

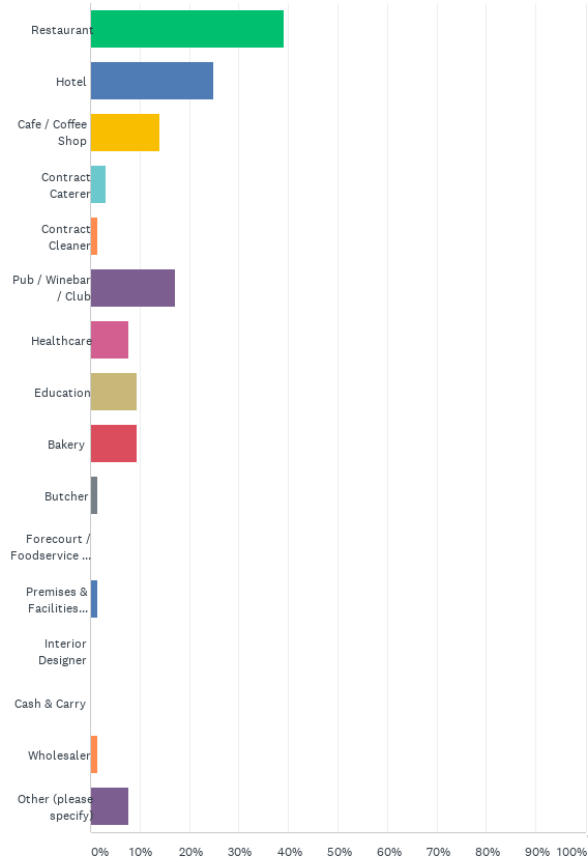


FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

JUNE 2021

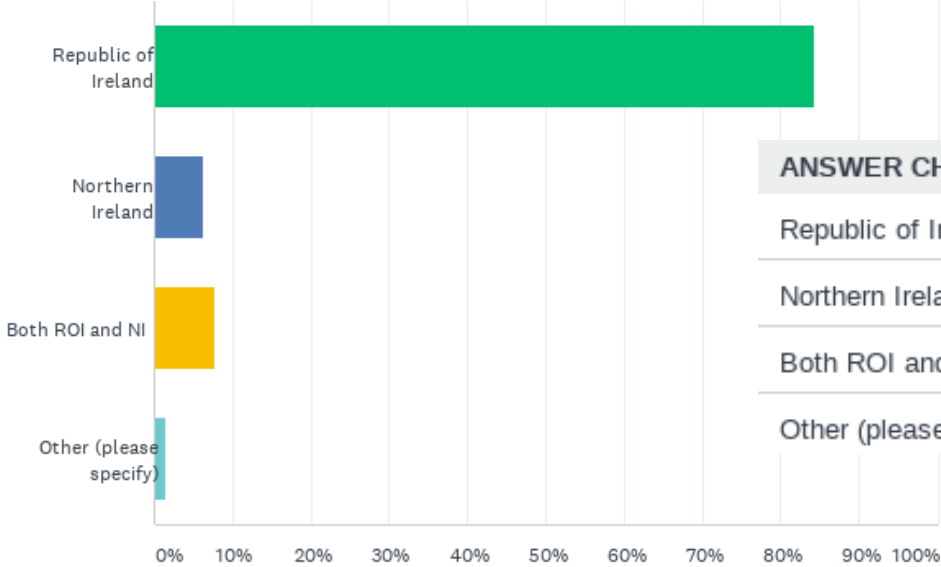


Q1: What Sector Category do you operate in?



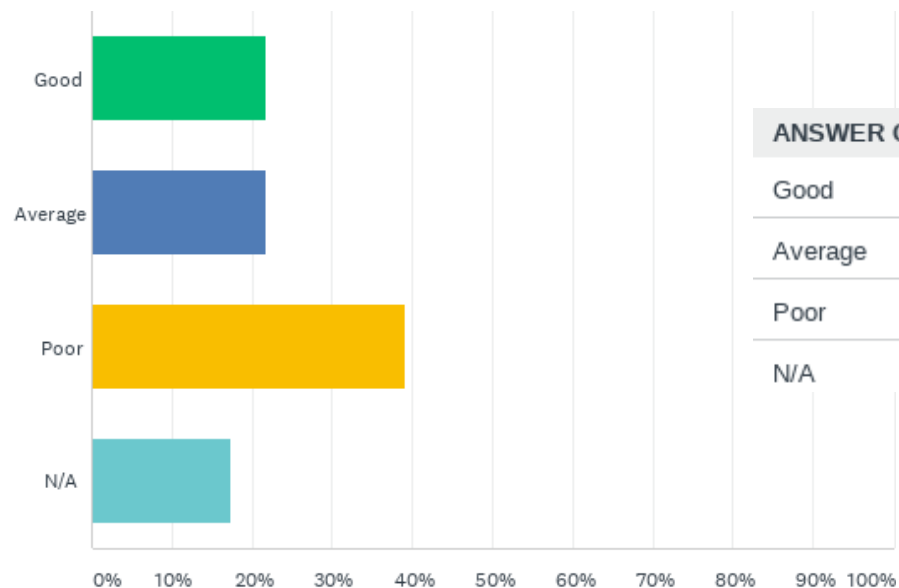
ANSWER CHOICES	RESPONSES
Restaurant	39.06%
Hotel	25.00%
Cafe / Coffee Shop	14.06%
Contract Caterer	3.13%
Contract Cleaner	1.56%
Pub / Winebar / Club	17.19%
Healthcare	7.81%
Education	9.38%
Bakery	9.38%
Butcher	1.56%
Forecourt / Foodservice in Retail Setting	0.00%
Premises & Facilities Management	1.56%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	1.56%
Other (please specify)	7.81%

Q2: What jurisdiction do you operate in?



