



FOODSERVICE OPERATORS INDUSTRY SENTIMENT INDEX

JANUARY 2021



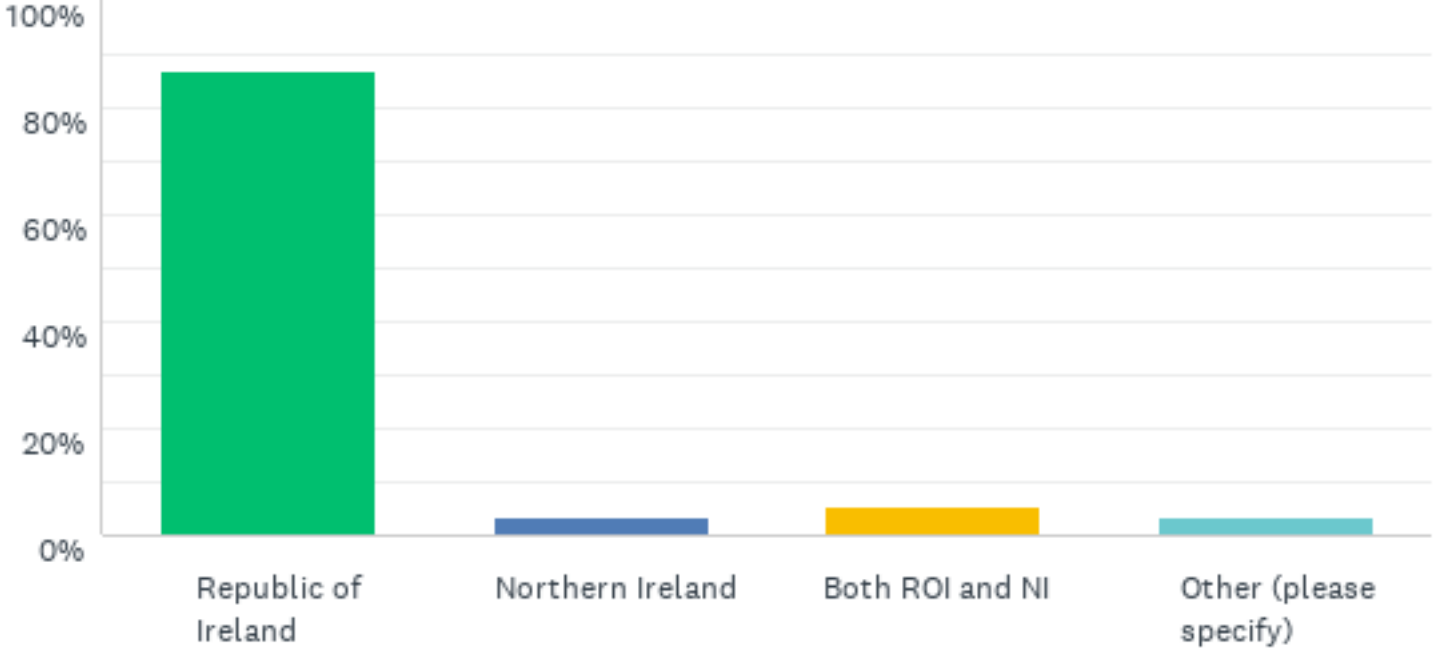
Q1: What Sector Category do you operate in?

ANSWER CHOICES	RESPONSES
Restaurant	42.59%
Hotel	18.52%
Cafe / Coffee Shop	16.67%
Contract Caterer	18.52%
Contract Cleaner	1.85%
Pub / Winebar / Club	11.11%
Bakery	7.41%
Butcher	3.70%
Forecourt / Foodservice in Retail Setting	1.85%
Premises & Facilities Management	1.85%
Interior Designer	0.00%
Cash & Carry	0.00%
Wholesaler	1.85%
Other (please specify)	20.37%

