

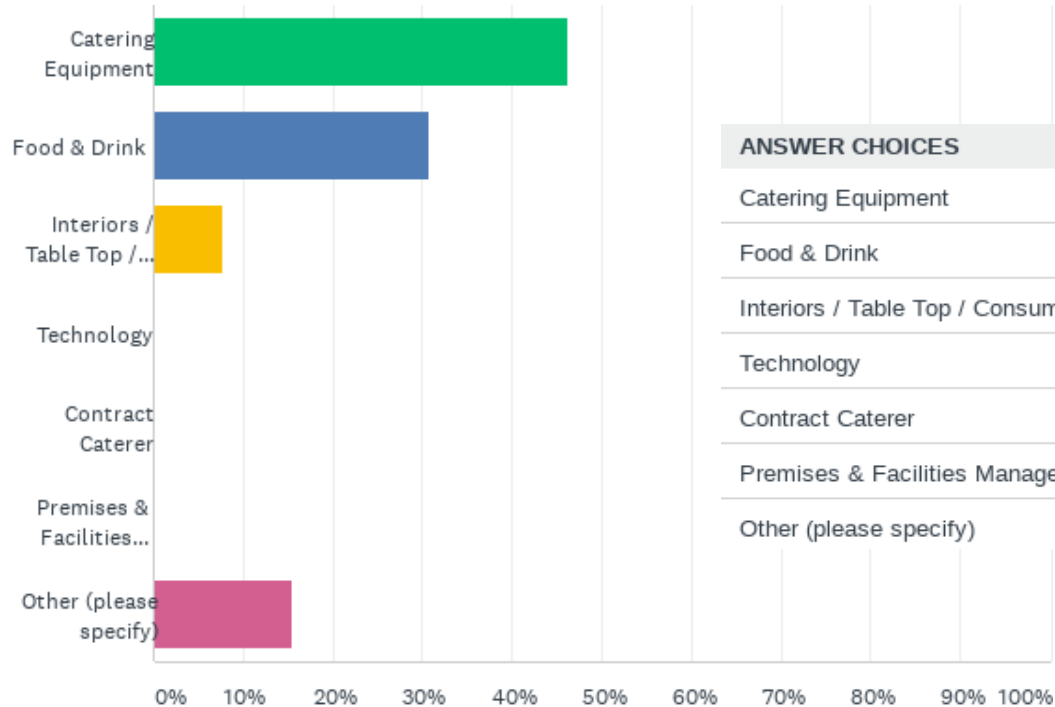


IRISH FOODSERVICE SUPPLIERS ALLIANCE

# IFSA MEMBERS INDUSTRY SENTIMENT INDEX

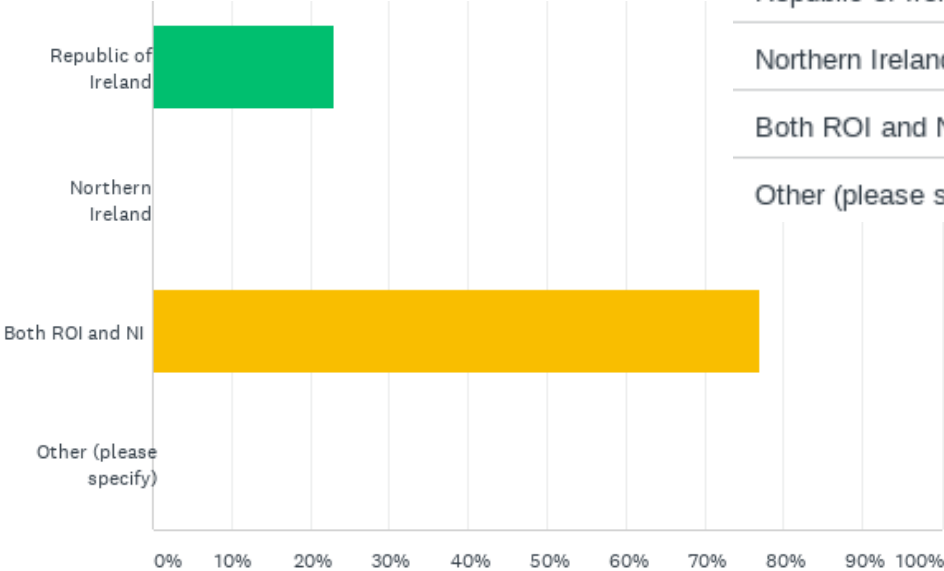
MARCH 2021

# Q1: What Sector Category do you operate in?



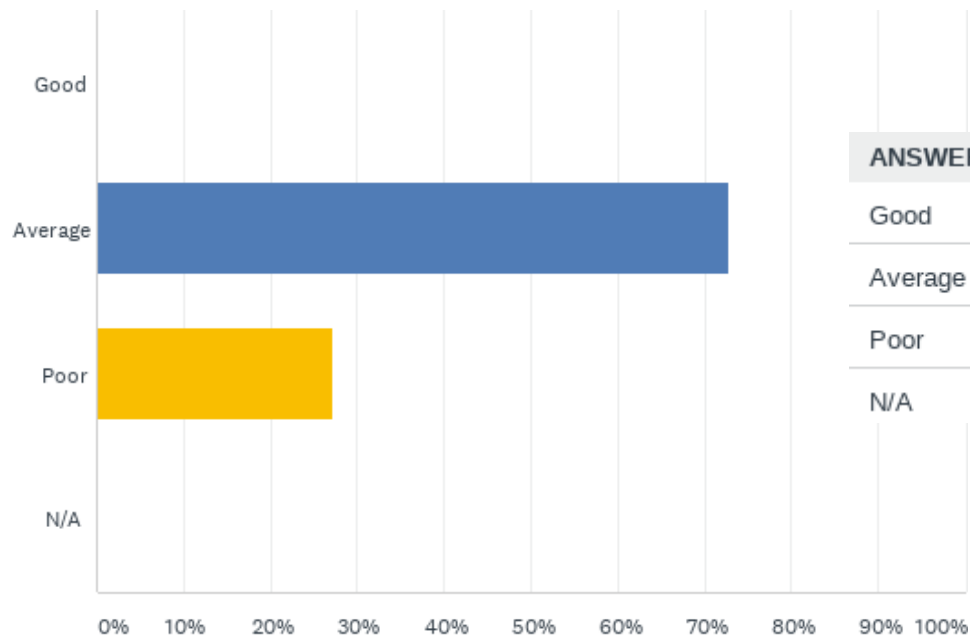
ANSWER CHOICES	RESPONSES
Catering Equipment	46.15%
Food & Drink	30.77%
Interiors / Table Top / Consumables	7.69%
Technology	0.00%
Contract Caterer	0.00%
Premises & Facilities Management	0.00%
Other (please specify)	15.38%

# Q2: What jurisdiction do you operate in?



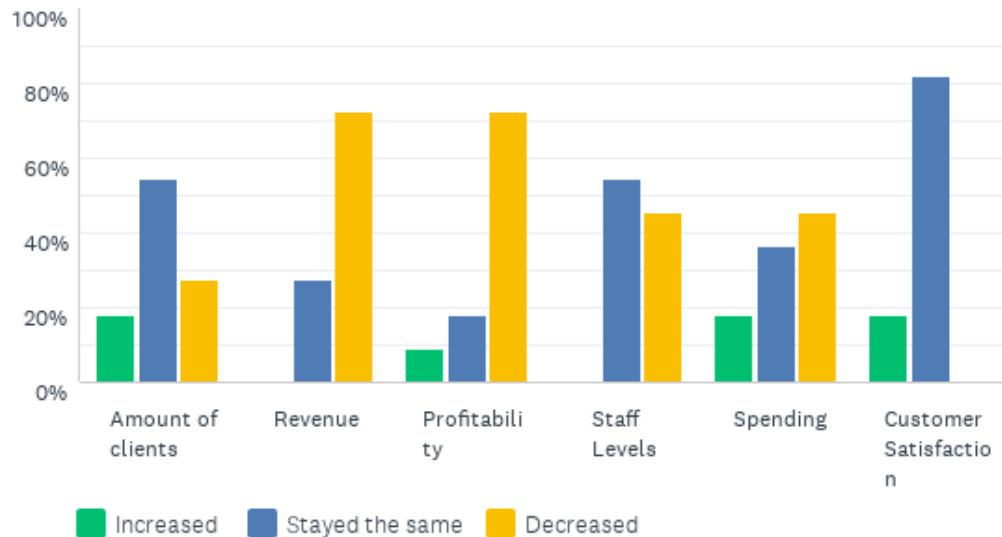
