

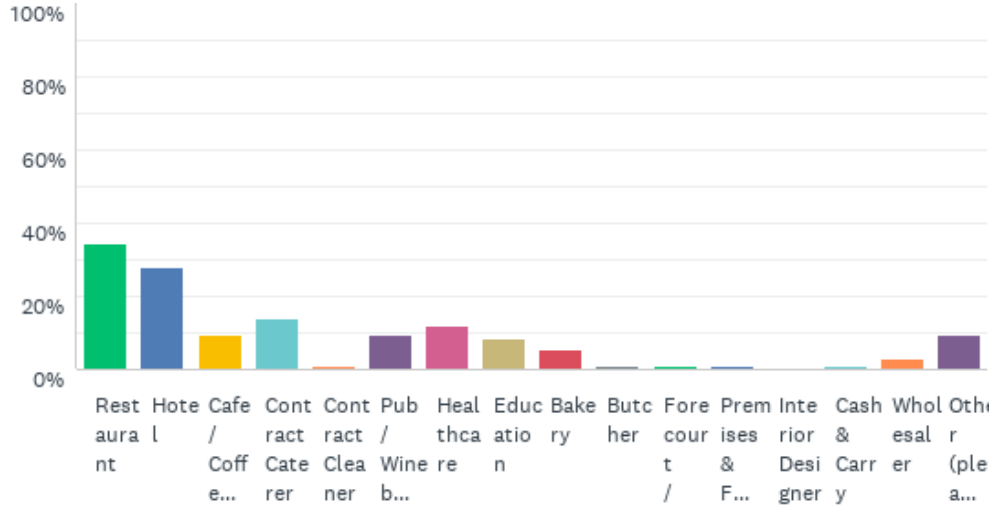


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

MARCH 2021

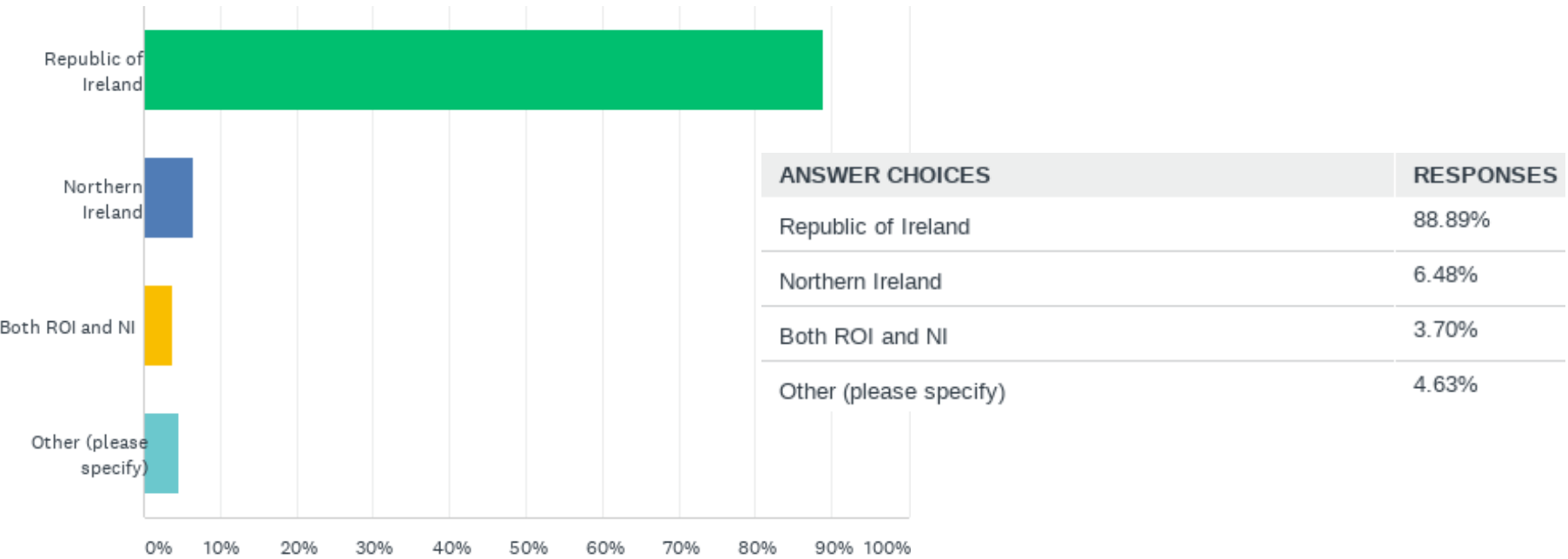


Q1: What Sector Category do you operate in?

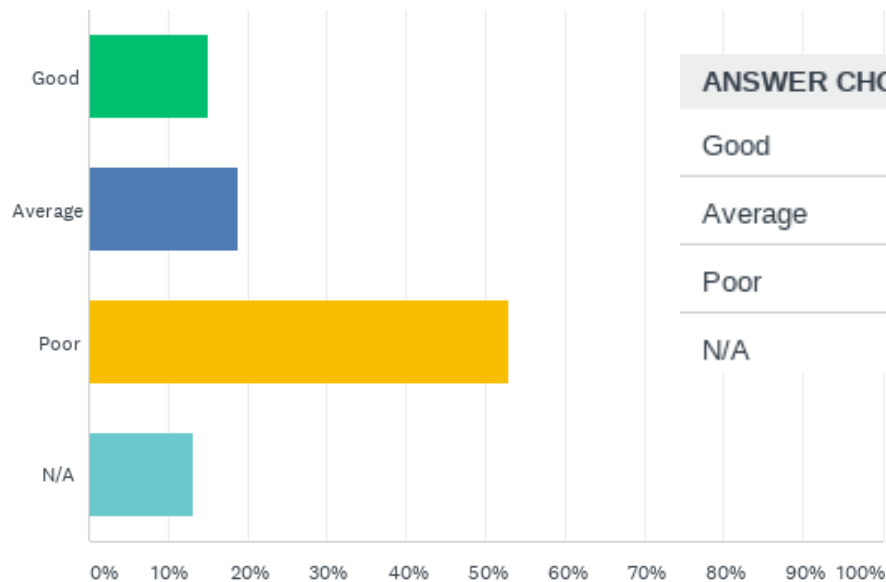


ANSWER CHOICES	RESPONSES
Restaurant	34.26%
Hotel	27.78%
Cafe / Coffee Shop	9.26%
Contract Caterer	13.89%
Contract Cleaner	0.93%
Pub / Winebar / Club	9.26%
Healthcare	12.04%
Education	8.33%
Bakery	5.56%
Butcher	0.93%
Forecourt / Foodservice in Retail Setting	0.93%
Premises & Facilities Management	0.93%
Interior Designer	0.00%
Cash & Carry	0.93%
Wholesaler	2.78%
Other (please specify)	9.26%

Q2: What jurisdiction do you operate in?