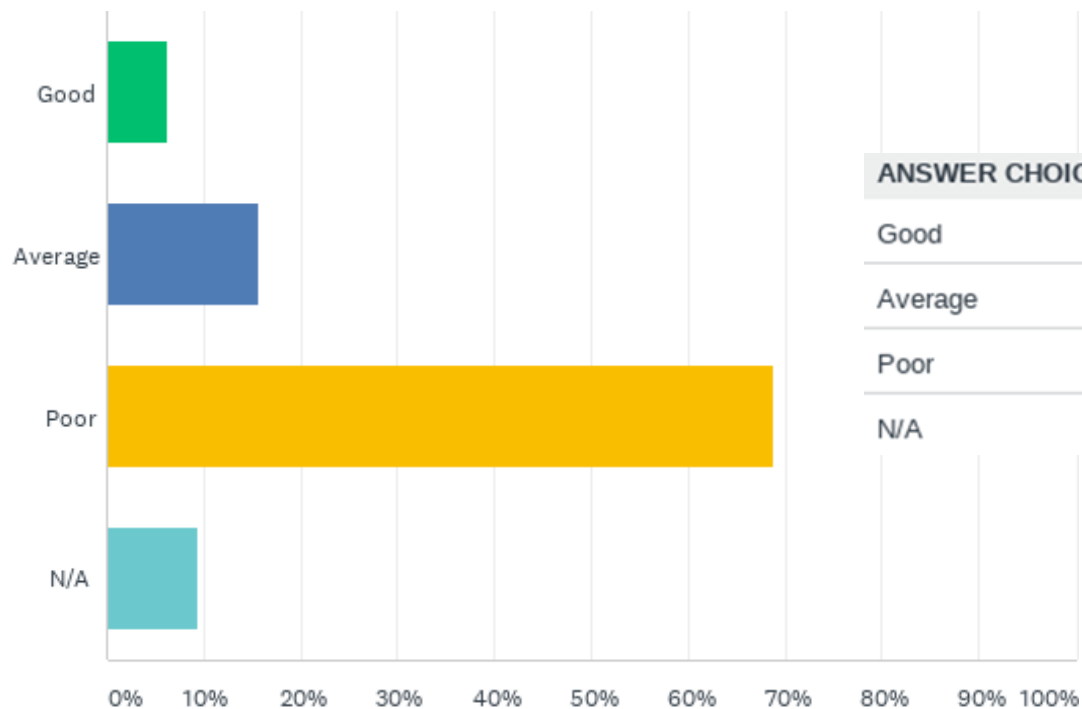
Other

- HSE
- Healthcare
- Food research
- Education
- Deli
- providing a public funded service to food businesses
- Basically Uniform supply to all the above
- Hospitality Education
- Food to go
- Home events/functions
- Teacher/product demonstrator

Q2: What jurisdiction do you operate in?

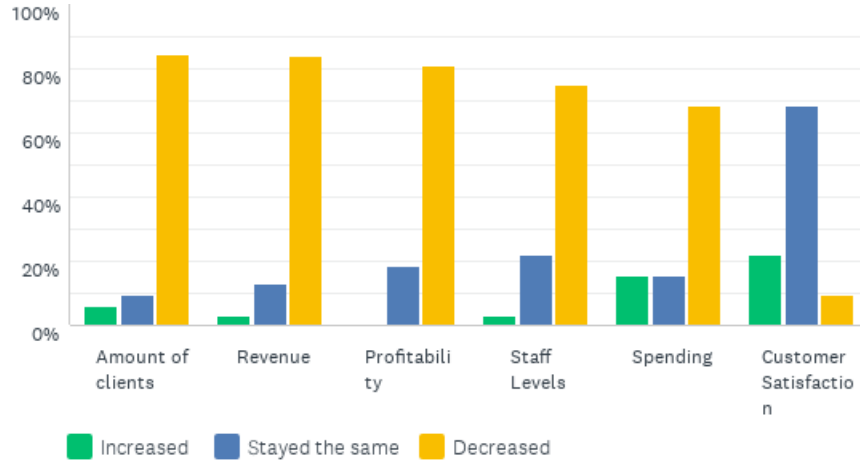


Q3: How would you describe the overall performance of your business over the LAST 6 months?



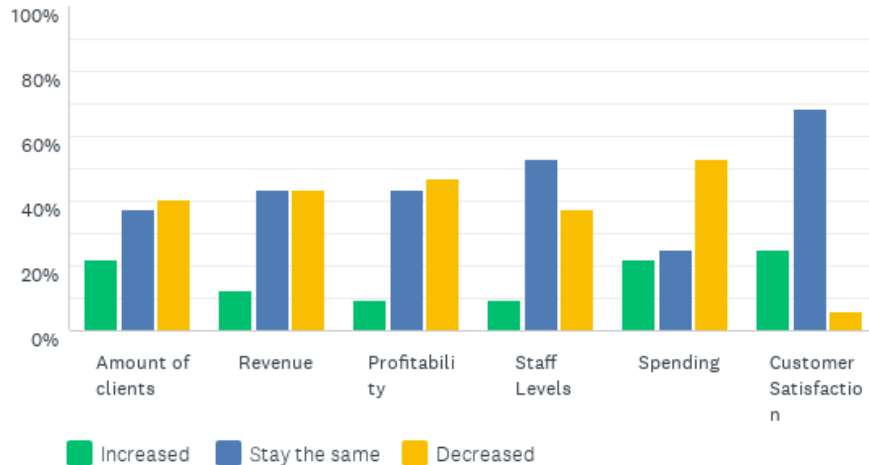
ANSWER CHOICES	RESPONSES
Good	6.25%
Average	15.63%
Poor	68.75%
N/A	9.38%