ANSWER CHOICES	RESPONSES
Republic of Ireland	84.38%
Northern Ireland	6.25%
Both ROI and NI	7.81%
Other (please specify)	1.56%

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

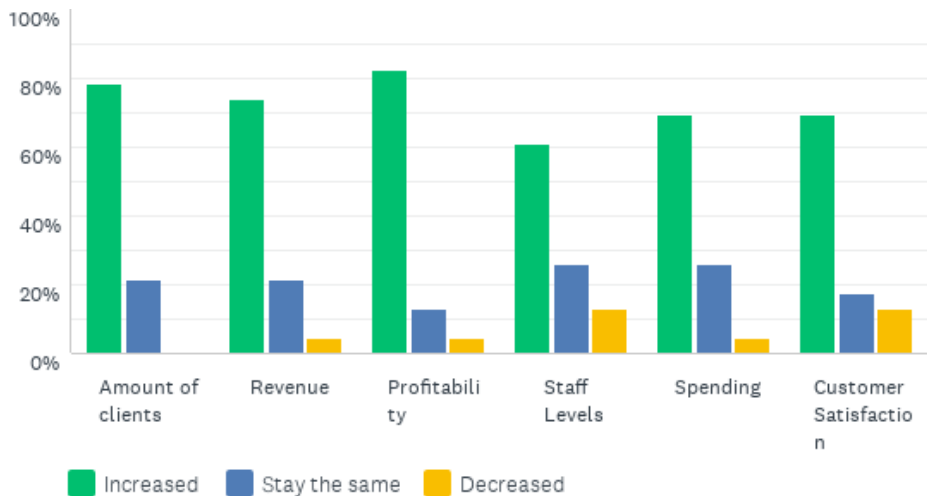


ANSWER CHOICES	RESPONSES
Good	21.74%
Average	21.74%
Poor	39.13%
N/A	17.39%

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

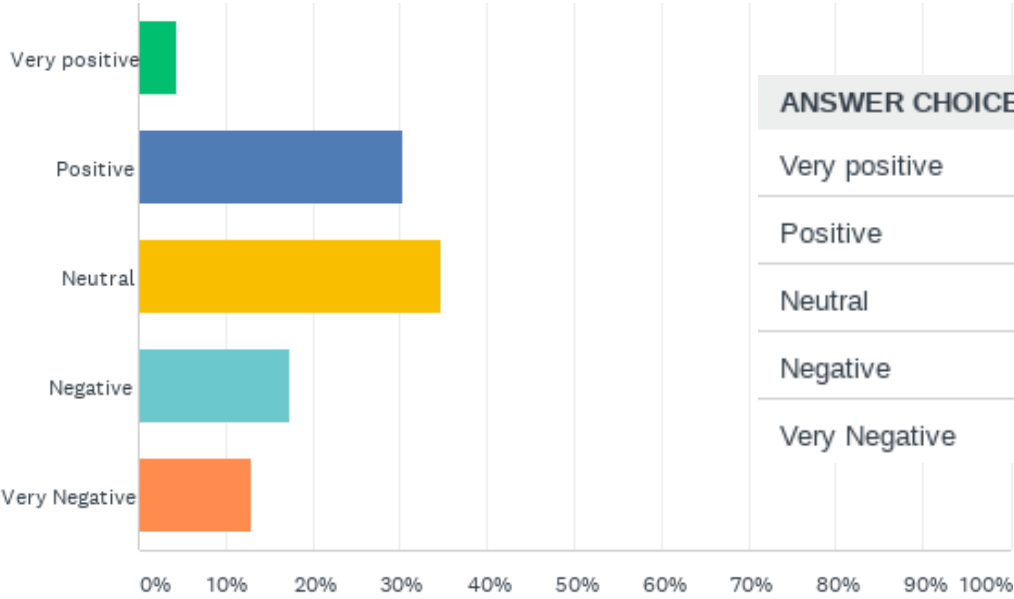


Q5: Please indicate the EXPECTED performance of your business for each of the criteria below over the NEXT 6 months:



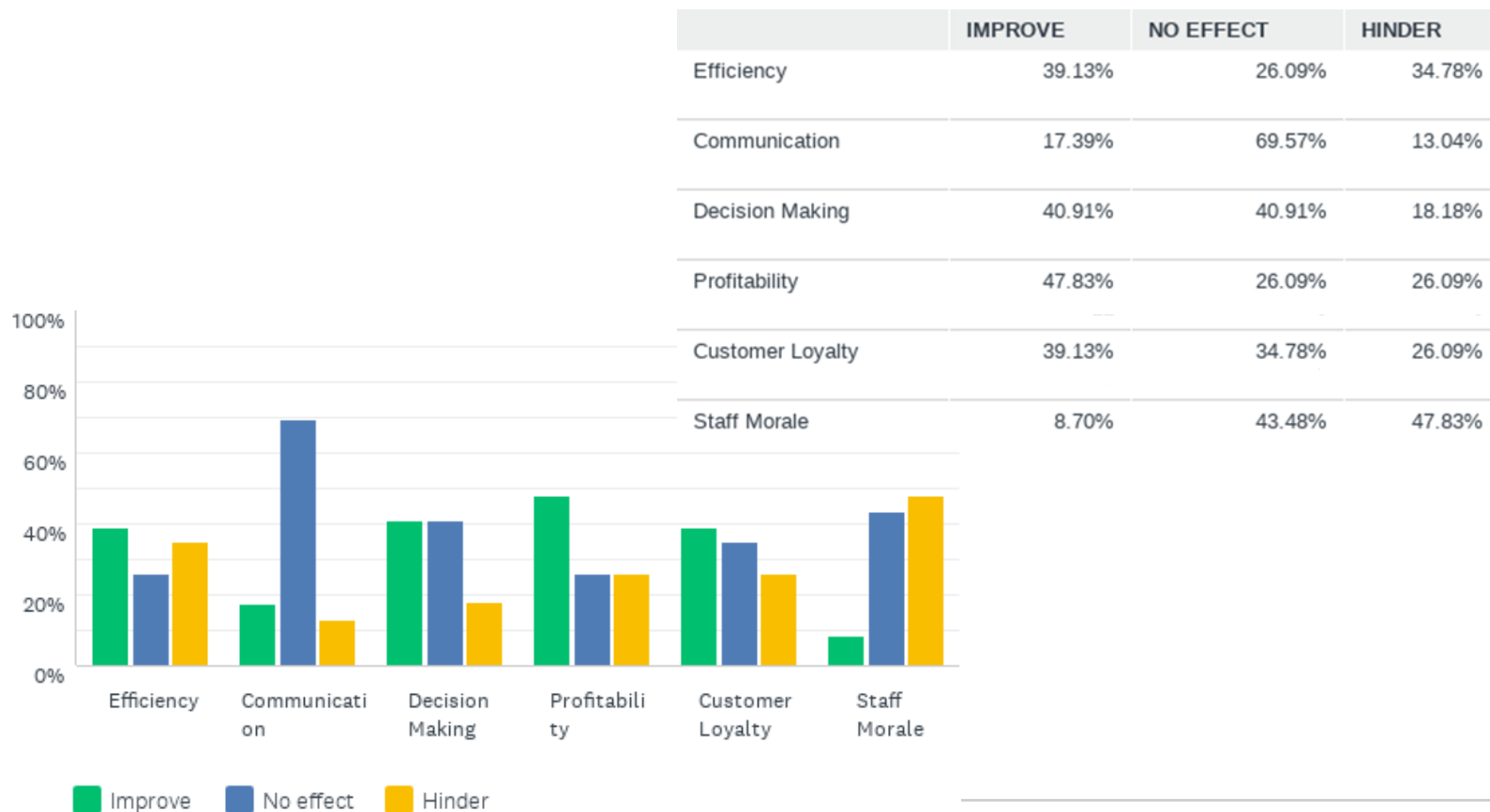
	INCREASED	STAY THE SAME	DECREASED
Amount of clients	78.26%	21.74%	0.00%
Revenue	73.91%	21.74%	4.35%
Profitability	82.61%	13.04%	4.35%
Staff Levels	60.87%	26.09%	13.04%
Spending	69.57%	26.09%	4.35%
Customer Satisfaction	69.57%	17.39%	13.04%

