



The Tile & Timber Inn
Little Town, Fluteshire

Market Assessment & Customer Survey
2007

Survey done by KVM Research, May-June 2007

The purpose of the market assessment and customer survey is to assess the potential of the business and the premises that are The Tile & Timber Inn.

It was conducted during May and June 2007 by Knud Møller of KVM Research at the request of the tenant landlord Mr A N Other. The questionnaires and their safe keeping was the responsibility of KVM Research and they have now been destroyed in a secure manner.

The content of this report and its accuracy is the responsibility of KVM Research. However, KVM Research accepts no responsibility for any actions that the tenant landlord, the owners of the premises, that are The tile & Timber Inn, or anyone else is taking in pursuance of the conclusions of the report.

The report is owned by the tenant landlord and no part of it must be copied or quoted in public or private or used for any purpose whatsoever without the express permission in writing by the tenant landlord.

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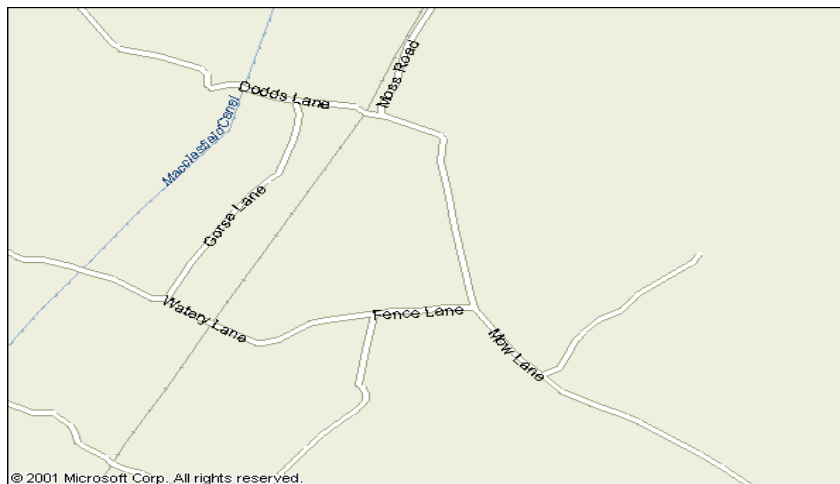
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Introduction

'The Tile & Timber Inn' is a medium sized traditional town public house within the borough of Little Town, Fluteshire. It is situated on the junction of Forge Street and Goneaway Road in the parish of Timberbury near the border with Drumbershire. The nearest town is Large Town to the North approximately 20 miles from the pub. Some 25 miles to the South is the Drumbershire town of Lyme grove.

It is a large two-storey brick building which originally also served as a coach house.

The premises are owned by Flemmings Brewery and the current tenant is Andrew N Other who manages the business jointly with his wife Angela.



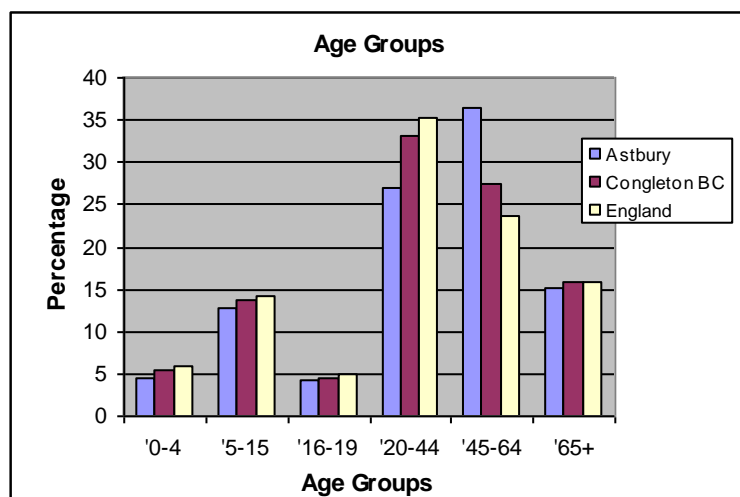
General

Market Assessment, The Area and Its People

Timberbury Parish is semi rural in character highlighted by the fact that its 4,032 hectares (15.6 sq miles) makes up 19.1% of the boroughs area (21,083 hectares, 81.4 sq miles), but the population at the time of the 2001 Census (1,774 people) only made up 2% of the boroughs population (90,655). Population density in Timberbury is 0.44 persons per hectare (0.18 pers/acre) compared to 4.30 per hectare (1.74 pers/acre) in the borough as a whole.

How old are they? - Age

A striking feature of the age structure of Timberbury Parish is the high percentage of people aged 45-64, 36.4% compared to 27.4%. This would suggest a high proportion



Source: 2001 Census

of people at a time in their life when their potential for social and economic involvement is at its peak.