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



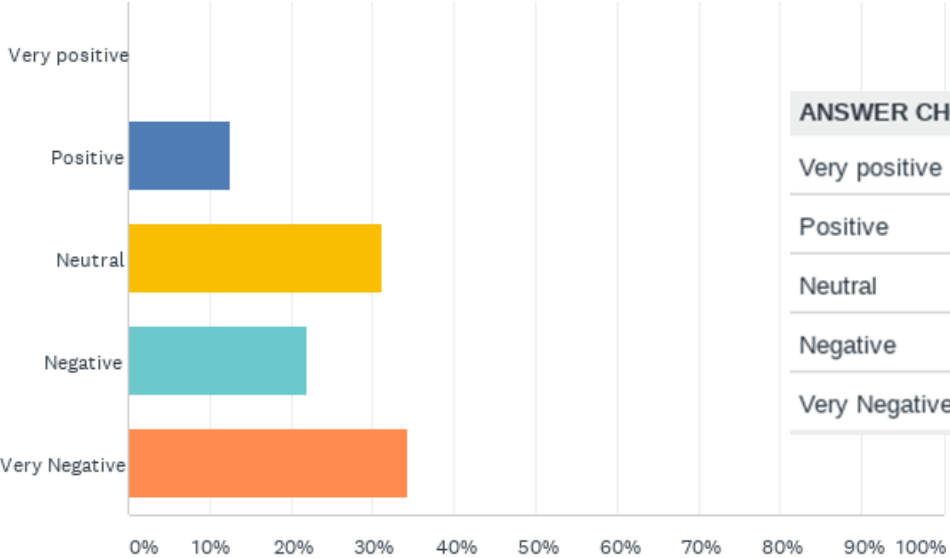
	INCREASED	STAYED THE SAME	DECREASED
Amount of clients	6.25%	9.38%	84.38%
Revenue	3.23%	12.90%	83.87%
Profitability	0.00%	18.75%	81.25%
Staff Levels	3.13%	21.88%	75.00%
Spending	15.63%	15.63%	68.75%
Customer Satisfaction	21.88%	68.75%	9.38%

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



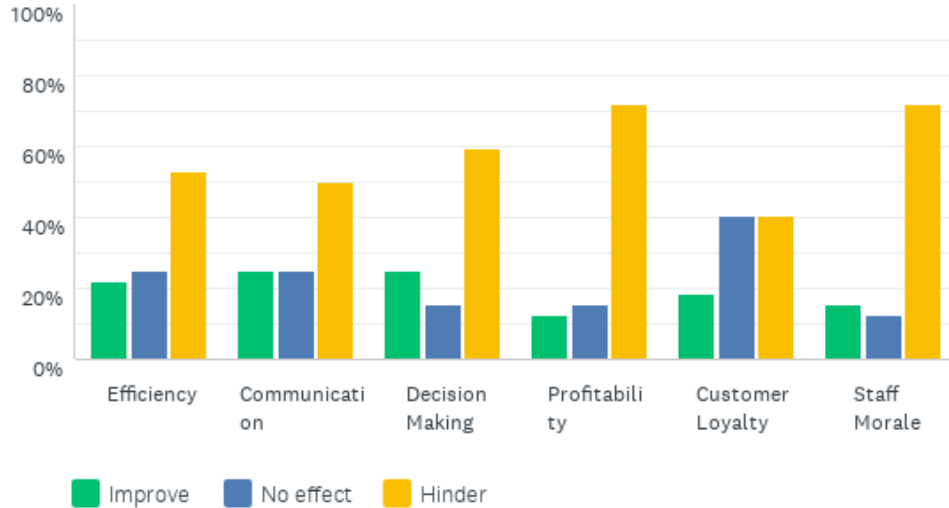
	INCREASED	STAY THE SAME	DECREASED
Amount of clients	21.88%	37.50%	40.63%
Revenue	12.50%	43.75%	43.75%
Profitability	9.38%	43.75%	46.88%
Staff Levels	9.38%	53.13%	37.50%
Spending	21.88%	25.00%	53.13%
Customer Satisfaction	25.00%	68.75%	6.25%

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



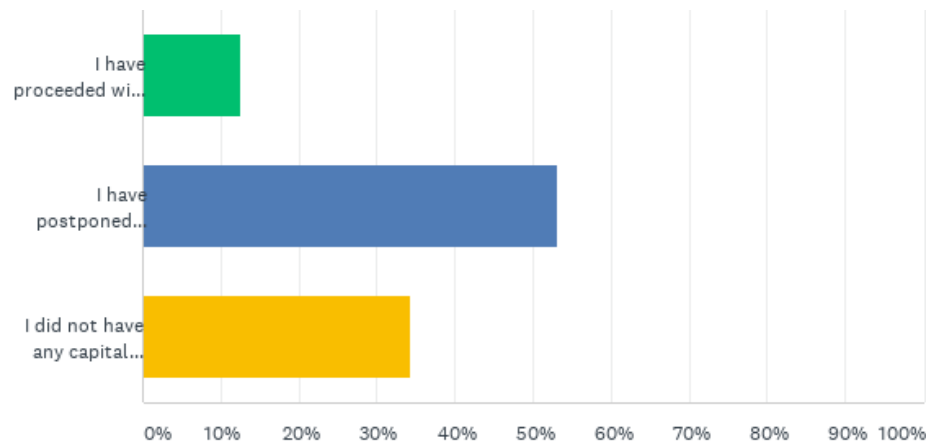
ANSWER CHOICES	RESPONSES
Very positive	0.00%
Positive	12.50%
Neutral	31.25%
Negative	21.88%
Very Negative	34.38%

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



	IMPROVE	NO EFFECT	HINDER
Efficiency	21.88%	25.00%	53.13%
Communication	25.00%	25.00%	50.00%
Decision Making	25.00%	15.63%	59.38%
Profitability	12.50%	15.63%	71.88%
Customer Loyalty	18.75%	40.63%	40.63%
Staff Morale	15.63%	12.50%	71.88%

