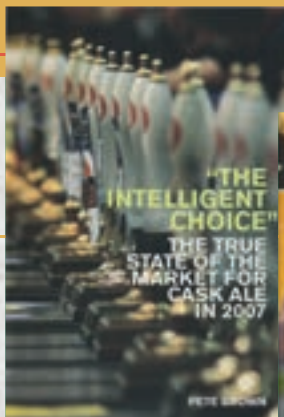




THE CASK REPORT 2017

HOW TO MAKE
MONEY FROM CASK
BY SOPHIE ATHERTON



2017 front cover image: bhofack2/iStock/thinkstock.co.uk



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FOREWORD

This is the 10th edition of The Cask Report. It's been a decade of change for beer and cask ale has moved with the times.

When I started drinking cask beer in the late 1980s it was all brown. I loved it, but there was little variety. I rarely managed to persuade friends to drink it, especially not female ones. Fast forward to 2007, the first year covered by the Cask Report. All my friends drink cask because there are plenty of different styles and many are golden! My friends who discovered cask beer back then still drink it now.

The craft beer movement can take much credit for stories like this - and cask ale can be seen as the cornerstone of craft beer. From adventurous brewers to enthusiastic beer fans the beer world has changed, dramatically, for the better.

With change comes challenge. There's more choice than ever before - from a raft of new beers and innovations in dispense and packaging - and the industry has responded with initiatives to help drinkers navigate this exciting new world. Now the UK has 1,900 breweries it's also a competitive world. Cask is one of the biggest players. It continues to outperform the total on-trade beer market and accounts for 17% of it. It's a vital asset to pubs because of the value chain associated with cask drinkers - who go to the pub more often, spend more and bring their friends too.

If there's a theme to this year's Cask Report it's turning challenge into opportunity.

Backed by well trained, knowledgeable staff and high standards of beer quality, cask is the lifeblood of British pubs. Keeping and serving it with care and attention not only boosts business and profits, it tells customers something about what kind of pub they're in. The kind they want to go to again.



Be that pub and you're ready to face down the challenges - so let's bring on opportunity.

Sophie Atherton
Journalist & Accredited Beer Sommelier



zifkovec/Stock/Thinkstock.co.uk



SUMMARY

Cask ale is resilient and vital for successful pubs. See p9-15

- Cask ale is resilient. It has outperformed total on-trade beer for ten of the last 12 months.
- **82%** of licensees say their cask ale sales are in growth. Cask beer is in **72%** of pubs.
- Cask ale accounts for **17%** of total on-trade beer, **58%** of on-trade ale and its market is worth **£1.7 billion**.

Staff training must include communication skills. See p17-22

- If drinkers find bar staff can talk knowledgeably about cask beer they are more likely to want to stay for another drink, give the pub repeat business and recommend the pub.
- Cask ale drinkers have high expectations of bar staff; **86%** feel pub staff should be trained to speak knowledgeably about cask ale.
- When bar staff initiate conversations with customers about cask ale it results in **50%** of customers ordering cask.

Cask is the cornerstone of craft beer. See p20

- Drinkers have a positive attitude to the term craft beer and associate it with being locally brewed, trendy and fashionable and traditional.
- **57%** of cask drinkers are more likely to visit a pub if it advertises that it sells craft beer.

Beer quality is vital. See p24-33

- **90%** of consumers say beer quality is very important or essential when choosing where to drink.
- Successful pubs prioritise beer quality. See our cask hero case studies p26-29.
- **60%** of customers would rather a smaller range of beers served perfectly than a wider choice.

Customers want and trust good beer knowledge. See p12-31

- **92%** of consumers want to know more about beer styles.
- **60%** said pubs don't offer sufficient tasting notes on how beer looks, tastes and smells.
- **50%** of drinkers trust brewers to know most about cask ale - suggesting meet the brewer events could help pubs sell more cask.



Source: CGA Strategy; Licensee survey; Beer Quality Report 2016



TIMES CHANGE

A look back at a decade of *The Cask Report*.

The Cask Report was first published in 2007 as *The Intelligent Choice Report*. It brought together key players – organisations and brewers – from the world of cask beer and aimed to speak as one representative voice.

In 2007 cask seemed in need of a boost – because of decreasing sales and losses within the big four multinational brewers (at that time InBev, Coors, Carlsberg and Scottish & Newcastle). They invested more heavily in their lager brands and looked to ‘cool’ continental beers to offer a point of difference in the face of lager becoming a supermarket loss-leader and little more than a commodity.

The term ‘craft beer’ was mentioned in that first report, but only in passing. The ‘craft beer revolution’ had not quite begun.

It was the year the smoking ban hit pubs in England, Wales and Northern Ireland – having begun in Scotland the year before.

In 2008 the Beer Duty Escalator was introduced. Tax on beer would increase for four consecutive years by 2% ABOVE



**670
up to
1,900**

**the number of
breweries has
steadily risen
over the last
decade**

BBPA

the rate of inflation. No wonder 52 pubs a week were closing. Despite this in 2009 cask sales began to climb. Its share of the on-trade beer market has been increasing ever since.

In 2010 pub closure rates fell, down to 39 per week, although then and now the on-trade still battles the off-trade as more people drink at home. There was also an upsurge of public interest in beer, spurred on by new technology and the internet. Cask Marque launched its CaskFinder App joining the trend for beer-rating and networking platforms like RateBeer and Untappd. In 2011 the first beer bloggers conference was held in the UK.

2013 saw the hated beer duty escalator axed; by 2014 craft beer had become mainstream. Throughout the whole period the number of UK breweries was steadily rising from around 670 to some 1,900 today.

It's been a decade of fast-paced change. The challenge for the next ten years is making sure we don't waste the progress made in the last.

**Casking in
glory: this
is the 10th
edition of
*The Cask
Report***

2007



2016



10 THINGS...

... we've learned from the previous editions of *The Cask Report*.

1 Offering customers the chance to sample cask ale through 'try before you buy' initiatives helps sell more cask beer.

2 Beer quality is vital. Successful cask ale pubs have the highest standards of cellar hygiene, equipment maintenance, glass washing and bar service.

3 Cask ale creates a unique 'value chain'. It attracts more drinkers to a pub, they visit more often, spend more money than other drinkers and bring more customers – even if their fellow pubgoers don't drink cask, the cask drinker chooses where to go.

4 Beer is as good a match for food as wine. British pale ale with fish & chips or serving the beer used in steak & ale pie with the pie are two easy pairings.

5 The biggest barrier to encouraging more cask ale drinkers is lack of knowledge.



Give it a try: tasters help to sell more cask beer

£967
the amount cask
drinkers spend in pubs
each year.

