

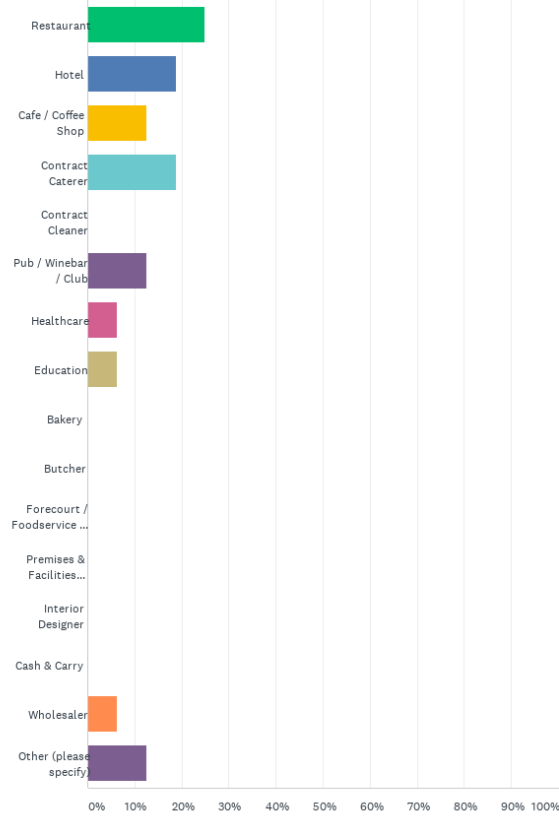


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

July 2021

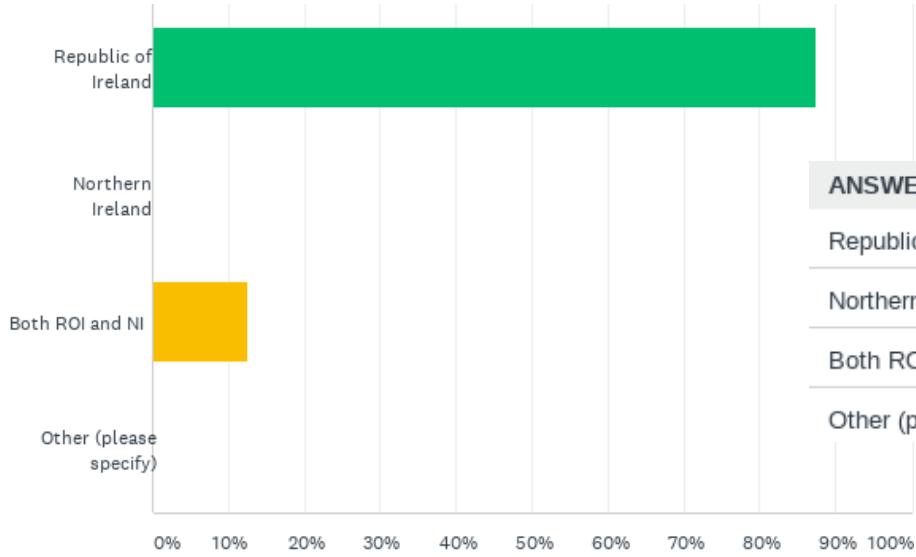


Q1: What Sector Category do you operate in?



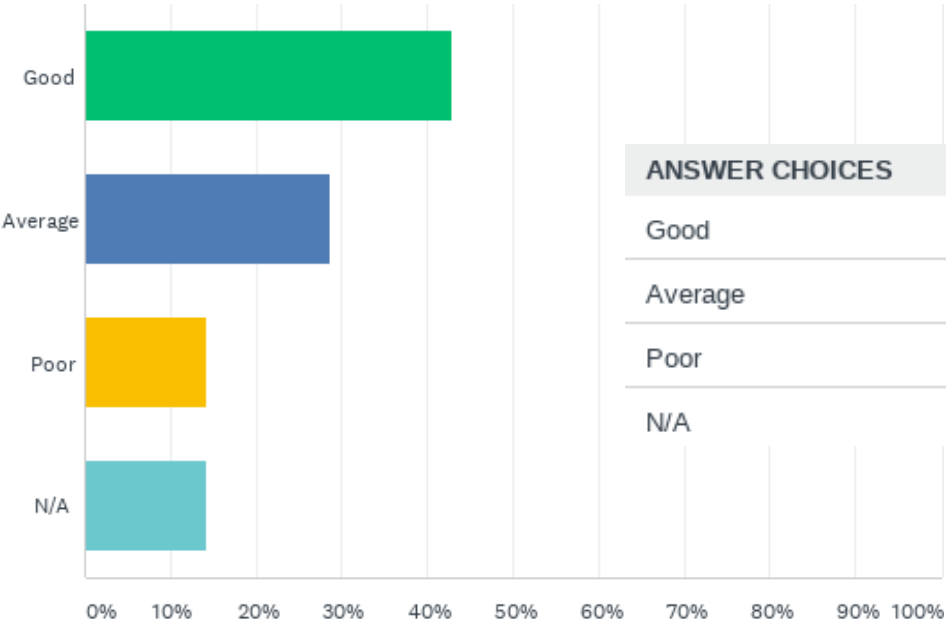
ANSWER CHOICES	RESPONSES
Restaurant	25.00%
Hotel	18.75%
Cafe / Coffee Shop	12.50%
Contract Caterer	18.75%
Contract Cleaner	0.00%
Pub / Winebar / Club	12.50%
Healthcare	6.25%
Education	6.25%
Bakery	0.00%
Butcher	0.00%
Forecourt / Foodservice in Retail Setting	0.00%
Premises & Facilities Management	0.00%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	6.25%
Other (please specify)	12.50%

Q2: What jurisdiction do you operate in?