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



ANSWER CHOICES

RESPONSES

I have proceeded with planned capital spend

12.50%

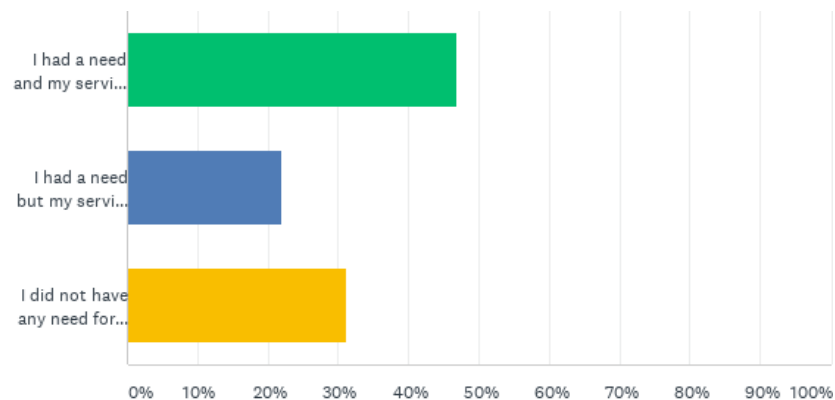
I have postponed capital spending until COVID-19 effects has passed