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

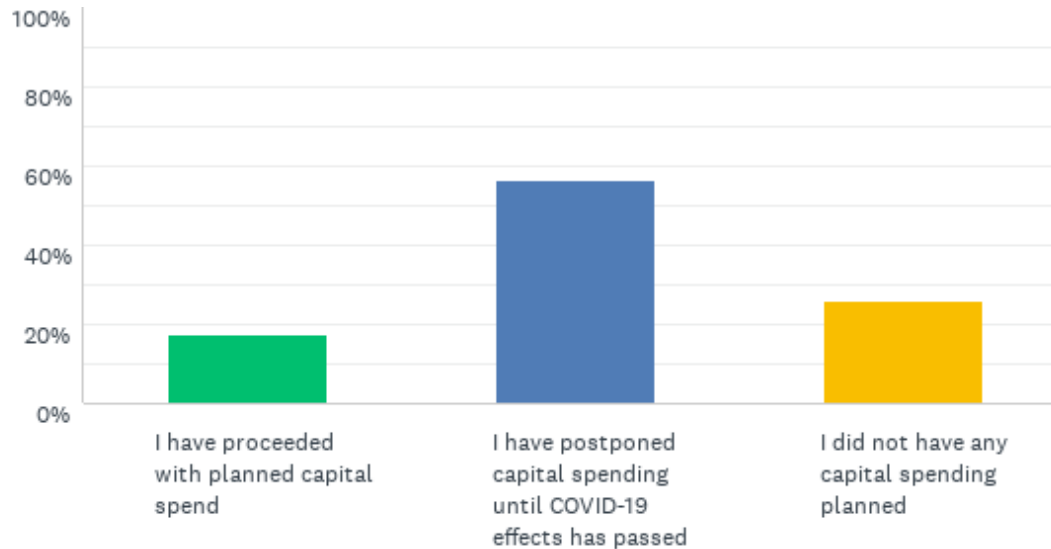


ANSWER CHOICES	RESPONSES
Very positive	4.35%
Positive	30.43%
Neutral	34.78%
Negative	17.39%
Very Negative	13.04%

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

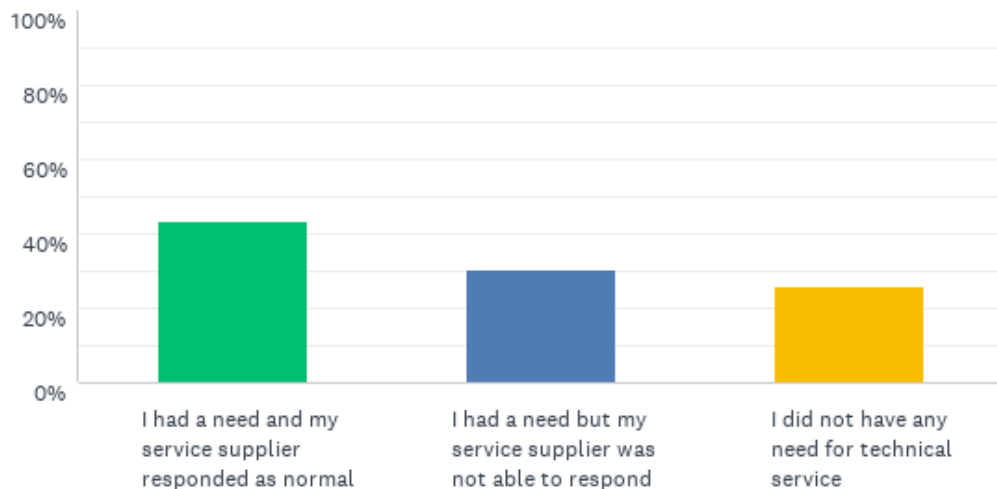


Q8: How has COVID-19 effected your planned capital expenditure on catering / foodservice equipment ?



