

CSG CONSUMER SPENDING REPORT

MAY 2018

RESTAURANT SPENDING ON THE RISE

Top-Line US Spending Monitor Down Again

Guide's Consumer Spending Monitor is down again after hitting an all-time in February. However, there's plenty of good news to go around. The 12-month trend for the Monitor, which indexes overall consumer spending intentions and capacity, remains decidedly positive.

The Restaurant Spending Index, a component of the US Spending Monitor, is up on the month, reaching a 12-month high (which we detail on page 2), bringing some welcome news to the industry.

The Retail Spending Index is relatively flat, signaling consumers plan another month of spending at levels seen in March and April.

So, what's dragging the Spending Monitor back from its giddy heights? As we see inside, it's not so much short-term spending intentions but another slight shift in consumer sentiment concerning the overall economy.

CSG
US Spending Monitor

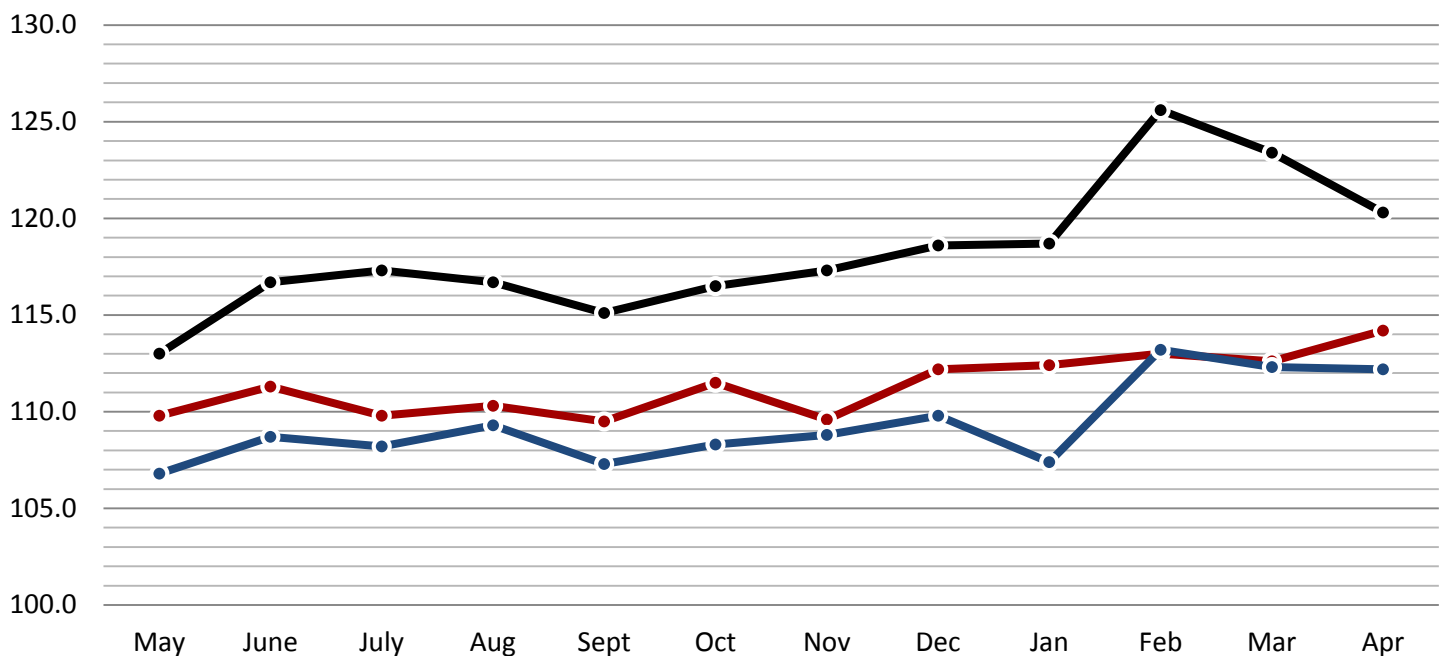
123.4

CSG
Restaurant Spending Index

112.6

CSG
Retail Spending Index

112.3



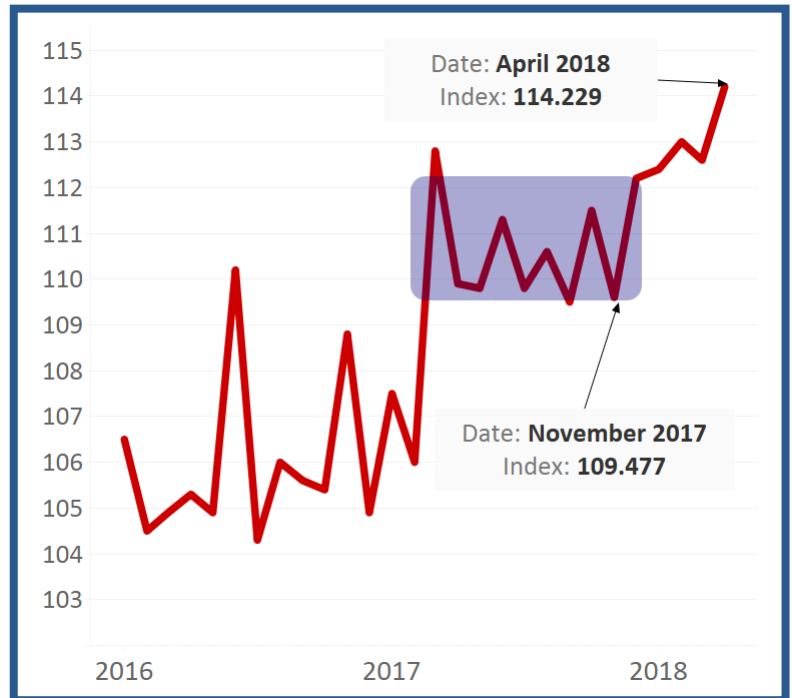
