

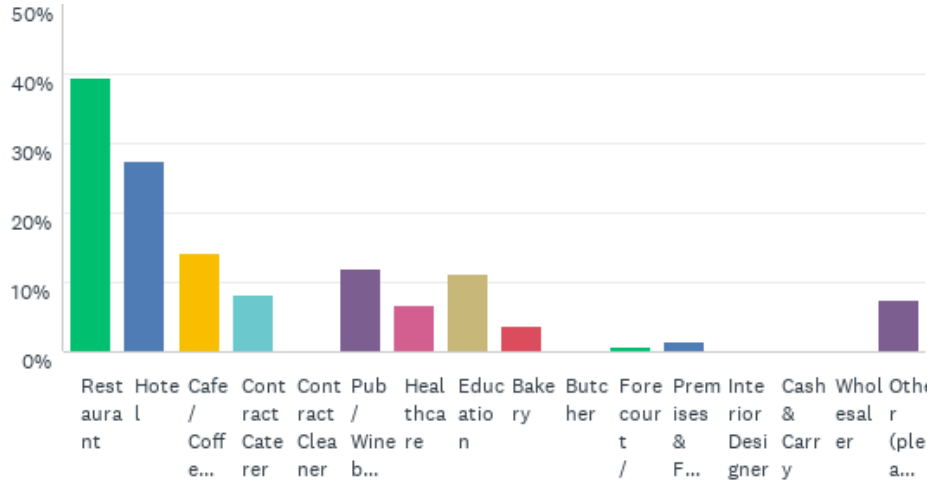


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

FEBRUARY 2021

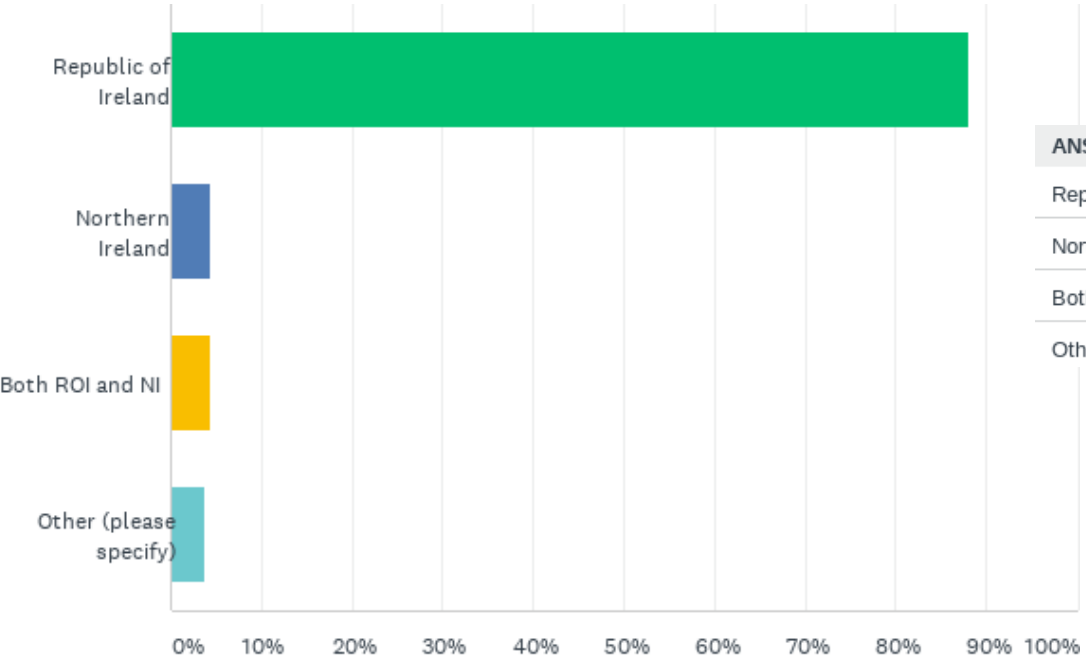


Q1: What Sector Category do you operate in?



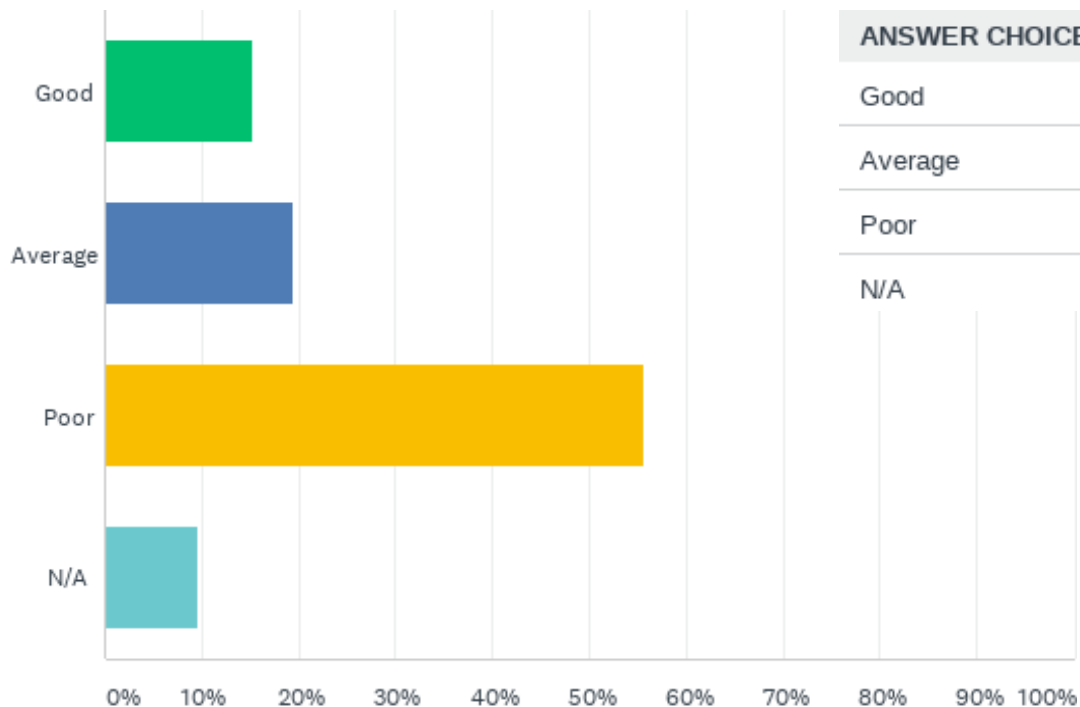
ANSWER CHOICES	RESPONSES
Restaurant	39.55%
Hotel	27.61%
Cafe / Coffee Shop	14.18%
Contract Caterer	8.21%
Contract Cleaner	0.00%
Pub / Winebar / Club	11.94%
Healthcare	6.72%
Education	11.19%
Bakery	3.73%
Butcher	0.00%
Forecourt / Foodservice in Retail Setting	0.75%
Premises & Facilities Management	1.49%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	0.00%
Other (please specify)	7.46%

Q2: What jurisdiction do you operate in?