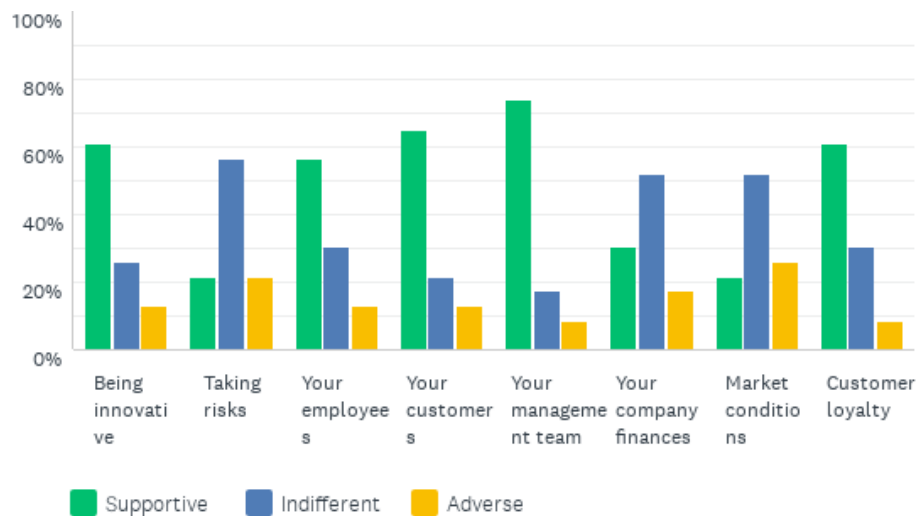
ANSWER CHOICES	RESPONSES
I have proceeded with planned capital spend	17.39%
I have postponed capital spending until COVID-19 effects has passed	56.52%
I did not have any capital spending planned	26.09%

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



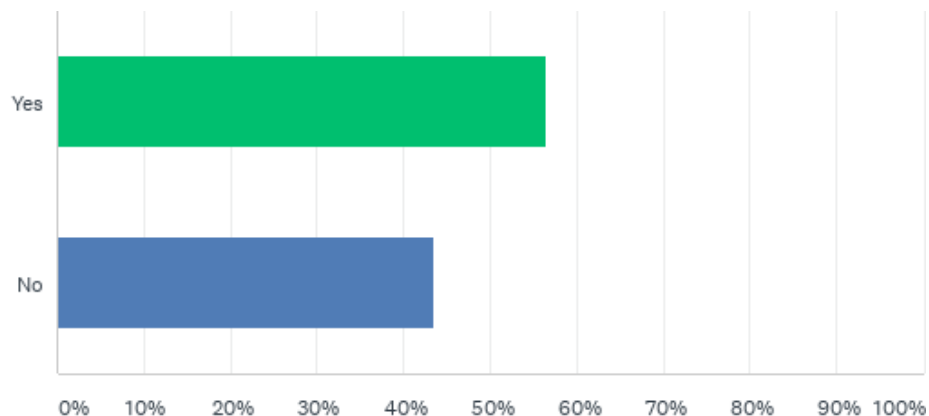
ANSWER CHOICES	RESPONSES
I had a need and my service supplier responded as normal	43.48%
I had a need but my service supplier was not able to respond	30.43%
I did not have any need for technical service	26.09%

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



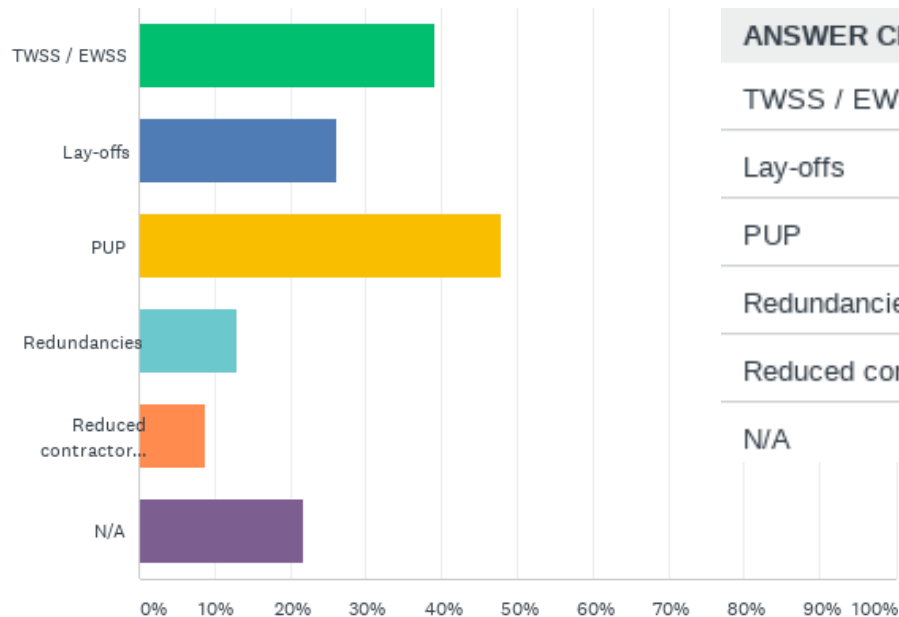
	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	60.87%	26.09%	13.04%
Taking risks	21.74%	56.52%	21.74%
Your employees	56.52%	30.43%	13.04%
Your customers	65.22%	21.74%	13.04%
Your management team	73.91%	17.39%	8.70%
Your company finances	30.43%	52.17%	17.39%
Market conditions	21.74%	52.17%	26.09%
Customer loyalty	60.87%	30.43%	8.70%