ANSWER CHOICES	RESPONSES
Republic of Ireland	23.08%
Northern Ireland	0.00%
Both ROI and NI	76.92%
Other (please specify)	0.00%

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



ANSWER CHOICES	RESPONSES
Good	0.00%
Average	72.73%
Poor	27.27%
N/A	0.00%

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



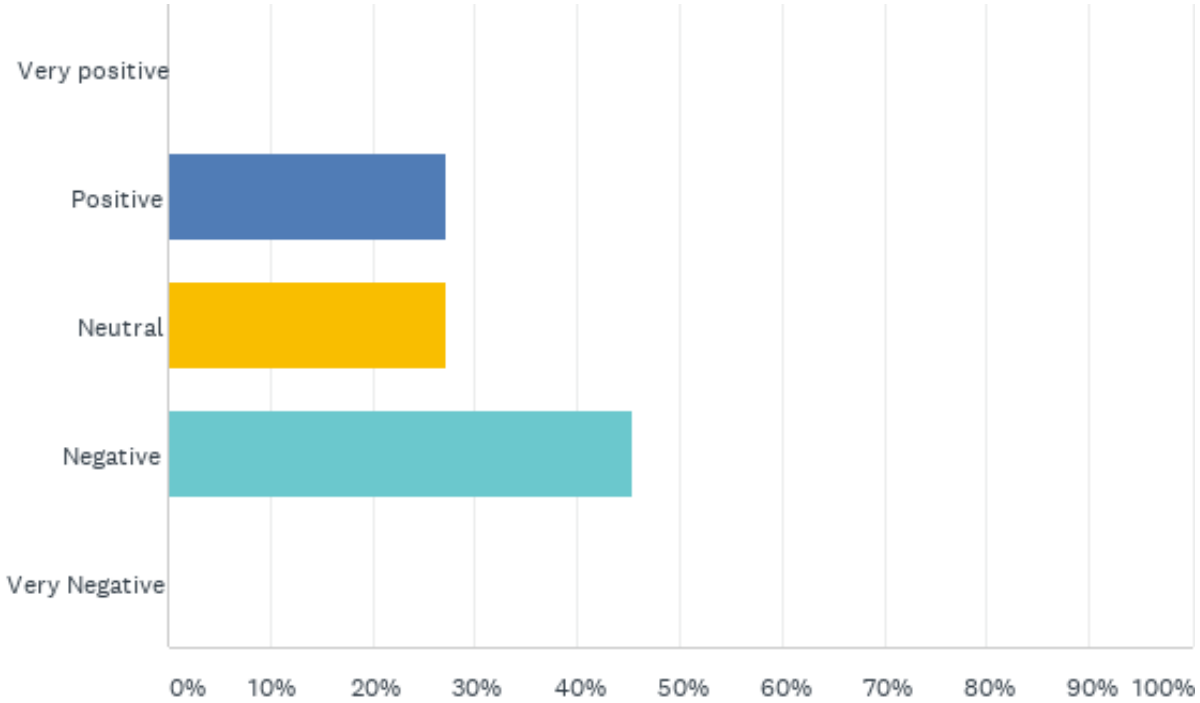
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	18.18%	54.55%	27.27%
Revenue	0.00%	27.27%	72.73%
Profitability	9.09%	18.18%	72.73%
Staff Levels	0.00%	54.55%	45.45%
Spending	18.18%	36.36%	45.45%
Customer Satisfaction	18.18%	81.82%	0.00%