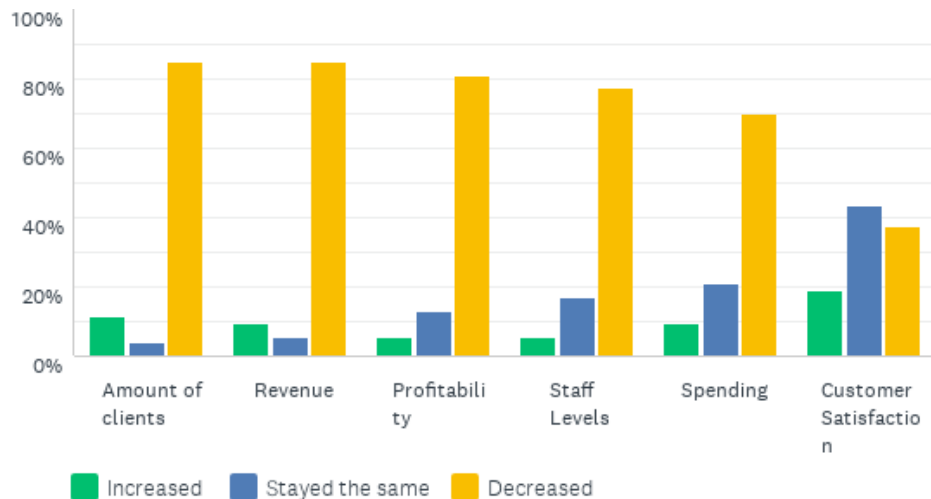


Q3: How would you describe the overall performance of your business over the LAST 6 months?



ANSWER CHOICES	RESPONSES
Good	15.09%
Average	18.87%
Poor	52.83%
N/A	13.21%

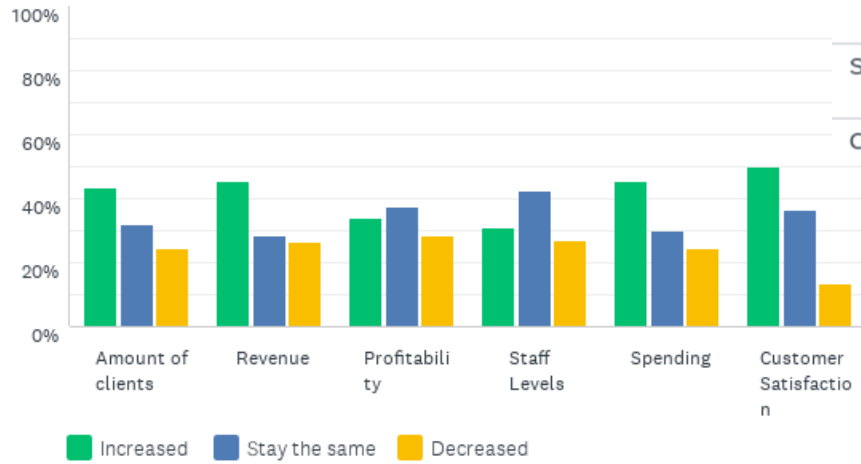
Q4: Please indicate the performance of your business for each of the criteria below over the LAST 6 months:



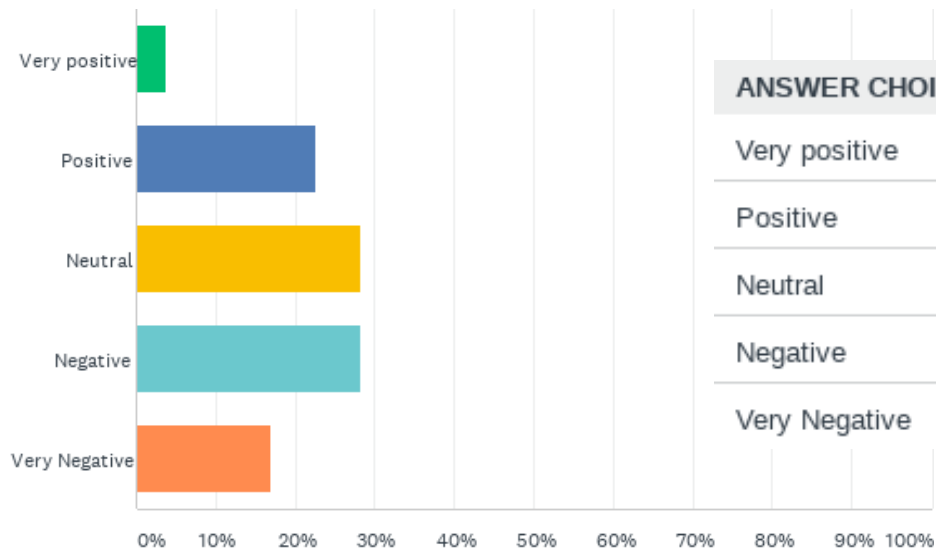
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	11.32%	3.77%	84.91%
Revenue	9.43%	5.66%	84.91%
Profitability	5.66%	13.21%	81.13%
Staff Levels	5.66%	16.98%	77.36%
Spending	9.43%	20.75%	69.81%
Customer Satisfaction	18.87%	43.40%	37.74%

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	43.40%	32.08%	24.53%
Revenue	45.28%	28.30%	26.42%
Profitability	33.96%	37.74%	28.30%
Staff Levels	30.77%	42.31%	26.92%
Spending	45.28%	30.19%	24.53%
Customer Satisfaction	50.00%	36.54%	13.46%