ANSWER CHOICES	RESPONSES
Republic of Ireland	87.50%
Northern Ireland	0.00%
Both ROI and NI	12.50%
Other (please specify)	0.00%

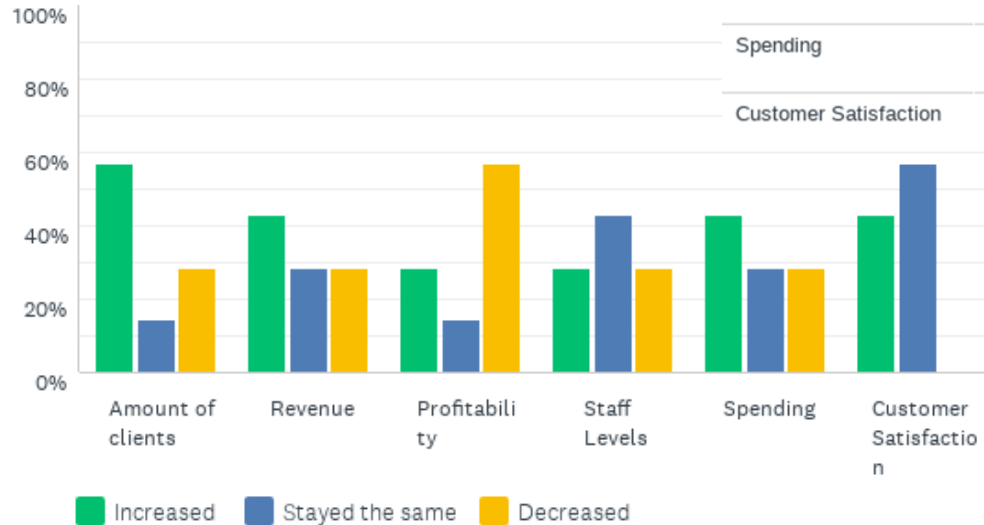
Q3: How would you describe the overall performance of your business over the LAST 6 months?



ANSWER CHOICES	RESPONSES
Good	42.86%
Average	28.57%
Poor	14.29%
N/A	14.29%

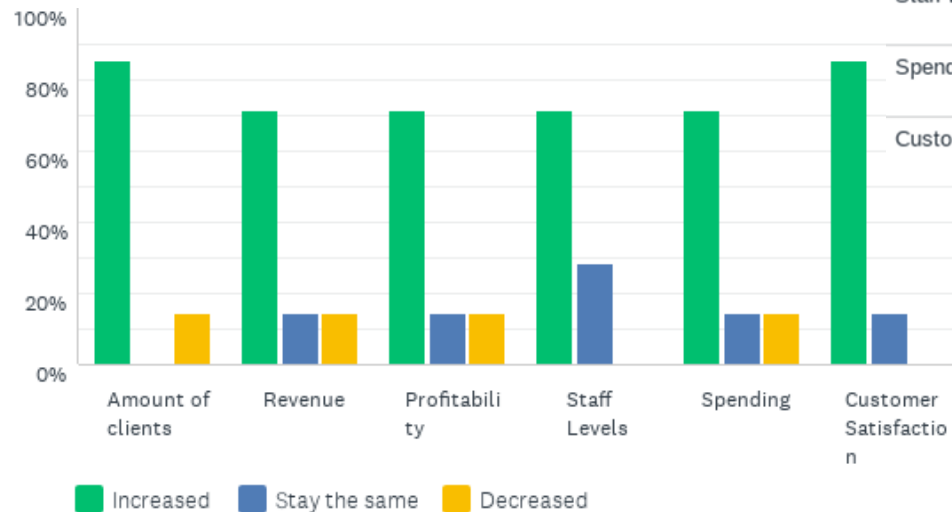
Q4: Please indicate the performance of your business for each of the criteria below over the LAST 6 months:

	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	57.14%	14.29%	28.57%
Revenue	42.86%	28.57%	28.57%
Profitability	28.57%	14.29%	57.14%
Staff Levels	28.57%	42.86%	28.57%
Spending	42.86%	28.57%	28.57%
Customer Satisfaction	42.86%	57.14%	0.00%

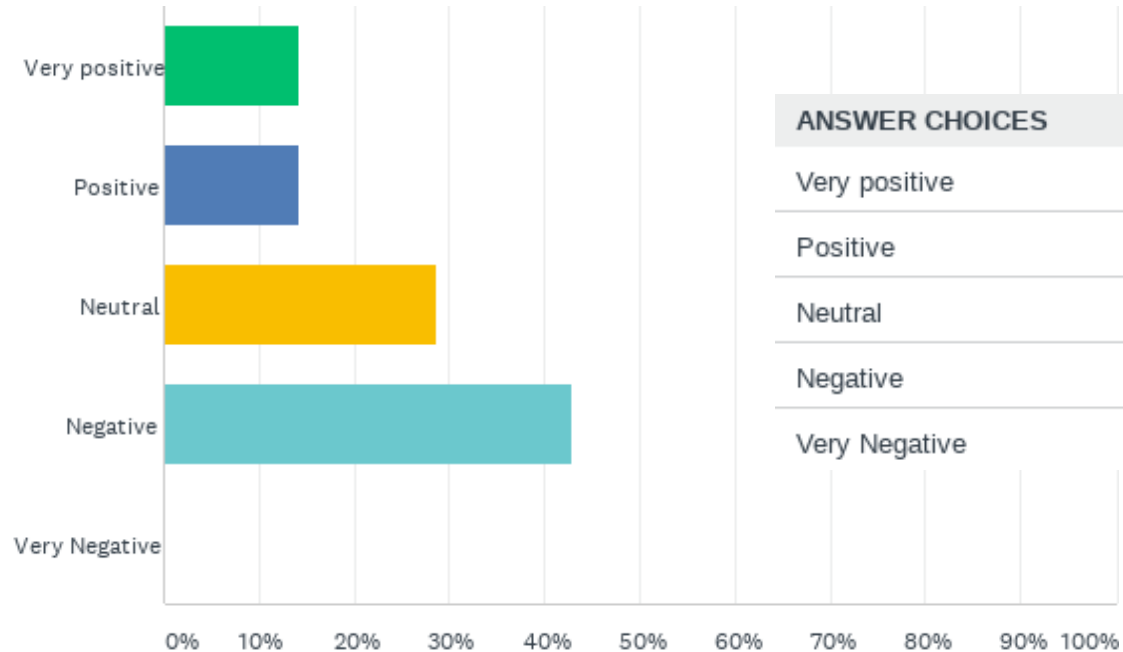


Q5: Please indicate the EXPECTED performance of your business for each of the criteria below over the NEXT 6 months:

	INCREASED	STAY THE SAME	DECREASED
Amount of clients	85.71%	0.00%	14.29%
Revenue	71.43%	14.29%	14.29%
Profitability	71.43%	14.29%	14.29%
Staff Levels	71.43%	28.57%	0.00%
Spending	71.43%	14.29%	14.29%
Customer Satisfaction	85.71%	14.29%	0.00%



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



ANSWER CHOICES

RESPONSES

Very positive

14.29%

Positive

14.29%

Neutral

28.57%

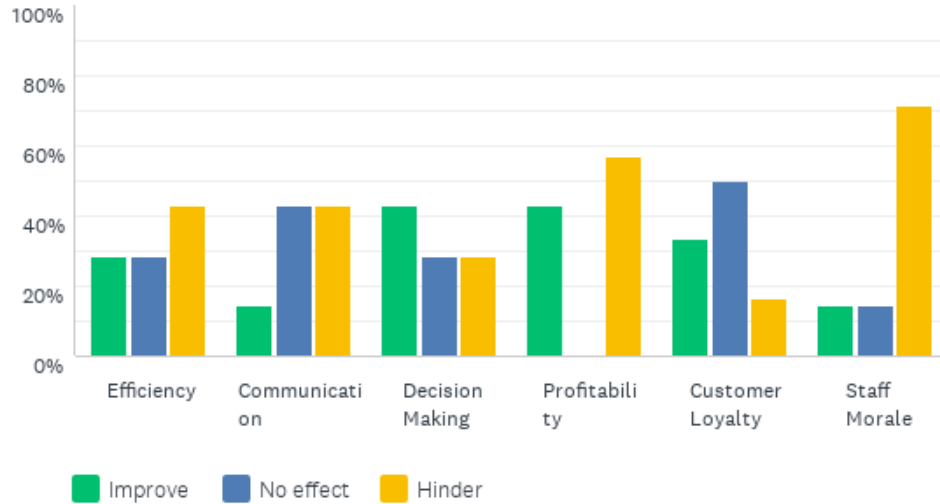
Negative

42.86%

Very Negative

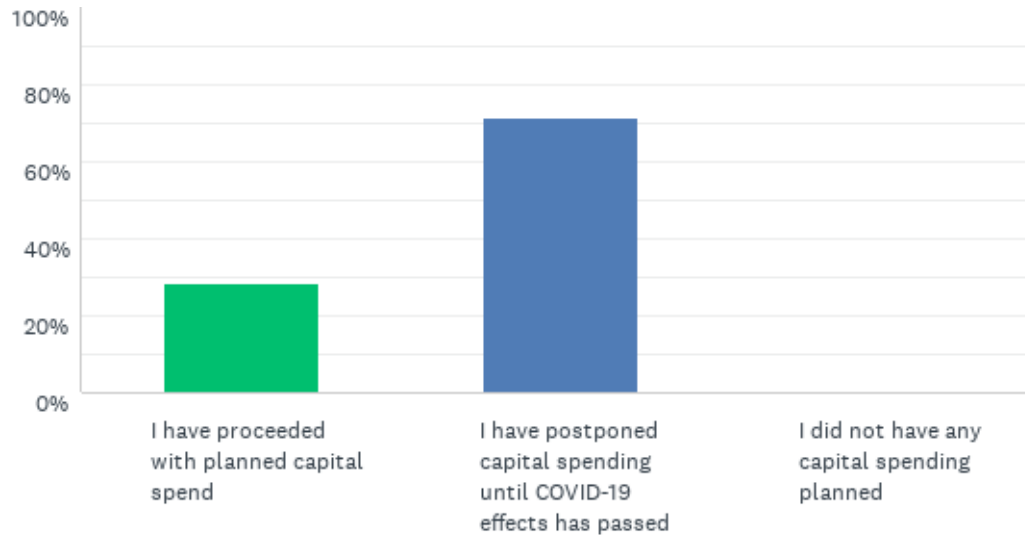
0.00%

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



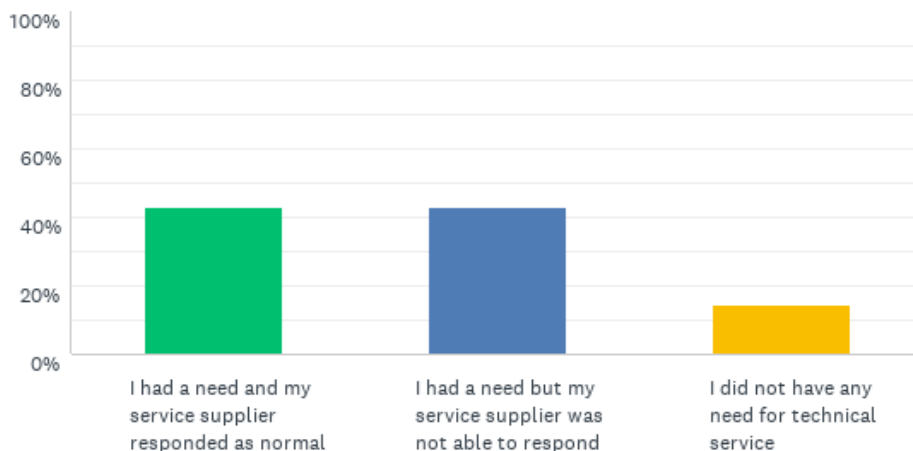
	IMPROVE	NO EFFECT	HINDER
Efficiency	28.57%	28.57%	42.86%
Communication	14.29%	42.86%	42.86%
Decision Making	42.86%	28.57%	28.57%
Profitability	42.86%	0.00%	57.14%
Customer Loyalty	33.33%	50.00%	16.67%
Staff Morale	14.29%	14.29%	71.43%

