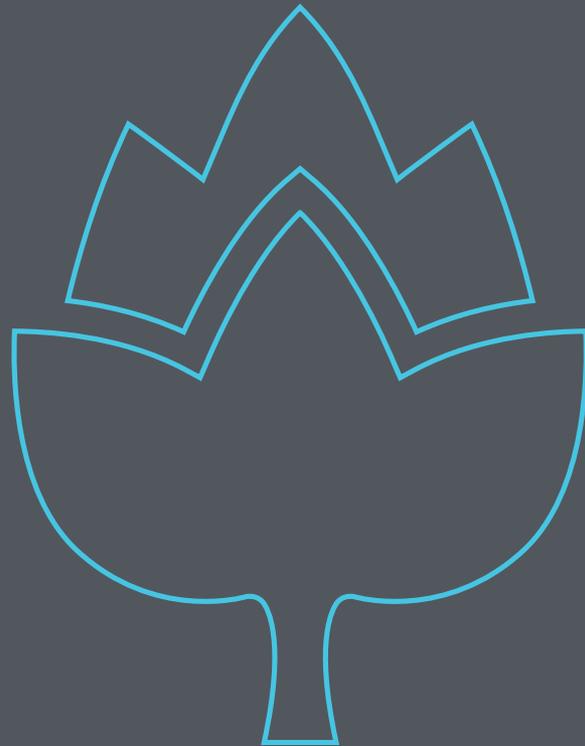


— THE —
CASK REPORT
— 2019 —



MAKING MORE WITH CASK



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FOREWORD



THERE ARE SIGNS THE FORTUNES OF CASK BEER COULD BE ABOUT TO TURN FOR THE BETTER.

INNOVATION IN THE FORM OF COOLER CASK AND THE RETURN OF PLAYERS SUCH AS BREWDOG AND CLOUDWATER TO THE SCENE HAVE ENHANCED ITS REPUTATION AND RELEVANCE TO A NEW GENERATION OF BEER DRINKERS.

There remains huge love and affection for the beer most intrinsically associated with this country and its pubs.

There are signs that cask is returning to growth. Sales of cask were up 3.5% in July this year (British Beer & Pub Association) compared to the same month a year ago. That's only the third month of growth in more than three years.

Premium cask is also alive and kicking, with growth in four consecutive months from April to July.

Yes, cask faces challenges in an extremely competitive market, but green shoots are beginning to emerge.

In this year's report we wanted to get closer to the people who have such a vital role to play in driving cask back to year on year growth: pub licensees and their teams.

They have told us why cask works for them and why it doesn't, the support they need from the industry and what would help them sell more beer.

What becomes apparent is that in certain types of pub, cask can still work brilliantly as a point of difference and a driver of new custom and loyalty in the on-trade. Get it right and it's hard to beat cask ale.

Unfortunately, there are still too many instances where cask is not quite right. In previous Cask Reports, customers have told us that what they perceive as a 'bad' pint can put them off cask, the pub they drank it in and the brand itself. Some will never return to the category.

This year, the message is very clear that pub licensees feel the same way as customers when it comes to cask quality.

The whole industry has to work together to improve the consistency and quality of cask. This will enable it to be positioned in a more premium manner on the bar, reignite wider interest and ultimately bring cask back to growth.

It might not quite be cask's moment yet, but it feels like it's coming and pubs should be fully prepared by embracing it now.

Matt Eley, *September 2019*

Editor

METHODOLOGY

THE JOURNEY OF CASK BEER FROM BREWERY TO CUSTOMER IS ONE INVOLVING MANY PLAYERS, PERHAPS MOST IMPORTANTLY OF ALL, THE PUBLICAN SERVING THE DRINK. THE FUTURE OF CASK IS DEPENDENT ON A KNOWLEDGEABLE AND PASSIONATE PUB WORKFORCE, WHICH IS WHY LICENSEES ARE AT THE HEART OF THE RESEARCH IN THIS YEAR'S CASK REPORT.

In a project led by beer writer Pete Brown, we surveyed 1,700 licensees about cask beer. This was then followed up with in-depth interviews with licensees, managers and staff at different styles of pub from across the country.

We wanted to find out what they think about cask beer. Why it works in their businesses and what drives customer interest. On the flip side, we also wanted to know the challenges that need to be overcome and the support that should be provided in order to encourage more pubs to consider cask.