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

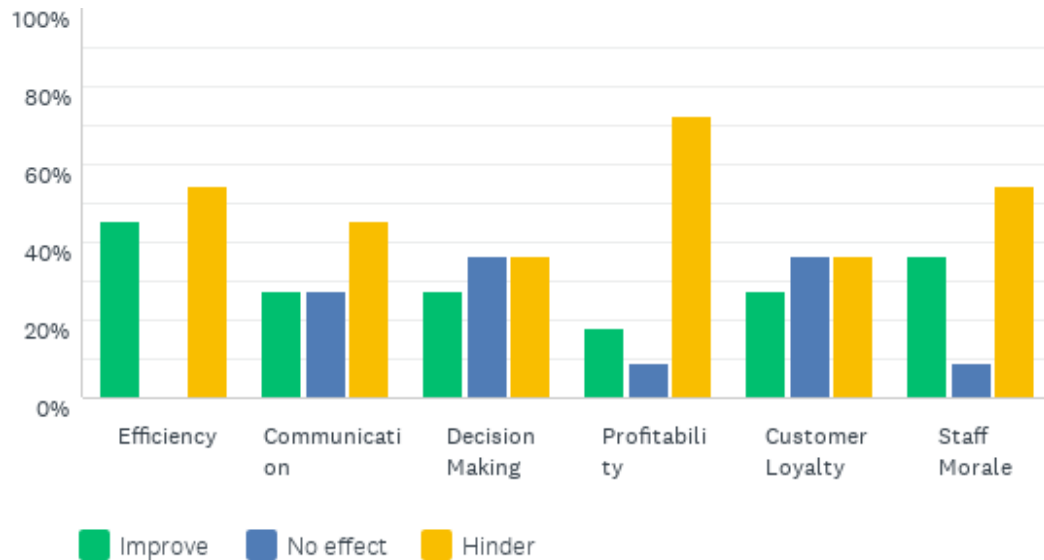


# Q6: What is your attitude to the direction of the industry over the NEXT MONTH?

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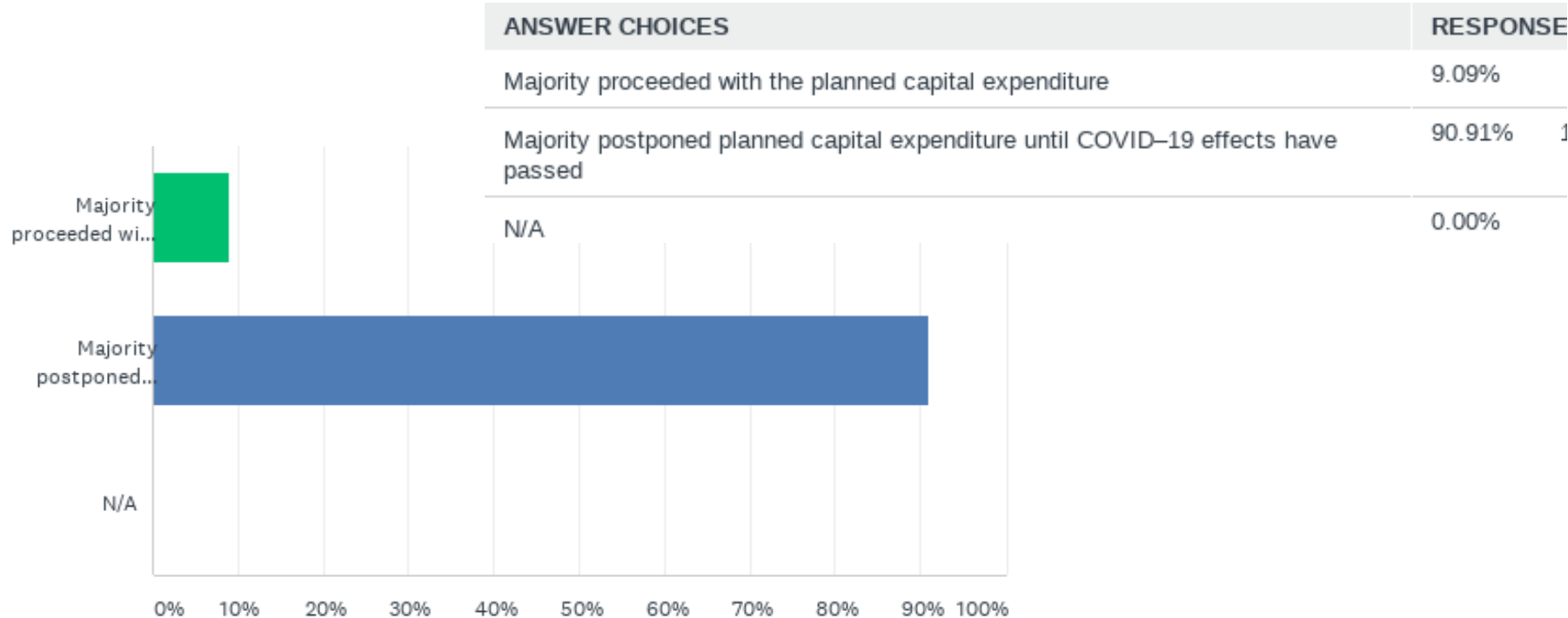
## Q7: How do you feel the current conditions will effect the following areas of your business?