Cask Report 2015/16

6 Cellar, bar and customer service-trained staff make cask ale more profitable for pubs.

7 Craft beer is a useful way of creating interest in cask ale. Most cask ale can be considered craft beer. Think of cask as the cornerstone of craft beer.

8 Beer range is crucial. Drinkers want both familiar AND unfamiliar brands. They tend to choose based on ABV and colour, so 'weak', 'strong', 'light' and 'dark' is a useful starting point when considering range.

9 Quality is more important than quantity. Fewer cask ales served perfectly is better than a vast selection which may end up in poor condition if not sold quickly enough.

10 Cask beer drinkers spend more money in pubs than anyone else – around £967 per year, compared with just £507.36 for the general population.



Quality counts: fewer cask ales served perfectly is better than a huge range



MARKET FORCES



CASK ALE VOLUME IS RESILIENT

Cask ale is a force to be reckoned with and has the power to deliver financial gains to pubs that serve it well.

Cask ale has outperformed total on-trade beer for ten of the last 12 months.

Cask ale's share of the market has risen for four of the last five years.

Cask accounts for **58%** of all on trade ale (compared with 42% keg).

The total on trade beer market shrank by 1.5% in the 12 months to June 2016.

But cask ale is resilient: it still accounts for almost **17%** of all on-trade beer.

Cask Ale Value

The cask ale market is worth **£1.7 billion**. Its value has increased by 6.3% in the last 5 years.

Cask ale is worth some **£546.61 per pub** per week compared with £448.72 five years ago, **this represents 22% growth**.

£5k

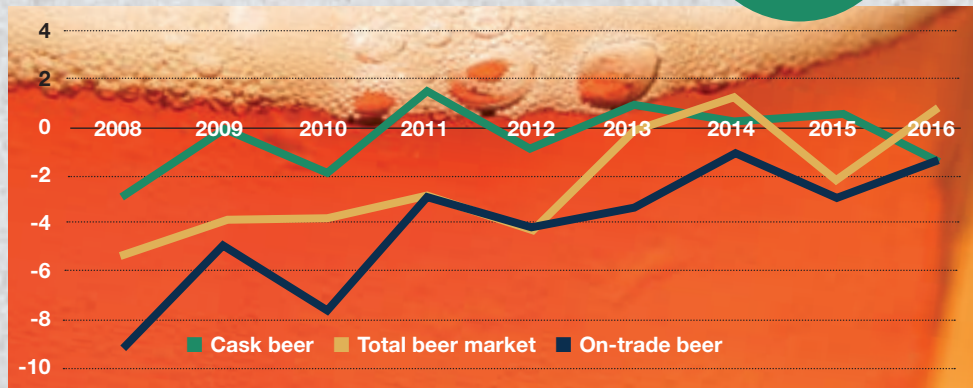
the extra annual amount cask is now worth to your pub compared with five years ago
CGA Strategy

17%

the volume of on-trade beer that is made up by cask ale
BBPA

58%

the percentage of all on-trade ale that cask ale represents
CGA Strategy



Source: British Beer and Pub Association and CGA Strategy



CASK BEER IS PROFITABLE

Distribution for the total beer market, across the whole of the on-trade, remains largely unchanged, but pub closures mean cask is losing ground.

Despite growing consumer and media interest in beer, the on-trade is not seeing the same benefits as the off-trade.

But traditional pubs are currently closing at a slightly slower rate than last year. Closures dropped from 27 to 21 per week in the six months to June 2016¹ and cask ale's resilience means its value is stable despite a somewhat shrinking market.

The ongoing boom in craft beer – a category into which much cask ale fits – suggests cask can return to growth and increase to 20% of on-trade beer by 2020.

With a little effort – such as ensuring high cellar standards and investing in staff training – pubs can benefit from cask ale's resilience and stability to increase their profits.



Crafty move:
cask fits into
the category
of craft beer

¹Source: CAMRA Pub Tracker figures compiled by CGA Strategy



LOOKING TO THE FUTURE



57%

of cask ale drinkers are more likely to go to a pub that says it serves craft beer
YouGov

Despite a challenging year, cask ale's share of the market is stable, but if it is to reach 20% of on-trade beer by 2020, pubs need to see cask as an opportunity to bring in the money.

Although craft beer and cask ale are not always the same thing, it is legitimate to think of cask as part of the craft beer boom. In fact it's essential to see and speak of it that way.

Craft beer continues to thrive and consumers are much more comfortable with the term, and have a better understanding of it, than a few years ago. According to research carried out for this year's *Cask Report* the majority of cask ale drinkers are more likely to go to a pub that advertises it serves craft beer.

Drinkers see craft beer as a locally made and traditional product, but also consider it fashionable and trendy, which indicates its potential for appealing to drinkers of all ages.

Beer lovers are also increasingly open to enjoying their favourite drink with a meal. Pubs that want to boost cask ale sales – and profits – must act on this.

In this year's *Cask Report* you will find practical advice on how to make the opportunity to further profit from cask beer a reality.



Pubs need to see cask as an opportunity to earn





FACTORS AND TRENDS

The state of the cask ale market is rosy or challenging depending on who you ask. The best course of action is to turn any challenge into opportunity. Take note of these key trends and factors to maximise profit and avoid pitfalls.

Craft is not a dirty word

Drinkers are persuaded by the term craft beer. Yet only 25% of licensees surveyed by us for this year's Cask Report have ever used it to promote cask ale.

Britain's cask ale culture, rich in regional family brewers, microbreweries and pubs, can be viewed as the equivalent of the USA's craft beer scene. So make money from terminology by promoting cask ale as craft beer. To do this effectively cask must be served in a way that meets the expectations of craft beer drinkers. They have already come to expect modern glassware and well kept beer, carefully presented to them by bar staff who treat it as the premium product that it is.

A new generation of beer-lovers wants flavour and quality but doesn't discriminate when it comes to the method of dispense. **This means high cellar standards and the ability to keep cask beer properly are not just important, but essential, for all pubs that want to profit from cask.**

Consumers' thirst for knowledge

Knowledge is power – the power to sell more cask beer. Recent SIBA research found some 92% of consumers want to know more about the different styles of beer now available and two thirds want to know more about beer's ingredients – such as hops and malt. More than 60% also said there aren't sufficient tasting notes explaining the look, smell and taste of the beer in pubs, hotels and restaurants. **Having well-trained bar**

staff, who truly understand the beer they're selling, has never been more important.