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



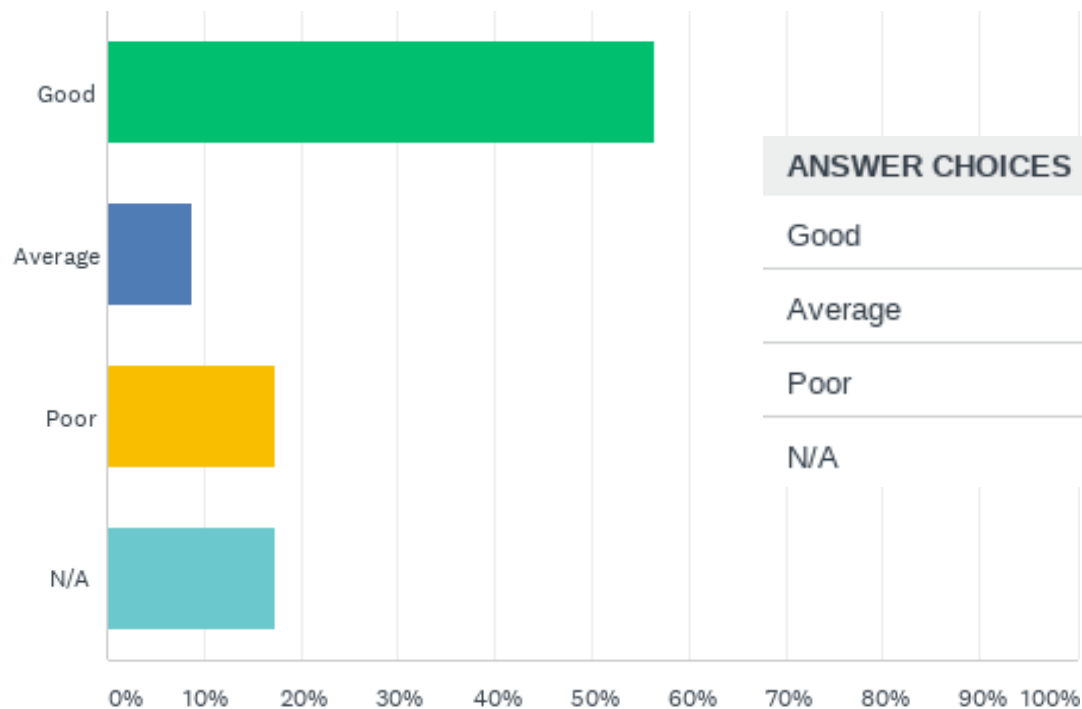
ANSWER CHOICES	RESPONSES
Yes	56.52%
No	43.48%

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



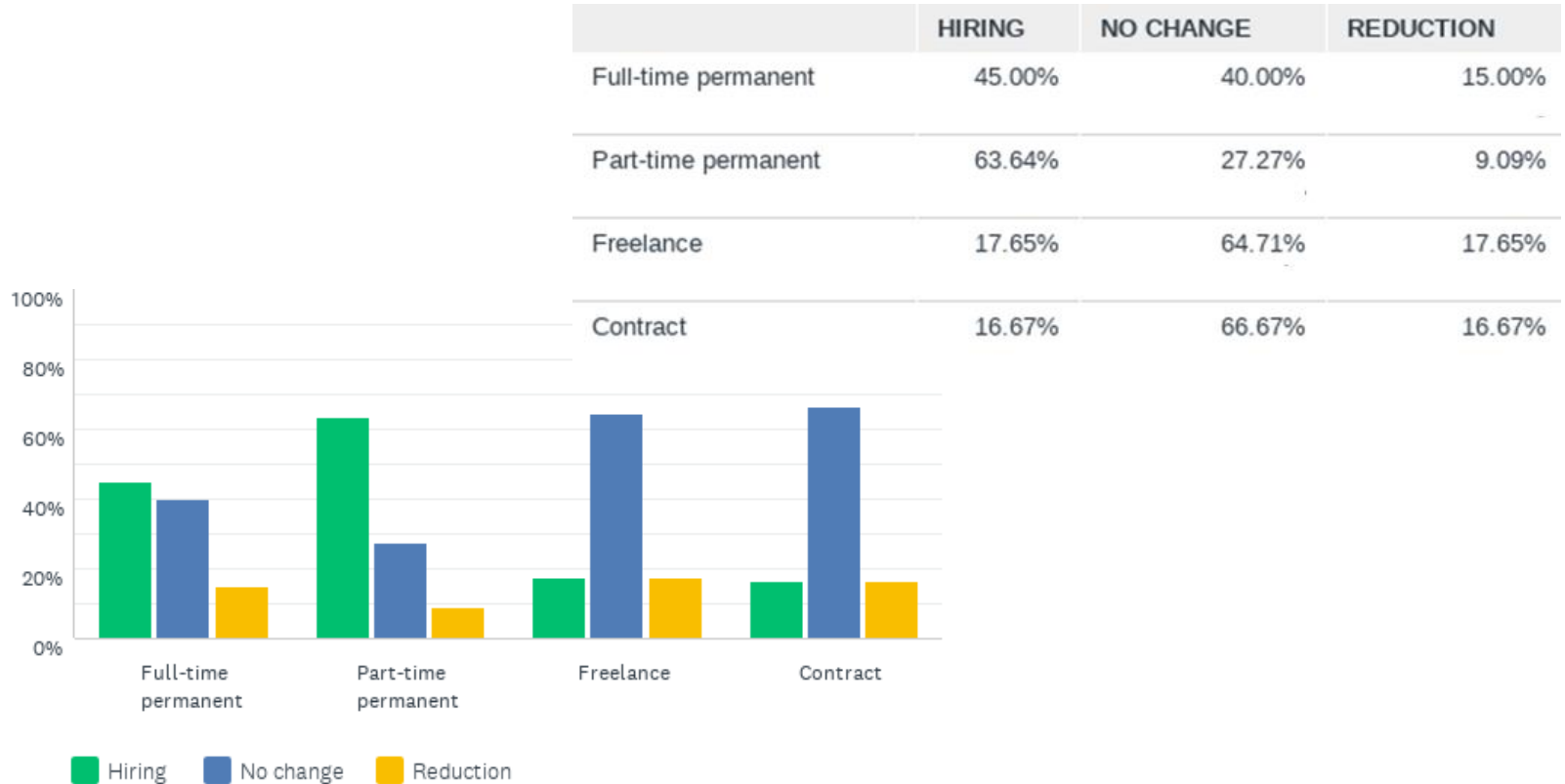
ANSWER CHOICES	RESPONSES
TWSS / EWSS	39.13%
Lay-offs	26.09%
PUP	47.83%
Redundancies	13.04%
Reduced contractor hours	8.70%
N/A	21.74%