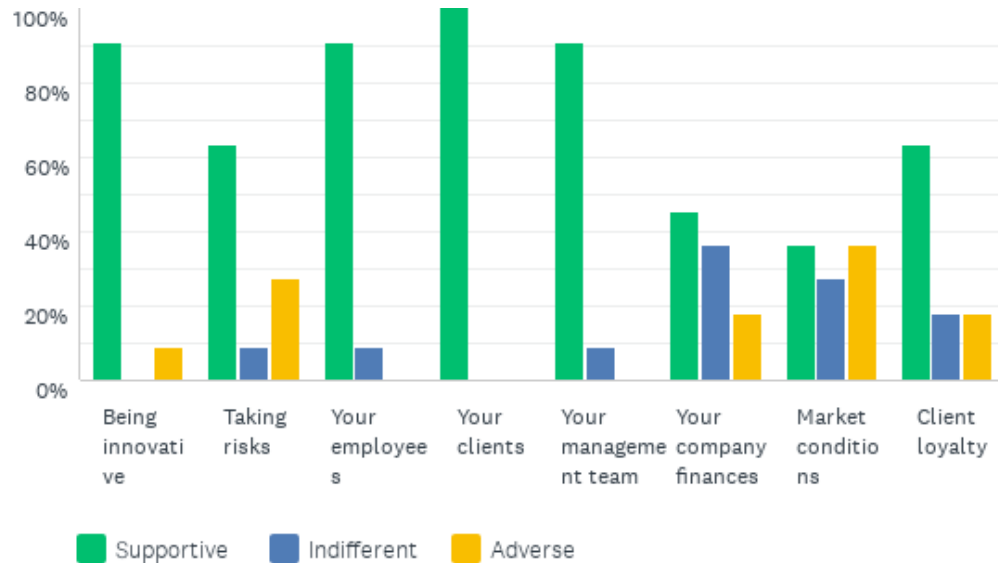
	IMPROVE	NO EFFECT	HINDER
Efficiency	45.45%	0.00%	54.55%
Communication	27.27%	27.27%	45.45%
Decision Making	27.27%	36.36%	36.36%
Profitability	18.18%	9.09%	72.73%
Customer Loyalty	27.27%	36.36%	36.36%
Staff Morale	36.36%	9.09%	54.55%



# Q8: To the best of your knowledge, how has COVID-19 affected your customers planned capital expenditure ?



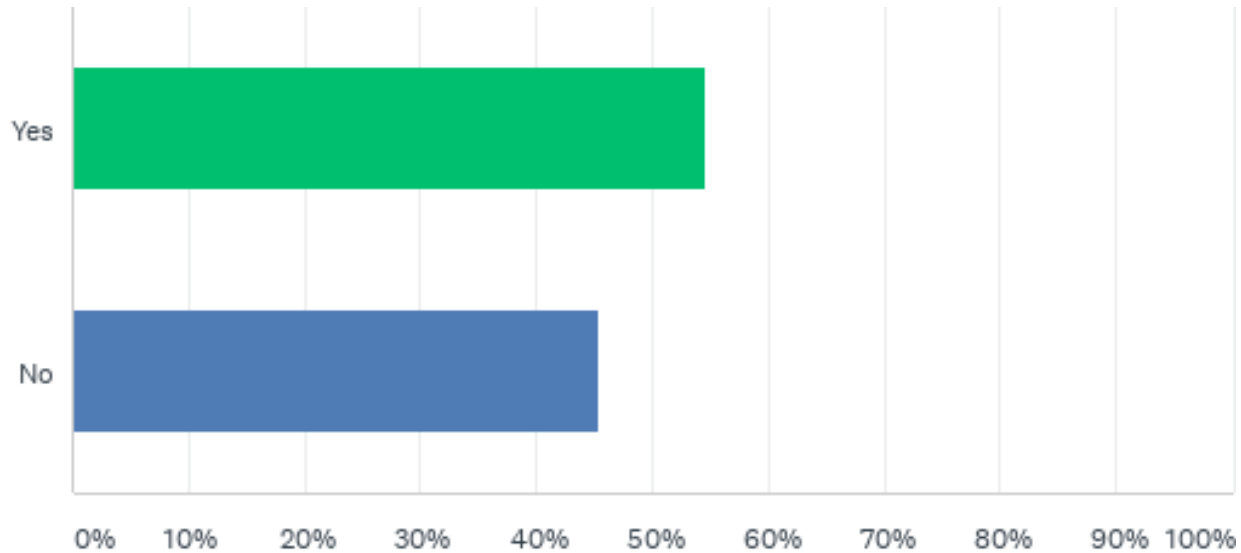
## Q9: In the current climate, what is your attitude (right now) to the following?