Who are they - Socio-economic profile

	Timber- bury	Little Town	North East	England
People aged 16-74: Economically active	- Percentage -			
Employees Full-time	35.42	43.77	38.77	40.81
Employees Part-time	11.46	11.89	11.87	11.81
Self-employed	21.68	8.82	7.10	8.32
Unemployed	2.13	2.22	3.63	3.35
Full-time student	2.42	2.58	2.54	2.58
People aged 16-74: Economically inactive	- Percentage -			
Retired	11.98	14.93	14.28	13.54
Student	3.53	4.21	4.62	4.67
Looking after home / family	6.76	5.63	6.12	6.52
Permanently sick / disabled	3.16	4.03	7.75	5.30
Other	1.47	1.92	3.32	3.10

Source: 2001 Census

This impression is strengthened by an analysis of the above table. It emerges that among the economically active people in Timberbury there is a high proportion of Self-employed and a high proportion of people (probably women) looking after home and family. The proportion of people in other groups are conversely relatively small.

Further evidence of the nature of the area is found when we look at the industry in which the residents are employed.

You find that although the numbers are small there is relatively more of the people of Timberbury employed in Agriculture, a relatively low income industry. By contrast you also find a relatively high proportion employed in Financial services, estate & business activities.

What do they do? - Industry of Employment

	Little				
	Timberbury Town	Little Town	Fluteshire	North East	England
All People	964	44,575	318,586	2,900,020	22,441,498
	<-		Percentage		->
Agriculture, hunting, forestry & fishing	9.65	2.24	2.26	1.24	1.48
Mining, manufacturing, water & energy	18.26	22.48	19.05	17.83	15.79
Construction	6.43	5.68	15.5	6.49	6.76
Distribution & catering	18.67	20.28	22.29	22.95	21.58
Transport, storage and communications	6.33	6.49	6.38	6.79	7.09
Financial services, estate & business activities	19.40	17.70	17.85	14.57	18.01
Public admin, education, health & social work	17.32	20.92	22.16	25.60	24.10
Other	3.94	4.21	4.33	4.54	5.20

Source: 2001 Census

How do they live? - Tenure

	Timberbury	Little Town	Fluteshire	North East	England
Households					
All Households - Numbers	697	37,283	280,031	2,812,789	20,451,427
			- Percentage -		
Owner occupied: Owns outright	40.89	34.94	33.30	29.78	29.19
Owner occupied with a mortgage or loan	40.75	46.91	43.00	38.89	38.88
Shared ownership	0.00	0.24	0.42	0.59	0.65
Rented from local authority	1.00	2.59	10.03	13.57	13.21
Rented from Housing Association / RSL	5.45	8.25	4.43	6.50	6.05
Rented from: Private landlord or letting agency	7.60	4.67	5.94	7.66	8.80
Other Rented	4.30	2.41	2.88	3.01	3.22

Source: 2001 Census

More than 40% of the households in Timberbury own their house outright. This is nearly 6% more than in Little Town Borough Council area as a whole and an even higher proportion than in wider areas such as Fluteshire County.

How do they live? - Rooms

Area	Rooms per Household	Percentage 7 or more Rooms
England	5.3	19.8
North East	5.4	18.7
Fluteshire	5.8	N/A
Little Town BC	5.9	30.6
Timberbury	6.7	41.9

Source: 2001 Census

People in Timberbury evidently live in bigger houses than any wider areas. On average there are 6.7 rooms per household in Timberbury compared to less than 6 rooms per household in wider areas and nearly 42% of all households have more than 7 rooms at their disposal compared to less than a third in Little Town BC area as a whole and less than 20% within the North East region and England.

How do they live? - Cars

There are more cars per household in Timberbury 1.87 cars per household compared to 1.43 and less in wider areas. 20.6% of households have got three or more cars available compared to 9.4% within the borough area as a whole and fewer still in wider areas.

	Timberbury	Little Town	Fluteshire	North East	England
Households					
All Households - Numbers	696	37,283	280,031	2,812,789	20,451,427
			- Percentage -		
No car or van	5.75	14.53	18.91	30.21	26.84
1 Car	29.45	40.54	42.52	43.54	43.69
2 Cars	44.25	35.53	30.75	21.53	23.56
3 Cars	14.66	7.12	6.00	3.70	4.52
4 Cars or more	5.89	2.29	1.81	1.02	1.39
Total number in area	1304	53,310	364,067	2,874,991	22,607,629
Cars per household	1.87	1.43	1.30	1.02	1.11

Source: 2001 Census

Income & Expenditure

	Residents
Male	£566.1
Female	-380.9
Total	£476.1

Source: NOMIS & ASHE

There are no statistics available on personal or family income and expenditure for such a small area as Timberbury Parish. We therefore rely on statistics for the larger area of Little Town BC. The above table shows the average weekly earnings of individual residents in that area who are also in employment. This we can relate to the national statistics on household expenditure, but before we can do that we need to consider average weekly household earnings.