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

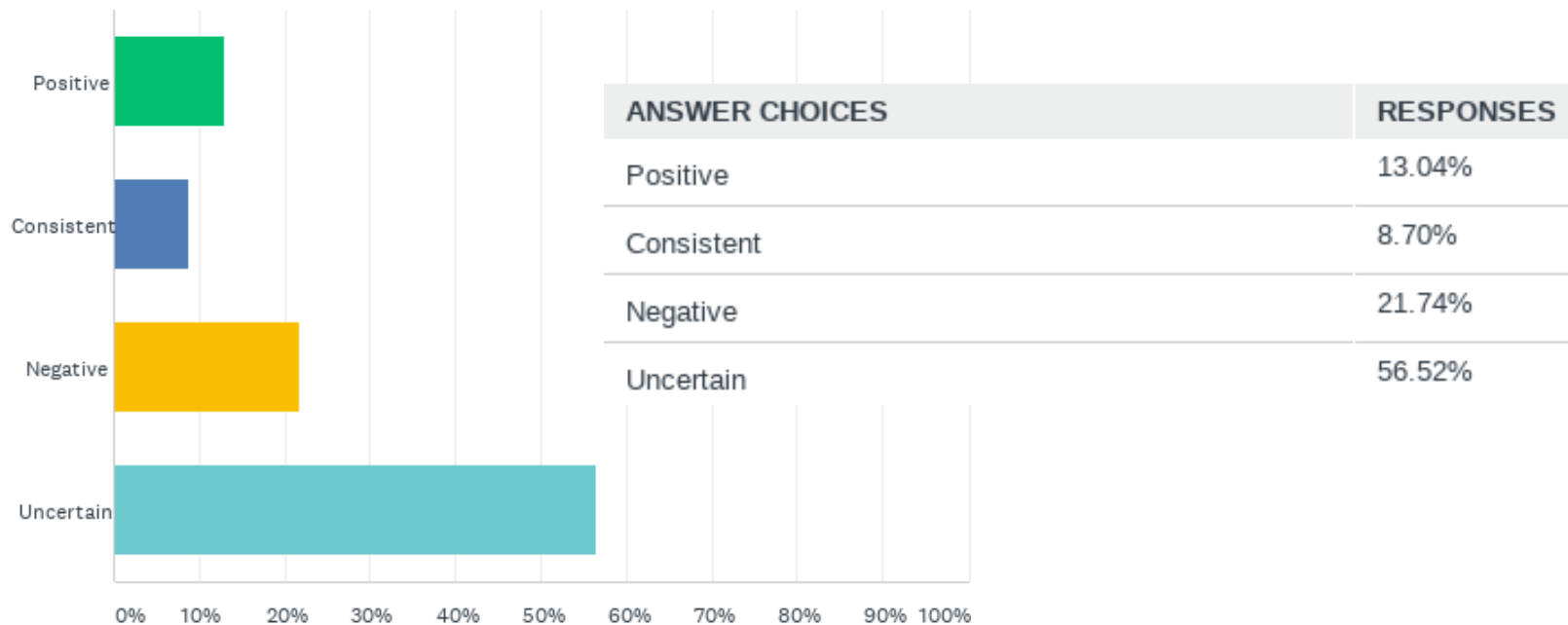


ANSWER CHOICES	RESPONSES
Good	56.52%
Average	8.70%
Poor	17.39%
N/A	17.39%

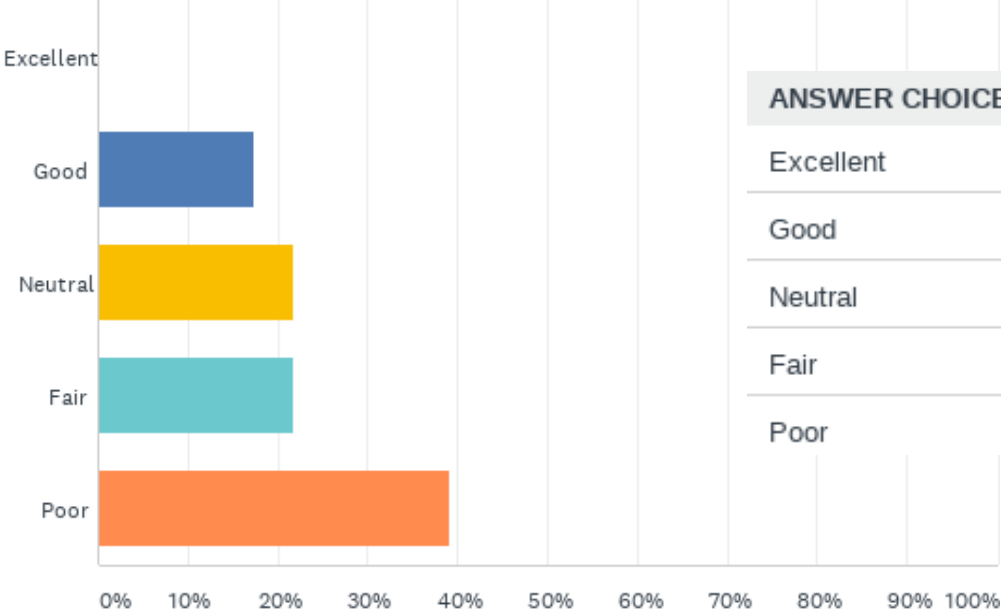
Q14: What are your current hiring plans for each type of staff?



