

Ashdale Insights

INSIDE THIS ISSUE:

Economic Headlines	2
Retail Headlines	2
Consumer Headlines	2
Drinks Update - Wine	3
Pub & Bar Update	3
Weather Summaries	3
Dates for Your Diary	4

The lady who did brunch

This month we look at whether some operators are missing an opportunity by not tapping into the growing demand for Brunch?

It's fair to say that breakfast is probably my favourite meal of the day. Whether that's a Full English, Eggs Benedict or something slightly more American such as pancakes, streaky bacon and scrambled eggs – my son's favourite! That said, like many people I often find that during the week business appointments and train timetables don't always provide sufficient time in a morning for me to be able to enjoy the experience as often as I would like.

Quite often the weekends also seem to get away from me. Either I am working or I have perhaps enjoyed a beer or glass of wine too many, so that by the time I wake up the time for breakfast seems long gone.

Not wanting to lose out I



have found myself joining the growing band of people who now regularly 'Do Brunch'.

Breakfast meets lunch

It's generally accepted that the concept of BRUNCH originated in the late 19th century. However who came up with the idea is a matter of some debate.

Google the term and undoubtedly you will be presented with Guy Beringer. An English writer who, after being inspired by a weekend hangover, is credited by many for proposing the idea in his 1895 essay "Brunch: A Plea".

Breakfast back then, certainly for the better-off, often consisted of

some quite substantial items and not something one would wish to embark on after a heavy night of drinking. Beringer also believed that by eating later friends could share their debauched tales of the previous evening. "Brunch is cheerful, sociable and inciting. It is talk-compelling." Beringer wrote. "It makes you satisfied with yourself and your fellow beings."

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

www.ashdale-consulting.com

or

Casual Dining Magazine
www.casualdiningmagazine.co.uk

CPI is the highest it has been in six years, as the squeeze on households' continues

Aldi reclaimed its crown as Britain's fastest growing grocer during the latest quarter, with sales up +15.1%

The Consumer Confidence Index hasn't been in positive territory for nearly two years – current thinking is that the likelihood is that 2018 will go even lower

Economic Headlines

These headlines are from our Economic Bulletin.

CPI for November 2017 was +3.1% up on +3.0% in October, the highest in nearly six years, as the squeeze on households continues.

Latest figures from the ONS show that unemployment remained at 4.3%, a 42-year low,

although wages continue to lag behind the cost of living.

The final estimate for GDP for Q3 was +0.4% unrevised from the second estimate better than the 0.3% rate recorded in the first and second quarters.

CPI	+3.1%
RPI	+3.9%
CPIH	+2.8%

UNEMPLOYMENT	+4.3%
PAY	+2.5%

Q3 GDP	+0.4%
TRADE BALANCE	(£5.0BN)
SERVICES	+£27.91BN

Retail Headlines

These headlines are from our Retail Bulletin.

Retail sales rose +1.6% in November 2017 vs. November 2016, as analysts warned that “Black Friday” had distorted sales as retailers faced challenging conditions.

Average store prices increased by 3.1% in

November 2017 as Food Stores had the largest price increase since September 2013 of +3.6%.

Latest 12 week figures saw the Grocery Market grow by +3.1%, as like-for-like grocery inflation stood at +3.6% its highest level since 2013.

RETAIL VOLUMES	+1.6%
RETAIL VALUES	+4.7%
INTERNET SALES	+10.2%

GROCERY MARKET	+3.1%
GROCERY INFLATION	+3.6%

Aldi	+15.1%
------	--------

Consumer Spending Headlines

These headlines are from our Consumer Spending Bulletin.

Average family spending power was down (£1) a week in November at £199, as the higher cost of essential spending has led to a decline in discretionary spending.

The estimated average mortgage debt in October

was £122,235, meaning the average annual interest paid would be £3,056 per household (based on a rate of 2.5%).

GfK's UK Consumer Confidence Index was (13) in December down (1) compared to November, representing nearly two years of declining consumer confidence.