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



ANSWER CHOICES

RESPONSES

Very positive

3.77%

Positive

22.64%

Neutral

28.30%

Negative

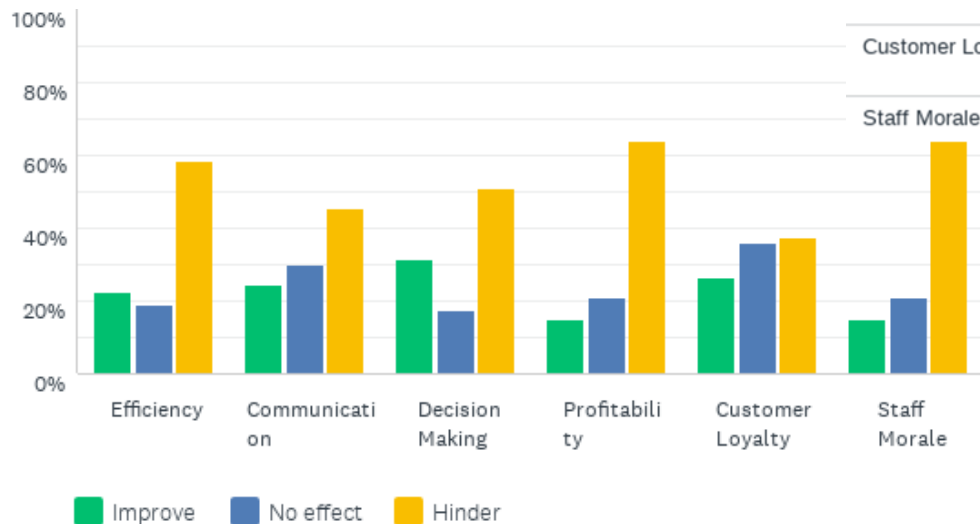
28.30%

Very Negative

16.98%

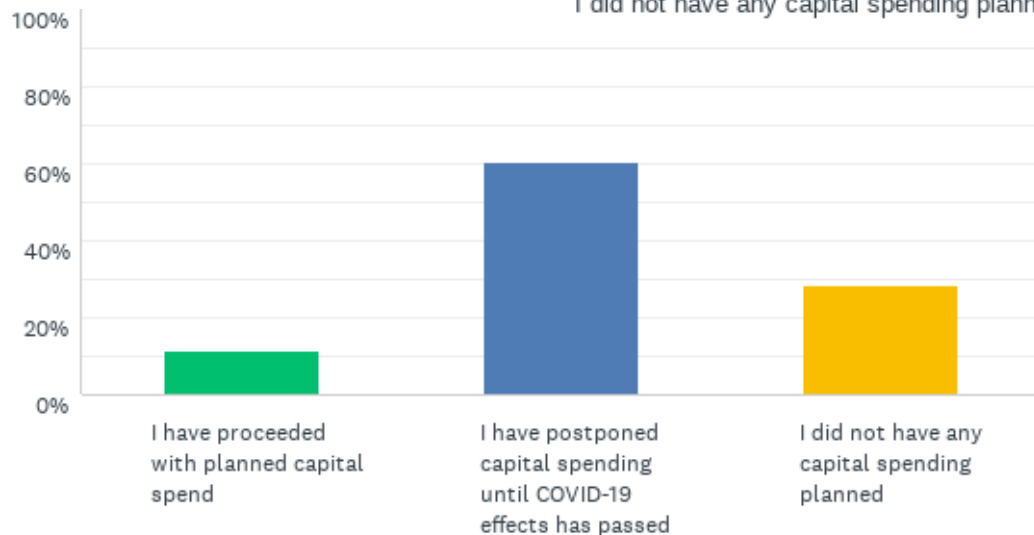
Q7: How do you feel the current conditions will effect the following areas of your business?

	IMPROVE	NO EFFECT	HINDER
Efficiency	22.64%	18.87%	58.49%
Communication	24.53%	30.19%	45.28%
Decision Making	31.37%	17.65%	50.98%
Profitability	15.09%	20.75%	64.15%
Customer Loyalty	26.42%	35.85%	37.74%
Staff Morale	15.09%	20.75%	64.15%

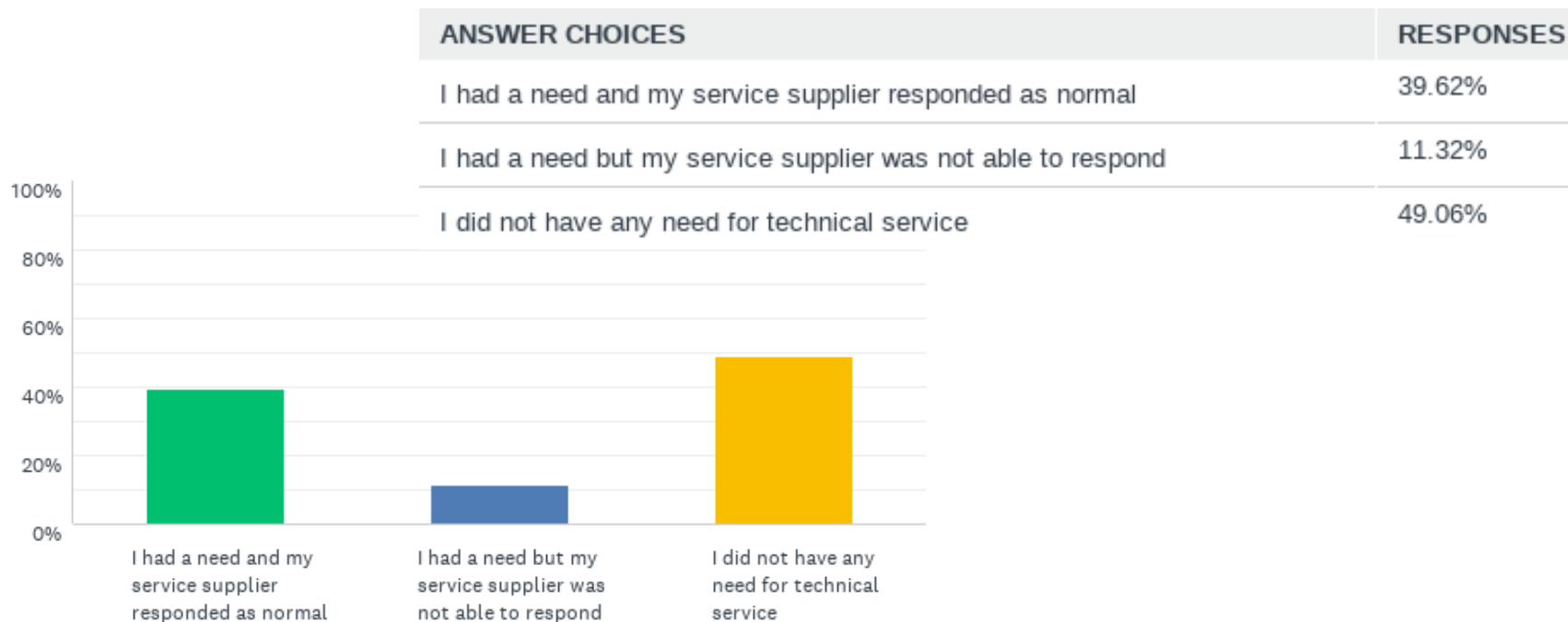


Q8: How has COVID-19 effected your planned capital expenditure on catering / foodservice equipment ?