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



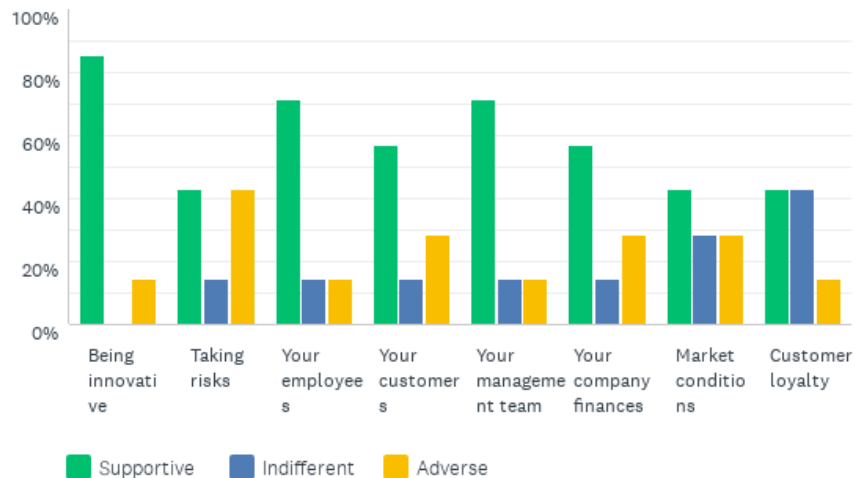
ANSWER CHOICES	RESPONSES
I have proceeded with planned capital spend	28.57%
I have postponed capital spending until COVID-19 effects has passed	71.43%
I did not have any capital spending planned	0.00%

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



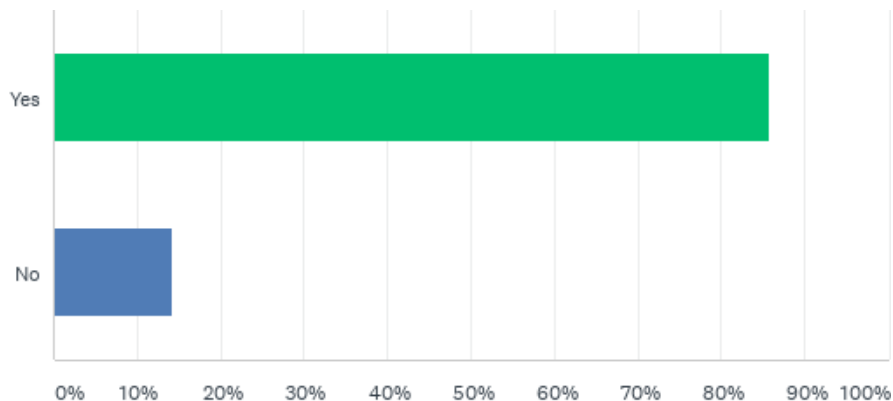
ANSWER CHOICES	RESPONSES
I had a need and my service supplier responded as normal	42.86%
I had a need but my service supplier was not able to respond	42.86%
I did not have any need for technical service	14.29%

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



	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	85.71%	0.00%	14.29%
Taking risks	42.86%	14.29%	42.86%
Your employees	71.43%	14.29%	14.29%
Your customers	57.14%	14.29%	28.57%
Your management team	71.43%	14.29%	14.29%
Your company finances	57.14%	14.29%	28.57%
Market conditions	42.86%	28.57%	28.57%
Customer loyalty	42.86%	42.86%	14.29%

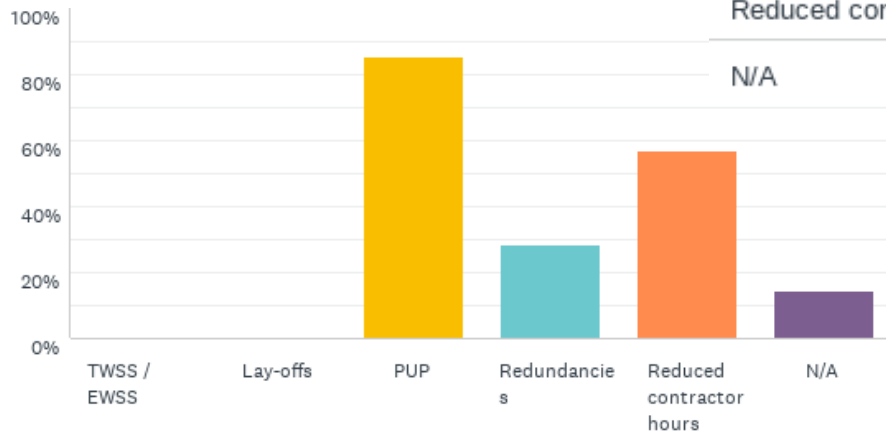
Q11: Have you had to reduce your workforce due to current trading conditions?



