, no health insurance etc I can go on. Alternative is try and get on PUP which gets them 300 max if they are lucky. Again this is totally unmanageable, I get trying to keep business afloat but when it comes to recovery time they won't be the work force on hand to service it, reputational damage to the companies, industry will be even more damaged.... take the chef crisis as a yard stick of what the entire industry, all aided by the government and nobody lobbying for the workers... makes you think about the hospitality industry workers and a need for trade union membership. Food for thought.

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

- Put fixed costs on all Covid essential good that businesses need, to leave it fair for all. More Covid checks on business and secret shoppers to carry out full checks, many places I know aren't following any of the guidelines!! Staff are leaving as a result as business owners don't want to become educated with the new measures!! Wake up everyone! What about Culinary Graduates? Small suppliers who have to compete with Pallas etc? What about the new lower rates of pay for staff? Some staff are being paid €5 an hour!
 - Better leadership with more clear direction so we can plan better more consistent outlook
 - Actively campaigning against the disgraceful actions this current government are taking to destroy the hospitality industry
 - Getting more financial support, guidance on how to operate
 - Lobbying to restore the Wage Subsidy Scheme I have been paid weekly and return increases for full time staff
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Published jointly in October 2020 by