92%

of consumers want to know more about the different styles of beer now available
SIBA

Micropub boom

The idea is simple: open a small freehouse, listen to your customers, focus on serving cask ale, offer conversation rather than electronic entertainment and dabble in traditional pub snacks (cheeseboards particularly welcome). The first outlet known as a micropub opened in Herne, Kent in 2005. By 2011 there were still just a handful, but since then the idea took off. Today there are at least 200, with plenty more set to open in the near future. Their raison d'être is cask ale and business is good. It is proof of cask's resilience in a challenging market that these entrepreneurs have made it the core of their business and also shows the value of cask to the on trade as a whole.

Small is beautiful:
Martyn Hillier of the Butcher's Arms micropub in Herne, Kent





The price is right?

Although the phenomenon of what's been called 'weekend millionaires' still exists (the rise of supermarkets like Lidl and Aldi, people spending less on essentials, then using what they've saved to splash out on more expensive brands as a treat) research shows there is resistance to paying over the odds for a pint. Market analysts Mintel found only 29% of beer drinkers are prepared to pay more than £4 a pint and 20% of on trade beer drinkers aren't prepared to go above £3. In addition it found low price was the biggest factor in encouraging drinkers to try new beer.

This creates a conundrum for cask ale. Better breweries often price their wares accordingly - you get what you pay for - but will drinkers shell out the extra cash? It's a risk in a market where customers are already hit in the pocket by high taxes, but a small price increase might work for pubs selling the generally more pricey craft keg alongside cask on the bar.

Only
29%
of beer drinkers are
prepared to pay
more than
£4 a pint
Mintel

Another approach is a pricing strategy with different price points for different beers. Think of it as similar to the difference between a supermarket charging more for household names than own brand products. If certain beers cost you more to buy it's legitimate to charge more for them. As well as increasing profits this also has the potential of encouraging drinkers to see cask ale as the premium product it genuinely is.



Source: SIBA consumer research by M&C Allegra Foodservice; Mintel Beer report 2015



THE PUB SECTOR CONTEXT

The pub is *the* place to drink cask ale – but this is both a selling point and a challenge.

We can take heart in the recent news that pub closure rates have slowed – with six fewer pubs a week closing than last year – but everyone in the industry, especially licensees, knows drawing customers to the pub is a bigger challenge than ever as they battle against the rise in at-home drinking fuelled by cheap supermarket beer.

Here we consider recent changes in the sector and look at how to tackle them.

Where the beer's at

Supermarkets are the most popular place to buy beer¹ and experts put this down to the difference in price between the on and off trade. This is just more evidence of what pubs already know they are up against.

Other changes in beer-drinking habits also challenge pubs. Research by M&C Allegra Foodservice for SIBA found younger consumers - those under 35 - are drinking more beer in restaurants and that a fifth of consumers would go to coffee shops more often if they sold a selection of British craft beers. The UK has more than 20,000 coffee shops and the large chains already seem to be making the move towards selling alcohol.

All of this is competition for pubs, but cask beer offers a point of difference and can be a USP. To make the most of cask pubs need to serve it to the highest standards and promote it well too - remembering that promotion includes how bar staff speak about the drinks pubs serve.

Brewers respond to a shrinking route to market

There are now almost 1,900 breweries in the UK. With fewer pubs to sell to,

smaller brewers are investing in bottling and canning to make the most of the off-trade. An increasing number are also putting beer in keg (so-called craft keg) to take advantage of the rise in independent bars and tap rooms, some of which don't stock cask ale at all. There's been a dramatic rise in sales of cans and kegs up more than 500% and 100% respectively in the year to June 2016².

Many breweries are also opening their own tap rooms and bars - creating further competition for traditional pubs.

Younger people are drinking more beer in restaurants





1,900
number
of breweries
in the UK
BBPA

There are pros and cons to this. It may contribute a decline in cask ale or it could make pubs which serve cask all the more attractive to loyal cask beer drinkers. Either way it's not something the traditional pub industry can afford to ignore. Research into consumer attitudes to the different drinking environment offered by new tap rooms, 'beer cafes' and coffee shops is a must; as is maximising cask ale's potential by ensuring storage and service maintain its freshness and flavour.

The National Living Wage

Introduced in April, the National Living Wage or NLW is an area of concern for pubs already struggling to make a profit. It requires workers over 25 are paid at least £7.20 per hour - an increase of 50p.

Research by hospitality software company Fourth found businesses outside London likely to be hit harder as those in the capital already pay above the minimum rate.

Investing in training at the same time as staff costs rise might be a stretch for some, but given the increase is compulsory pubs will need to respond by ensuring they get maximum value for money from their staff.

In the longer term, better value for money in relation to higher wages could be

Hop to it:
fewer pubs
to sell to
means
brewers are
turning to
the off-trade

obtained by creating career paths for pub staff to retain talent within the industry. The culture of pub work being little more than casual employment till something better comes along isn't helpful for the cask ale category or the industry as a whole.

Technology-
savvy staff
can help
keep pub
websites and
social media
up-to-date

Licencees could start by using quiet times to give staff informal, in-house cask ale training that will inevitably increase profit. They should also make use of technology-savvy younger staff, who could boost custom by spending time keeping pub websites and social media channels up-to-date during any lull between busy periods.



Sano Trezzarri/Shutterstock.com

Source:
¹Mintel 2015 Beer report
²CGA Strategy

A man with a beard and a red and black plaid shirt is smiling and holding a glass of beer. He is at a bar, and another person's hand is visible holding another glass of beer. The background is a blurred bar scene with shelves of bottles and a warm, ambient light.

THE CASK CONVERSATION



MAKING CASK WORTH TALKING ABOUT

Whether via social media or in real life if you want to reach customers you need to give them something to talk about. On social media if something's 'trending' it's getting attention, so making cask beer worth talking about is an easy way to promote sales and increase profits.



Although pubs shouldn't overlook it as a promotional tool, the rise of social media has somewhat overshadowed what can be achieved by more traditional means.



If you say the right thing, talking to your customers – those already in your pub and ready to spend – is an easy opportunity to increase cask ale sales.

This year The Cask Report surveyed nearly 250 licensees on topics including how often they talk to customers about cask beer and what they say.

Customer-initiated top three cask conversation topics (according to licensees)

- | | | |
|---|---|---|
| 1 | Complimenting the pub on its cask beer | ✓ |
| 2 | Enquiring about how cask ale tastes | ✓ |
| 3 | Suggesting cask ales they'd like the pub to stock | ✓ |

41%

The number of licensees who say they talk to customers about cask ale in detailed terms

Overwhelmingly licensees believe they are initiating cask conversations with customers all the time and say customers are starting conversations with them too.

Are you beer-lingual?