ANSWER CHOICES	RESPONSES
Republic of Ireland	88.06%
Northern Ireland	4.48%
Both ROI and NI	4.48%
Other (please specify)	3.73%

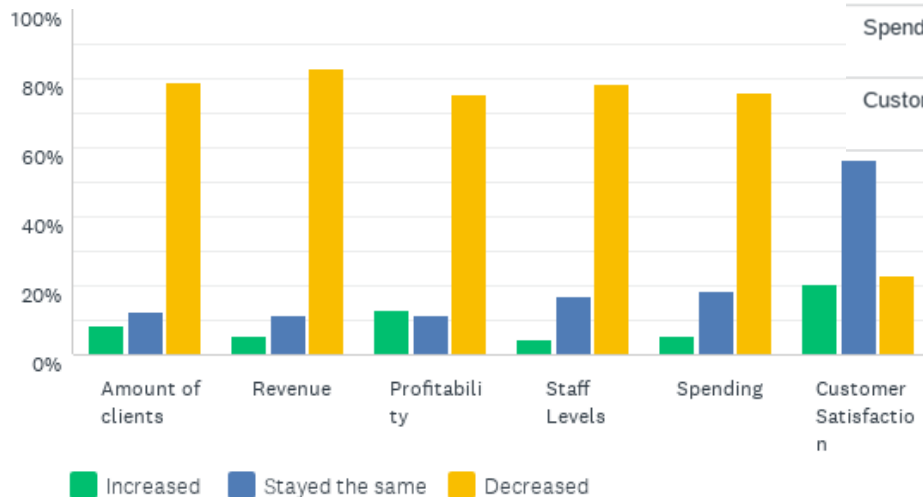
Q3: How would you describe the overall performance of your business over the LAST 6 months?



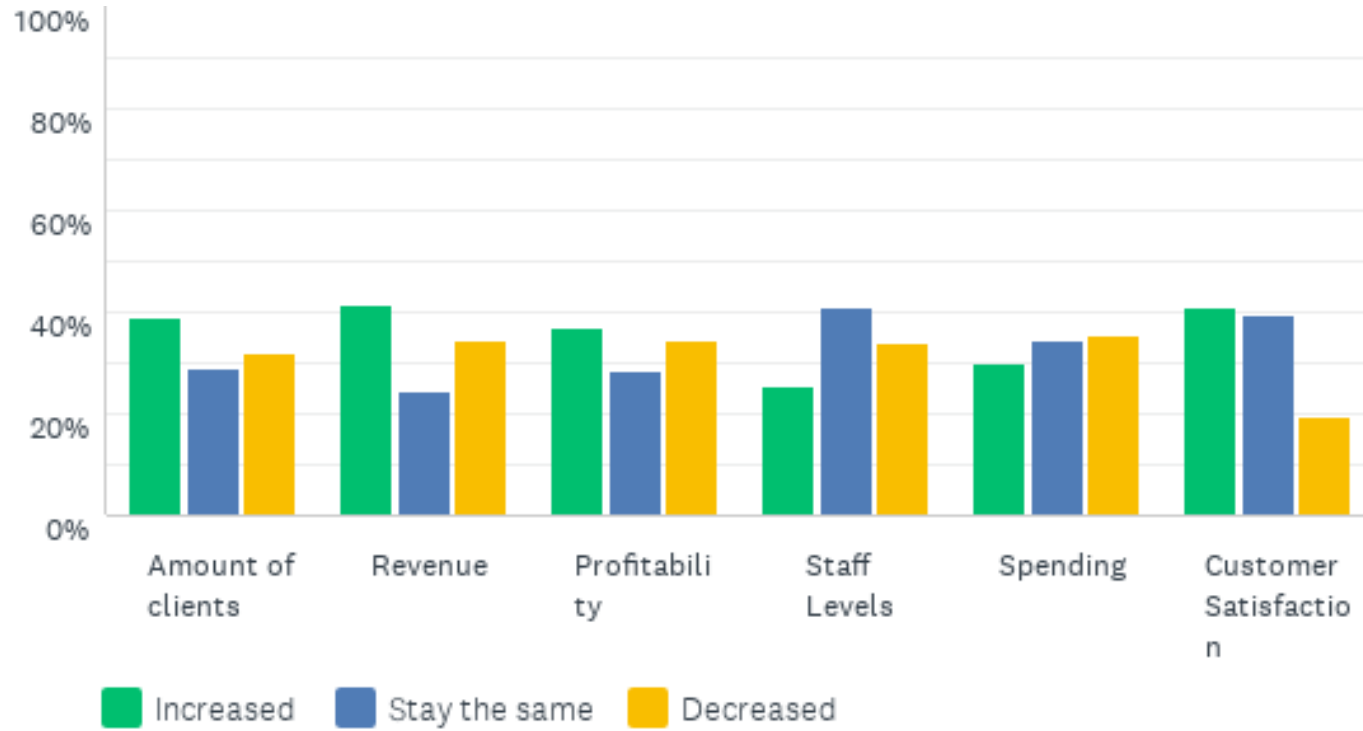
ANSWER CHOICES	RESPONSES
Good	15.28%
Average	19.44%
Poor	55.56%
N/A	9.72%