HOUSEHOLD INCOME	£774
TAXES & COST OF LIVING	£575
DISCRETIONARY	£198

HOUSEHOLD DEBT	£57,432
EXC MORTGAGES	£7,549

Overall Confidence	(13)
LY Personal Finances	(3)
NY Personal Finances	+2

Wine Update

Latest data from the HMRC shows that still wine returns for September 2017 were up +3.8% versus September the previous year.

This combined with July down (0.8%) and August up +0.1% meant that Q3 was up +1.0% vs. 2016.

This means that the current MAT is up +0.3%

vs. this time last year.

Sales of sparkling wines were up again in September although only, +0.9%.

Combined with increases in July +11.9% and August +0.0% meant Q3 was up +4.2% vs. 2016.

This means that the current MAT is up +5.4%

compared to last year.

The last few months have seen a marked slowdown in the growth of sparkling wine vs. the last few years.

Source: HMCR November 2017



The last few months have seen a marked slowdown in the growth of sparkling wine vs. the last few years

Pub & Bar Update

Drinks group C&C has acquired a stake in UK pub operator Admiral in partnership with investment firm Proprium Partners. Under the terms of the deal, C&C is paying £37m for 47% of Admiral's issued capital.

It said the minority stake in Admiral, which owns 845 pubs in the UK, will give it a direct route to

market for its products. Admiral's pubs are 95% freehold or long leasehold and are mainly in suburban or city locations and are operated as a tenanted estate.

Thornbridge Brewery is joining forces with Pinovar to open new Thornbridge and Co. sites across the UK. The

brewer and the distributor have worked alongside each other since the opening of The Sheffield Tap eight years ago, and aim to open 10 new sites over the next five years.



Drinks group C&C has acquired a stake in UK pub operator Admiral - paying £37m for 47% of Admiral's issued capital

Weather Summaries

For more months and years then simply go to:

www.ashdale-consulting.com

NOVEMBER		
	DRY	Temp = (0.4)
FROST		Rain = 89
		Sun = 121
<ul style="list-style-type: none"> Started quiet although turning much colder in the last week Quite sunny in most parts of the country 		

DECEMBER		
WINDY		Temp = 0.2
FROST		Rain = 99
		Sun = 115
<ul style="list-style-type: none"> Cold & frosty with snow, especially in the Midlands Strong winds at the beginning and end of the month 		

December began cold and frosty, with snow both before and after Christmas in some areas

Ashdale Business Consulting Ltd
6 Lichfield Street
Burton-on-Trent
Staffordshire
DE14 3RD

Phone
07967 197533
E-mail
chris@ashdale-consulting.com
Twitter
@Ashdale2012

Helping clients...

Sell More
Charge More
Lower Costs

About Ashdale Business Consulting

Ashdale Business Consulting is an independent consultancy providing analysis, insight and strategy across the UK alcohol and hospitality industry. Specialist areas include Strategic & Marketing Analysis, Scenario Planning & Forecasting, Category Management and Profit & Value Chain Modelling. We also deliver training across a range of business and marketing activities, all of which help to improve an organisations ability to make more profitable decisions.

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 our website:

www.ashdale-consulting.com

For more information about our FREE and chargeable eLearning training go to:

www.http://ashdale-academy.teachable.com

Dates and Events for Your Diary

General

January

1st New Year's Day
25th Burns Night

February

13th Shrove Tuesday
14th Valentine's Day
16th Chinese New Year
(Rooster)

Licensed Trade

January

16th Restaurant Marketer
Awards (Lnd)
30th National Breakfast
Awards (Lnd)

February

6th-8th Pub 18 (Olympia)
21st-22nd Casual Dining Show
(Lnd)
22nd National Burger Awards

Sports

January

15th-28th Australian Tennis
Open

February

4th Super Bowl (USA)
9th-25th Winter Olympics
(South Korea)
25th League Cup Final (Lnd)

Ashdale Training Dates

Licensed Trade

January

Elearning courses available
No open workshops

February

15th How To Make More Profit (BoT)
27th How To Make More Profit (BoT)

Marketing

January

Elearning courses available
No open workshops

February

6th For Small Businesses (BoT)
20th For Small Businesses (BoT)