Not all talk is created equal. How you speak about beer is vital to making the cask conversation a tool to increase sales and profit.

Staff training

Publicans are confident their staff are able to talk customers about cask ale – which might explain why it's not a major area of staff training.

The majority of licensees say some or all of their staff have received bar and/or cellar training. Few such training courses include so-called 'soft skills' like how to talk about beer.

Turn the page for the customer's view of the cask conversation...

Licensee-initiated top three cask conversation topics (according to licensees)

- | | | |
|---|---|---|
| 1 | What beers are on/coming on | ✓ |
| 2 | Telling customers they can try before they buy | ✓ |
| 3 | Explaining what beers taste, smell or look like | ✓ |

Licensees say **94%** of cask conversations begun by them revolve around telling customers what beers are on the bar



The most-used descriptions of cask ale used by licensees:

Fresh, natural, live product, hoppy, malty

All data from licensee survey, see appendices



THE CHAT THAT LEADS TO SALES

Many licensees feel they have the gift of the gab when it comes to the cask conversation – but do they have what it takes to keep customers coming back for more?

It's important because more than a fifth (23%) of drinkers have a conversation with bar staff about cask ale at least once every six months or more. For cask ale drinkers this rises to 61%. These cask conversations are overwhelmingly initiated by the drinker.



Highwaystarz Photography/Stockthinkstock.co.uk

64%

of drinkers who have spoken with bar staff about cask ale in the past six months struck up the cask conversation

rising to
71%
for cask ale drinkers

Fewer than a third (31%) said bar staff started conversations about cask ale. It's a missed opportunity because when bar staff begin a cask conversation with the customer it results in 50% of people ordering cask ale – more so if the customer already considers themselves a cask drinker (54%)

50%

of customers ordered cask ale as a result of staff-initiated cask conversations

Top 5 cask conversations drinkers are likely to have...*

Who brews cask beer and/or where do they brew it.

21%

Query about colour or flavour of cask beer.

20%

Positive feedback about the range and number of cask ales.

16%

Question about ABV/how strong cask ale is.

15%

Comment on quality – in terms of how well kept cask ale is.

11%



ARE YOUR BAR STAFF ABLE TO ANSWER?

Despite a level of satisfaction when they start conversations with staff about cask ale, drinkers expectations aren't being fully met. See right.

But of drinkers who started cask conversations with bar staff in the last six months most felt they got an informed response to a query (79%), although 14% said they received answers that weren't very well informed and 11% found their question couldn't be answered at all.

Perhaps this accounts for high expectations about whether bar staff ought to be trained to engage knowledgeably in cask conversations - with cask drinkers thinking it even more important.



DGLimages/Stock/innisstock.co.uk

When asked about their
general experience of bar
staff knowledge
Only around a third

(36%)

report bar staff
having an understanding
of cask and

12%

feel bar staff know
very little if anything
about cask beer

Customer expectations of pub staff cask ale training and knowledge

67%

of drinkers feel
pub staff should
be trained to
speak about
cask beer

Rises to

86%

among cask
drinkers.

36%

of alcohol
drinkers think
ALL staff should
have that
training

Rises to

45%

among cask
drinkers



WHEN BAR STAFF TALK THE TALK

Great cask conversation = customers will:



If drinkers find bar staff can talk knowledgeably about cask beer they are more likely to want to stay for another drink, give the pub repeat business and recommend that pub to other people. The figures roughly double for cask drinkers. Bar staff who can engage in cask conversation not only encourage new cask drinkers but are effective at retaining custom too.

The power of craft beer

Our research shows that 'craft beer' is a helpful term to use in connection with cask ale. While some still don't know what to think when faced with the words, for many it has positive connotations, which means it could help sell more cask beer.

Almost a third

(27%)

of customers are more likely to visit a pub if it advertises that it sells craft beer, rising to

57%

among cask drinkers.

There's everything to gain - and little to lose - from using the term 'craft beer'. Hardly any drinkers

(just 3%)

are less likely to visit a pub that says it sells it.

Top three things drinkers associate with craft beer

28%

Locally brewed

26%

Trendy and fashionable

20%

Traditional



DRINKERS AS CASK ALE ADVOCATES

YakobchukOlena/Stock/Thinkstock.co.uk



Although it's not the thing most talked about down the pub, more than a fifth (23%) of drinkers and 64% of cask ale drinkers said they regularly had cask conversations with each other during the last six months. So boosting the level of cask conversation between customers could be an advantage.

Even drinkers who aren't talking about cask beer represent an opportunity for pubs when you know why they aren't talking about it.

Cask conversation is clearly an opportunity to sell more cask beer and boost pub profits. If it's worth talking about, it's worth drinking



Three most common reasons for drinkers NOT having cask conversations – and what to do about it

1 “I have no reason to talk about cask ale.” **64%**

Give them a reason by talking to them! Remember 50% of cask conversations started by bar staff result in a customer ordering cask beer.

2 “I don't like cask ale.” **31%**

Many people who say they don't like cask ale simply haven't tried it. Start the conversation by offering them a sample.

3 “I don't know much about cask ale.” **27%**

The perfect excuse for clued-up bar staff to share their cask ale knowledge with customers.



What are drinkers saying to each other?	All alcohol drinkers	Cask drinkers
Discuss cask ales they like/prefer	54%	62%
Share knowledge/learn new things	42%	41%
Persuade non-cask drinkers to try it	29%	33%
Persuade non-beer drinkers to try cask	18%	20%

See appendices for full details of the YouGov research quoted in this section



CASK CONVERSATION SKILLS – A GUIDE TO BECOMING BEER-LINGUAL

Before bar staff can talk fluently about cask beer they need to understand and be able to identify the flavours within. Beer tasting must be a part of their training – with regular sessions for pubs stocking guest beers.

Understanding



All cask beer's ingredients may contribute something to its flavour, but it's best to begin with malt and hops. Malt flavours are the base of beer and hops can be seen as the seasoning. Beer tasting is subjective. Bar staff need to practise tasting and describing cask beer to build their confidence in sharing their opinion with customers.



Describing

Bar staff should be aware of beer colour and easily be able to describe it. Keep it simple: gold, amber, brown, dark brown. Talking about flavour is more of a challenge – which is where vocabulary comes in.



Vocabulary

Saying a beer is hoppy or malty doesn't tell a drinker much. Comparing the taste to flavours found in food takes the cask conversation to a whole new level. Staff training might include tasting unfamiliar foods to broaden knowledge of flavour comparisons.