Their responses have played a big part in informing this year's report, along with several other sources including a OnePulse survey of 1,000 consumers.

We are also grateful to CGA Strategy and the BBPA for providing us with a wealth of statistical information around beer sales, volumes, prices and trends that helps to paint an overall picture of the market.

Further reports and statistics from Cask Marque, Marston's, Molson Coors, Heineken, SIBA and CAMRA have also been used throughout the report.



EXECUTIVE SUMMARY

INSIDE THIS REPORT AT A GLANCE

MARKET OVERVIEW

UK on trade beer sales have levelled out after years of decline. In 2018, sales of beer grew in seven out of 12 months.

In a market with continuing pub closures and brewery openings, there remains pressure on the cask beer category. The rate of decline is beginning to slow and in July 2019 cask sales were up compared to the same month last year.

Premium cask, however you measure it, is an area of growth.

Specialist cask venues are outperforming the rest of the market when it comes to cask beer sales. Those who do cask well continue to reap the benefits.

(pages 8-9)

VENUE STYLE

Cask beer sells better in pubs where the people serving it care about the product or the venue is considered to be 'right' for cask.

Community, rural and food pubs are more likely to be the 'right kind of pub' for cask beer.

The majority of licensees who sell a lot of cask believe it is part of a pub's DNA and that one of the reasons it sells well in their pubs is because it is Britain's national drink.

Different styles of pubs want different types of support from breweries and the wider industry to help them sell more cask.

(pages 11-14)

QUALITY

Disappointing quality is the main reason why customers avoid cask beer. Seeing poorly kept cask is also an issue that greatly concerns passionate cask publicans when they are out in trade.

Successful cask licensees highlight the use of samples and tasting notes as important tools.

Many of the pubs that do not sell much cask say it is because they are 'not the right type of venue' or because their clients do not want it, yet they continue to stock it – potentially impacting on the overall quality of cask in the on trade.

(pages 15-18)

TEMPERATURE

Cooler cask is likely to work as an option in certain types of venue, such as high street or pubs that do not currently sell much cask.

The vast majority of consumers believe that cask served at a temperature between 11-14°C is 'just right'. Anything above that is generally considered too warm.

Nearly half of pubs monitored by Cask Marque served beer above 14°C in July this year.

(pages 20-21)





RANGING

Despite the average number of cask brands on the bar falling, there remains evidence of over-ranging and not enough throughput.

Premium beers are in growth but the majority of the market remains in the 3.9 to 4.6% ABV slot.

ABV, style, geography and occasions all need to be taken into consideration when planning a range.

(pages 22-24)

MONEY

The more important cask is to a venue, the greater need there is for support on margin.

There remains a gap of more than £1.20 between a pint of cask ale and a pint of craft beer.

Cask beer remains similarly priced to mainstream lager. Though customers are generally not aware of where cask sits on the pricing ladder.

(pages 25-27)

CUSTOMERS

Most people include cask in their drinks repertoire but only 15% say it is their favourite drink.

The terms the industry uses to describe and sell cask do not always hit the mark with consumers.

One third of consumers are interested in learning more about the carbon footprint of cask compared to other beers.

(pages 28-31)

INDUSTRY ACTIONS

Most pub staff and licensees want the industry to do more to educate customers about cask style.

More eye-catching fonts would help high street pubs but not necessarily traditional cask venues.

The industry needs to do more to tailor the support it offers to different styles of venue.

(pages 32-33)



MARKET OVERVIEW

THERE ARE SIGNS THAT THE UK BEER MARKET IS STARTING TO RECOVER. THE DECLINE IN SALES OF OVERALL ON-TRADE BEER AND, WITHIN THAT, CASK BEER IS BEGINNING TO SLOW. IN FACT, FIGURES FROM THE BBPA SHOW THAT OVERALL ON-TRADE BEER SALES GREW IN FOUR OF THE 12 MONTHS TO JULY 2019.

Much of the improved fortune is due to an increase in lager sales. Overall lager sales are up 0.9% this year (BBPA, MAT to July 2019). In the same period premium lager sales are up 7.5%. The slight tail off in the summer months this year is due to comparisons with 2018 which included the FIFA World Cup and a heatwave.