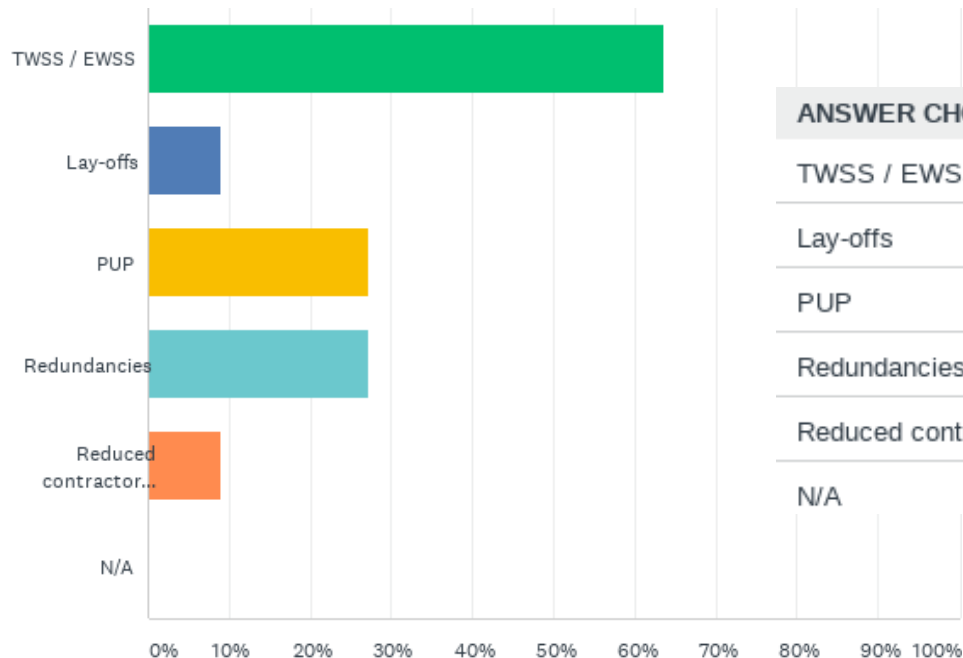
	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	90.91%	0.00%	9.09%
Taking risks	63.64%	9.09%	27.27%
Your employees	90.91%	9.09%	0.00%
Your clients	100.00%	0.00%	0.00%
Your management team	90.91%	9.09%	0.00%
Your company finances	45.45%	36.36%	18.18%
Market conditions	36.36%	27.27%	36.36%
Client loyalty	63.64%	18.18%	18.18%

## Q10: Have you had to reduce your workforce due to current trading conditions?

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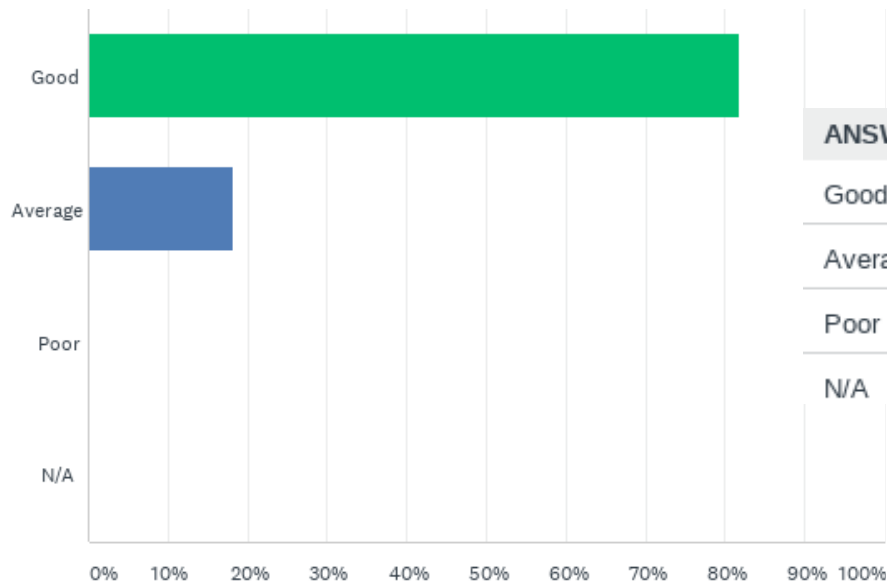


## Q11: If you have had to reduce or implement supports for your workforce, what mechanisms have your implemented to assist with this?