Customer service

It might sound obvious but staff training should include a reminder to smile, say hello and be welcoming to customers. Extend this to the cask conversation. Expressing interest and enthusiasm for cask beer encourages those who have never tried it and endorses the choice of the confirmed cask drinker.

Cask beer flavour terms

Malt

Breakfast cereal:

weetabix, shreddies,
bran flakes etc

Biscuity:

digestives, rich tea

Chocolatey:

milk, dark, chocolate biscuits

Also:

roasty coffee beans,
caramel or caramelised brown
sugar, muscovado, treacle

Hops

Earthy:

peppery, marmaladey

Citrusy:

lemon, lime, grapefruit,
mandarin

Tropical fruit:

mango, melon, passion fruit,
pineapple,

Also:

piney, resinous, pithy

QUALITY IN ACTION





BEER QUALITY MAKES CASK HEROES



2%

the amount the average British pub could grow their yields if they improved cellar practices and pouring techniques. This represents £111m missed profit opportunity across the industry



Down in the cellar

4

average number of days per month that cellars are running too warm

90%

of consumers say beer quality is very important or essential when choosing where to drink

Our cask heroes make it absolutely clear that beer quality is their top priority. They are making a success of cask ale because they know you can't skimp on cellar standards or service at the bar.

Each of the pubs chosen told us what they consider most important about storing and serving cask beer, and shared their top tips for how other pubs can be as successful as they are. Read their stories and advice on the following pages.

Beer quality isn't just the preserve of cask ale geeks in anoraks, it's something that every drinker notices and that all pubs should be on top of.

33%

of ale pythons are low on water – leading to inconsistent temperature of cask beer (and expensive maintenance call-out costs)

61%

of people would tell their friends about poor-quality beer in a pub (they'd also refuse to drink it and complain)



Top 5 tips for top quality beer

- 1** Never neglect line cleaning – do it at least once every seven days
- 2** Ensure your cellar – and beers stored there – are kept at the correct temperature
- 3** Monitor and maintain your glasswasher and glassware regularly
- 4** Review your beer range – if you are not selling two casks a week of permanent beers, consider replacing them with more popular cask ales
- 5** Maximise your yields by ensuring cellar staff are fully trained to stop problems before they occur



The dirty truth

33%

of pints are served through unclean lines

33%

of glasses are dirty

35%

of glass washers are deemed unhygienic

Poor practices and poor-quality beer lose pubs money.

No one likes it hot

- Being described as 'satisfactory' is no one's idea of high praise but it's what 25% of consumers said when asked about beer temperature.
- One in 10 pubs has had an issue with beer being served too warm.
- The recommended dispense temperature for cask ale is between 11°C and 13°C.



Less is more

60%

of consumers would rather a smaller range of beers perfectly served than a bigger choice

30%

of cask handpulls are dispensing fewer than 20 pints per week

87%

of cask handpulls are dispensing fewer than 144 pints per week

All data from Beer Quality Report 2016 produced by Vianet and Cask Marque



Quality in action

CLACHAIG INN, GLENCOE, SCOTLAND

Licensee – Guy Daynes, in charge since 1988

“Cask beer is at the very core of what we do. We’ve been offering locally produced ‘craft beer’ from independent breweries since long before the term became a marketing slogan.”



Tied or freehold? Freehold.

Cask Marque status? Yes.

View on staff training?

Training for cellar staff is in-house, but only one or two work in the cellar. A keen interest in beer is the key.

Core v guest ales?

Constantly rotating selection, but always from Scottish breweries.

What is your best-selling cask beer?

Changes daily depending what beers are on that day. Mid/ lower gravity IPAs always tend to do well.

How much cask ale do you get through in an average week?

Varies enormously; 40 to 50 firkins at the busiest times, 20 to 30 in summer, six at the quietest times.



Cask is at the heart: licensee Guy Daynes says he was selling craft beer before the term gained popularity



Cost of a pint?
£3.20
across the board



Number of cask beers on the bar?
Up to 15

How to do it...

The three most important things about looking after cask beer in the cellar?

Cleanliness, the right temperature and planning ahead – especially if you want to turn around 50 firkins in a week. It’s about being methodical and taking pride.

The three most important things when serving cask beer at the bar?

Quality, quality and quality. Fresh

beer, clean equipment and beer served and tasting the way the brewer intended.

If you want to sell more cask beer, what should you do?

Bit of a catch-22 this. The bigger the range of beers available, the easier it is. They are all different, which is, of course, the point. But, and it’s a big BUT, never risk compromising quality by having beer on dispense too

long, in an attempt to increase the range/choice.

Advice to other licensees who want to be cask ale heroes?

Understand cask beer – and why it’s still as relevant as ever. Sell it to a consistently high standard. Maybe offer a choice of styles, and/or of breweries – but never risk compromising quality by having beer on dispense too long.



THE GEORGE HOTEL, BRIDPORT, DORSET

Licensee – Alan Fryer with business partner Hayley Bolding

Tied or freehold?

Tied to Palmers Brewery

Cask Marque status?

Yes

View on staff training?

All members of staff will receive in-house training for at least two weeks. Myself and the full time front-of-house staff have BIIAB level 2 – Award in Beer and Cellar Quality, Cask & Keg certificates (ABCQ).

Number of cask beers on the bar?

Three regular, one seasonal.

Cost of a pint?

From £3.40 up to £3.90.

Best-selling cask beer?

Palmers Best Bitter

How much cask ale do you get through in an average week?

Eight pins and one firkin



Cost of a pint?

From £3.40 to £3.90



Number of cask beers on the bar?

Three regular, one seasonal



Handle with care: Fryer and Bolding believe cask ale needs respect

How to do it...

The three most important things about looking after cask beer in the cellar?

Hygiene, storage and conditioning.

The three most important things when serving cask beer at the bar?

Clarity, using a clean glass, perfect pour.

If you want to sell more cask beer, what do you do?

If I want to sell more of a

particular beer, I'd take another line off. In general though, just keep the beer flowing perfectly and selling more beer won't be an issue. Being a Cask Marque pub helps us though. Drinkers know they'll get a good pint, but they can also scan a QR code on our certificate for a chance to win things and that brings in extra custom.

Advice to other licensees who want to be cask heroes?

Treat the cask ales like they were

your babies! Another thing we do is mostly order pins (half a firkin/36 pints) so we have easier stock management of cask ale and can keep high rotation to ensure the beer is at its best at all times. I'd also highly recommend the ABCQ cellar training – then you can't forget to clean your beer lines and cellar weekly. But also listen to your trusted locals – they most probably drink your beer more than you do.