UK BEER SALES PERCENTAGE CHANGE 2019 V 2018

	JAN	FEB	MAR	APR	MAY	JUN	JULY
TOTAL ON-TRADE BEER	-0.2	-0.6	-1.4	+6.6	-4.2	-10.2	-1.9
CASK ALE	-9.5	-4.5	-5.8	-0.3	-4.6	-6.3	+3.5
STANDARD CASK	-13.2	-2.8	-6.7	-2.8	-7.8	-11.8	0.0
LAGER	+1.8	-0.1	+0.6	+9.6	-4.0	-12.1	-3.8
PREMIUM LAGER	+12.4	+2.9	+10.1	+11.9	+3.8	-7.7	-1.2

Source: BBPA

Cask sales are showing signs of improvement. There was growth of 3.5% in July this year compared to the same month in 2018. This is the first month of growth since January 2018. As of July 2019, the MAT for all cask sales was -4.8%. There are still serious challenges for the industry to overcome before cask returns to growth, but there are positive signs.

PREMIUM CASK

Although 'premium' cask, as measured by CGA as cask with an ABV between 5 and 5.5%, has a relatively small share of volume in the market (6.1% of all cask ale), it is in growth. CGA's figures show that this sub-section of cask has grown by 0.7% in the last 12 months.

The BBPA classes anything between 4.2% and 7.5% ABV as 'premium' cask. They too are seeing signs of growth this year compared to last.

Premium itself is a term that, like craft beer, has no standard industry definition. However, as we will see later in the report, it is beer of this nature and what customers perceive to be premium that could have a significant role to play in driving cask growth in pubs.

PREMIUM CASK ALE SALES IN 2019 V 2018



Source: BBPA

Cask is also performing better at venues that specialise in cask compared to pubs where it is part of a more general portfolio of drinks. In the pubs that Heineken categorises as 'Great pub, great food', cask volume is down just 0.5%, this is against a backdrop of pub closures and a reduction in overall handpumps in the trade.

420 MILLION

(Figure from CGA)

PINTS OF CASK SOLD ANNUALLY IN THE UK, ACCOUNTING FOR 1 IN 7 OF ALL PINTS (13.5%)

PUBS

No drink is more synonymous with pubs than cask ale, nor is one more tied to the fortunes of the trade. Therefore, with 13,200 (22%) of pubs closing since 2000 (BBPA) it is little surprise that cask volumes have been challenged. Latest figures from CAMRA suggest the rate of pub closures is now starting to slow down. At last count there were 14 (net) pub closures a week, some way down from the peak 10 years ago when 52 were closing every seven days.

BREWERIES

Not only has cask had to face up to a declining retail market but it has also had the further challenge of an explosion in the number of small brewery openings. While many of these breweries produce cask, there has been a significant growth in crafted keg products. This has meant increased competition in a reduced market. Similarly to pubs, we may also be seeing a levelling out in brewery openings. According to UHY Hacker Young there was a net increase of just eight in 2018. However, the 2,274 breweries in the UK at the end of 2018 is nearly double the 1,352 in 2013.

NET BREWERY OPENINGS



Source: UHY Hacker Young via HMRC



UK PUBS BY NUMBERS

	MANAGED	TENANTED & LEASED	INDEPENDENT	TOTAL
2000	14,400	27,200	19,200	60,800
2018	9,200	15,660	22,740	47,600

Source: BBPA

50,204

THE NUMBER ON ON-TRADE OUTLETS WHERE CASK IS STOCKED, AROUND 44% OF THE OVERALL MARKET

IS YOUR CELLAR 5* RATED?

Having good cellar practices improves yields by 7%+ and beer quality which adds 3% to your beer sales. This will add £5,500 to the average pub's bottom line profitability (Quality Report 2017).

Over the last couple of years Cask Marque has undertaken more than 7,000 cellar audits. Sadly, over 50% are 3* or below (see Diagram 1). This is simply not good enough, both from the pubs point of view but more importantly the customer's experience of beer.

When analysing the failures against the 11 point check list it is simple housekeeping that needs to be addressed (see Diagram 2).

- Temperature – Cellar temperature should be set at 11-13°C.
- Line Cleaning – for cask 7-day line cleaning routine is important due to yeast build up
- Glass Cleanliness – renovate glasses regularly
- Ale Python – the water level should be kept topped up regularly

To have a trained cellar manager is important for the pub. Cask Marque runs courses in breweries throughout the UK and also offers 1-2-1 training in pubs for as little as £85+VAT.

