

Ashdale Insights

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Who's in charge

This month we ask who is making sure every session runs as smoothly as it should?

The month of December and the run up to Christmas is usually a time for friends and family. It is also a time for reminiscing about events and experiences from previous years. Looking forward to traditions which have to been maintained, excited about those which have emerged and being fondly amused by those enjoyed by previous generations.

One such story I was recently recalling was how both the BBC and ITV use to have a habit of putting a circus on their schedules at that time of year. Two of the most commonly broadcast back in the day were Billy Smart Circus and I believe Charlie Cairoli at the Blackpool Tower!

Of course whilst circuses still exist their appearance on mainstream TV is now a thing of the past, whereas in years gone by



they were more common place. Of course everyone had their own favourite acts; clowns, acrobats, jugglers and back in the day, trained animals; however without exception at the heart of all the great circuses was the ringmaster.

A pivotal role which included introducing the various acts, directing the attention of the audience to the appropriate performance areas and most importantly maintaining the smooth flow of the circus.

The other greatest show on earth

As we know, running a

great restaurant doesn't happen by chance. It takes a lot of hard work, preparation and of course a great deal of planning. However no matter how much planning you do, the one thing you can very rarely control is your customers.

Just because you take bookings doesn't mean that people will always turn up on time.

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

www.ashdale-consulting.com

The latest estimate for GDP for the 3 months to August suggests there is less likelihood that the UK economy will slip into a recession

Aldi and Lidl continue to gain share and now combined account for over 14% of UK grocery sales

People's view of their own finances is starting to look weak which may have an impact in the coming months

Economic Headlines

These headlines are from our Economic Bulletin.

CPI for September 2019 was +1.7% flat on +1.7% in August, as downward movements in fuels & utilities were off-set by increases in household goods and recreation.

Latest figures from the ONS show that the unemployment rate was

3.9%, as wage growth continues to increase ahead of inflation at +3.8%.

The latest estimate for GDP for the 3-months to August 2019 was +0.3%, meaning it looks less likely that there will be a recession.

CPI	+1.7%
RPI	+2.4%
CPIH	+1.7%

UNEMPLOYMENT	+3.9%
PAY	+3.8%

3 MTH TO AUG	+0.3%
TRADE BALANCE	(£2.89BN)
SERVICES	+£23.80BN

Retail Headlines

These headlines are from our Retail Bulletin.

Retail sales rose +3.1% in September 2019 vs. September 2018, as Department Stores and Household Goods Stores continue to struggle.

Food shops bounced back after a weak few months, but there was yet more bad news for department

stores with sales continuing to fall in September.

Latest 12 week figures saw the Grocery Market +1.3%, as shoppers spent £1.5m on pumpkins during the past 12 weeks as they get ready for Halloween!

RETAIL VOLUMES	+3.1%
RETAIL VALUES	+3.4%
INTERNET SALES	+8.7%

GROCERY MARKET	+1.3%
GROCERY INFLATION	+0.8%
Lidl	+8.2%

Consumer Spending Headlines

These headlines are from our Consumer Spending Bulletin.

Average family spending power was up £14 a week in August at £216, helped by a combination of favourable wage growth and a slowdown in the rate of inflation. **No update.**

The estimated average mortgage debt in August

was £130,722, meaning the average annual interest paid would be £3,163 per household (based on a rate of 2.42%).

GfK's UK Consumer Confidence Index was **(14)** in October down **(2)** compared to September, as all five measures showed month-on-month decreases this time

HOUSEHOLD INCOME	£818
TAXES & COST OF LIVING	£602
DISCRETIONARY	£216

HOUSEHOLD DEBT	£59,441
EXC MORTGAGES	£7,874

Overall Confidence	(14)
LY Personal Finances	+1
NY Personal Finances	+1

Beer Update

Latest data from the British Beer & Pub Association shows that beer sales in Q3 2019 were up +4.2% on the same quarter a year ago.

The growth was driven by sales through Supermarkets & Convenience Stores although sales through Pubs, Bars & Restaurants also grew.

Sales through Pubs, Bars & Restaurants in the UK in Q3 were up +2.0%. This compares to a decline of (2.8%) in Q2 this year and a growth of +1.5% in Q3 in 2018.

Sales through Supermarkets & Convenience Stores in the UK in Q3 were up +6.0% compared to the same quarter last year.

This compares to a decline of (1.7%) in Q2 and growth of +6.2% in Q3 in 2018.

Total sales on a MAT basis are up +1.7%.

Source: BBPA October 2019



The outlook for beer sales currently looks positive however sales in Q4 last year were also good so year-on-year comparisons may suffer in the next quarter

Supermarkets Update

Latest 12 week figures show the grocery market +1.3% vs. +0.5% last month. Grocery inflation is +0.8% for the 12 week period ending 6th October 2019.

Sainsbury's launches own-label Hyde & Wilde craft beer into on-trade. The brand, brewed by Marston's, has been touted as one of the

supermarkets most successful tertiary launches.

M&S is to let customers pay for online purchases in four instalments over six weeks interest-free.

The option will be available on purchases of clothing and home products worth between £30 and £800 from mid-

November.

The option requires no credit application and simply splits the usual single payment into four, according to M&S.



M&S launches 'buy now, pay later' scheme online

Weather Summaries

For more months and years then simply go to:

www.ashdale-consulting.com

SEPTEMBER	
 	Temp = +0.5 Rain = 127 Sun = 115
WARM	
<ul style="list-style-type: none"> The month started and ended with quite a lot of rain However there were also quite a bit of sun and warm temps 	

OCTOBER	
COLD	
Temp = (0.5)	Rain = 109
	Sun = 95
<ul style="list-style-type: none"> Generally unsettled with temperatures below the average Wet in most regions most notably Yorkshire & South West 	

Until the 20th of October there were frequent low pressure systems and rain belts crossing the country

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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

November

5th Bonfire Night
11th Armistice Day
15th Children In Need
28th Thanksgiving (USA)
29th Black Friday
30th St Andrew's Day

December

2nd Cyber Monday
12th General Election
22nd Winter Solstice
25th Christmas Day
26th Boxing Day
31st New Year's Eve

Licensed Trade

November

7th National Pizza Awards
13th-15th Pizza & Pasta
Show (Olympia)
12th Purple Tuesday
21st Beaujolais Day
21st-24th Taste of London

December

17th UKH (ALMR) Christmas
Lunch

Sports

November

2nd Rugby Union WC Final
14th Eng vs Montenegro
17th Kosovo vs Eng

December

1st Abu Dhabi GP (last one)

Ashdale Training Dates

Helping Pubs & Bars Make More Money

No more Open Workshops in 2019_

For more information [click here](#).