DINING TRENDS:

POSITIVE NEWS FOR MAY

CSG Restaurant Spending Index Makes Largest Leap Since 2017

Respondents in our latest round of consumer polling signaled that they're ready to dine out in May. Their feedback was responsible for the largest jump in CSG's Restaurant Spending Index in four months, pushing the index to an all-time high.

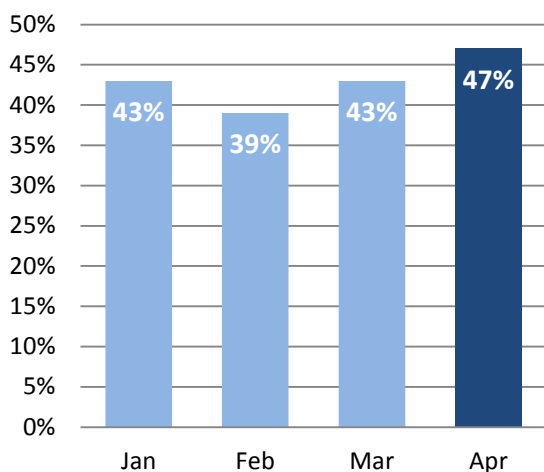
This month's jump is another signal that the industry is ready to break out of the sideways trend that stretched through most of 2017 (as seen in the figure). This possibility is reinforced by trailing data that shows actual spending in US foodservice and drinking establishments is up 2.8% through March as compared to last year.



OVERALL FEELINGS ON ECONOMY CONTINUE TO COOL

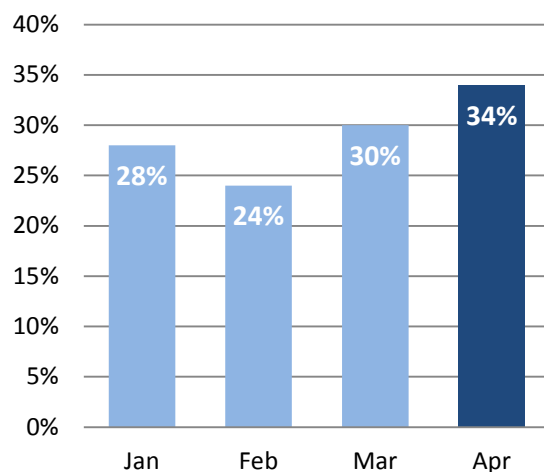
Chain Store Guide's Consumer Spending Monitor has dropped while the Restaurant Spending Index is up and the Retail Spending Index is flat. Accounting for this seeming discrepancy are the responses to a number of polling questions related to overall economic sentiment and personal finances.