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

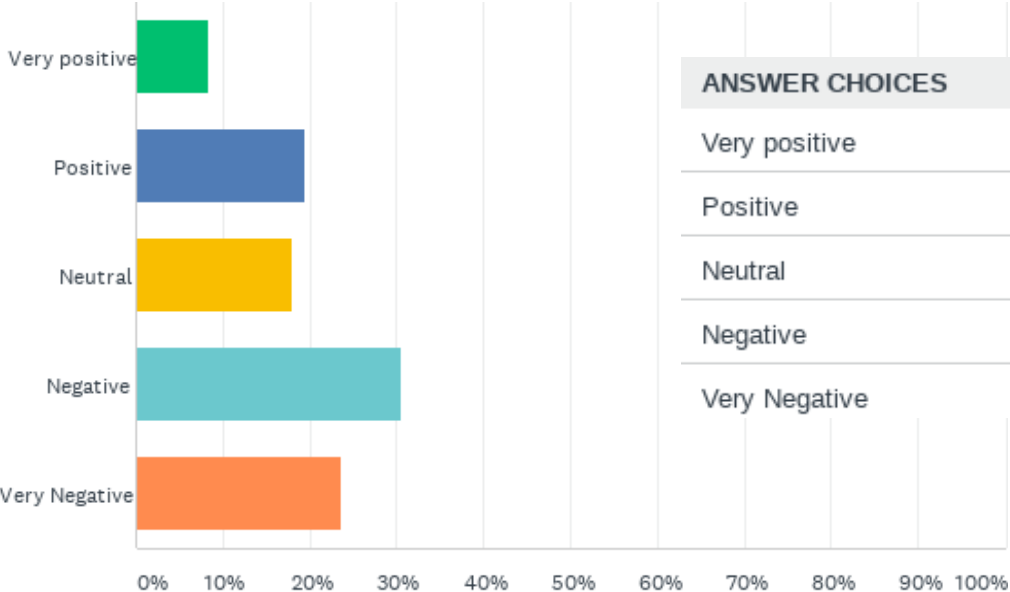
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	8.33%	12.50%	79.17%
Revenue	5.63%	11.27%	83.10%
Profitability	13.04%	11.59%	75.36%
Staff Levels	4.29%	17.14%	78.57%
Spending	5.63%	18.31%	76.06%
Customer Satisfaction	20.29%	56.52%	23.19%



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

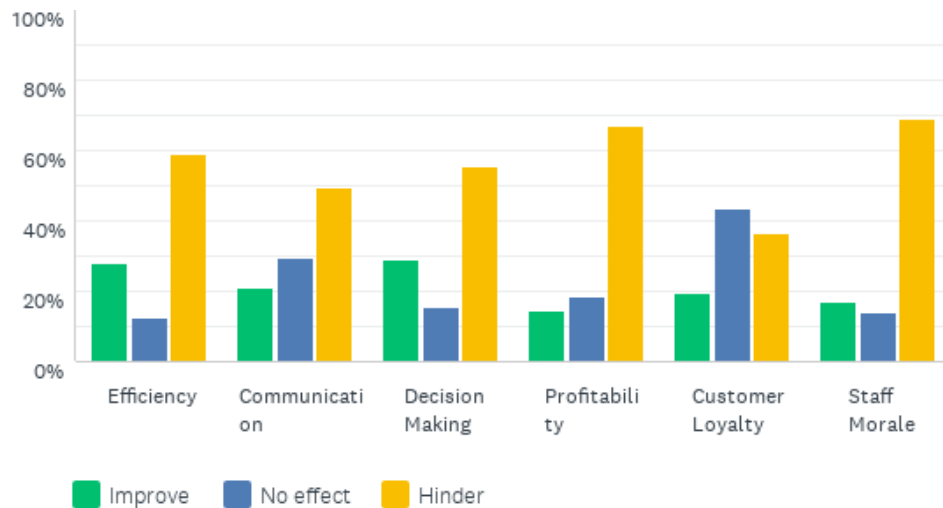


Q6: What is your attitude to the direction of the industry over the NEXT MONTH?



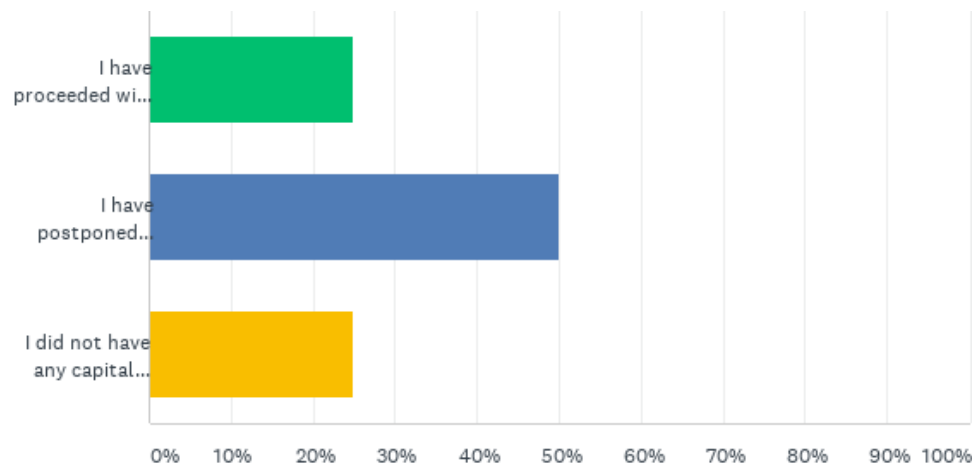
ANSWER CHOICES	RESPONSES
Very positive	8.33%
Positive	19.44%
Neutral	18.06%
Negative	30.56%
Very Negative	23.61%