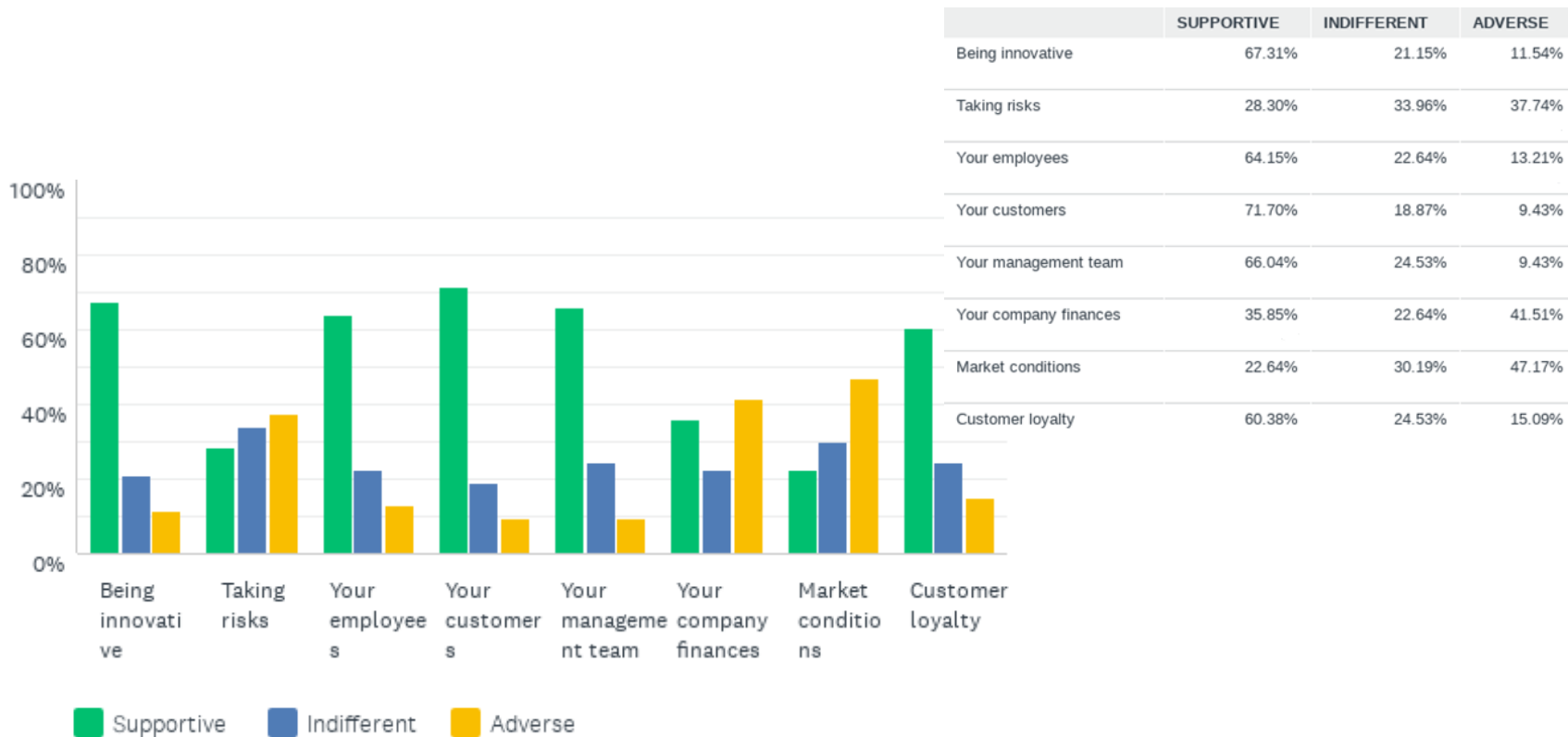
ANSWER CHOICES	RESPONSES
I have proceeded with planned capital spend	11.32%
I have postponed capital spending until COVID-19 effects has passed	60.38%
I did not have any capital spending planned	28.30%



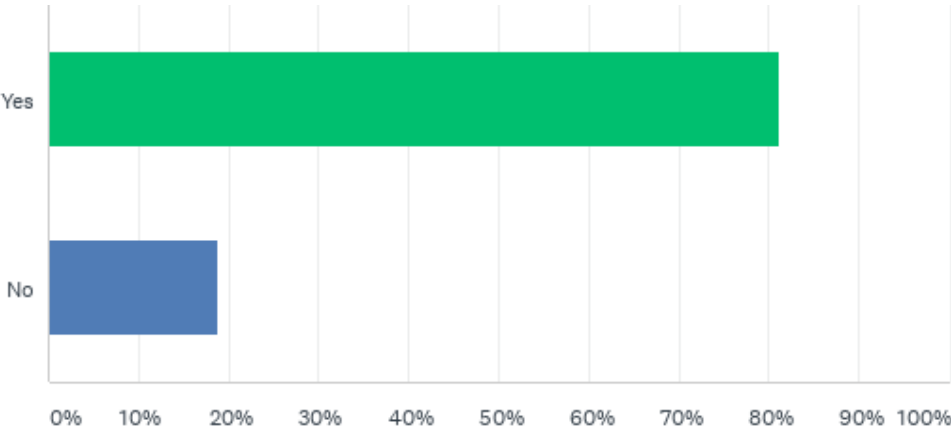
Q9: Have COVID-19 restrictions effected your technical service supplier ability to service your catering equipment?