53.13%

I did not have any capital spending planned

34.38%

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

46.88%

I had a need but my service supplier was not able to respond

21.88%

I did not have any need for technical service

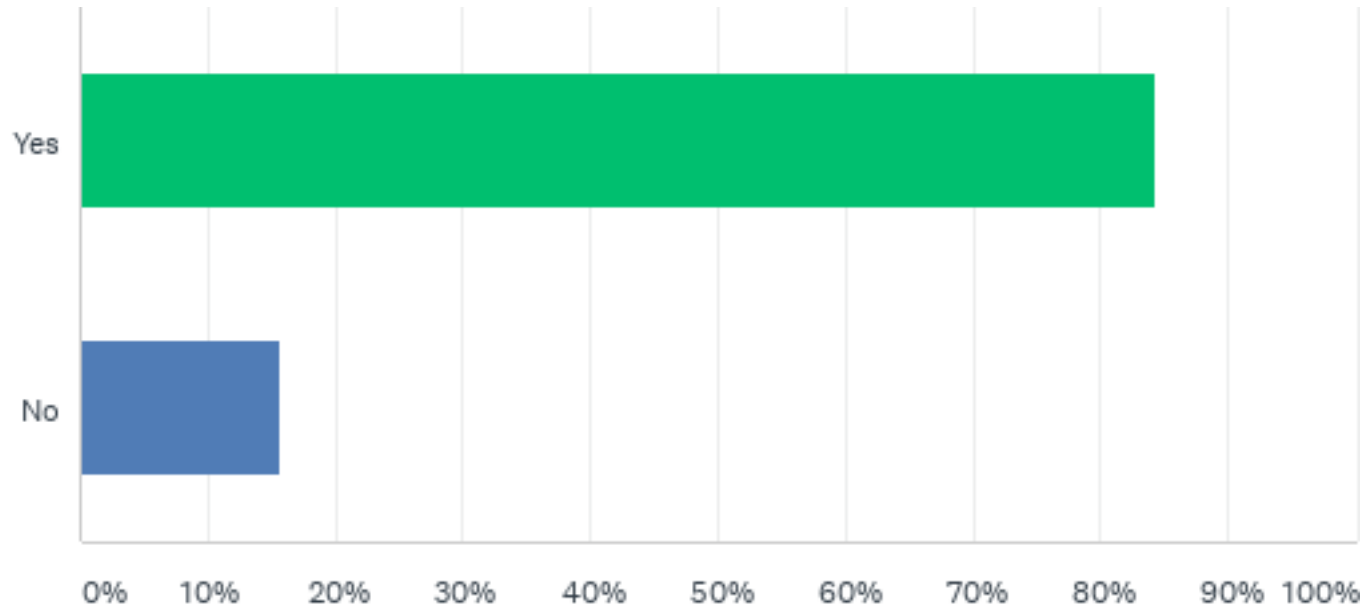
31.25%

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

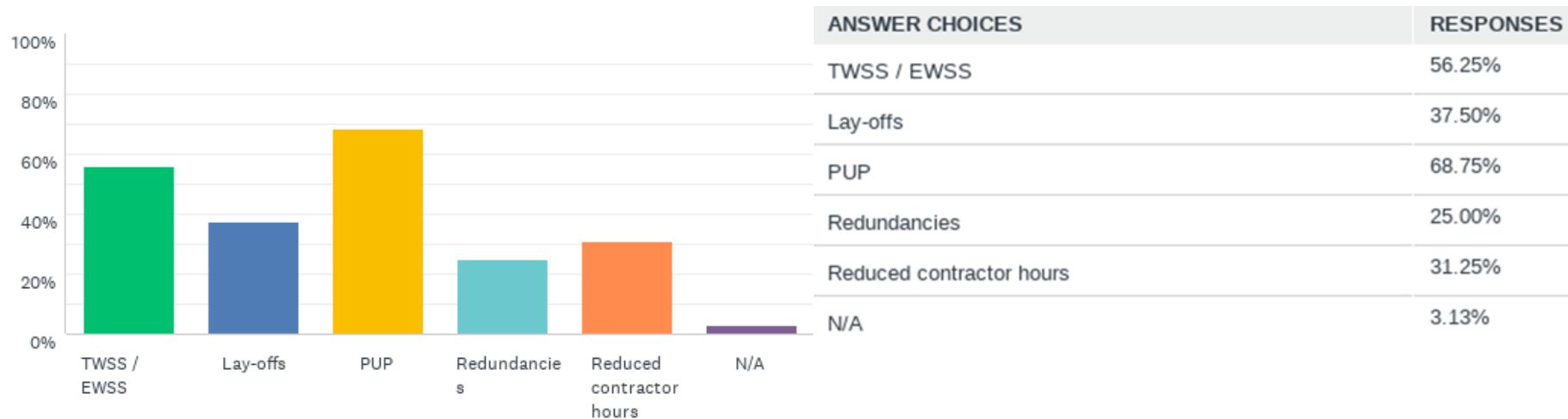


	SUPPORTIVE	INDIFFERENT	ADVERSE
Being innovative	56.25%	25.00%	18.75%
Taking risks	34.38%	28.13%	37.50%
Your employees	75.00%	6.25%	18.75%
Your customers	70.97%	19.35%	9.68%
Your management team	75.00%	15.63%	9.38%
Your company finances	31.25%	25.00%	43.75%
Market conditions	28.13%	9.38%	62.50%
Customer loyalty	73.33%	16.67%	10.00%

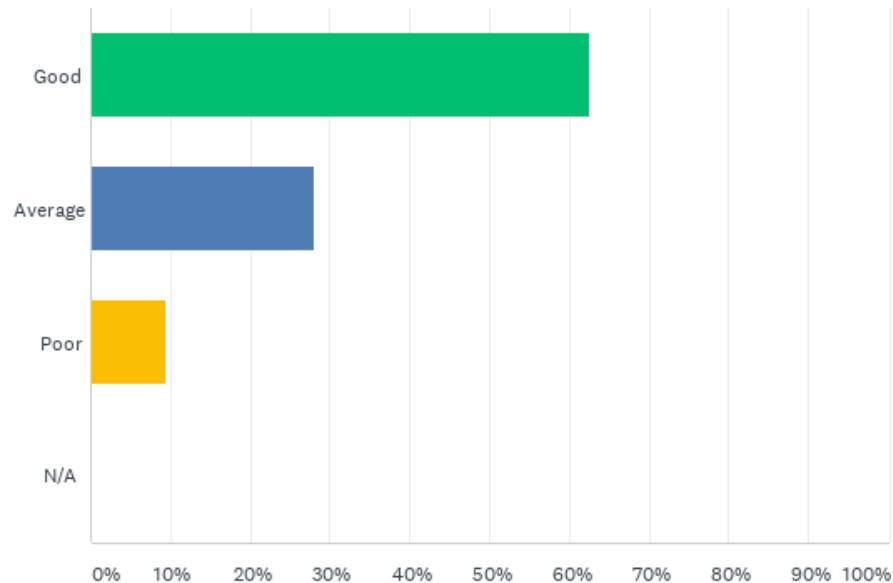
Q11: Have you had to reduce your workforce due to current trading conditions?



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

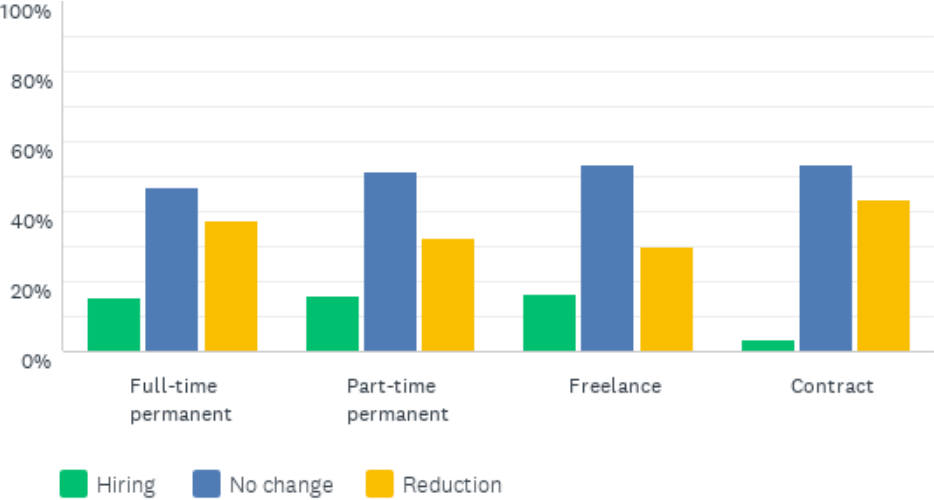


Q13: How would you describe the overall performance of your team over the last 6 months?