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



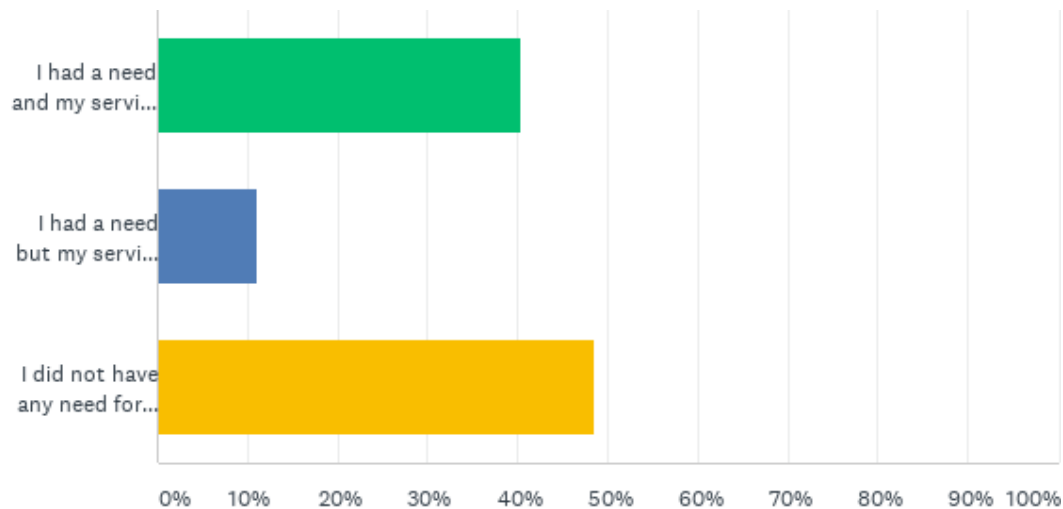
	IMPROVE	NO EFFECT	HINDER
Efficiency	28.17%	12.68%	59.15%
Communication	21.13%	29.58%	49.30%
Decision Making	29.17%	15.28%	55.56%
Profitability	14.29%	18.57%	67.14%
Customer Loyalty	19.72%	43.66%	36.62%
Staff Morale	16.90%	14.08%	69.01%

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



ANSWER CHOICES	RESPONSES
I have proceeded with planned capital spend	25.00%
I have postponed capital spending until COVID-19 effects has passed	50.00%
I did not have any capital spending planned	25.00%

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



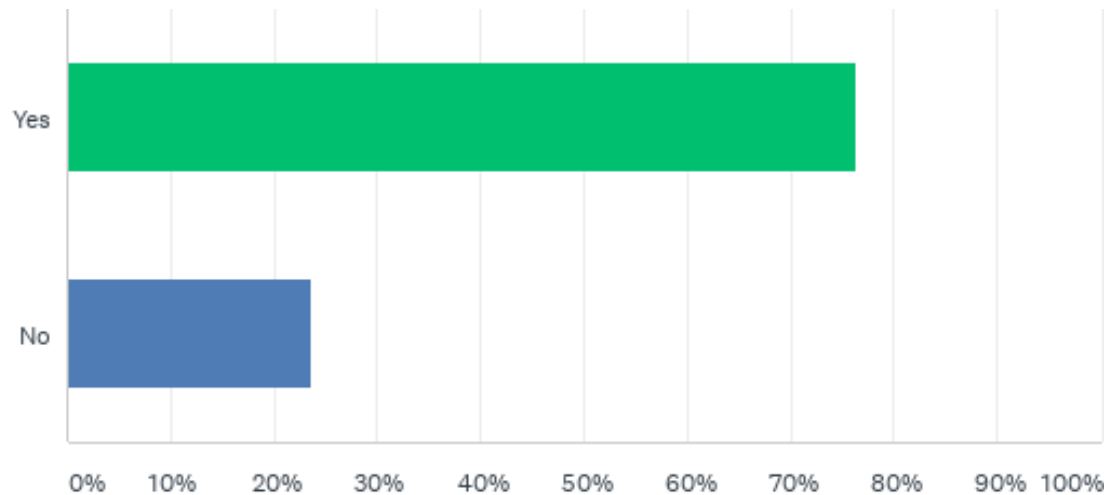
ANSWER CHOICES	RESPONSES
I had a need and my service supplier responded as normal	40.28%
I had a need but my service supplier was not able to respond	11.11%
I did not have any need for technical service	48.61%

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



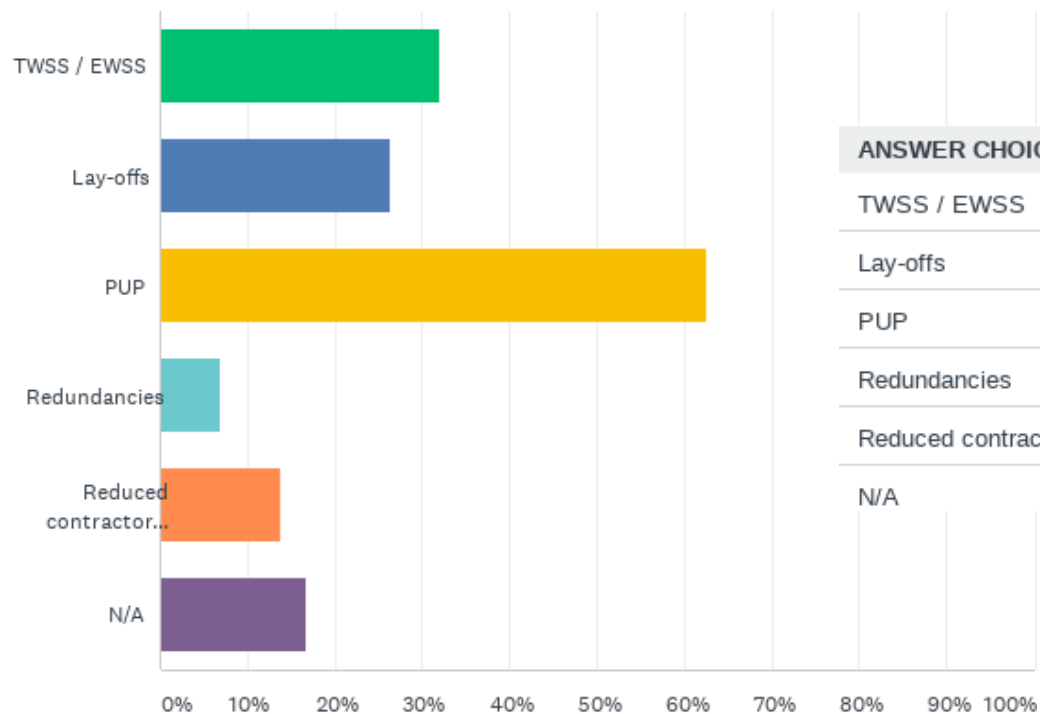
	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	62.50%	22.22%	15.28%
Taking risks	36.11%	30.56%	33.33%
Your employees	61.76%	22.06%	16.18%
Your customers	61.97%	26.76%	11.27%
Your management team	59.72%	26.39%	13.89%
Your company finances	31.43%	28.57%	40.00%
Market conditions	28.17%	23.94%	47.89%
Customer loyalty	54.29%	34.29%	11.43%