Remember, the cellar is to beer as the kitchen is to food. Will you achieve a 5* rating?

Talk to Carol at Cask Marque on **01206 752212** about training and gaining a cellar rating or find out more on www.cask-marque.co.uk/training

It will improve your business.



SCORES ON THE CELLAR DOORS

7259 visits since 1st Jan 2017

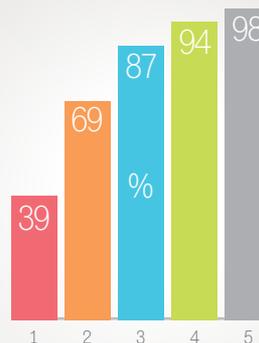
Diagram 1

STAR RATING	QTY	%
1	24	0.33%
2	826	11.38%
3	2796	38.52%
4	1223	16.85%
5	2390	32.92%
Grand total	7259	

Diagram 2

%	Item out of Spec
31.52%	Cellar Temperature
29.74%	Line Cleaning
26.74%	Glass Cleanliness
26.40%	Ale Python

SOTCD RATING (1-5) VS % PASSING CASK MARQUE BEER CHECK



BETTER
THE CELLAR,
BETTER
THE BEER



VENUE STYLE

By Pete Brown

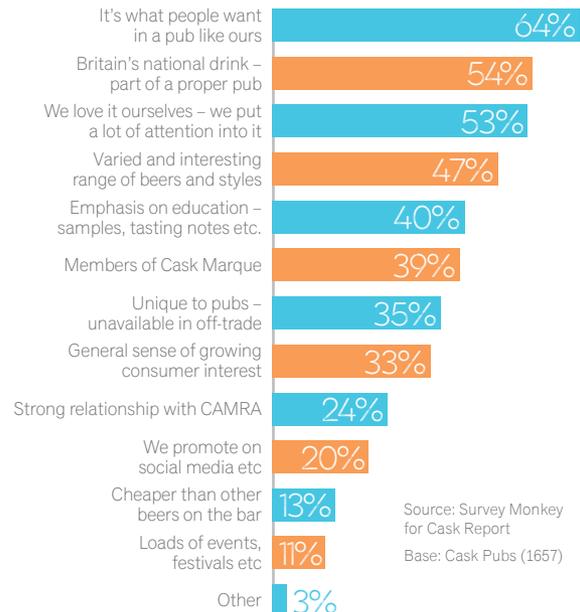
ONE OF THE GREAT THINGS ABOUT PUBS IS THEIR ASTONISHING DIVERSITY. THE BEST PUBS EVOLVE TO SUIT THEIR LOCATION AND THEIR CUSTOMERS. WHAT WORKS IN ONE MAY NOT BE RIGHT FOR ANOTHER.

This year's research for the Cask Report asked publicans how well cask ale performs for them and how important it is to their businesses. We then segmented the answers by type of pub, and found some interesting comparisons.

WHAT MAKES CASK ALE SELL IN A PUB?

Within pubs that define themselves as ones that sell a lot of cask ale, the answer seems to be, simply, it's the right kind of pub (64%). It's also likely that the people serving it care about it themselves (53%) to the extent that they believe it is Britain's national drink, part of the DNA of a proper pub (54%).

WHY DO YOU THINK CASK SELLS SO WELL IN YOUR BUSINESS?



Source: Survey Monkey for Cask Report
Base: Cask Pubs (1657)

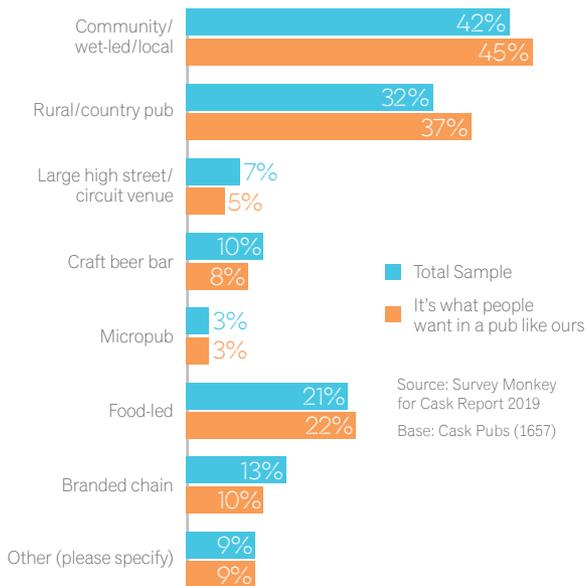
But when they say, 'it's what people want in a pub like ours', what kind of pub are they talking about?