Q. RATE THE ECONOMY A. FAIR OR POOR



Q. IS THE ECONOMY GETTING BETTER, WORSE OR STAYING THE SAME?

A. WORSE

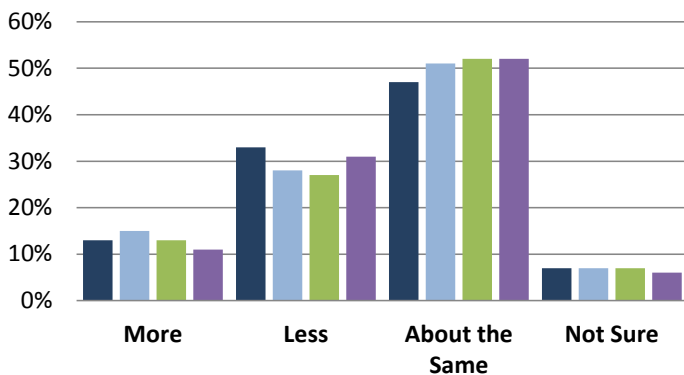


RETAIL FOCUS

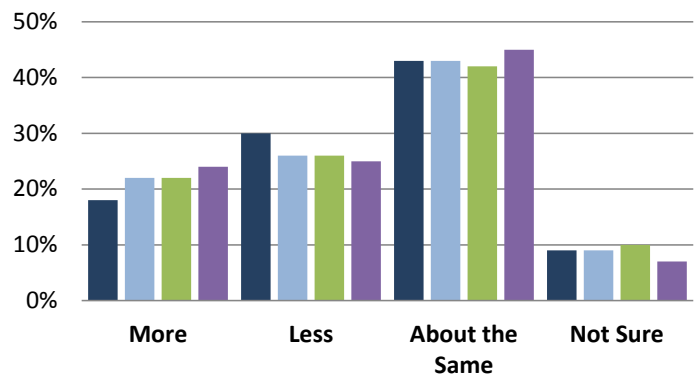
The retail story this month is consumers anticipate spending more in the home improvement category as Spring rolls around, but a slightly larger group of consumers is looking to tighten the purse strings across each of the other categories in May.

Q. IN THE NEXT MONTH, WILL YOU SPEND MORE, LESS OR ABOUT THE SAME ON _____ ?

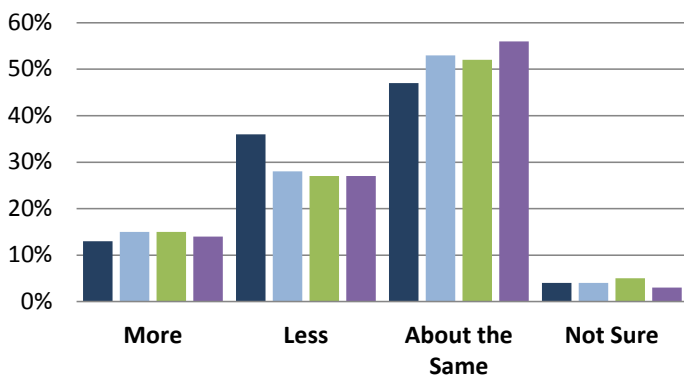
Household Items



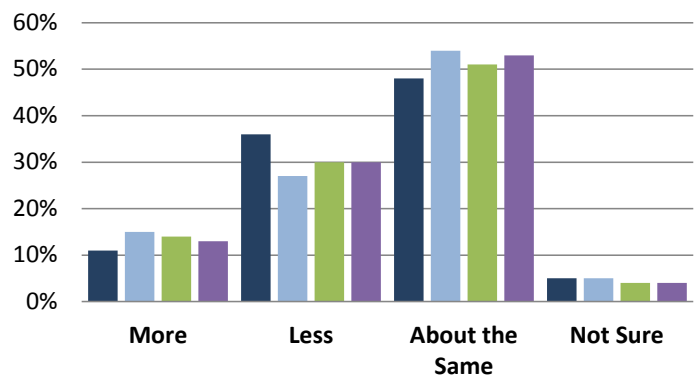
Home Improvements



Clothing, Footwear + Accessories



Discretionary Personal Expenses



Get More Leads & Drive More Sales With
CSG's Discount, Dollar & Specialty Stores Database

[CLICK HERE FOR DETAILS](#)

ABOUT CHAIN STORE GUIDE

For more than 80 years, Chain Store Guide (CSG) has been the leading provider of comprehensive and definitive retail and foodservice intelligence to businesses around the world.

Chain Store Guide data is the definitive source that is used by manufacturers, suppliers, service providers, brokers, real estate professionals, retailers, analysts, consultants and other professionals seeking to gain insight into retail and foodservice markets in the U.S. and Canada.

Our data includes all major retailers, restaurants, distributors and wholesalers in the United States and Canada with contact information on over 70,100 chains.

OUR DATA IS USED FOR

- **Competitive Analysis**
- **Proximity Analysis**
- **Market Share Reporting**
- **Industry Profiling**
- **Market + Trend Analysis**
- **Forecasting**
- **Site Planning**
- **Industry Profiling**
- **Data Appending/Cleansing**
- **Lead Generation**

ABOUT THE CONSUMER SPENDING REPORT

The CSG US Spending Monitor, Retail Spending Index, and Restaurant Spending Index are monthly indexes of consumer spending intentions and capacity **based on interviews with a random sample of 1,500 U.S. adults**. In addition to spending, the survey asks consumers their opinions on the U.S. economy and their personal finances, retail and other discretionary spending. The Monitor began in January 2014 with a base index of 100. CSG captures a unique view of consumer, retail, and foodservice spending intentions. The CSR includes the CSG US Spending Monitor, which tracks economic confidence and spending intentions of US consumers, the CSG Restaurant Spending Index, which measures consumer spending intentions for restaurant purchases, and the CSG Retail Spending Index that measures consumer retail and discretionary spending confidence.