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



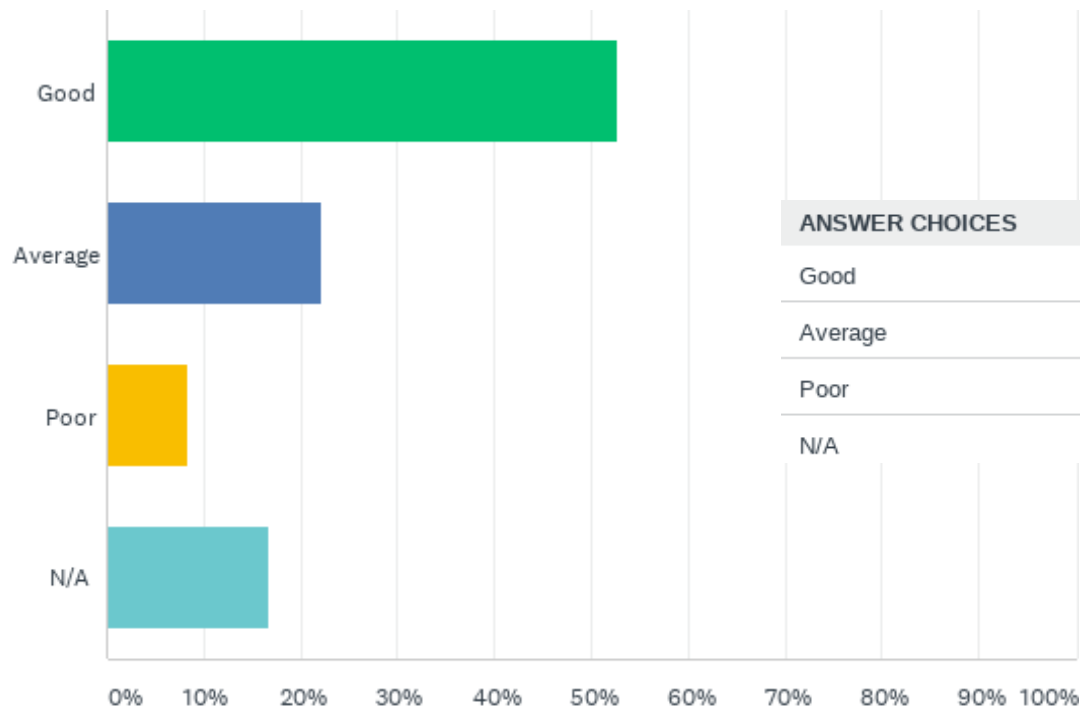
ANSWER CHOICES	RESPONSES
Yes	76.39%
No	23.61%

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



ANSWER CHOICES	RESPONSES
TWSS / EWSS	31.94%
Lay-offs	26.39%
PUP	62.50%
Redundancies	6.94%
Reduced contractor hours	13.89%
N/A	16.67%

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



ANSWER CHOICES

RESPONSES

Good

52.78%

Average

22.22%

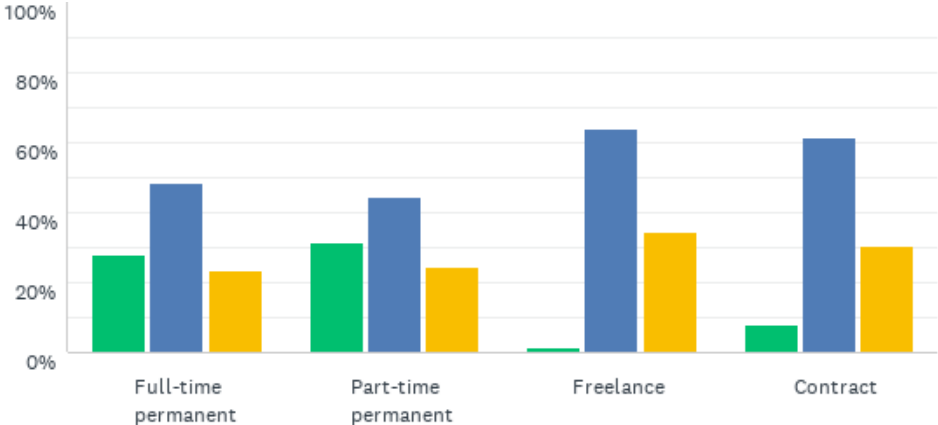
Poor

8.33%

N/A

16.67%

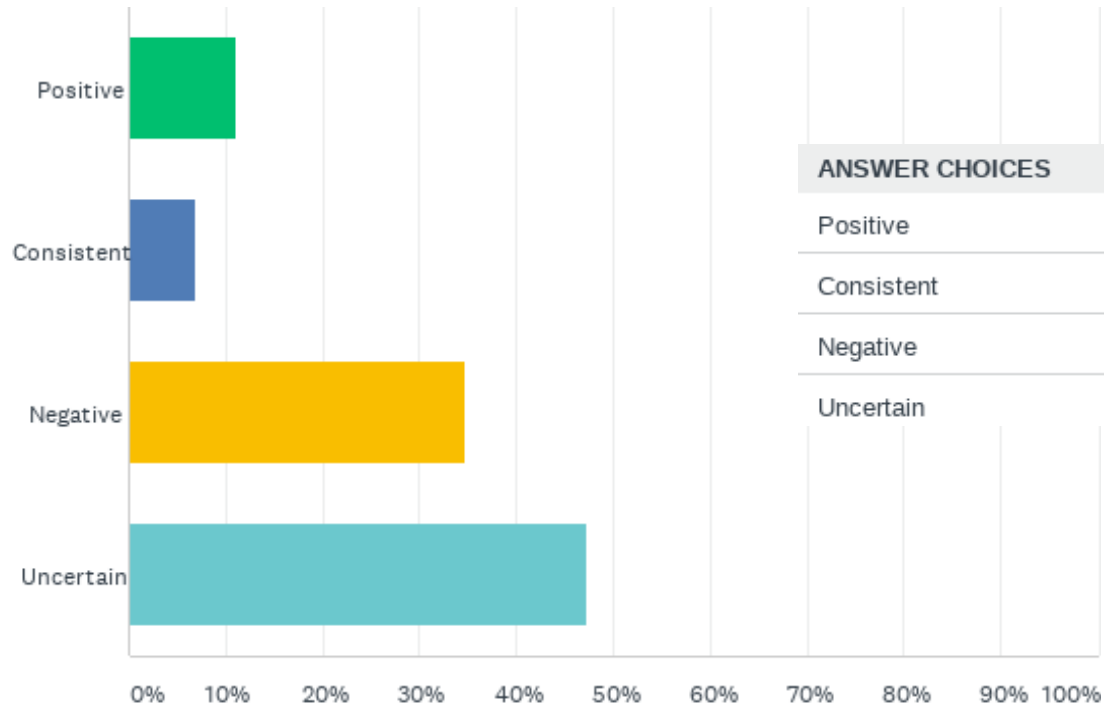
Q14: What are your current hiring plans for each type of staff?