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

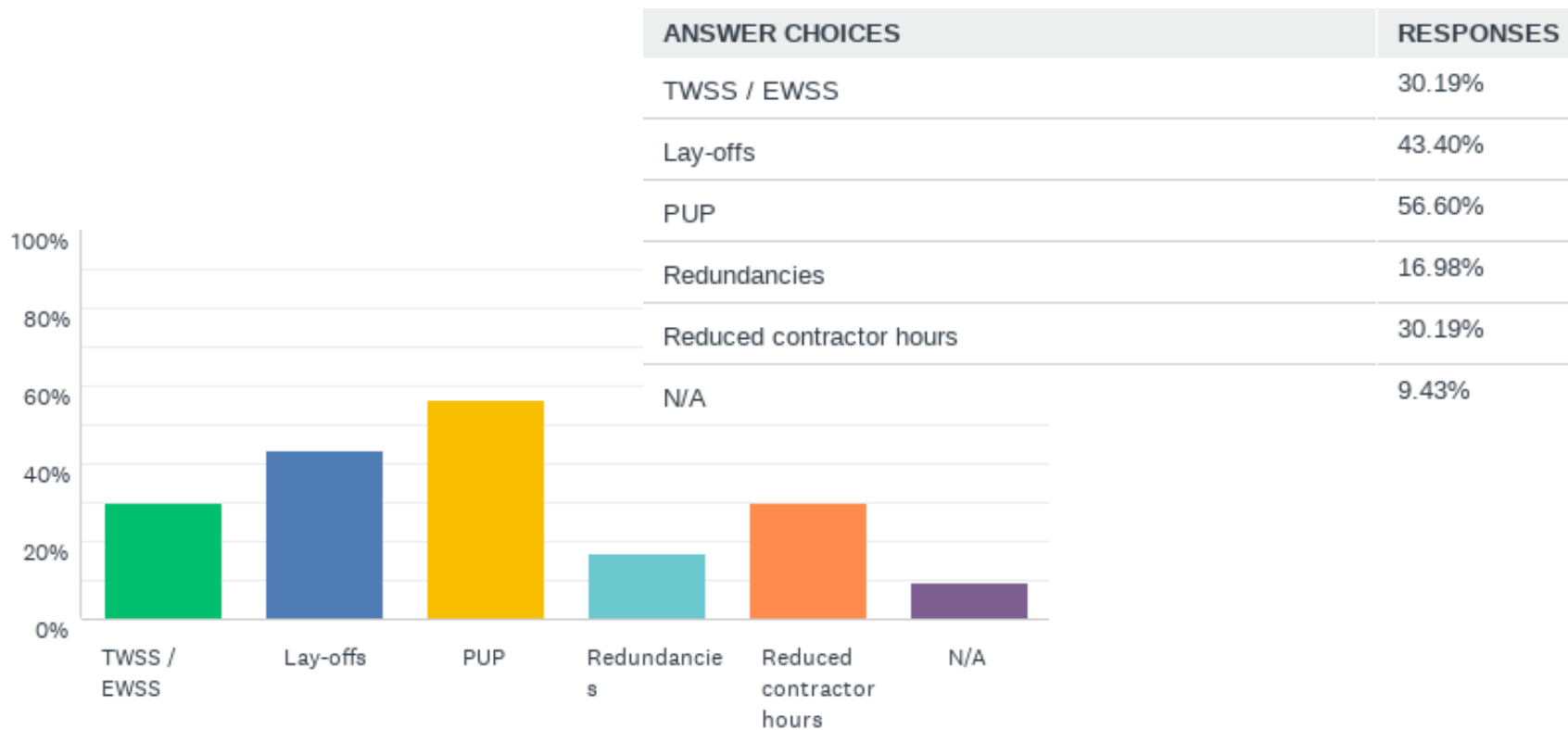


Q11: Have you had to reduce your workforce due to current trading conditions?

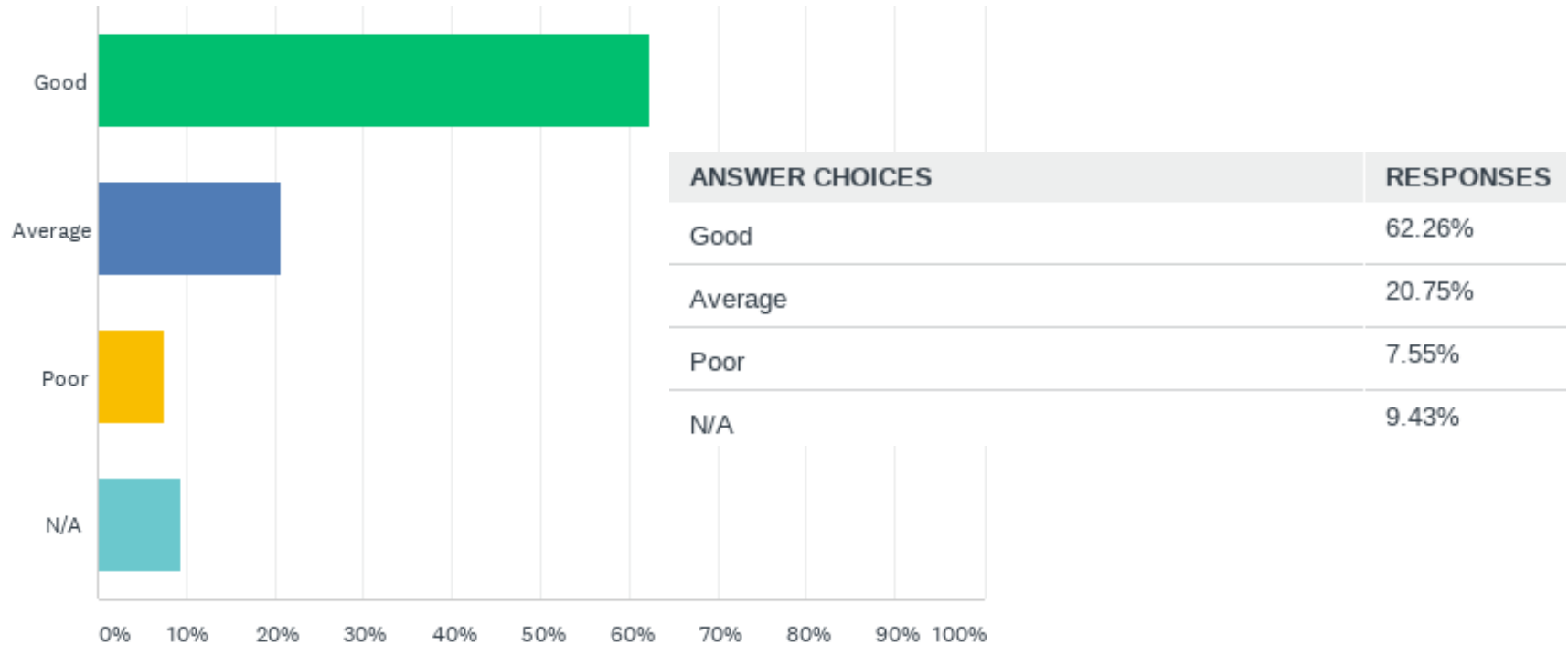


ANSWER CHOICES	RESPONSES
Yes	81.13%
No	18.87%

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

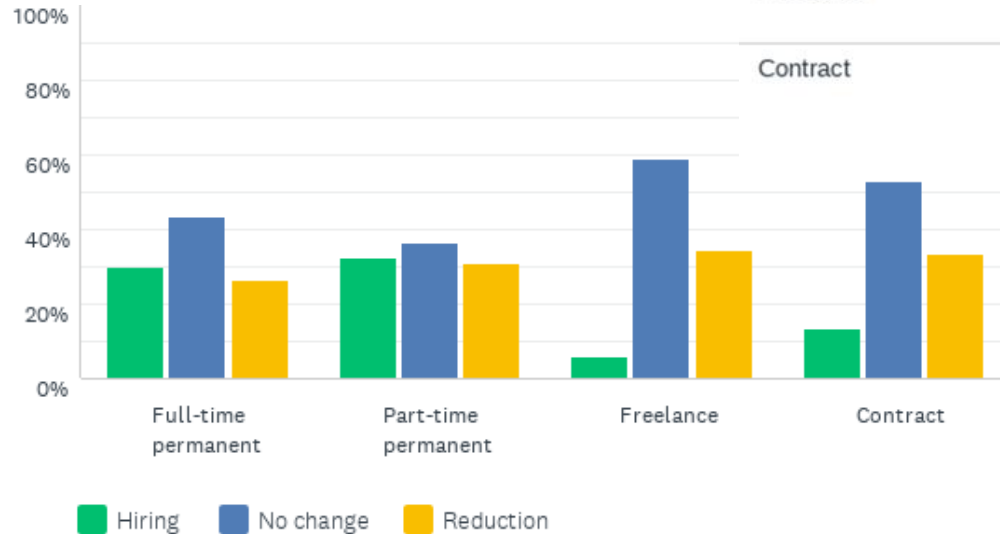


Q13: How would you describe the overall performance of your team over the last 6 months?