Quality in action

THE STAR INN, HAROME, NORTH YORKSHIRE

Licensee – Andrew Pern who's been there 20 years

"Keeping and serving cask ale is the very essence of a quintessential 14th-century thatched inn. The quality it represents matches our style perfectly because we're a pub first and foremost, but we also happen to serve top-quality food with a Michelin Star."



Tied or freehold? Freehold.

Cask Marque status? No.

View on staff training?

Tasting is one of the most important training sessions with staff. You can't sell a product if you don't know it. We're expected to know about the food we serve and have knowledge of where it's from and how it's been cooked. The same is expected with the beer. This boosts confidence and means staff can chat easily to customers. We get cellar training from breweries and bar training in-house.

Number of cask beers on the bar?

Four in total, three regulars and one guest.

Cost of a pint?

From £3.40 up to £4.40 for Timothy Taylor Landlord.

What is your best-selling cask beer?

Black Sheep Special Ale. We also do well with Great Yorkshire Brewery's Two Chefs, a honey beer seasoned with lemon thyme which was designed by Andrew Pern and James MacKenzie (of the The Pipe & Glass Inn, East Yorkshire).

How much cask ale do you get through in an average week?

Eight to 10 firkins.



Cost of a pint?

From £3.40
to £4.40
for Timothy
Taylor
Landlord



**No of cask
beers on
the bar?**

Four in total



Pub first, but great food helps: licensee Andrew Pern

How to do it...

The three most important things about looking after cask beer in the cellar?

Temperature, stock rotation and cleanliness.

The three most important things when serving cask beer at the bar?

Clean glassware, clean beer lines and knowing the product.

If you want to sell more cask beer, what do you do?

Get your customers involved – it's them that drink it after all – use their feedback to either change or try different things. We also pair beer with food for our tasting menu so when deciding what to put on the bar, we try to think if the customer will like it and if will it go with certain dishes.

Advice to other licensees who want to be cask ale heroes?

Make sure you research your beers, get the customers involved (find out what they like, etc.), serve a good variety of ales to cater for different tastes and think about customers who travel to visit you as well as your regulars.



THE THIRTY NINE STEPS ALEHOUSE, BROADSTAIRS, KENT

Licensee – Kevin Harding, since opening in November 2012

Tied or freehold?

Free of tie.

Cask Marque status?

No.

View on staff training?

Most of my staff have previous experience of serving cask and a genuine interest in it. Knowledge of beer styles and breweries is something they also need. Cellar skills are crucial for providing the very best beer in town every day. Good customer service is also vital.

Number of cask beers on the bar?

Usually four, sometimes five. No regular beers, all guests.

Cost of a pint?

£3 across the board, but if it's very strong or expensive to source, £3.50.

What is your best-selling cask beer?

Pale session ales under 4% ABV sell best, but we have regulars who like all strengths and styles. Local breweries attract interest from visitors and are known and trusted by local drinkers. From further afield, consistently good beers from Oakham, Dark Star, Timothy Taylor and Harveys sell very well.

How much cask ale do you get through in an average week?

Around 15 firkins.

Size doesn't matter: Kevin Harding will deal with the tiniest nanobrewery or the biggest national one



"There's no more adventurous drinker than a cask ale drinker. In just over three-and-a-half years, we've served almost 1,600 different cask beers from more than 650 different breweries. Unlike other micropubs, we happily serve beer from the tiniest nanobrewery up to the biggest national brewery. If it's great cask beer, people want to drink it."



Cost of a pint?
From £3 across the board



Number of cask beers on the bar?
Usually four, up to five

How to do it...

The three most important things about looking after cask beer?

A good supply chain prior to the cellar is crucial; temperature control and then treating the beers properly – so they are in the best possible condition prior to serving. They all behave differently!

The three most important things when serving cask beer at the bar?

Serving a full measure, offering guidance and expertise to the customer – we provide tasting notes for everything as it's daunting if you don't recognise any of the beers – and offering tasters.

If you want to sell more cask beer, what do you do?

Generate interest by organising tap takeovers – sourcing the entire range of beers from a given brewery.

Advice to other licensees?

Do your research: what can you offer that's different from other nearby pubs? Gen up on breweries and beers available. Look after your beer. Cask beer can be temperamental. It needs time and care. One bad pint could put a customer off... for life!



ENTHUSIASM FOR CASK

For this year's *Cask Report* we ran a self-selecting survey that asked publicans to tell us about their cask ale communications.

You've already read about their cask conversations with customers but they also told us about themselves, their attitude to cask ale and their relationships with brewers.

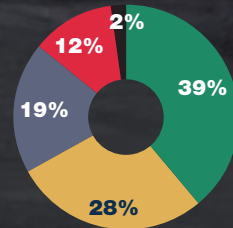
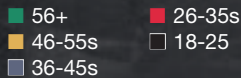
There was a broad response from pubs around the UK, but fewest responses came from the south and London.

The majority of respondents were male (77%) and less than a quarter (23%) female.

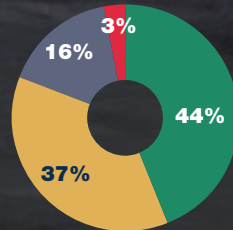
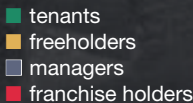
82%

percentage of surveyed licensees who say their cask ale sales are in growth

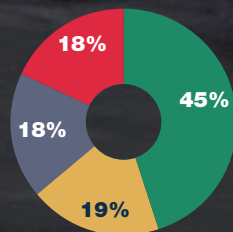
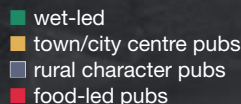
How old are pro-cask licensees?



Which type of licensee were the majority of respondents?



Which style of pub were the majority of respondents?



The figures below show a high level of enthusiasm for, and engagement with, cask beer. Enthusiasm is clearly the engine of success.

78%



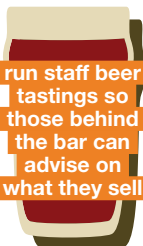
of respondents are cask ale drinkers

67%



have an interest in buying cask in smaller casks

60%



run staff beer tastings so those behind the bar can advise on what they sell

90%



offer try before you buy for cask ale

33%



held a beer festival in the past 12 months

40%



will be holding one in the next 12 months



LICENSEE AND BREWER RELATIONS

How closer relations can help sell more cask beer.

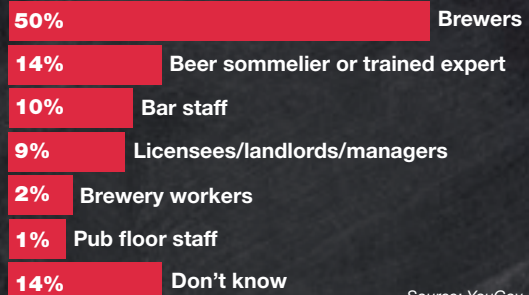
Our YouGov consumer research for this year's *Cask Report* found that drinkers trust brewers more than other beer industry professionals to be most knowledgeable about cask ale.