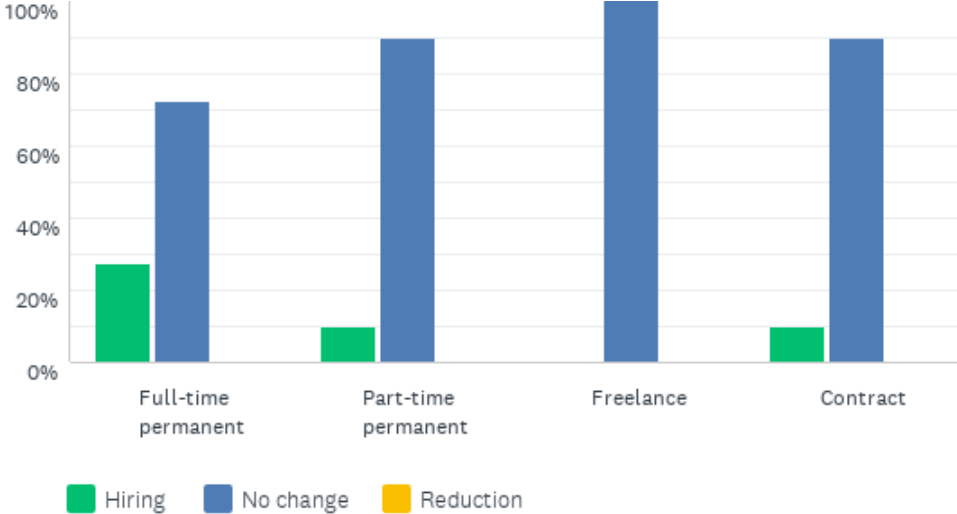
ANSWER CHOICES	RESPONSES
TWSS / EWSS	63.64%
Lay-offs	9.09%
PUP	27.27%
Redundancies	27.27%
Reduced contractor hours	9.09%
N/A	0.00%

## Q12: How would you describe the overall performance of your team over the last 6 months?



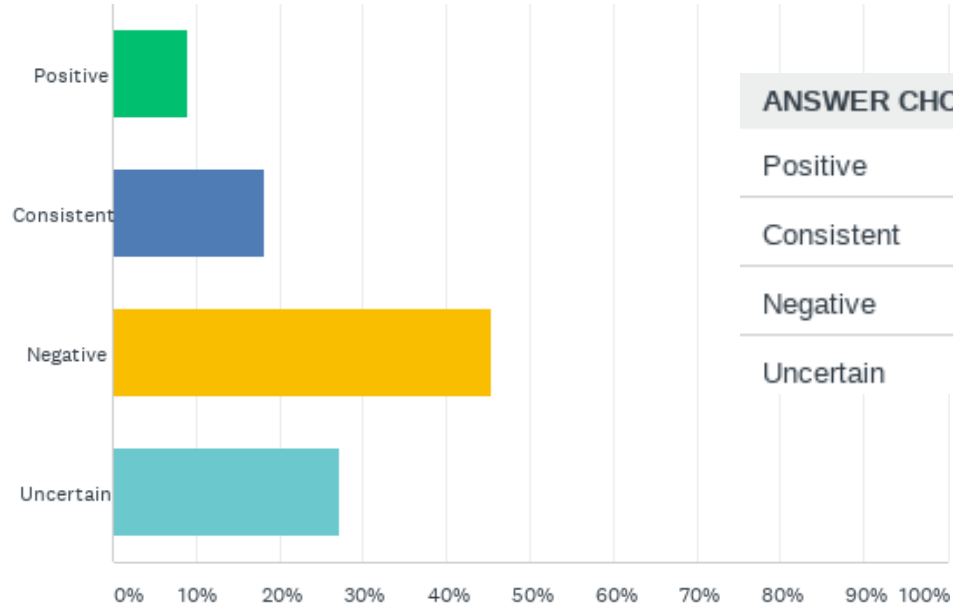
ANSWER CHOICES	RESPONSES
Good	81.82%
Average	18.18%
Poor	0.00%
N/A	0.00%

# Q13: What are your current hiring plans for each type of staff?



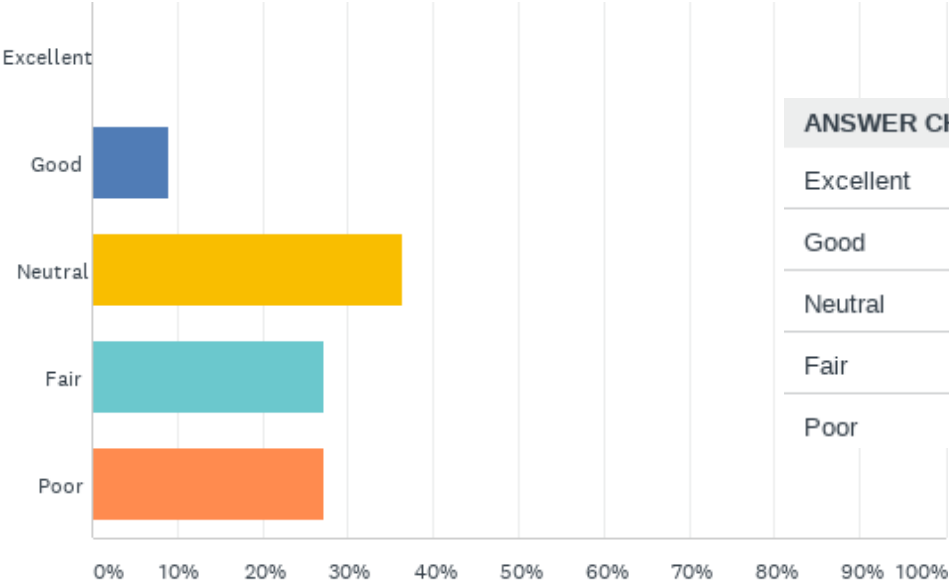
	HIRING	NO CHANGE	REDUCTION
Full-time permanent	27.27%	72.73%	0.00%
Part-time permanent	10.00%	90.00%	0.00%
Freelance	0.00%	100.00%	0.00%
Contract	10.00%	90.00%	0.00%