PUBS THAT DO WELL WITH CASK

Pubs that say cask is right for a 'pub like ours' tend to be talking about traditional pubs: they're more likely to be community wet-led locals, country pubs or pubs that put an emphasis on their food offer. They are quite a bit less likely to be large high street, urban venues.

'THE RIGHT KIND OF PUB' IS MORE LIKELY TO BE A COUNTRY OR COMMUNITY PUB

Which of the following best describes the pub or bar where you work?



The pubs where cask ale works best are more likely to be independent, and less likely to be managed houses, than pubs as a whole.

WHY DOESN'T CASK ALE WORK IN SOME TYPES OF PUB

If the top answer for why cask works in some pubs is that 'it's the right kind of pub, the reverse is also true:

- Pubs that sell some cask, but not very much cite 'We're not that kind of pub – the clientele don't want it' as the main reason why (54%).
- Pubs that sell no cask at all cite lack of proper cellar facilities as the main reason (35%) but the second-most popular answer is 'It wouldn't work here – we're not that kind of pub.'

Other considerations are the ability to make a decent enough margin (see pages 25-27), and a sense that tastes are moving away from it (something successful cask pubs disagree with) particularly with the rise of quality keg beer. In some rural pubs, the throughput simply isn't high enough to make cask work.





WHICH, IF ANY, OF THE FOLLOWING WOULD HELP OR ENCOURAGE YOU TO SELL MORE CASK ALE

There are some pubs for which cask just isn't right. But even where it's doing really well, publicans and staff have strong opinions on how it could be even better.

Consumer education by brewers and greater profile and visibility from marketing and design are the most popular requests to help sell more cask ale, with over a third of respondents saying an improved margin would help too.

While there's quite a bit of consensus on this, there are some striking differences when we break down the answers by type of pub:

- Country pubs are much less likely to say they need flashy designs and fonts, but more likely than any other type of pub to say that margin is the key issue.
- Conversely, high street destination venues and chains, catering to a younger audience, are more likely than any other type of pub to say they need more eye-catching design fonts and point of sale, and the most in need of cooler serving temperatures.
- Craft beer bars support more education of both consumers and staff, and are far less likely than any other kind of pub to suggest that high-profile marketing and eye-catching fonts are the answer.
- Pubs that currently sell a lot of cask ale believe consumer education is the answer, whereas those that don't currently sell much place more emphasis on better margin, more help with quality, and cooler serving temperatures.

“SMALL BREWERS NEED HELP WITH PUMP CLIP DESIGN. POOR OR UNREADABLE CLIPS MEAN POOR SALES.”

Cask-loving publican, Midlands

WHICH WOULD HELP YOU SELL MORE CASK:

CASK	LARGE HIGH STREET	COUNTRY PUBS	FOOD-LED PUBS	TOTAL SAMPLE
MORE CONSUMER EDUCATION FROM BREWERS AND THE INDUSTRY	46%	50%	48%	50%
MORE EYE-CATCHING DESIGNS AND STAND-OUT BAR FONTS	51%	27%	35%	34%
COOLER SERVING TEMPERATURES (I.E. BELOW THE CURRENT RECOMMENDATION OF 11-13°C)	31%	15%	15%	18%
MORE HELP FROM BREWERS ON CELLAR QUALITY AND SERVICES	32%	26%	27%	26%

Source: Survey Monkey for Cask Report 2019

“CASK ALE IN GOOD CONDITION IS ESSENTIAL FOR THE CONTINUED SUCCESS OF THE BRITISH PUB AND MORE MEDIA SUPPORT AND TRAINING GIVEN BY BREWERS WOULD INCREASE THE SURVIVAL RATE OF BRITISH PUBS.”

Cask-loving publican, South East

There is no 'one size fits all' approach to selling more cask. Publicans understand the issues around it and need to be given support that suits the kind of establishment they run. This may sound like common sense. But on a broad level, there are huge opportunities to grow cask by investing in a more tailored approach.



A TRADITIONAL VENUE: THE BRIDGE INN, TOPSHAM

Saturday lunchtime, just gone midday and the Bridge Inn is open for business. A tranquil view demands a beautiful beer and here at the Bridge, a cool, gentle glass of cask is the ideal accompaniment.