This shows the enormous potential brewers – the people who make the beer – have to help pubs sell cask ale. Most brewers like talking about their beer and drinkers want to hear about it. 'Meet the brewer' events are a simple way to boost cask ale sales.

In addition, breweries are well-placed to offer training and advice about cask ale – which could also help pubs boost sales and profits.

Bring in a brewer

When asked to rate beer and pub industry professionals, who do drinkers expect to be most knowledgeable about cask ale?

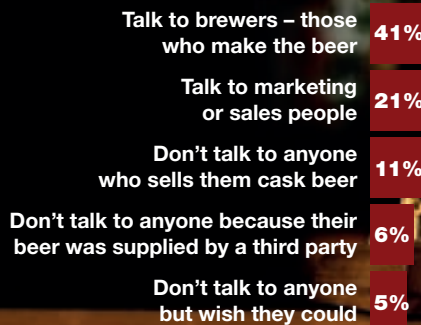


Source: YouGov



Are licensees and brewers talking?

According to our survey, 56% of licensees said the communication they had with breweries was useful or very useful, but who do licensees actually talk to?



What are publicans talking to breweries about?

The hot topics

- 1 New cask ales we could order
- 2 Cask ale re-orders
- 3 = Advice on cellaring
- 3 = Brewery visits for staff
- 5 Staff training

22%

of licensees aren't talking to anyone who supplies their cask ale

All data from licensee survey unless otherwise stated

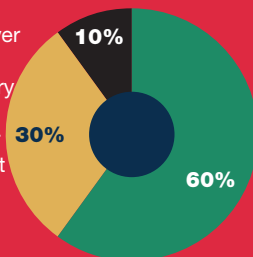


Quality in action

Training

Staff training was a hot topic for licensees but are breweries sharing their cask-beer knowledge?

- Licensees who have never been offered any kind of staff training by a brewery
- Licensees who have been offered it and either taken it or are arranging it
- Licensees who said 'no thanks' when it was offered



Caring for cask beer

The picture is brighter when it comes to breweries helping pubs by offering advice in caring for cask beer.

78%

of licensees have received an offer of training/advice on caring for beer from a brewery

41%

take advice

17%

of those offered it, think they don't need the brewery's advice

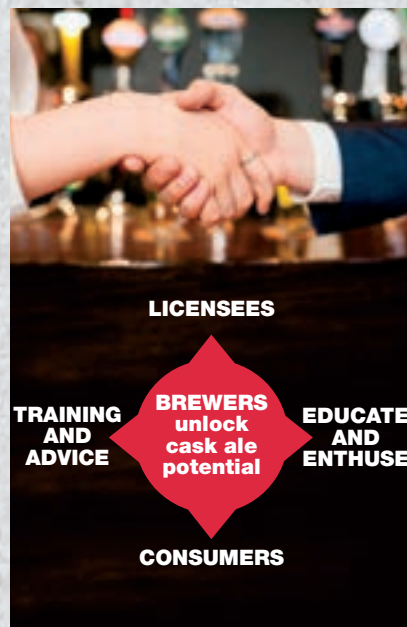
22%

of licensees have not received an offer of advice or training on cask beer care from a brewery



In summary

Licensees and brewers have a fairly good relationship – but if it were better, it has the potential to improve cask beer quality, boost sales and increase profits.



All data from licensee survey

ADVICE AND CONCLUSION





WHERE TO GO FOR HELP AND ADVICE

Training and advice is essential for all pubs. Beginners need to learn the basics and experts must keep skills up-to-date. Here's a round up of industry resources to build and maintain your cask beer know how.



Cask Matters

One stop shop on cask ale focusing on training and education together with the latest information on the cask market. Also includes:

- FREE e learning course, Cask Beer Uncovered, created for bar staff.
- Best practice guidelines on the pub cellar and line cleaning with downloadable daily/weekly checklists for staff.
- How to guide on running a beer festival.

www.caskmatters.co.uk



Cask Marque

Cask Marque accredits pubs that serve great cask ale. Nearly 10,000 pubs have the award which is recognised by 56% of cask ale drinkers (Source: NOP).

It's also the No. 1 provider of cellar management training including yields and sales through better beer quality leading to the BII Award in Beer and Cellar Quality (ABCQ). Offers alternative training in your own pub on a one-to-one basis.

www.cask-marque.co.uk

01206 752212

CaskFinder App

Free app with details of more than 3,000 breweries and 10,000 beers including tasting notes, details of allergens (legal requirement) and beer and food matching. New upgrade adds a pumpclip recognition tool which should prove useful for bar staff as well as customers.

Available from Apple Store and Android Play Store.





OTHER RESOURCES

Beer Academy

Offers beer sommelier accreditation and a variety of beer tasting courses contributing towards it or that may be taken as stand alone training. Also offers beer and food matching training.

www.beeracademy.co.uk
01207 290 6087



BIIAB

Training arm of the British Institute of Innkeepers. Offers a wide range of courses for the licensed retail industry including the one-day Award in Beer Cellar Quality (ABCQ) at venues throughout the UK.

<http://biiab.bii.org/home>
01276 684449



Brewers/PubCos

Larger breweries and pub co's offer training to their licensees and many extend this to those stocking their beer but outside their estate. It's also worth asking smaller micro/craft breweries for advice on cellaring and serving their beer.

CAMRA

The Campaign for Real Ale campaigns for pubs as well as cask ale and runs the What Pub? website, a directory of all pubs not just those in the Good Beer Guide. Publishes Cellarmanship by Patrick O'Neil now in its 6th edition.

www.camra.org.uk;
www.whatpub.com
01727 867 201



Cyclops

Cyclops Beer is a quick and easy system providing a way of describing how beer looks, smells and tastes in user-friendly format. Around 2,500 beers have been 'Cycloped' and the scheme is now becoming widely used in pubs. Details of all beers covered by the scheme are listed on the website along with other useful resources.

www.cyclopsbeer.co.uk





CONCLUSION



It's both a challenging and exciting time for cask beer. The past six months may have seen somewhat stalled growth, but licensee confidence is strong and cask is still a popular choice with discerning drinkers and, importantly, those with spending power.

Despite a small decline in volumes sold, cask's market share of on-trade beer remains stable. This can be seen as evidence of its resilience and capability of achieving a 20% share by 2020.