From the above tables on residents in employment and no of households we find that in Timberbury there is an average of 1.4 people per household in employment. To find the average earnings per household we can therefore multiply the above average by that ratio and we thus find an average household earning of £666.5.

Households with that amount of earnings will according to the Family Expenditure Survey*) spend an average of £32 a week on alcoholic drinks and meals in restaurants and cafés. Multiplied with no households we thus find a potential weekly expenditure by Timberbury households on these items of £30,880 or with an estimated 20 pubs, restaurants and cafés in and around Timberbury a potential weekly spending of £1,544 per establishment.

*) National Statistics, 'Information - Family Spending 2006 Edition', 1 May 2007

Market Assessment, Conclusion

As has been demonstrated above Timberbury is a reasonably wealthy area with a population, which belong to the upper end of the socio-economic spectrum and with a good spending power. If the catchment area of 'The Tile & Timber' is limited to Timberbury a weekly turnover of at least £1,500 should be expected. If the present turnover is lower than that, improvements should be achievable without too much difficulty.

Customer Survey, Analysis

The following is an analysis of a questionnaire survey that was conducted in the spring of 2007 among the customers visiting 'The Tile & Timber' PH. Customers were invited to pick a questionnaire from a box exhibited in the bar area. 46 questionnaires were returned which equates to probably about 15% of the total clientele. The analysis give an indication of where improvements can be achieved with the consensus of the existing customers.

Response from Male Customers

	Car Owner	Employee	Self-employed	Un-employed	Students	Other	Total
Who?	30	10	15	1	5	3	34
	Timberbury	Little Town	Lymegrove	Bliddulph	Mow Lawn	Elsewhere	Total
Where?	9	3	4	5	5	8	34
	Daily	2-3 times	Once a week	Weekends	Regularly	Occasional	Total
How often?	8	6	5	7	7	1	34
	Lunchtime	Evenings	Lunch & Eve	Total			
When?	11	15	8	34			
	Quality	<u>Drinks</u>		Quality	<u>Food</u>		<u>Snacks</u>
Attraction	30	Variety	Price	20	Variety	Price	15
		15	25	17	19		
	<u>Atmosphere</u>						
Atmosphere	Staff	Owner	Décor	Atmosphere	Hygiene	Smoking	Opening
	19	23	10	18	20	8	8
	<u>Improvements</u>						
Improvements	Drinks	Snacks	Traditional food	Spicy food	Vegetarian	Entertainment	Modernisation
	7	6	11	8	7	3	3

The customer profile matches the profile of the general area of Timberbury in terms of age and socio-economic structure and a great majority are car owners who travel to 'The Tile & Timber' by car. They visit the inn mostly in the evenings, but about a third of the male customers also visit it at lunchtimes.

It appears that the attraction is the quality and price of drinks and food while the friendly attitude of people behind the bar both staff and management and the general atmosphere are also important.

We have already noted that 'The Tile & Timber' PH is a traditional country pub and the customers appreciate the

traditional atmosphere. However, it appears that many, both men and women, would like to see more traditional food on the menu with many men also wanting more spicy dishes. Few cares about entertainment or modernisations to the pub. However, these attitudes varies with age.

Response from Female Customers

	Car Owner	Employee	Self-employed	Un-employed	Students	Other	Total
Who?	10	1	1	1	2	7	12
	Timberbury	Little Town	Lymegrove	Bliddulph	Mow Lawn	Elsewhere	Total
Where?	2	3	1	1	1	4	12
	Daily	2-3 times	Once a week	Weekends	Regularly	Occasional	Total
How often?	1	5	1	2	2	1	12
	Lunchtime	Evenings	Lunch & Eve	Total			
When?	2	4	6	12			
	Drinks			Food			Snacks
Attraction	Quality	Variety	Price	Quality	Variety	Price	
	6	11	9	11	8	6	3
	Atmosphere						
Atmosphere	Staff	Owner	Décor	Atmosphere	Hygiene	Smoking	Opening
	10	11	10	8	11	2	8
	Improvements?						
Improvements	Drinks	Snacks	Traditional food	Spicy food	Vegetarian	Entertainment	Modernisation
	7	1	11	3	7	3	2

It is seen from the table below that variety and price are dominant attractions in the minds of younger people while quality, price (value for money?) and the attitude of staff and general atmosphere of the place ('Friendliness') become more important to the older customers. Appearance ('Décor' and 'Hygiene') of the place also becomes more important.