The Bridge has been in the ownership of the same family since the 19th century and its celebration of cask beer has drawn in the faithful from the 1970s onwards as a CAMRA Guide to Real Ale in Devon from that period testifies: 'True draught beers a speciality'.

Cellarmanship, a cool cellar, experience and good turnover are the secrets of good cask, according to landlady Caroline Cheffers-Heard, who famously welcomed the Queen to the pub in 1998.

Among the six cask beers available, all of which are drawn from the wood, there is Martha's Mild from Teignworthy in nearby Newton Abbot. Impenetrably dark, it pulsates with notes of toffee, malt and chocolate, which is balanced by a delicate fruitiness and a dry finish. My glass is soon empty.

I live in Exeter, five miles from the Bridge Inn, but visit whenever I can, either travelling by bicycle or taking a short train ride. I have never had a bad pint of cask here and, unlike many other pubs, I am always confident when I order a pint.

By Adrian Tierney-Jones, Beer Writer of the Year 2017



THE QUESTION OF QUALITY

By Pete Brown

ATTRACTING NEW DRINKERS TO CASK IS ONE THING. BUT IF CASK IS IN DECLINE, THAT MEANS EXISTING DRINKERS ARE DRINKING LESS OF IT, OR TURNING AWAY FROM IT ALTOGETHER.

The main reason they do so is poor quality cask. And the impact of every bad pint served goes beyond the beer in question and affects the pub as a whole, the brand, and even the entire cask ale market.

Cask exists within a broad repertoire of drinks. When drinkers choose to drink cask over something else, perceived good quality is the main reason people give: 'I trust the quality of cask in this venue' is their top answer when asked (47%), ahead of 'Knowing I can taste it before purchasing.' (31%). (CGA for Molson Coors)

Conversely, perceived poor quality is the main reason drinkers avoid it – 'Poorly kept cask' is the main reason people swerve it (31%), ahead of a 'Poorly served pint' (29%).

What makes these statistics concerning for the trade is that poor quality cask – the biggest barrier to people drinking it – is an everyday occurrence for the drinker:

- 70% of ale drinkers say they have been served off or stale beer.
- 1 in every 10 purchases of ale leaves the consumer disappointed.
- For every ale style except IPA, more pints are considered 'below average' than are considered 'excellent'.

Many pubs are unaware of the scale of the problem because, as previous cask reports have shown, the typical cask drinker tends to lack the confidence to complain about poor quality beer directly. What they do instead, according to the Marston's Beer Report 2019, is worrying for anyone in the trade:

- 40% avoid the pub
- 39% stay away from the brand
- 37% tell their friends

If we put these figures together, for every 100 pints of cask ale a pub sells, 10 of those pints are disappointing the drinker, and four of those drinkers are going to avoid the pub in future, and probably tell their friends to do the same. Over time, this represents a significant drain of custom.

You might think publicans who serve consistently excellent cask ale would welcome this, because it means they should end up with more cask drinkers who are deserting poor cask quality pubs. But these publicans become genuinely angry about poor quality cask in other establishments, partly because they want to enjoy cask elsewhere on their days off, and partly because poorly-kept pints spread a negative image of cask across the entire industry.

70%

OF ALE DRINKERS SAY
THEY HAVE BEEN SERVED
OFF OR STALE BEER.

40%

AVOID THE PUB

39%

STAY AWAY FROM
THE BRAND

37%

TELL THEIR FRIENDS

Source: Marston's Beer Report 2019

“LOW TURNOVER PUBS SHOULD BE BANNED FROM SELLING CASK, AS THIS IS WHERE THE PROBLEM STARTS. CASK SITTING ON THE BAR IS BAD FOR THAT PUB AND FOR THOSE THAT SELL CASK FAST AND FRESH, BECAUSE THESE PUBS DRAG DOWN THE QUALITY OVERALL.”

Cask ale publican, Midlands

So, poor quality is the biggest barrier to sales of cask ale. Getting quality right is therefore the biggest priority for anyone who wants to profit from cask ale. And getting it right is the responsibility not just of the publican, but of the entire cask ale industry.