## Q14: How would you describe your overall perception of the hospitality supply sector right now?



ANSWER CHOICES	RESPONSES
Positive	9.09%
Consistent	18.18%
Negative	45.45%
Uncertain	27.27%

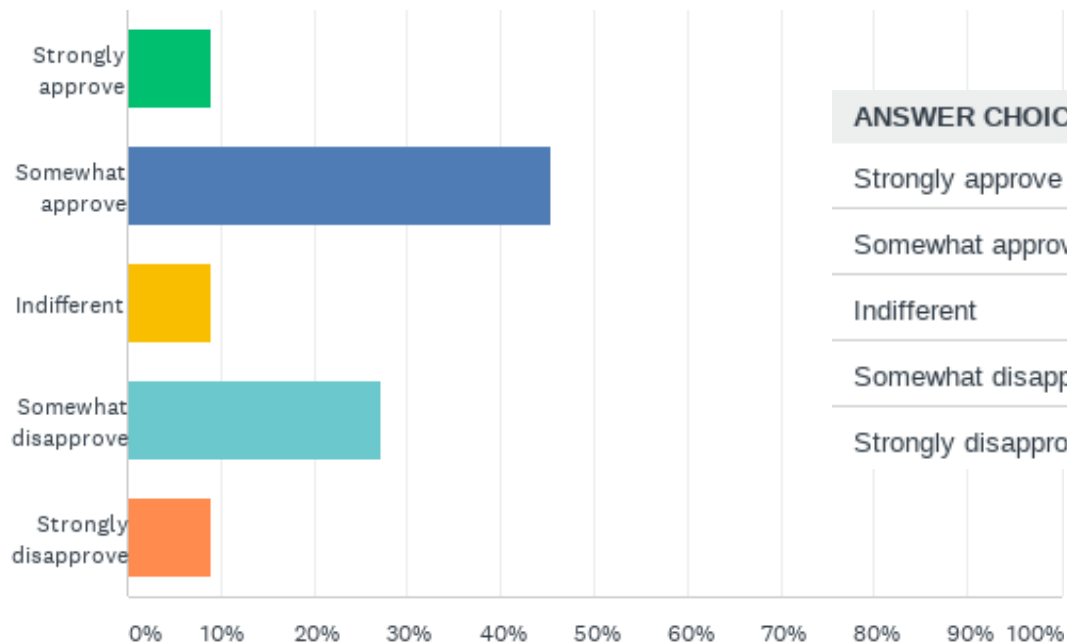
# Q15: What is your opinion of the current economic climate?



ANSWER CHOICES	RESPONSES
Excellent	0.00%
Good	9.09%
Neutral	36.36%
Fair	27.27%
Poor	27.27%

