

# Ashdale Insights

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## Breakfast like a king

*This month we ask how can operators tap into the growing trend of eating breakfast out of home?*

It has long been said that breakfast is the most important meal of the day. Whilst this may or may not be actually correct what is true is that many of us need to re-fuel after our overnight fast. As well as providing us with energy it also helps restore glucose levels, an important carbohydrate when it comes to how our brains function. Studies have also shown that eating breakfast can improve memory and concentration levels and it can also make us happier as it can improve mood and lower stress levels. Adelle Davis, a popular nutritionist in America in the 1960s and 1970s famously said, "Eat breakfast like a king, lunch like a prince, and dinner like a pauper".

So if we believe this to be true why do various studies still suggest that around half of all of us miss breakfast at least



once a week with over two-thirds missing it every few days. Although everyone is different here are the 5 most commonly given reasons for people missing breakfast:

1. *I have no time for breakfast*
2. *I am constantly late for work*
3. *I am on a diet*
4. *I don't feel like eating or drinking early in the morning*
5. *I don't feel like cooking or preparing anything in the morning*

So how can the casual dining sector help us start the day right?

### Tailor the offer

To begin with it needs to be recognised that a

number of operators already open for breakfast and offer a variety of options from ultra-healthy to those of us wishing to indulge in the full English (or as I discovered a few years ago Scottish) Breakfast! That said in some cases these menus are pale shadows of what the operator would serve at either lunch or certainly later in the day. If you are offering breakfast then try and ensure that it is in keeping and to the same quality as your overall proposition.

**To read this in full and previous articles go to Ashdale Articles**

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

**Pay (including bonuses) grew by +3.5% on a year earlier, private sector pay grew by +3.6% and public sector pay grew by 2.6%**

**Growth of +8.6% saw Lidl maintain their market share high, as Aldi continues to be the fastest growing supermarket**

**Consumers currently seem to be holding firm in their outlook and are not responding to the daily political uncertainties coming out of Westminster**

## Economic Headlines

*These headlines are from our Economic Bulletin.*

CPI for March 2019 was +1.9% flat on +1.9% in February, although the British Retail Consortium reported that food inflation hit +2.5%, its highest in 6 years.

Latest figures from the ONS show that unemployment remained

at 3.9%, as the number of people in work reached a new record high of 32.72 million.

The estimate for GDP for the 3 months to February 2019 was +0.3%, this was slightly higher than had been expected, possibly driven by pre-Brexit stockpiling.

CPI	+1.9%
RPI	+2.4%
CPIH	+1.8%

UNEMPLOYMENT PAY	+3.9% +3.5%
3-Mth to Feb GDP TRADE BALANCE (£13.6BN)	+0.2%
SERVICES	+£27.83BN

## Retail Headlines

*These headlines are from our Retail Bulletin.*

Retail sales rose +6.7% in March 2019 vs. March 2018, as milder weather helped to boost sales in comparison with the "Beast from the East" last year.

March's mild weather boosted sales, with food shops also recovering

after a weak February as food stores registered a +3.3% annual rise.

Latest 12 week figures saw the Grocery Market grow by +2.0%, as sales were boosted by the good weather over the Easter break including ice cream up +8%.

RETAIL VOLUMES	+6.7%
RETAIL VALUES	+7.3%
INTERNET SALES	+12.4%

  

GROCERY MARKET	+2.0%
GROCERY INFLATION	+1.4%
Aldi	+11.6%

## Consumer Spending Headlines

*These headlines are from our Consumer Spending Bulletin.*

Average family spending power was up £11 a week in January at £211, in pound terms the strongest increase since June 2016. **No update.**

The estimated average mortgage debt in February was £129,490,

meaning the average annual interest paid would be £3,185 per household (based on a rate of 2.46%).

GfK's UK Consumer Confidence Index was (13) in April flat compared to March, the third month in a row at this level, as two measures increased and three decreased.

HOUSEHOLD INCOME	£800
TAXES & COST OF LIVING	£589
DISCRETIONARY	£211

  

HOUSEHOLD DEBT EXC MORTGAGES	£59,552 £7,888
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Overall Confidence	(13)
LY Personal Finances	(1)
NY Personal Finances	+0

## Beer Update

Latest data from the British Beer & Pub Association shows that beer sales in Q1 2019 were up +1.3% on the same quarter a year ago.

The growth was driven by sales through Supermarkets & Convenience Stores while sales through Pubs, Bars & Restaurants declined.

Sales through Pubs, Bars & Restaurants in the UK in Q1 were down (**1.1%**). This compares to growth of +2.2% in Q4 last year and a decline of (**1.9%**) in Q1 in 2018.

