

Ashdale Insights

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It's Dinner Time or Is It!

This month we ask what time should operators open in the evening?

Regardless of which part of the country you live in, the first meal of the day is always considered to be breakfast. Nothing wrong with that. But as the day progresses the language that we use for the following meals can vary quite considerably depending on a number of different factors. For example geography, there is definitely a North vs. South divide. There is also Social Class, the upper and middle classes tend to use different terminology compared to their more traditional working class cousins. And of course the most common of British traditions inconsistency! When I was at school in Rochdale I remember, quite fondly at times, the joys of queuing for school dinners. A meal usually taken between 12pm and 1pm. Then later on in the day usually around 6pm we would gather round as a family and have our 'tea'.



Having lived further south over later years I found myself more regularly referring to that mid-day meal as lunch and then planning what I was going to have for dinner later.

Although research into this subject is fairly difficult to find, there was a piece of work done by Geest, the fresh food supplier back in 2005. Based on a sample of 1,000 people, they found that just over half called the main evening meal 'dinner', about 40% called it 'tea' with just under 10% referring to it as 'supper'! But breaking the research down by geography revealed that nearly 70% of

respondents in the north of England called their main meal 'tea', but only 5% of those in London used the same language. So does any of this really matter?

The kitchen is closed

On one level whether your customers or potential customers call their evening meal tea or dinner is entirely up to them and nothing to get too hung up about. However knowing which it is may give you some strong indicators...

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

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There were 1.42 million unemployed people, down 16,000 on the quarter (and down 136,000 on a year earlier)

Lidl was the UK's fastest-growing bricks and mortar supermarket, with Aldi also having strong growth

There was a steep decline in April in the numbers concerning personal finances

Economic Headlines

These headlines are from our Economic Bulletin.

CPI for March 2018 was +2.5% down on +2.7% in February, its lowest rate in a year, although economists still expect the Bank of England to raise interest rates in May.

Latest figures from the ONS show that

unemployment was 4.2%, with the gap between wage growth and inflation seeming to be coming to an end.

The preliminary estimate for GDP for Q1 was +0.1%, down from +0.4% in Q4, this is the slowest rate of growth since 2012 driven by a fall in construction.

CPI	+2.5%
RPI	+3.3%
CPIH	+2.3%

UNEMPLOYMENT	+4.2%
PAY	+2.8%

Q1 GDP	+0.1%
TRADE BALANCE	(£6.4BN)
SERVICES	+£27.84BN

Retail Headlines

These headlines are from our Retail Bulletin.

Retail sales rose +1.1% in March 2018 vs. March 2017, as the cold snap deterred many consumers from going out to the shops though it did boost online sales.

Department stores saw positive growth as promotions for Mothering

Sunday and Easter helped, along with online sales boosted by the adverse weather.

Latest 12 week figures saw the Grocery Market grow by +2.0%, somewhat over-shadowed by the proposed merger of Asda and Sainsbury's – potential 31.4% share.

RETAIL VOLUMES	+1.1%
RETAIL VALUES	+3.0%
INTERNET SALES	+13.3%

GROCERY MARKET	+3.4%
GROCERY INFLATION	+3.6%

Lidl	+9.1%
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Consumer Spending Headlines

These headlines are from our Consumer Spending Bulletin.

Average family spending power was up £3 a week in March at £199, supported by both an upturn in wage growth and easing inflationary pressures.

The estimated average mortgage debt in

February was £123,553, meaning the average annual interest paid would be £3,114 per household (based on a rate of 2.52%).

GfK's UK Consumer Confidence Index was (9) in April down (2) compared to March, the 28th consecutive month without the overall index being positive.

HOUSEHOLD INCOME	£778
TAXES & COST OF LIVING	£579
DISCRETIONARY	£199

HOUSEHOLD DEBT	£58,119
EXC MORTGAGES	£7,699

Overall Confidence	(9)
LY Personal Finances	(1)
NY Personal Finances	+4

Beer Update

Latest data from the British Beer & Pub Association shows that beer sales in Q1 2018 were down (1.7%) on the same quarter a year ago.

The decline was across sales through Supermarkets & Convenience Stores and through Pubs, Bars & Restaurants.

Sales through Pubs, Bars & Restaurants in the UK in Q1 were down (1.9%). This compares to a decline of (2.3%) in Q4 this year and a decline of (3.5%) in Q1 in 2017.

Sales through Supermarkets & Convenience Stores in the UK in Q1 were down (1.5%) compared to the same quarter last year.

This compares to a growth of +3.6% in Q4 and a growth of +11.3% in Q1 in 2017.

Source: BBPA May 2018



Following a good finish to 2017, sales through both on and off trade outlets are down in Q1 this year versus a year ago

Supermarket Update

The latest grocery market share figures reveal the overall market has grown by +2.0%, this is its slowest rate since March 2017.

Grocery inflation stands at +2.1% for the 12 week period ending 22nd April 2018.

Tesco and Morrisons both performed strongly, with

Morrisons doing well in London as well as its traditional northern heartlands. Tesco has grown more than +2.0% for the 12th consecutive period – the first time it has done this since March 2011.

The big news however was the proposed merger between Sainsbury's and

Asda, which would result in a combined grocery share of 31.4%.

This could be a pivotal moment for the British grocery market.

Source: Kantar World Panel



Asda achieves nearly two-thirds of its sales outside London and the south east of England in contrast to Sainsbury's, which registers 59% of its sales in those two areas

Weather Summaries

For more months and years then simply go to:

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MARCH		
		Temp = (1.6) Rain = 110 Sun = 83
<ul style="list-style-type: none"> Started cold with widespread snow & below freezing temps Rest of the month was milder but with rain and unsettled 		

APRIL		
		Temp = +1.0 Rain = 119 Sun = 90
<ul style="list-style-type: none"> Started off cold and wet with some snow on high ground Then brief hot spell which saw hottest April temps since 1949 		

A brief but very hot spell between the 18th & 21st which produced the highest temperatures in April since 1949

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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

GeneralMay

7th May Bank Holiday
19th Royal Wedding (1pm)
25th GDPR
28th Spring Bank Holiday

June

9th Queen's B'day (Official)
17th Father's Day
21st Summer Solstice

Licensed TradeMay

1st MUP Scotland
16th National Waiters' Day
23rd Pub & Bar Awards

June

1st Cocktails in City (Leeds)
3rd World Cider Day
13th-17th Taste of London
22nd Cider Summit (Bristol)

SportsMay

16th Europa League Final
19th FA Cup Final (5.15pm)
26th Champions League Final

June

14th World Cup (Russia)
18th Tunisia v England
24th England v Panama
28th England v Belgium

Ashdale Training Dates

Licensed TradeMay

3rd How To Make More Profit (BoT)
15th How To Make More Profit (Sheff)
17th How To Make More Profit (BoT)

June

7th How To Make More Profit (BoT)
21st How To Make More Profit (BoT)

MarketingMay

Currently no open workshops

June

Currently no open workshops