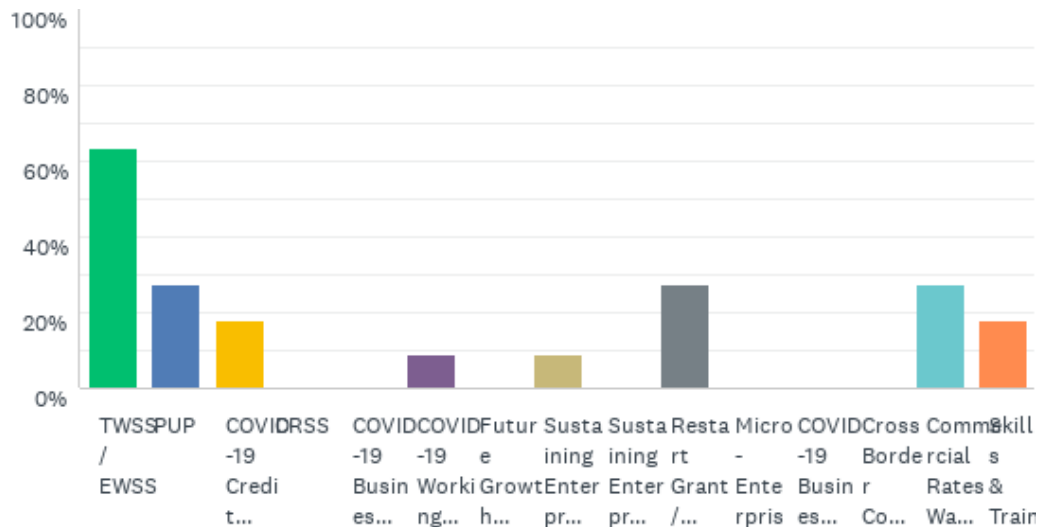


## Q16: Do you approve or disapprove of the way the current government is operating?



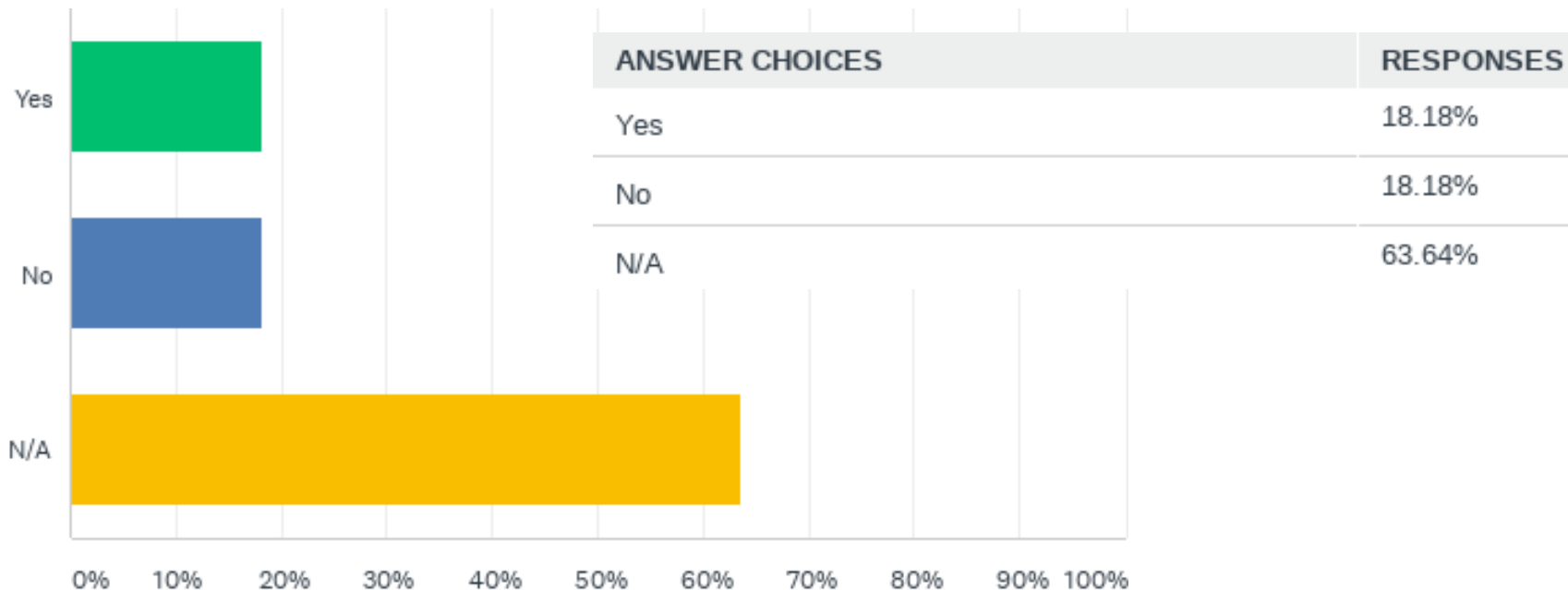
ANSWER CHOICES	RESPONSES
Strongly approve	9.09%
Somewhat approve	45.45%
Indifferent	9.09%
Somewhat disapprove	27.27%
Strongly disapprove	9.09%

# Q17: What if any Government supports have you availed of in the LAST 6 months?



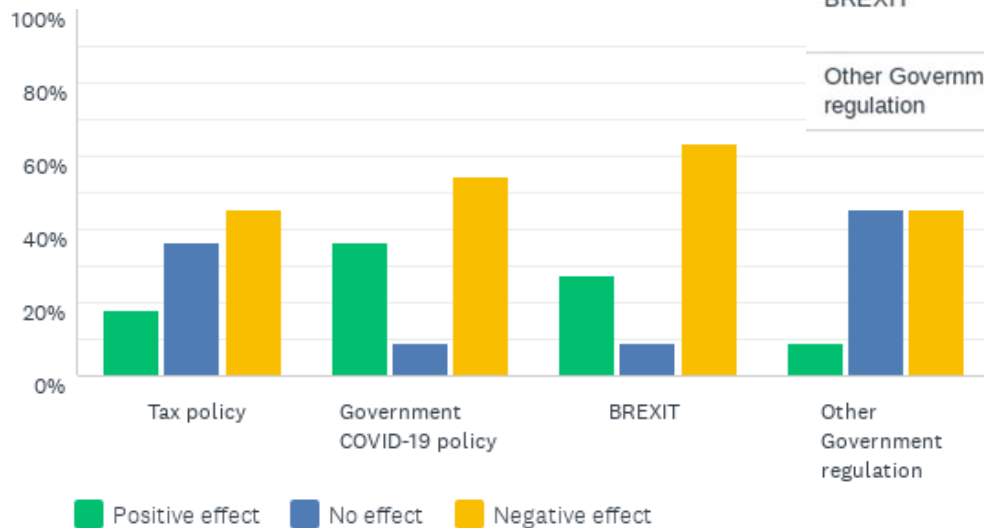
ANSWER CHOICES	RESPONSES
TWSS / EWSS	63.64%
PUP	27.27%
COVID-19 Credit Guarantee Scheme	18.18%
COVID-19 Business Loans	0.00%
COVID-19 Working Capital Scheme	9.09%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	9.09%
Sustaining Enterprise Fund for Small Enterprise	0.00%
Restart Grant / Restart Grant Plus	27.27%
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	27.27%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	18.18%

## Q18: If you have not yet availed of any Government supports, do you plan to look at these options in the NEXT 6 months?



## Q19: 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	18.18%	36.36%	45.45%
Government COVID-19 policy	36.36%	9.09%	54.55%
BREXIT	27.27%	9.09%	63.64%
Other Government regulation	9.09%	45.45%	45.45%



## **Q20: What you like to see IFSA doing on your behalf in order to assist your business in the current trading environment?**

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- Insist on updates to the industry. Especially for hospitality business owners.
  - Keep beating the drum that the hospitality supply industry needs at least the same supports as the hospitality industry itself.
  - Government Lobbying in favour of our clients
  - Keep the pressure on the government to open up the economy to level 3 until the vaccines have been rolled out as most businesses can survive for a while on level 3 with the right supports
  - vaccinations for hospitality workers and suppliers would be a good start to reopening
-

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