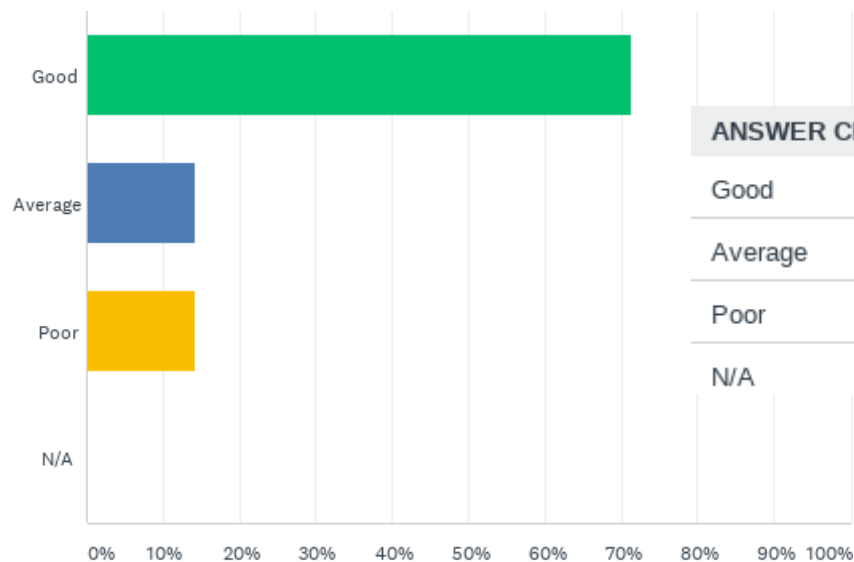
ANSWER CHOICES	RESPONSES
Yes	85.71%
No	14.29%

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	0.00%
Lay-offs	0.00%
PUP	85.71%
Redundancies	28.57%
Reduced contractor hours	57.14%



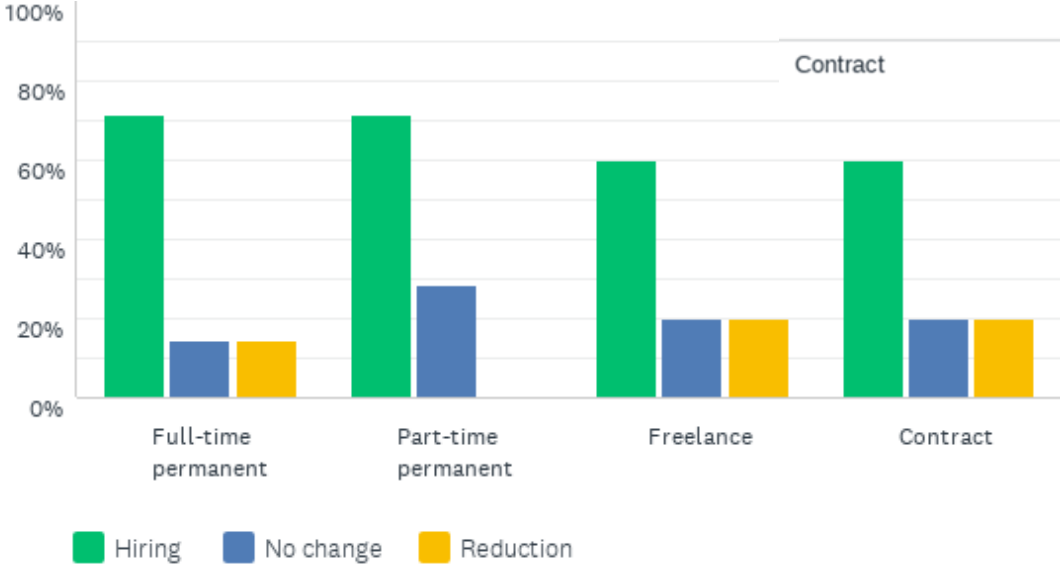
Q13: How would you describe the overall performance of your team over the last 6 months?



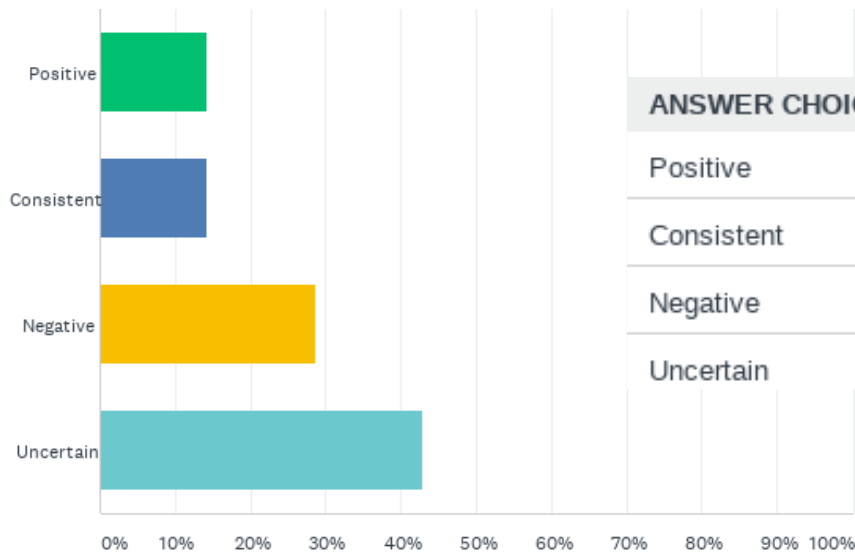
ANSWER CHOICES	RESPONSES
Good	71.43%
Average	14.29%
Poor	14.29%
N/A	0.00%

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

	HIRING	NO CHANGE	REDUCTION
Full-time permanent	71.43%	14.29%	14.29%
Part-time permanent	71.43%	28.57%	0.00%
Freelance	60.00%	20.00%	20.00%
Contract	60.00%	20.00%	20.00%

