

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

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	+3.9%
PAY	+3.5%

3-Mth to Feb GDP	+0.2%
TRADE BALANCE	(£13.6BN)
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	£59,552
EXC MORTGAGES	£7,888

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 21st April 2019.

🔗 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 prices 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

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

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

April turned more unsettled during the last week with strong winds on the 26th and 27th 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

Dates and Events for Your Diary

General

May

2nd Local Council Elections
6th Early Bank Holiday
23rd EU Parliament Elections
27th Spring Bank Holiday

June

8th Queens Official Birthday
16th Father's Day
21st Summer Solstice

Licensed Trade

May

13th-19th Vegetarian Week
22nd Pub & Bar Awards

June

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

Sports

May

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

June

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

Ashdale Training Dates

Helping Pubs & Bars Make More Money

Next Open Workshops – 2019

For more information [click here](#).

19th June

9th July

25th June

25th July