Sales through Supermarkets & Convenience Stores in the UK in Q1 were up +3.6% compared to the same quarter last year.

This compares to an increase of +3.8% in Q4 and decline of (**1.8%**) in Q1 in 2018.

Total sales on a MAT basis are up +3.2%.

Source: BBPA May 2019



**Sales in Q1 in Supermarkets & Convenience Stores compare favourably to last year when we had the 'Beast from the East'**

## Supermarket Update

Latest 12 week figures saw the Grocery Market grow by +2.0%, as sales were boosted by the good weather over the Easter break including ice cream up +8%.

Grocery inflation is +1.4% for the 12 week period ending 21<sup>st</sup> April 2019.

② Sainsbury's has reclaimed second position

helped by its online performance, although sales have declined.

Both Co-op and Ocado gained market share this time round, with Co-op benefiting from warmer weather.

Growth of +8.6% saw Lidl maintain their market share high, as Aldi continues to be the

fastest growing supermarket.

In April, the merger between Sainsbury's and Asda was blocked by the UK's competition watchdog over fears of consumer price rises.



**The failed bid to merge with rival Asda cost Sainsbury's £46m, the supermarket giant has said**

## Weather Summaries

For more months and years then simply go to:

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

MARCH	
COLD	WARM
Temp = +1.3 Rain = 140 Sun = 114	
<ul style="list-style-type: none"> <li>Until 17<sup>th</sup> cold &amp; frequent rain before becoming drier &amp; sunnier</li> <li>5<sup>th</sup> wettest March since 1910, last week of sun raised temps</li> </ul>	

APRIL	
COOL	WARM
Temp = +1.0 Rain = 71 Sun = 114	
<ul style="list-style-type: none"> <li>Started with showers and quite cool, with sleet on high ground</li> <li>Then sunnier and warmer before the arrival of Storm Hannah</li> </ul>	

**April turned more unsettled during the last week with strong winds on the 26<sup>th</sup> and 27<sup>th</sup> associated with Storm Hannah**

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## Helping clients...

**Sell More**  
**Charge More**  
**Lower Costs**

## About Ashdale Business Consulting

I help my clients ***sell more, charge more and lower costs.***

Having been a client myself I understand you always have ***more things which need doing*** than you ever have time for. Sometimes you also need ***additional skills or experience*** to complement those already in your organisation.

### Sound familiar?

That's where help. I provide an independent flexible resource to draw from on just those occasions. I work across a range of different industry sectors providing ***analysis, insight and strategic thinking***, however I specialise in helping the UK alcohol and hospitality sector.

Clients range from ***individual outlets*** and ***microbrewers*** through to ***regional/national brewers***, as well as ***global drinks companies*** and ***trade organisations***.

For more information go to my website:

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

## Dates and Events for Your Diary

### General

**May**  
2<sup>nd</sup> Local Council Elections  
6<sup>th</sup> Early Bank Holiday  
23<sup>rd</sup> EU Parliament Elections  
27<sup>th</sup> Spring Bank Holiday

### Licensed Trade

**May**  
13<sup>th</sup>-19<sup>th</sup> Vegetarian Week  
22<sup>nd</sup> Pub & Bar Awards

### Sports

**May**  
2<sup>nd</sup>-5<sup>th</sup> Tour de Yorkshire  
18<sup>th</sup> FA Cup Final  
25-27<sup>th</sup> EFL Play-offs  
29<sup>th</sup> Europa League Final  
30<sup>th</sup> Cricket WC Starts

### June

8<sup>th</sup> Queens Official Birthday  
16<sup>th</sup> Father's Day  
21<sup>st</sup> Summer Solstice

### June

3<sup>rd</sup> World Cider Day  
8<sup>th</sup> World Gin Day  
15<sup>th</sup> National Beer Day  
19<sup>th</sup>-23<sup>rd</sup> Taste of London

### June

1<sup>st</sup> Champions League Final  
1<sup>st</sup> Epsom Derby  
6<sup>th</sup> Hol v Eng – Nations Lg  
9<sup>th</sup> Nations League Final  
13<sup>th</sup>-16<sup>th</sup> US Open  
18<sup>th</sup> 20<sup>th</sup> Royal Ascot

## Ashdale Training Dates

### Helping Pubs & Bars Make More Money

Next Open Workshops – 2019

For more information [click here](#).

19<sup>th</sup> June  
25<sup>th</sup> June

9<sup>th</sup> July  
25<sup>th</sup> July