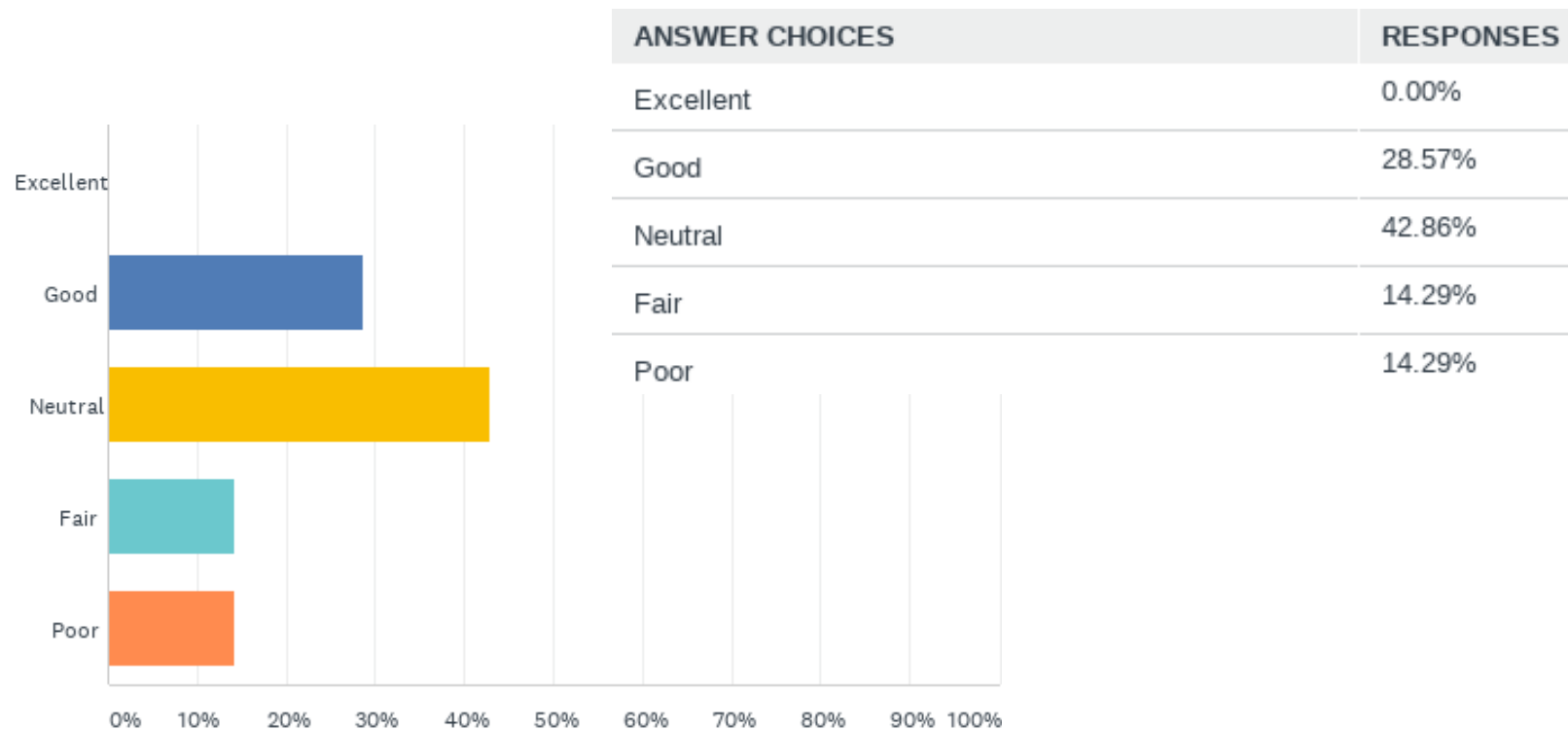


Q15: How would you describe your overall perception of the hospitality sector right now?