■ Hiring
 ■ No change
 ■ Reduction

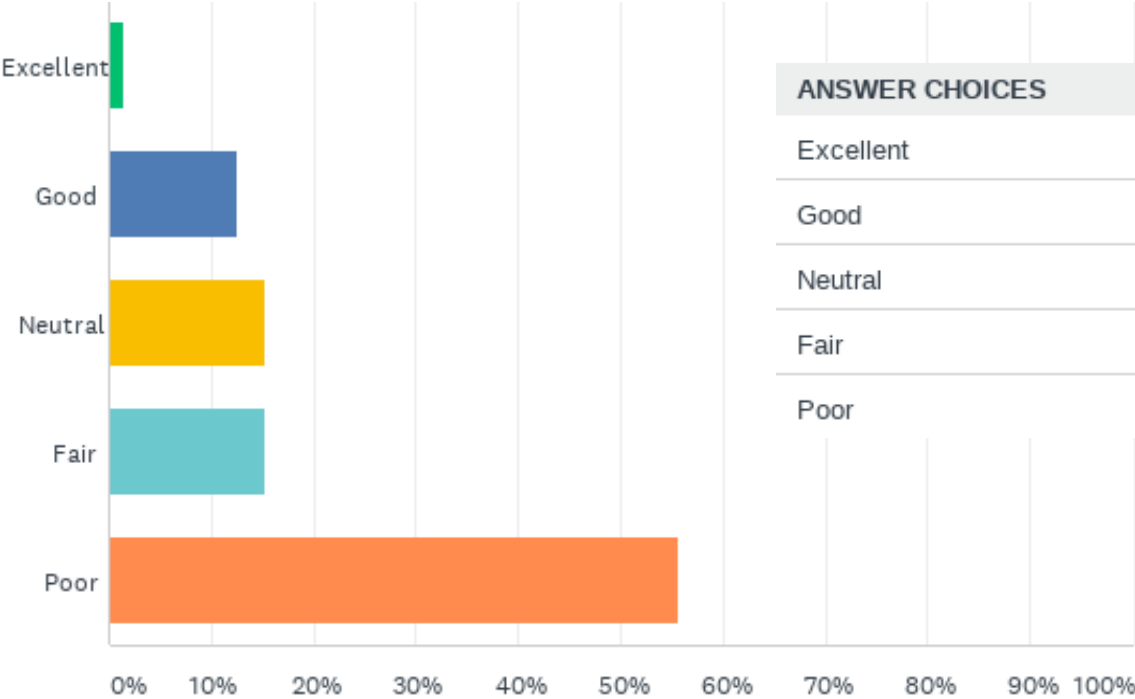
	HIRING	NO CHANGE	REDUCTION
Full-time permanent	27.94%	48.53%	23.53%
Part-time permanent	31.43%	44.29%	24.29%
Freelance	1.64%	63.93%	34.43%
Contract	8.06%	61.29%	30.65%

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



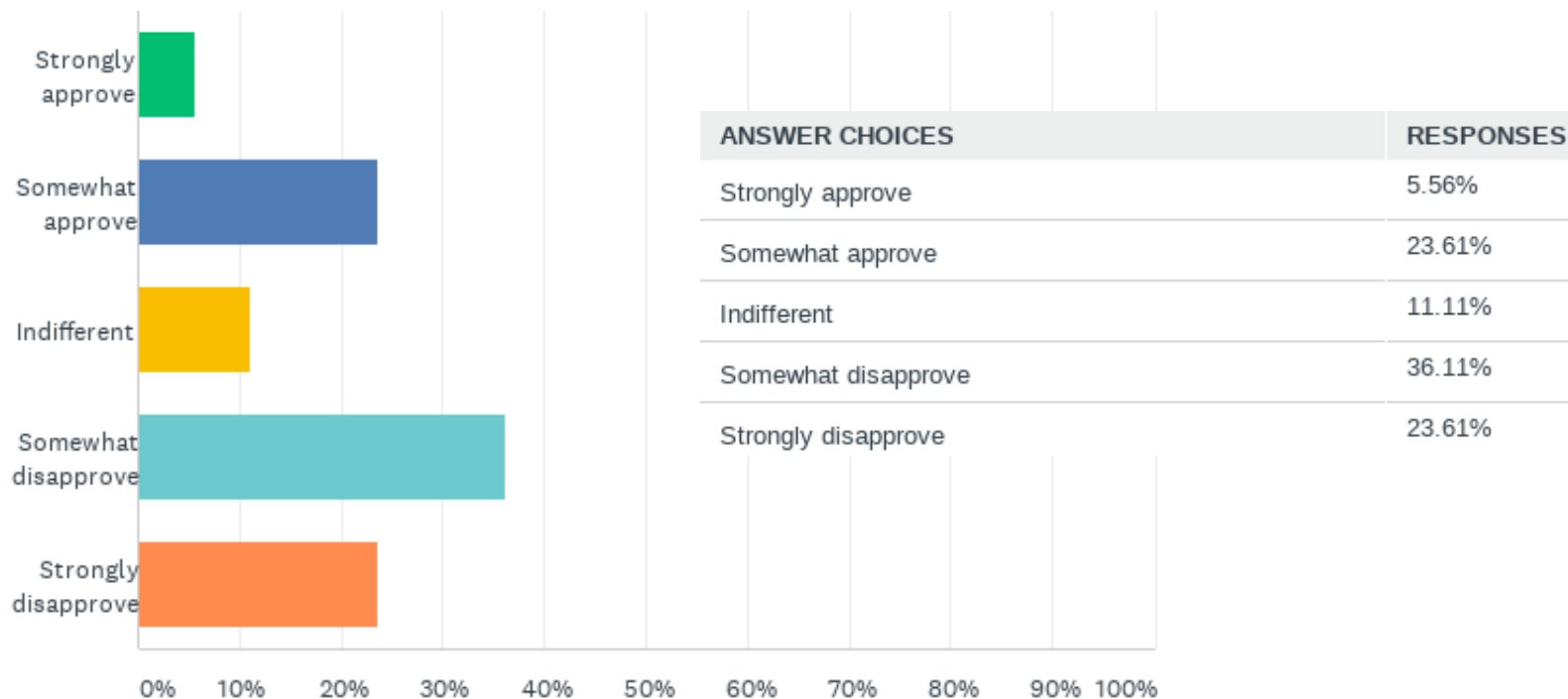
ANSWER CHOICES	RESPONSES
Positive	11.11%
Consistent	6.94%
Negative	34.72%
Uncertain	47.22%