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

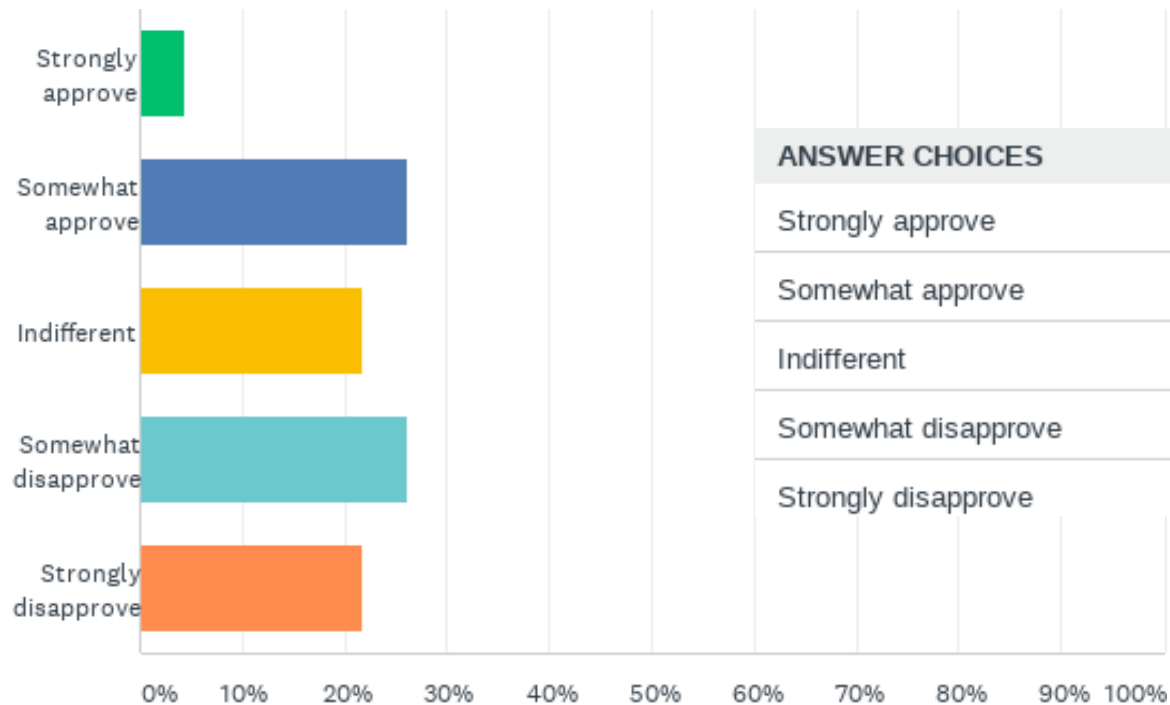


Q16: What is your opinion of the current economic climate?



ANSWER CHOICES	RESPONSES
Excellent	0.00%
Good	17.39%
Neutral	21.74%
Fair	21.74%
Poor	39.13%

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



ANSWER CHOICES

RESPONSES

Strongly approve

4.35%

Somewhat approve

26.09%

Indifferent

21.74%

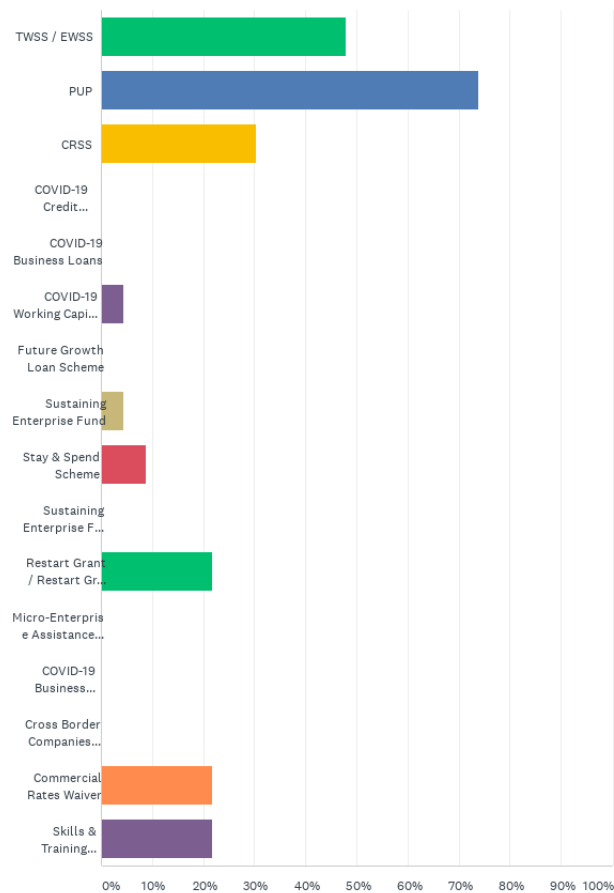
Somewhat disapprove

26.09%

Strongly disapprove

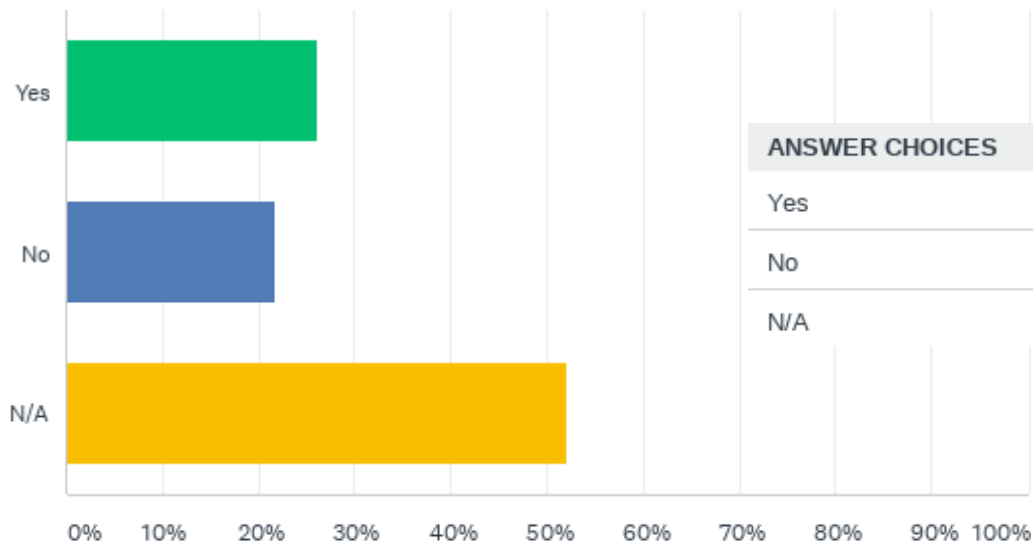
21.74%

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



ANSWER CHOICES	RESPONSES
TWSS / EWSS	47.83%
PUP	73.91%
CRSS	30.43%
COVID-19 Credit Guarantee Scheme	0.00%
COVID-19 Business Loans	0.00%
COVID-19 Working Capital Scheme	4.35%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	4.35%
Stay & Spend Scheme	8.70%
Sustaining Enterprise Fund for Small Enterprise	0.00%
Restart Grant / Restart Grant Plus	21.74%
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	21.74%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	21.74%