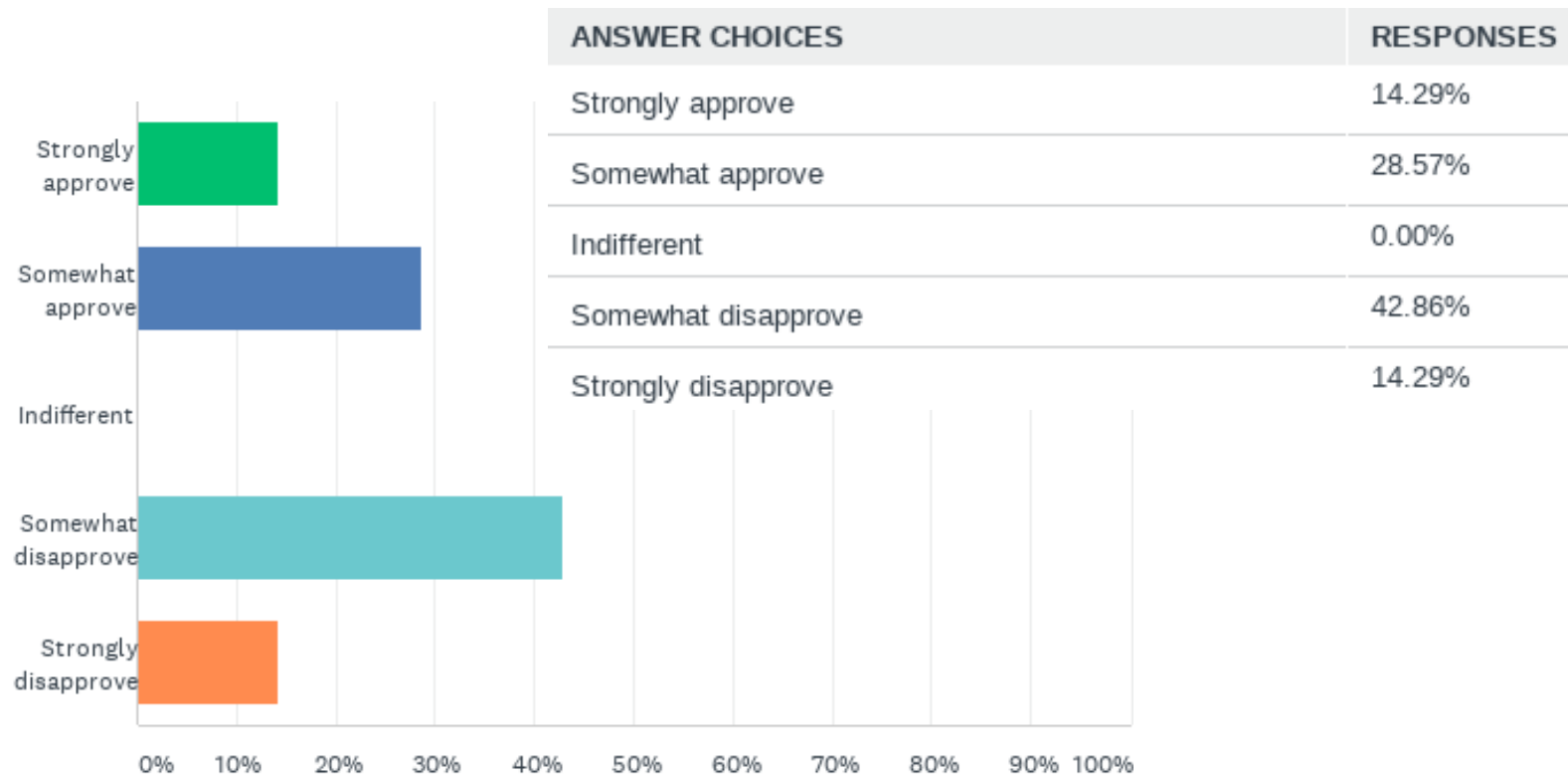


ANSWER CHOICES	RESPONSES
Positive	14.29%
Consistent	14.29%
Negative	28.57%
Uncertain	42.86%

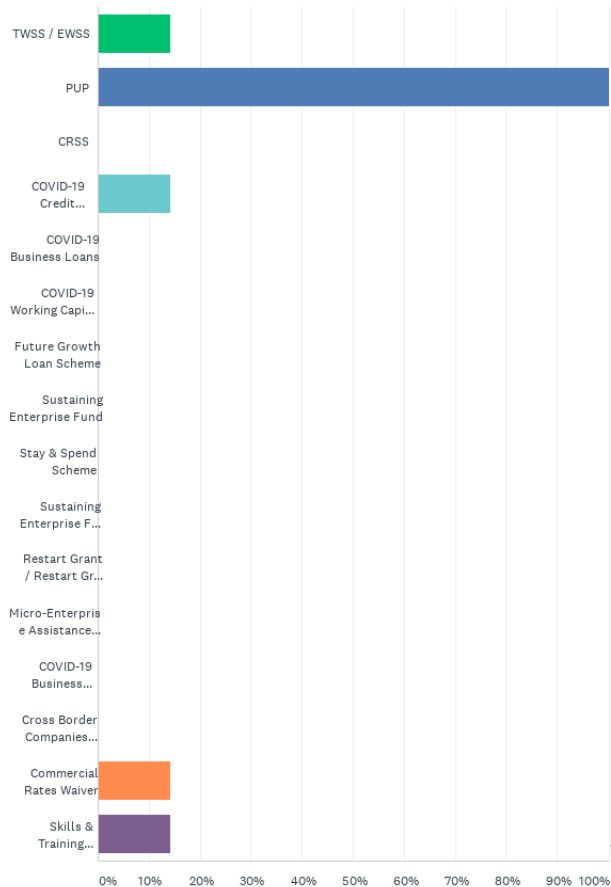
Q16: What is your opinion of the current economic climate?



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

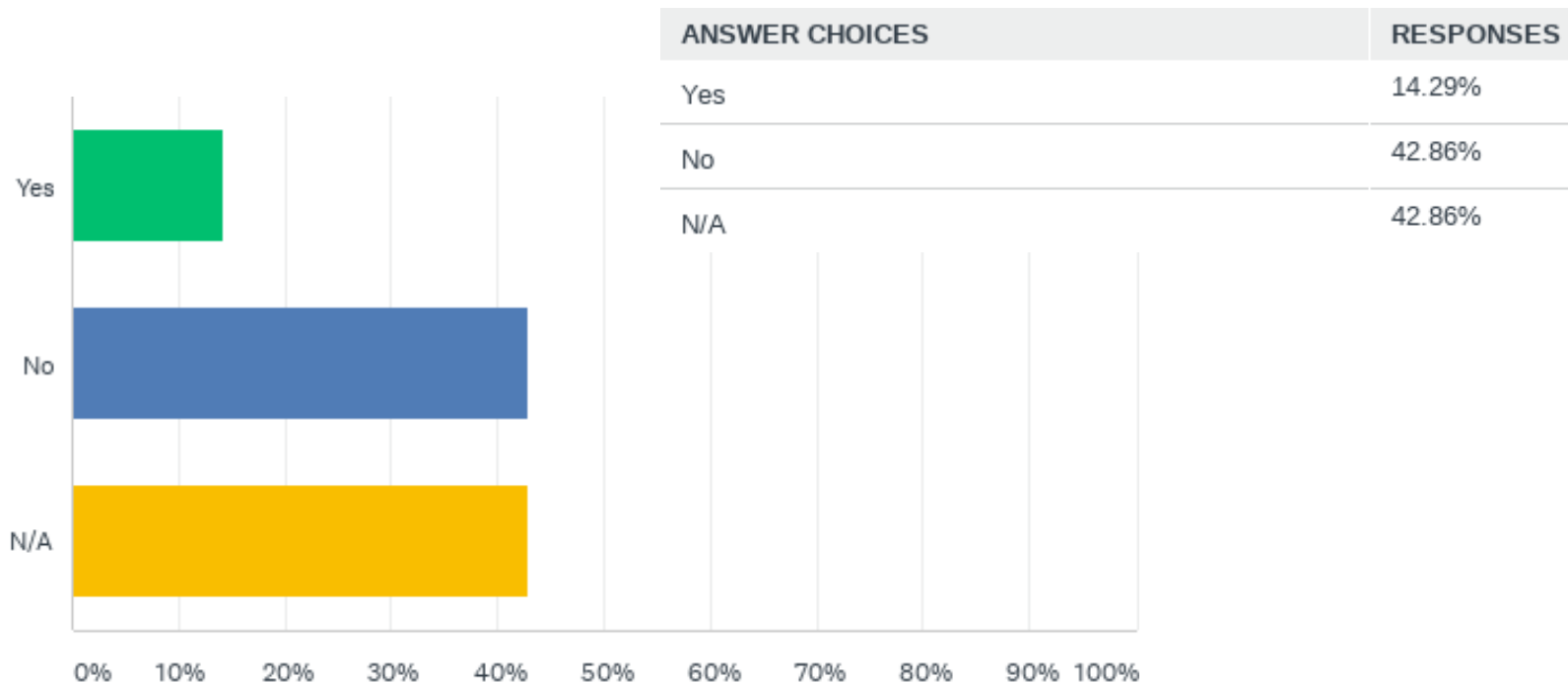


Q18: What if any Government supports have you availed of in the LAST 6 months?