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

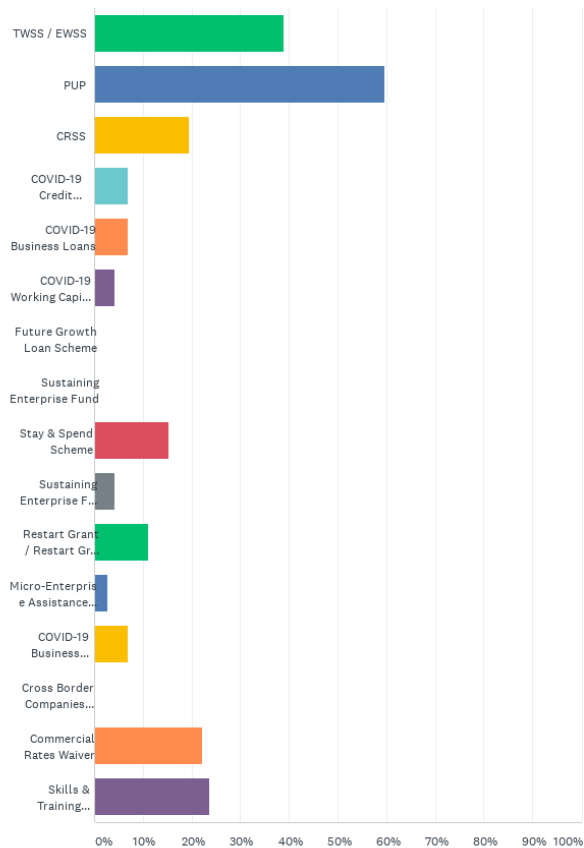


ANSWER CHOICES	RESPONSES
Excellent	1.39%
Good	12.50%
Neutral	15.28%
Fair	15.28%
Poor	55.56%

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

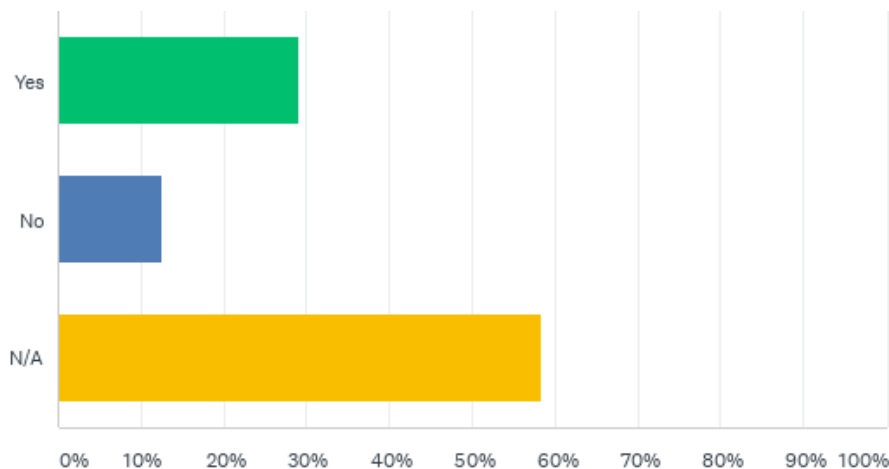


Q18: What if any Government supports have you availed of in the LAST 6 months?



ANSWER CHOICES	RESPONSES
TWSS / EWSS	38.89%
PUP	59.72%
CRSS	19.44%
COVID-19 Credit Guarantee Scheme	6.94%
COVID-19 Business Loans	6.94%
COVID-19 Working Capital Scheme	4.17%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	0.00%
Stay & Spend Scheme	15.28%
Sustaining Enterprise Fund for Small Enterprise	4.17%
Restart Grant / Restart Grant Plus	11.11%
Micro-Enterprise Assistance Fund	2.78%
COVID-19 Business Financial Planning Grant	6.94%
Cross Border Companies Emergency Business Solutions	0.00%
Commercial Rates Waiver	22.22%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	23.61%

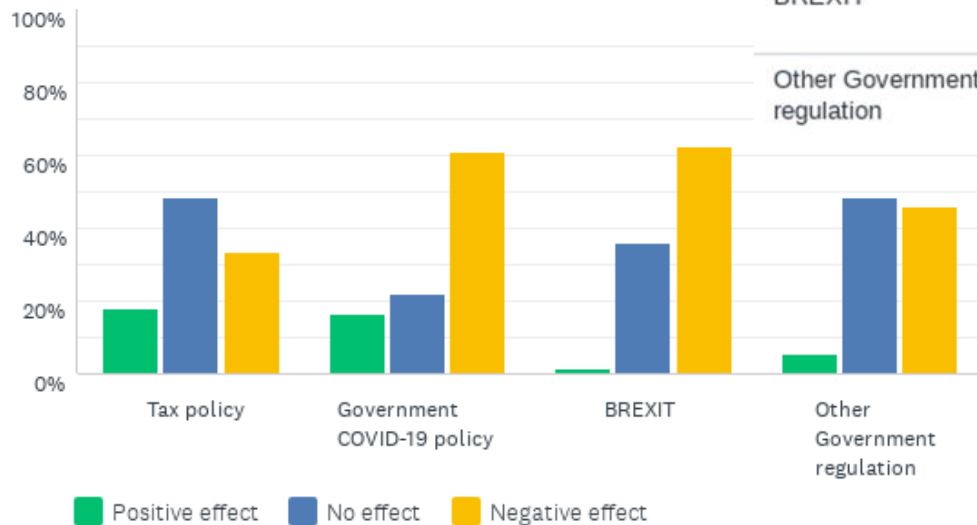
Q19: If you have not yet availed of any Government supports, do you plan to look at these options in the NEXT 6 months?