Pubs throughout the UK are doing an excellent job with cask beer, but this year's market figures are a reminder that there's no room for complacency. The research in this year's *Cask Report* reveals some daunting truths, but

also gives us a wealth of useful information that can easily be translated into action.

Increased effort will yield reward and although elements of what needs to be done will require some investment, not all increased effort comes with a huge price tag.

The UK economy as a whole is facing tough times in the age of Brexit and the wider hospitality industry will be battling to win customers who may decide to tighten their belts in the face of uncertainty. Perfectly served cask ale gives pubs a USP over other licensed outlets. Call it craft beer and they're also on trend for the modern era.

Making cask beer work for your pub means being proactive, so let's take the lessons of 10 years of *The Cask Report* and make the next decade even bigger for cask.





CASK ACTION PLAN

1. Review staff training in all pubs

Who has been trained? What did training cover? How effective was it? Ensure new staff understand cask beer, how it differs from keg and packaged beer and know the cask ales on your bar. Cellar train more than one person so there is always someone on duty who knows what to do and can change a cask if required. See pp. 34/35.

2. Beer quality audit for every pub

Cask Marque pubs have a head start with beer quality. A recent survey found 81% had positive growth in cask sales in 2015. Even pubs without the accreditation should take advice on cask ale standards. Organise regular cellar inspections and ensure staff are following best practice in cask beer. Resources, such as the cask cellar card and daily/weekly cask ale checklists, are available free of charge via the Cask Matters website. See pp. 24 - 29 and 34/35.

3. Start the cask conversation

Pub staff must talk about cask. When they start the conversation it results in 50% of customers ordering cask ale. Customers expect staff to be trained to talk about cask beer. Pubs with staff that can will be rewarded. As long as staff have good cask conversation skills simply talking about it can help pubs sell more cask beer. See pp 18 -22.

4. Don't be afraid of craft beer

Most cask ale is craft beer and cellar skills are also a craft - so don't be afraid to say it. Cask might also benefit from being positioned as the 'craft beer you can afford' - given the comparably high price of keg and packaged craft beer. In any case it's a term that can help pubs increase cask ale sales and profits. See p.20.

5. Build Trust

Thorough training in all things cask beer will make customers see pub staff as more trustworthy. Staff need an understanding of cask beer, practical knowledge of keeping it and communication skills to share their knowledge. 'Meet the brewer' events bringing beer producers into the pub will create staff training opportunities and a means of promoting cask ale. See p20, 22, 24 and 31.

Training



Quality



Communication



Craft



Trust





APPENDICES

The cask ale market at a glance

Volume

- **2.17m** barrels or 624 million pints
- Volume declined **0.5%** in 2015
- Total on-trade beer volume declined **1.5%** in first six months of 2016

Value

- **82%** of surveyed licensees say their cask sales are in growth
- The cask ale category is worth **£1.7bn**
- This is an increase of **6.3%** in the last five years

Distribution

- Cask ale is available in **72%** of UK pubs

Rate of sale

- Value rate of sale has grown by **22%**.
Up to **£546.61** per pub per week
v **£448.72** five years ago
- Volume rate of sale is up **0.5 gallons** to **21.4 gallons** per pub per week, over the past 12 months v five years ago

The cask drinker at a glance

Male	85%
Female	15%

18-24	5%
25-34	7%
35-44	13%
45-54	18%
55-64	21%
65+	36%

Frequency of on-trade drinking visits

	Cask drinkers	UK average
Weekly	47%	32%
Monthly	27%	23%
Less than monthly	26%	45%

The Cask Report was written by freelance journalist and accredited beer sommelier **Sophie Atherton**.

www.afemaleview.net

In addition to the valuable help provided by the partners (right) thanks to the British Beer & Pub Association, YouGov, CGA Strategy and Mintel for their invaluable help in compiling this report. Thanks also to Frances Brace for help with proofreading.

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Cask Marque
Frances Brace
SIBA
Thinkstock.co.uk

Data sources

YouGov

Survey of 2,015 adults (of which 1,588 were drinkers) carried out on behalf of *The Cask Report*. Fieldwork was undertaken between 6-7 July 2016. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).

Licensee survey

Self-selecting survey of 230 licensees. Conducted online using Survey Monkey, 1-13 July 2016.

CGA Strategy

CGA's Brand Index is the most comprehensive measure in the UK on-trade.

The British Beer & Pub Association (BBPA)

The BBPA has a long-established and authoritative reputation for the publication of statistics on the UK's brewing and pub sector. Data is sourced from members and from HMRC – and accounts for 100% of all beer sold in the UK.



Contacts and further information

The Cask Report is supported by:

The Cask Marque Trust

Non-profit organisation championing cask beer quality.
www.cask-marque.co.uk

The Campaign for Real Ale (CAMRA)

Europe's most successful consumer pressure group.
www.camra.org.uk

The Independent Family Brewers of Britain (IFBB)

Body representing 29 of the UK's family-owned brewers.
www.familybrewers.co.uk

The Society of Independent Brewers (SIBA)

Promoting and campaigning for Britain's independent craft breweries; representing more than 825 brewers.
www.siba.co.uk

Adnams

Suffolk-based regional brewer.
www.adnams.co.uk

Caledonian

Edinburgh-based regional brewer, now owned by Heineken.
www.caledonianbrewery.co.uk

Carlsberg UK

Brewers of Tetley bitter.
www.carlsberg.co.uk

Charles Wells

Bedfordshire-based regional brewer.
www.charleswells.co.uk

Fuller's

London-based regional brewer.
www.fullers.co.uk

Greene King

East Anglia-based regional brewer.
www.greeneking.co.uk

Marston's

Operates five breweries and an estate of managed and tenanted pubs across the country.
www.marstons.co.uk

Punch

Operator of around 3,500 pubs.
www.punchtaverns.com

Robinsons

Family brewery based in Stockport.
www.robinsonsbrewery.com

Shepherd Neame

Britain's oldest brewer.
www.shepherdneame.co.uk

St Austell

Cornish family brewery.
www.staustellbrewery.co.uk

Wadworth

Family brewery based in Devizes, Wiltshire.
www.wadworth.co.uk



The Cask Report 2017

Download copies of the Cask Report and find out more about the issues it explores on the Cask Matters website. It's the one-stop shop for the cask ale licensee, focusing on training and education together with market insight and news.

Resources include:

- **FREE e learning course, Cask Beer Uncovered, created for bar staff**
- **Best practice guidelines on the pub cellar and line cleaning**
- **Downloadable daily/weekly checklists for staff.**

Subscribe to our newsletter to keep up-to-date.

www.caskmatters.co.uk