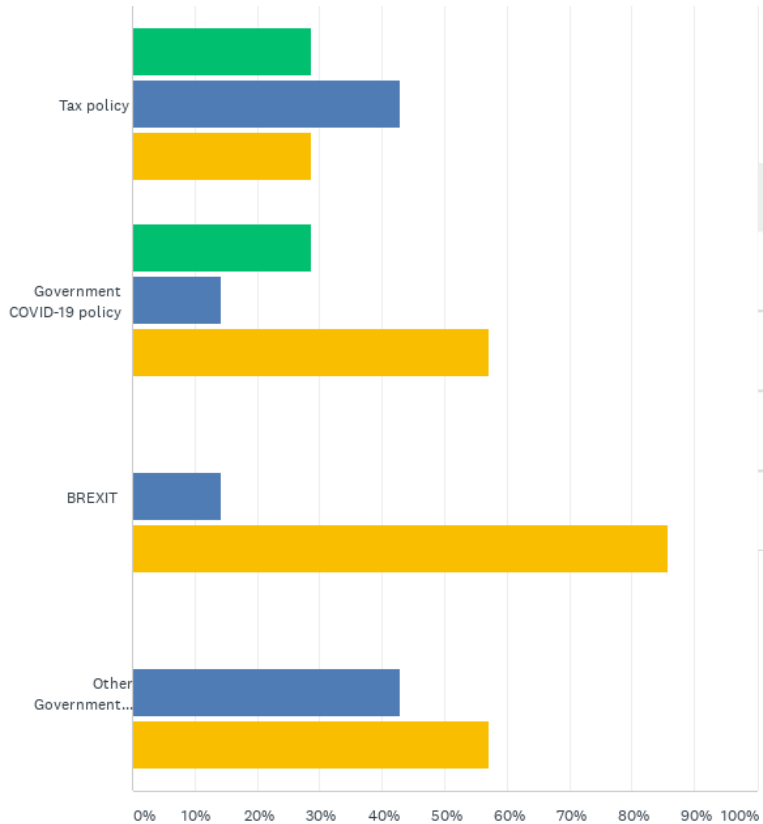


ANSWER CHOICES	RESPONSES
TWSS / EWSS	14.29%
PUP	100.00%
CRSS	0.00%
COVID-19 Credit Guarantee Scheme	14.29%
COVID-19 Business Loans	0.00%
COVID-19 Working Capital Scheme	0.00%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	0.00%
Stay & Spend Scheme	0.00%
Sustaining Enterprise Fund for Small Enterprise	0.00%
Restart Grant / Restart Grant Plus	0.00%
Micro-Enterprise Assistance Fund	0.00%
COVID-19 Business Financial Planning Grant	0.00%
Cross Border Companies Emergency Business Solutions	0.00%
Commercial Rates Waiver	14.29%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	14.29%

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



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?



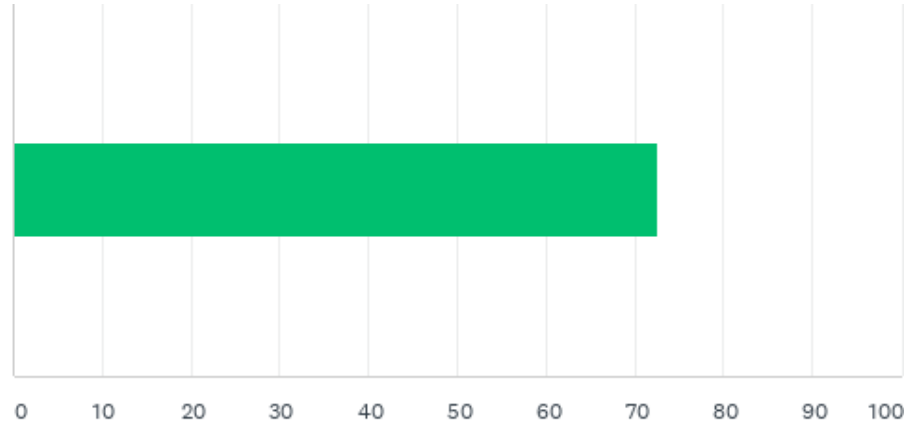
	POSITIVE EFFECT	NO EFFECT	NEGATIVE EFFECT
Tax policy	28.57%	42.86%	28.57%
Government COVID-19 policy	28.57%	14.29%	57.14%
BREXIT	0.00%	14.29%	85.71%
Other Government regulation	0.00%	42.86%	57.14%

■ Positive effect
 ■ No effect
 ■ Negative effect

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

- Cost of goods Supply issues Staff shortages
 - Train chefs like they did with failte Ireland when I qualified in 2006 trainee need to get paid.
 - The hospitality and service industry has been damaged beyond repair as so much knowledge left the industry, restaurant outdoor dining on limited menus, reduced choice, less skill requirement, and we are going to open indoor, but need to manage the customer beyond a service scope of what a restaurant is. Now we have less staff available, unskilled, and capacity increased. The greedy businesses out there will use as much as possible due to facts such as shorter trading period, holiday period, min tourism, and look to increase profitability. Quality and customers will suffer. The education system also impacted as hospitality workers don't seem to be taking up positions offered.
 - Tax breaks and staff shortages
 - Massive chef and wait staff shortage must be tackled
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Q22: To what extent to you think the current working environment has affected your mental health and the mental health of your team?



ANSWER CHOICES

AVERAGE NUMBER

73

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