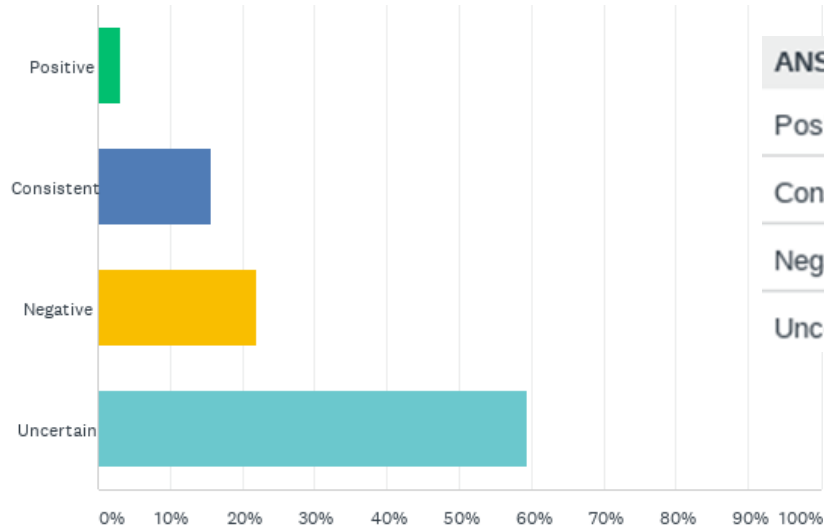
ANSWER CHOICES	RESPONSES
Good	62.50%
Average	28.13%
Poor	9.38%
N/A	0.00%

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



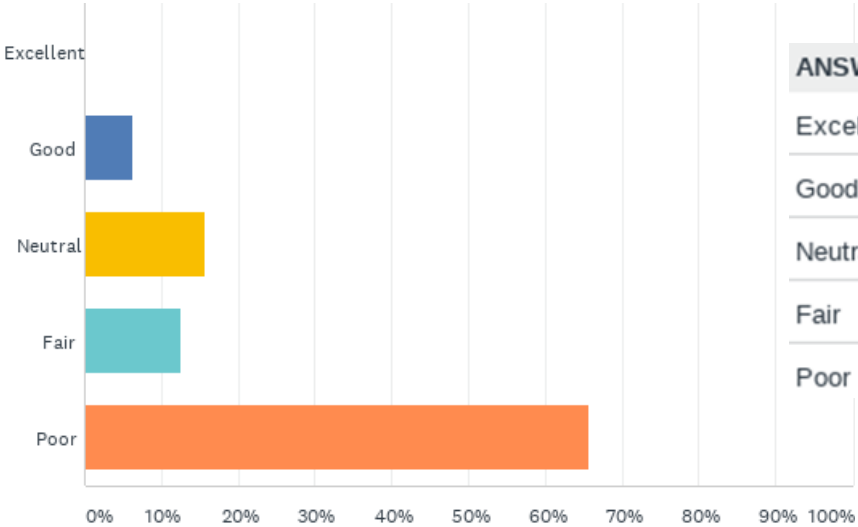
	HIRING	NO CHANGE	REDUCTION
Full-time permanent	15.63%	46.88%	37.50%
Part-time permanent	16.13%	51.61%	32.26%
Freelance	16.67%	53.33%	30.00%
Contract	3.33%	53.33%	43.33%

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



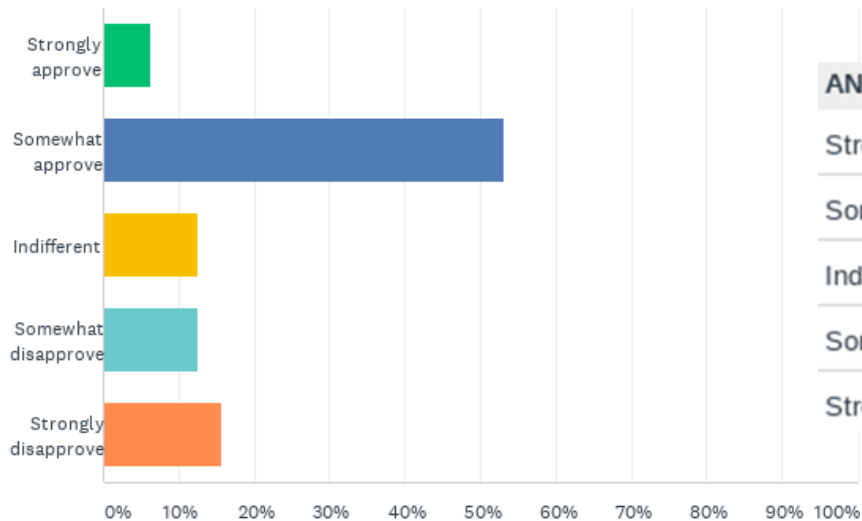
ANSWER CHOICES	RESPONSES
Positive	3.13%
Consistent	15.63%
Negative	21.88%
Uncertain	59.38%