ANSWER CHOICES	RESPONSES
Yes	29.17%
No	12.50%
N/A	58.33%

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	18.06%	48.61%	33.33%
Government COVID-19 policy	16.67%	22.22%	61.11%
BREXIT	1.39%	36.11%	62.50%
Other Government regulation	5.56%	48.61%	45.83%



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

- A more planned and structured re-emergence of hospitality re-opening for the future.
 - Avoid complete closure of restaurants. Maybe reduce hours and have some sort of set closing time. Allowing trading up until 4/5pm with restrictions.
 - Clarity in decision making, we need advance notice as to when we will be open again fully. once the numbers are good we need to push to re-open urgently
 - Demanding (from the govt.) clarity in communications about re-opening the restaurant dine-in business.
 - Do more to keep "wet" pubs from opening and crowding people in at bar counters when only pubs serving food are allowed to be open (if that happens again).
 - Ensure lower Vat and employment costs continue.
 - Financial help to restart.
 - Get a conditional time frame of reopening or sector. i.e if we are at a certain level of cases or vaccination then we can move to outdoor dining or indoor.
 - Get restrictions lifted.
 - Get the VAT gone completely for the rest of the year. Continue TWSS for the rest of the year. That will give small businesses a fighting chance.
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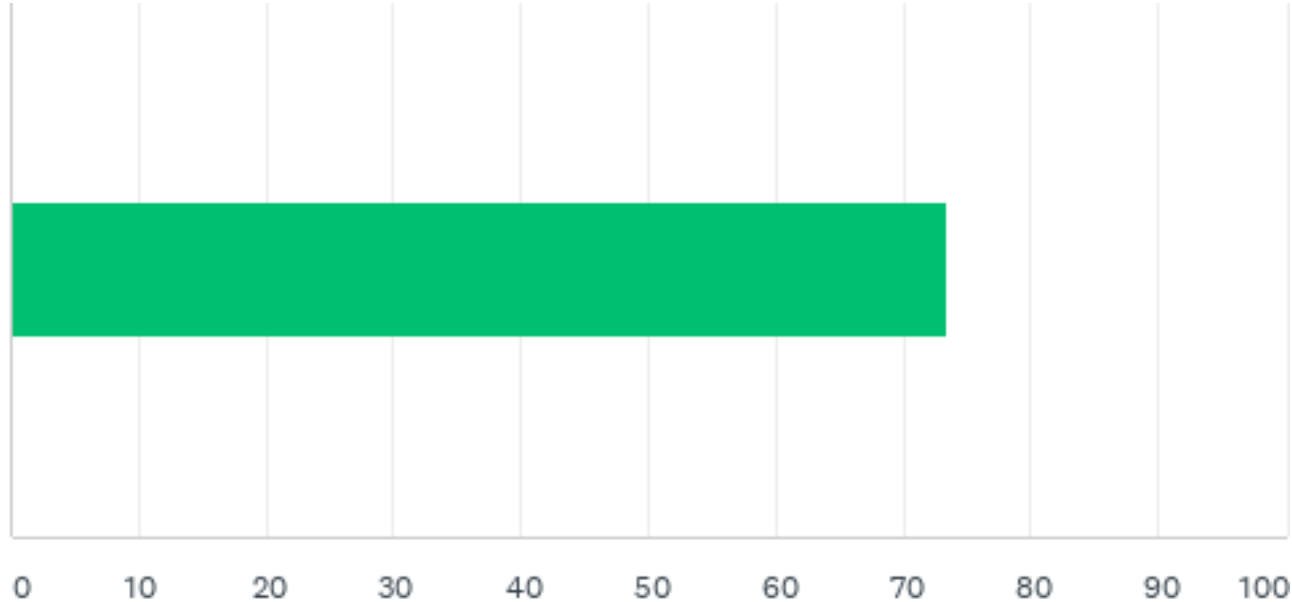
Q21: What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment?

- I find my services have benefited my clients greatly. People in this trade need an outsider to bounce off and feel reassured when it is legitimate feedback. The fear is too many people stay in their own heads and neglect their mental health. I believe a weekly chat with a coach would have a dramatic and positive impact on our Industry that is on its knees in many areas.
 - Industry representatives are worthless. If you decide to operate a business for over twenty years with an average return of 7.5%.
 - More comi chef jobs
 - More trained Chefs available
 - My business will only work when we get hospitality reopened and we start to look to develop concepts and start retraining kitchen teams etc. I feel a lot of chef won't go back.
 - Not a lot they can do, maybe stop complaining and get on with things. Support the lock down, never mind asking for reopening dates which are unrealistic and silly. Get rid or control the virus, rollout vaccines and then we can open. What's the point of government giving us dates they can't guarantee?
 - Not one shoe fits all capacity should depend on the size of the business some premises are capable of Catering for more than 15 safety.
-

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

- Open up outside dining.
 - Open up the country.
 - Positive Attitude
 - Pushing on VAT reduction s and extended opening hours.
 - Reduce VAT, promote back to training (up-skilling) for employees & employers.
 - Supporting local businesses big or small to maintain food and beverage industry throughout the current situation.
 - Tackle insurance and covid cover. Outside dining regulations. Wine licence v full license.
 - To be ready and supportive when we are allowed to re-open
 - To keep the 9% VAT rate
 - To see a plan with a structured plan to return to opening is all I need to see. Definite positive movement.
-

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



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