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

Yes

No

N/A

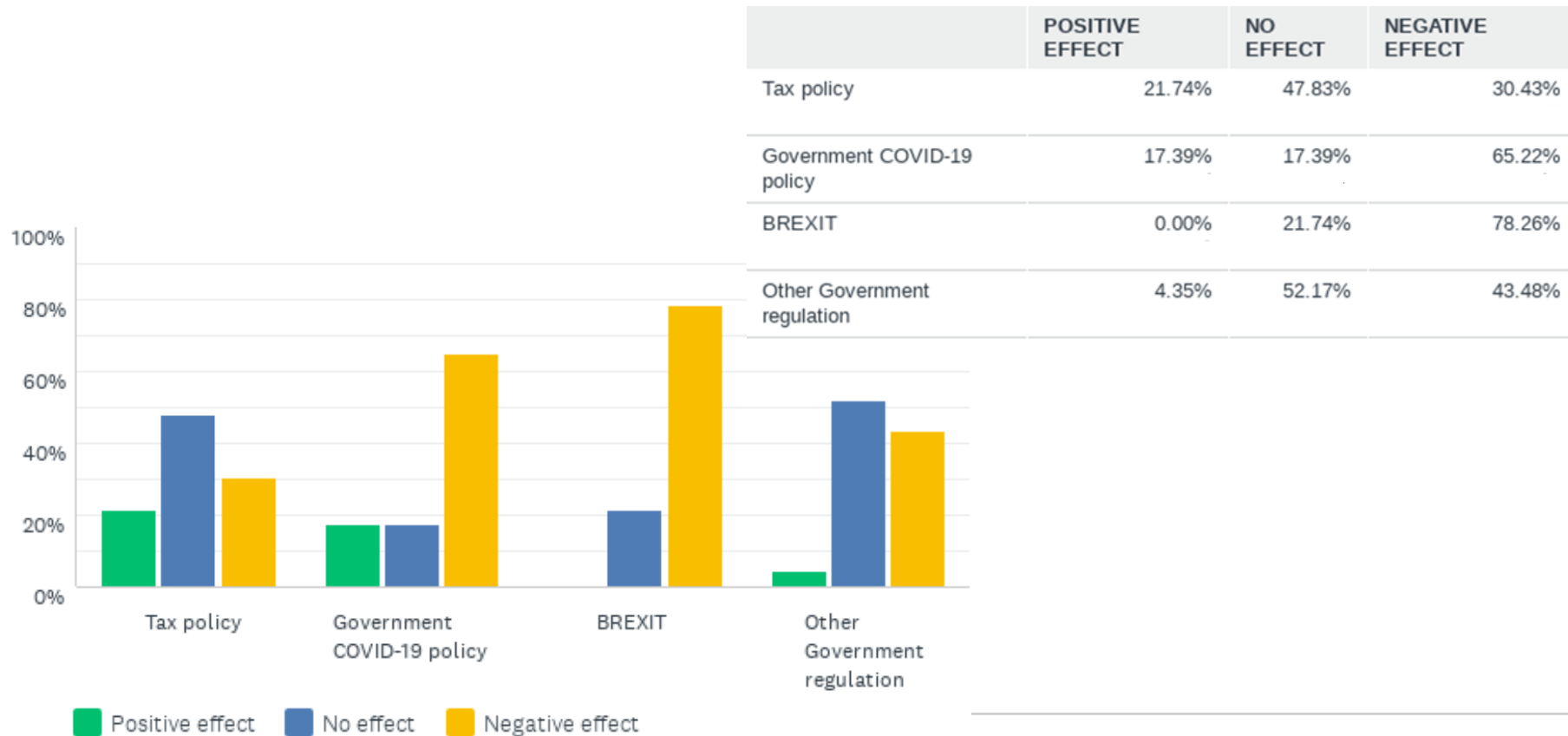
RESPONSES

26.09%

21.74%

52.17%

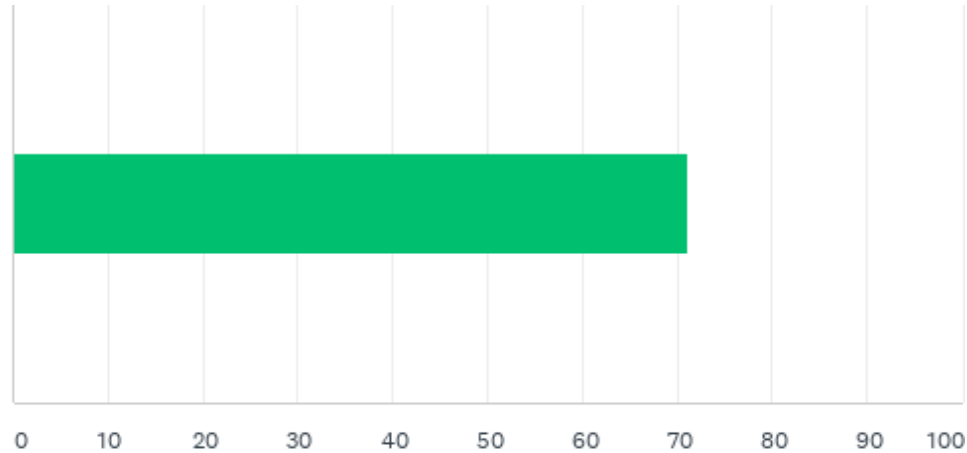
Q20: In the NEXT 6 months do you expect the following issues to have a positive effect, no effect or a negative effect on your business?



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

- Encourage owners to bring back staff even if capacity has been reduced
 - Getting industry back safely to work as soon as possible
 - Small independent premises need to be more conscious of the central issue which is numbers and ventilation. I don't feel that insisting all cafes and restaurants should proceed with indoor dining at this point, it is not viable or safe in very many establishments and therefore putting unrealistic expectations in the customers mind. Large hospitality groups and Hotels are generally larger cavernous, and purpose built with air exchange etc., the small independents are the ones that will feel the heat if we don't open.
 - Reality check concerning taxes and timeline for payments
 - Very little, only complaining
 - Keep talking to the government
 - Let us know when we can reduce distancing in canteens and get more customers in
 - Get the sector open again.
 - Support
 - Promote indigenous business
 - Continue to lobby the government on the real cost to the industry of indecision and of one minister e.g. the Tánaiste going on continuous solo runs which contradict what the Taoiseach is saying. It is showboating of the worst kind.
 - Implement a fair system where a restaurant can compete with a hotel restaurant. I refuse to believe COVID can discern between a resident and non resident at meal times
-

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



ANSWER CHOICES

AVERAGE NUMBER

71

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