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



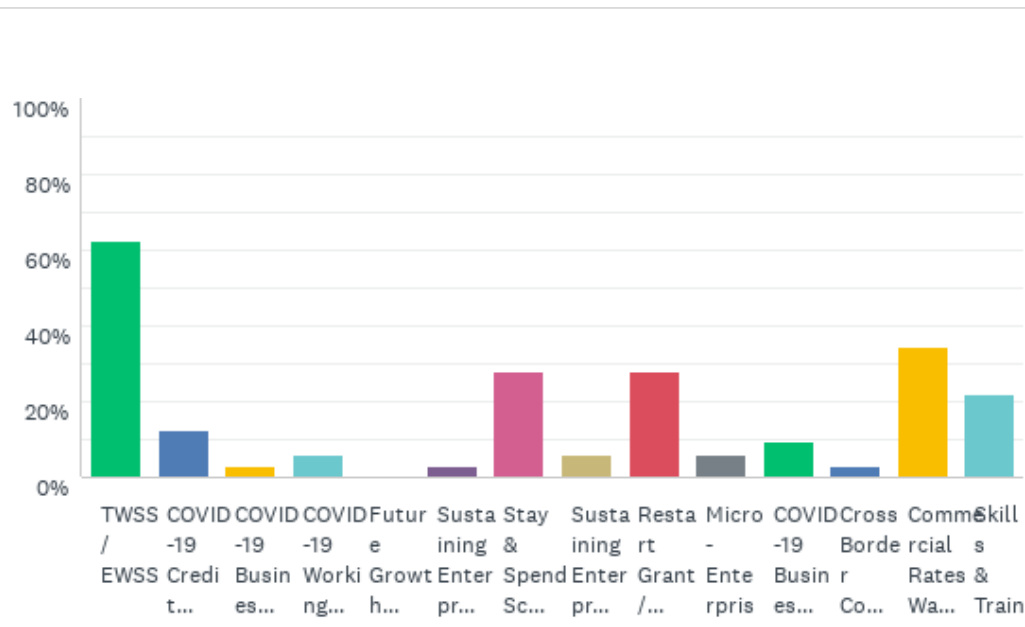
ANSWER CHOICES	RESPONSES
Excellent	0.00%
Good	6.25%
Neutral	15.63%
Fair	12.50%
Poor	65.63%

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



ANSWER CHOICES	RESPONSES
Strongly approve	6.25%
Somewhat approve	53.13%
Indifferent	12.50%
Somewhat disapprove	12.50%
Strongly disapprove	15.63%

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

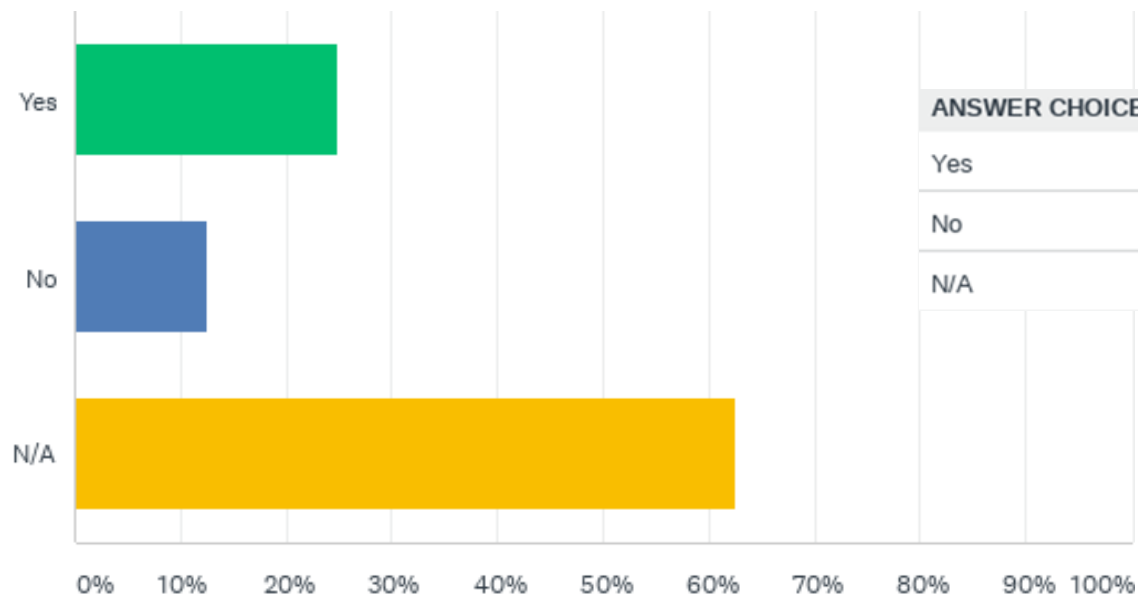


ANSWER CHOICES	RESPONSES
TWSS / EWSS	62.50%
COVID-19 Credit Guarantee Scheme	12.50%
COVID-19 Business Loans	3.13%
COVID-19 Working Capital Scheme	6.25%
Future Growth Loan Scheme	0.00%
Sustaining Enterprise Fund	3.13%
Stay & Spend Scheme	28.13%
Sustaining Enterprise Fund for Small Enterprise	6.25%
Restart Grant / Restart Grant Plus	28.13%
Micro-Enterprise Assistance Fund	6.25%
COVID-19 Business Financial Planning Grant	9.38%
Cross Border Companies Emergency Business Solutions	3.13%
Commercial Rates Waiver	34.38%
Skills & Training Supports from LEO, Skillnet, Enterprise Ireland	21.88%