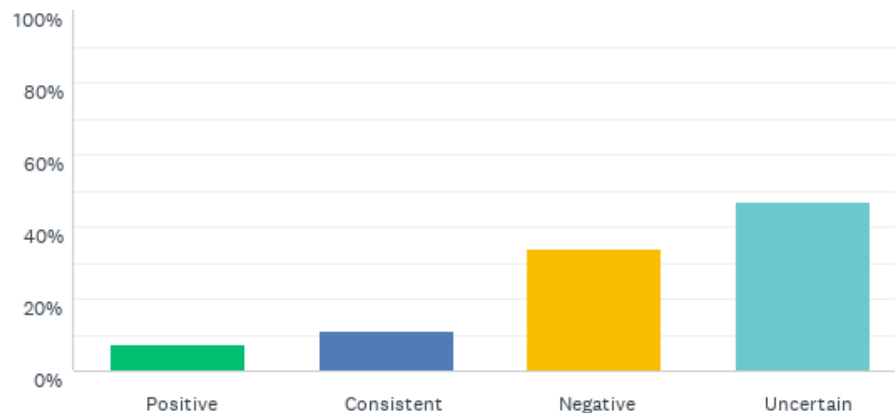


Q14: What are your current hiring plans for each type of staff?

	HIRING	NO CHANGE	REDUCTION
Full-time permanent	30.19%	43.40%	26.42%
Part-time permanent	32.69%	36.54%	30.77%
Freelance	6.12%	59.18%	34.69%
Contract	13.73%	52.94%	33.33%



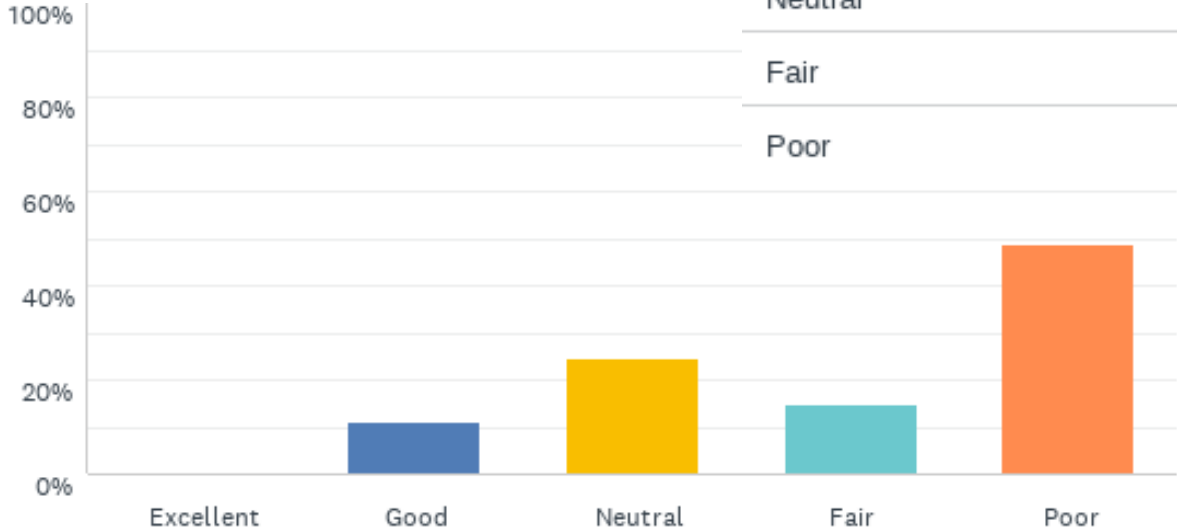
Q15: How would you describe your overall perception of the hospitality sector right now?



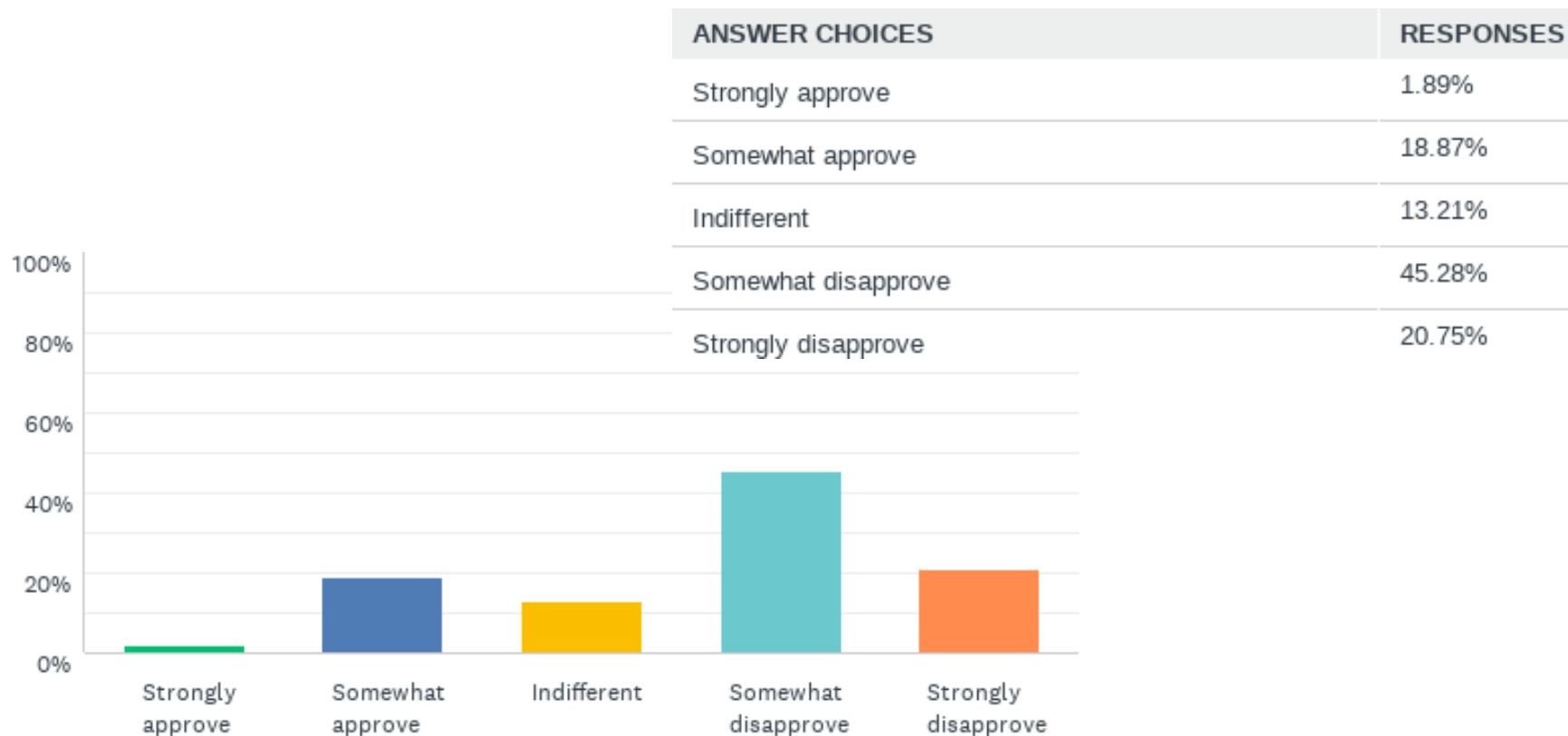
ANSWER CHOICES	RESPONSES
Positive	7.55%
Consistent	11.32%
Negative	33.96%
Uncertain	47.17%