Age and Atmosphere

	Quality	Variety	Price	Friendliness	Access	Décor	Hygiene
15-29	7	15	13	4	4	0	0
%	21.9	31.3	40.6	8.3	25.0	0.0	0.0
30-49	31	18	18	19	20	2	2
%	64.6	25.0	37.5	26.4	83.3	8.3	8.3
50+	10	0	8	9	5	2	2
%	83.3	0.0	66.7	50.0	83.3	33.3	33.3

Finally customers were asked to look at some possible improvements to what is offered at 'The Tile & Timber' PH.

The final table show how the preferences for improvements vary with age. It is seen that the younger age groups wish to see more variety in terms of drinks and snacks and the same groups seem to wish to see some form of entertainment while the older age groups put more emphasis on improvements to the food menu and especially wish to see more traditional food on offer. In between there is a group of people aged 20 to 39 who would like to see more spicy food and more vegetarian dishes on the menu and possibly a change to the décor.

Age and Possible Improvements

Age	Drinks	Snacks	Food	Trad Food	Spicy	Vegetarian	Entertainment	Décor
15-19	4	3					3	
20-24		2				3		2
25-29	2			2	2	2		1
30-34		1	3		3	2		
35-39	1		3	5	3			
40-49			2					
50-59			1	2				
60+				2				
Total	7	6	9	11	8	7	3	3
%	15.2	13.0	19.6	23.9	17.4	15.2	6.5	6.5

Customer Survey, Conclusions

'The Tile & Timber' PH has over the years had a faithful patronage who value the traditional fayre and atmosphere offered in the inn. Patrons appear to be drawn mostly from the local population of the surrounding area many of whom are quite well off by regional and national standards. They will probably tolerate increases in price, but will also wish to see value for money so increases should be accompanied by improvements eg to the food menu.

By contrast there is a group of younger customers who may wish to see a more up-to-date style of management with more variety in drinks, snacks and food and a modern décor. However, this age group is only a small proportion of the local population.

The choice in promotion and marketing is between heeding the wishes of the traditional customers and hope to

attract more or listening to the younger clientele. This will mean a complete change of direction and in order to make up numbers would have to attract customers from a much larger catchment area.

Appendix :

Customer Survey 'The Tile & Timber' PH, Timberbury, Nr Little Town, Fluteshire

A survey of the customers is requested by the tenant landlord of the 'The Tile & Timber' PH, Timberbury, Fluteshire. The outcome will assist him in planning the future of his business and implement any improvements if such are suggested by the customers. The survey is confidential and no detail about each response will be revealed to the landlord or any third party. An analysis and report will be handed to the owner of the PH and will be his property alone. Please fill in the questionnaire as accurate as you can. Customers should only fill in one questionnaire each. You may fill in the questionnaire here and hand it to the bar staff, at home and bring it back next time you visit 'The Horseshoe' or post it to: KVM Research, 1 South Street, Mow Cop, Stoke-on-Trent, ST7 4NR.

Who are you? Tick one box only in each section.

Gender: Male 34 Female 12

Age: 15-19 5 20-24 5 25-29 6 30-34 7 35-39 8

40-49 9 50-59 3 60+ 3

Car owner: Yes 32 No 14

Are You: Employed 11 Self-employed 16 Unemployed/seeking work 2

Student 7 Other: Housewife (6) Retired (4)

Where do you live? Mount Pleasant 3 Mow Lawn (near the top) 3

Timberbury 11 Abbey Green 3 Black Heath 3 Little Town 6

Mow Lawn, Drumbershire side 3 Lymegrove 5 Bliddulph 7

Elsewhere: Big Town (1), Alsfield (1).....

You and 'The Tile & Timber' Tick as many boxes as apply.

How often do you go to 'The Tile & Timber': Daily 9 2-3 times a week 11

Once a week 6 Weekends only 9 Less often, but regularly 9

Occasionally 2 Lunchtimes only 13 Evenings only 19

Lunchtimes & evenings 14

What attracts in 'The Tile & Timber'? Quality of the drinks 30 Variety of drinks 15

Variety of snacks 15 Quality of food 20 Variety of food 17

p.t.o.

Price of drinks [25] Price of food [19] Easy access [30]

Friendly bar staff [19] Friendly owner [23] Friendly atmosphere [18]

Furniture and decorations [10] Hygiene & cleanliness [20]

That there is facilities for smoking [8] Opening times [8]

The next section concerns any improvements or other suggestions you may have. However, please bear in mind that the landlord is constrained by the terms of his licence and has to keep on good terms with the authorities and his neighbours and other residents in the area.

Any improvements to suggest?

More variety of drinks [7] More variety of snacks [6]

More variety of food [9] More traditional food [11] More spicy food [8]

More vegetarian food [7] Some light entertainment eg piano [3]

Modernised furniture and/or decorations [3]

Other suggestions:

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