Comments

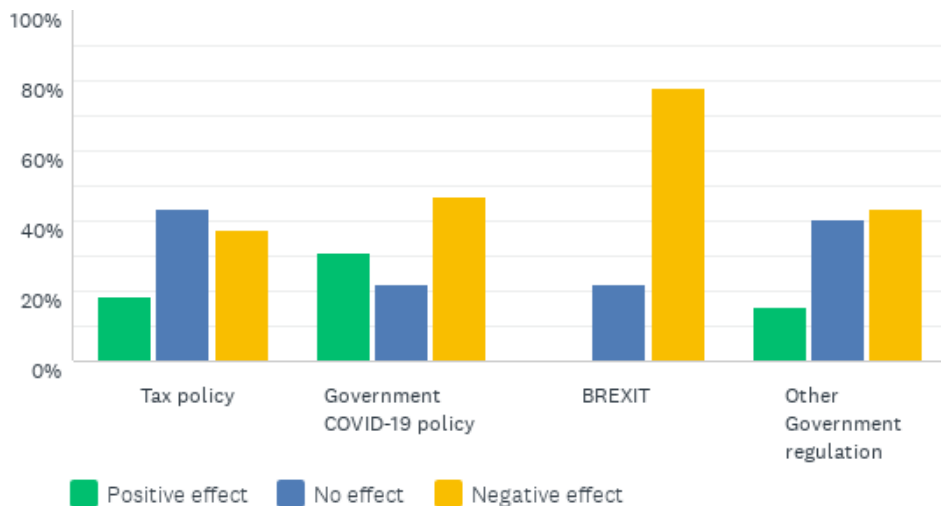
- CRSS
- Furlough Staff, Covid support Grant, Rates and Rent reduction, Rent Freeze, Rent 3 months no payment, Council Grant for outdoor furniture, company director grant, Government loan, Financial monthly support scheme, VAT reduction
- Cibls
- Pup

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	25.00%
No	12.50%
N/A	62.50%

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?

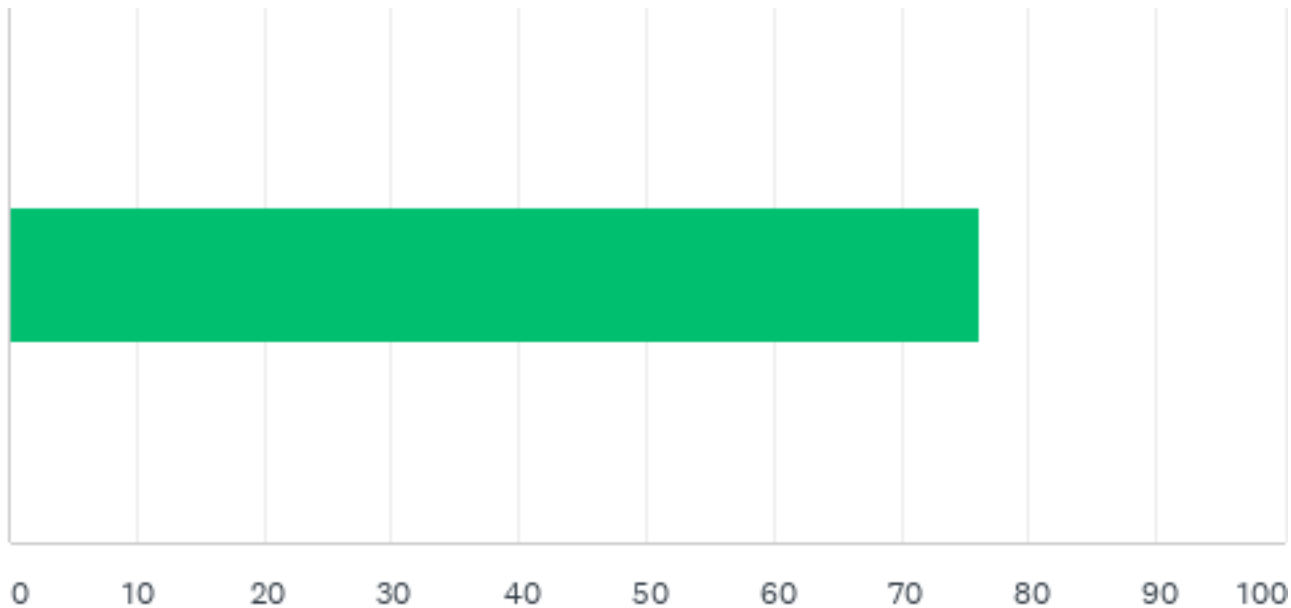


	POSITIVE EFFECT	NO EFFECT	NEGATIVE EFFECT
Tax policy	18.75%	43.75%	37.50%
Government COVID-19 policy	31.25%	21.88%	46.88%
BREXIT	0.00%	21.88%	78.13%
Other Government regulation	15.63%	40.63%	43.75%

Q 21. What you like to see Industry representatives doing on your behalf in order to assist your business in the current trading environment?

- Lower vat rates. Continued wage supports. More emphasis on promoting of charterers in hospitality and funding towards same.
 - Make it easier to avail of support
 - Extra hibernation grants. Key personnel grants to keep our team with us as we weather the storm.
 - Include all hospitality service providers in the mix seeking urgent, exceptional hospitality support.
 - VAT 5 % freeze
 - Advocate cash injections to help with stock purchase & cash flow to enable trading once the government's supports finish
 - Being realistic
 - Better resources for this sector
 - Nothing can happen in contract catering until there's a volume of viable vaccines.
 - Stop the wet pub across the street from opening if pubs serving food are allowed again
 - For EVERYONE TO FOLLOW THE MEASURES many are trading as normal as I have already stated.
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Q22: To what extent do you think the current working environment has affected your mental health and the mental health of your team?



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