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

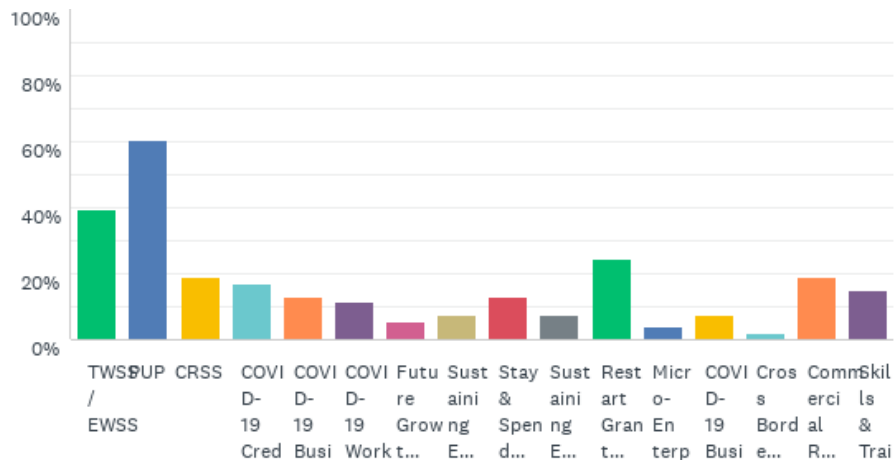
ANSWER CHOICES	RESPONSES
Excellent	0.00%
Good	11.32%
Neutral	24.53%
Fair	15.09%
Poor	49.06%



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



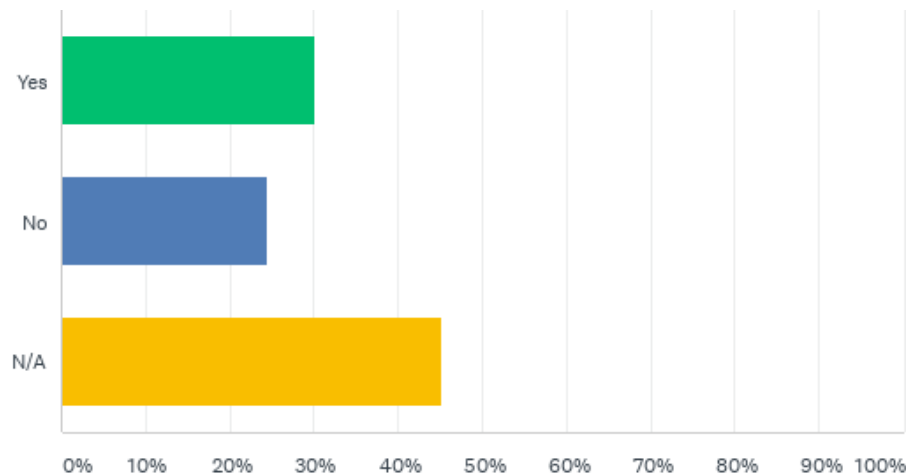
Q18: What if any Government supports have you availed of in the LAST 6 months?



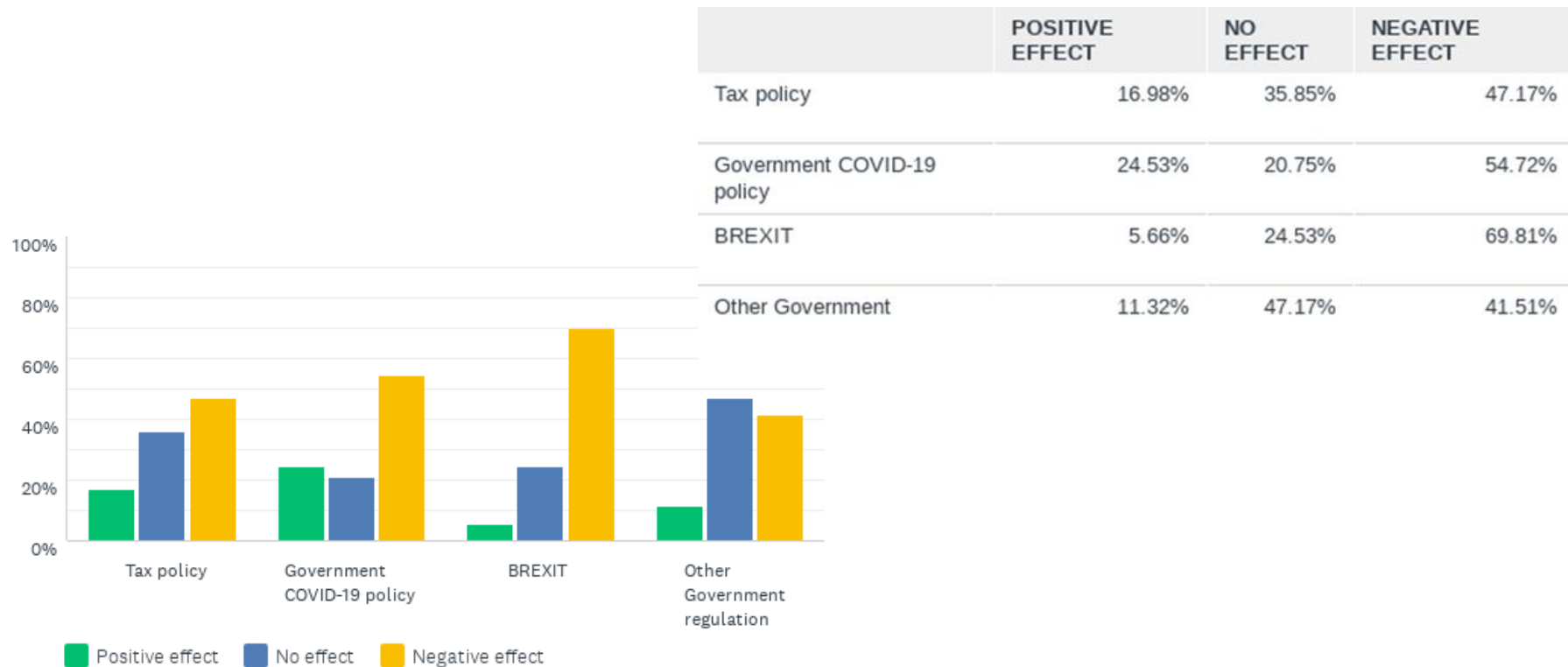
ANSWER CHOICES	RESPONSES
TWSS / EWSS	39.62%
PUP	60.38%
CRSS	18.87%
COVID-19 Credit Guarantee Scheme	16.98%
COVID-19 Business Loans	13.21%
COVID-19 Working Capital Scheme	11.32%
Future Growth Loan Scheme	5.66%
Sustaining Enterprise Fund	7.55%
Stay & Spend Scheme	13.21%
Sustaining Enterprise Fund for Small Enterprise	7.55%
Restart Grant / Restart Grant Plus	24.53%
Micro-Enterprise Assistance Fund	3.77%
COVID-19 Business Financial Planning Grant	7.55%
Cross Border Companies Emergency Business Solutions	1.89%
Commercial Rates Waiver	18.87%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	15.09%

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

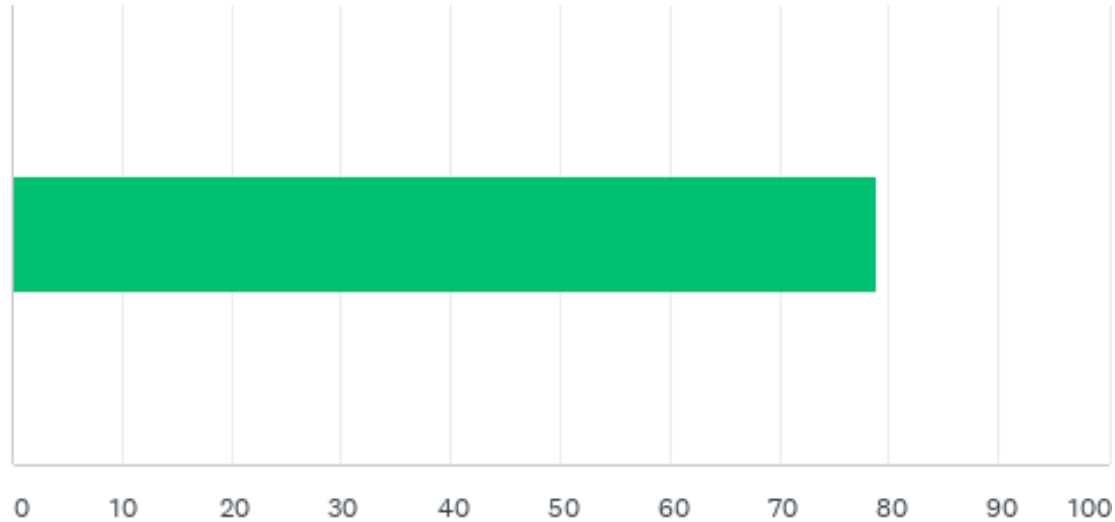
ANSWER CHOICES	RESPONSES
Yes	30.19%
No	24.53%
N/A	45.28%



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?



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



Q23: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment?

- Structured - clear plan for future re-opening strategy
 - More notice of reopening, a time plan. Reduction in the price of compostable takeaway containers and recyclables.
 - Get us open and full, look at the rest of Europe
 - Reducing Brexit issues, wait time with customs etc
 - Help with supply chain post Brexit situation
 - A lot of talking
 - Pushing for the VAT reduction of 9%, continue with all supports available
 - The problem is not with the industry representatives - it is clearly down to the governments ineptitude that we are all still suffering the adverse effects of COVID
 - Less paperwork, more clarity
 - As I'm working in a community nursing unit probably no help at this time
 - Fill up the apartments for our Independent living
 - Get economy running again. By using more local products. More spend incentives for customers. Get rid of the invisible Irish sea border to let free trade of goods.
 - Less chanting And more action.
 - Trend analysis will be important, but the future of the hospitality industry is in dire straights as staff, craft and skilled staff have moved on to different industries. The people left working are and will find the challenge bigger as more leave service industry. Training costs will spiral, and increased staff turnover. The government haven't done enough to protect and support. ARTS etc are also reeling from similar trends
 - Maintain government support
-

Q23: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment?

- Assistance, Grants, Vat reduction
 - I've left the industry. There's no hope for hospitality. The economic effects will only hit late 21 early 22.
 - Big premonition about catering and those in it
 - Assuring the public it is safe to get back to some kind of normal
 - Outdoor grants for rural locations. Make a road map to open up so we can have a start date and be ready for it. Support businesses that get into difficulty after covid due to covid
 - Lobby to retain vat 9% indefinitely twss/pup until summer 2022 minimum
 - I would like to see a bigger restart grant and continued wage support
 - Demand the government to do more for hospitality sector, find the way to exempt the sector from committing council rates and vat
 - Lobby politicians more aggressively.
 - Keep shouting for the hospitality industry overall and don't forget the small one woman/man team.
 - Give appropriate time & notice before reopening, let as much outside dining take place as possible with minimum restrictions, lay off on taxing workers on PUP payments until next year
 - A date to open.
 - Keep lobbying and run for council in future elections
 - Make decision and stick by them , create a better plan which will work , educate people on what the real issues are. work on policies for the greater good.
 - More vaccines to be procured and a better roll out strategy. Post roll out, more assistance for operators and incentives for domestic spend like the UK did.
 - Retaining staff and improved conditions
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