~ KEY RECOMMENDATIONS ~

ENSURE STAFF KNOW - AND CARE - ABOUT CASK QUALITY

53% of publicans who sell a lot of cask say one of the main reasons they do so is that they love it themselves and so put a lot of care into it. (Survey Monkey for Cask Report 2019)

IMPROVE DELIVERY LOGISTICS

Cask is a fresh product and needs to be treated as such. It should be kept in a temperature-controlled environment in the brewery, warehouse and its journey to and in the pub cellar.

GET THE RIGHT CONTAINER SIZE

Increase the use of pins in places where cask doesn't sell in three days.

USE ASPIRATORS (BUT DON'T VIEW THEM AS A MIRACLE CURE)

Aspirators may not be the answer to all quality issues, but they can help to extend peak quality from three to four days.

MAKE TRY-BEFORE-YOU-BUY AN INDUSTRY STANDARD

40% of publicans who sell a lot of cask say one of the main reasons they do so is that they educate the consumer with samples and tasting notes.

IF CASK ISN'T WORKING, TAKE IT OUT

54% of pubs that don't sell much cask say this is because "We're not that kind of pub - our clientele doesn't want it," and yet several tied licensees told the The Cask Report, they feel obliged to stock cask due to pressure from their pubco.



THE CLAPTON



A PUB WHERE QUALITY IS KING: THE SOUTHAMPTON ARMS, GOSPEL OAK, LONDON

When it comes to the quality of its cask ale, London has received more than its fair share of challenges. With its deep, complex infrastructure, cramped cellars and often hot, humid summers, looking after cask ale can be difficult.

Importantly, there are numerous boltholes within London where the cask ale is far beyond dependable, such as The Southampton Arms in Gospel Oak.

There is a selection of nine hand-pulled ales on offer at this cosy, North London pub. Just the right amount to balance a decent amount of throughput alongside an interesting and varied offer. Although they're joined by another nine keg taps serving modern beer styles, and six ciders, it is the worn, wooden and brass pumps that are the main attraction here.

They'll serve you bitter and golden ale, mild and stout, or perhaps even a New England IPA. There is no pretension (or, indeed Wi-Fi) and as such you'll find tried-and-trusted brands such as Hobson's and Thornbridge alongside younger guns such as Burning Sky or Beatnikz Republic. Plus, there is always fresh beer from the pub's sister business, Hackney brewery Howling Hops.

It's difficult to describe what makes the Southampton Arms such a special pub, because on the surface, it is much like a multitude of others. However, it's easy to demonstrate. You simply need to take a mug of ale, find a seat, and allow the gaiety of one of London's very best pubs to flow through you.

By *Matthew Curtis*

“IT IS NOT SOMETHING THAT SHOULD BE GRASPED AT BY EVERY LICENSEE AS THE CONSISTENCY CAN VARY WHEN SALES ARE LOW OR IRREGULAR.”

Licensee, North-West

“CASK BEER SHOULD BE TREATED IN THE SAME WAY AS SPECIALITY COFFEE. IT IS A PRODUCT WHICH REQUIRES CARE AND THIS SHOULD BE PROMOTED IN THE SAME WAY THAT GOOD COFFEE BARS STAND OUT FROM THE CHAINS SERVING AVERAGE COFFEE.”

Bar manager, London

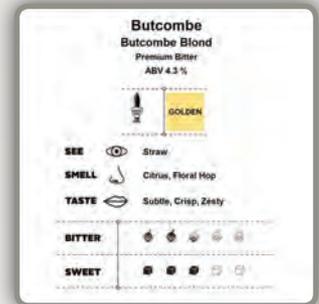
PUMP CLIP RECOGNITION

Using the free CaskFinder app, developed by Cask Marque, you can now scan a pump clip on your phone and it will give you the Cyclops description of the beer.

This is an important innovation because when a customer goes to the bar they are often confronted with an array of beers with little knowledge as to whether they suit their palate. With this consumer empowerment it may also encourage bar staff to learn via the app the tasting notes of the beers they have on sale, so they can interact with their customers.

TO THE BREWER:

- Ensure that all your beers are listed on the Cyclops website together with the latest Cyclops artwork. This is where the CaskFinder app gathers its information. If you don't have a password to login to update your Cyclops data call the Cask Marque office on **01206 752212**.
- Any new beers need to be added immediately so that their availability is communicated to the outside world.



TO THE RETAILER:

- Ensure your bar staff download the free app to their mobile phone and scan the beers you have on sale. They can also learn details about the brewer and other interesting facts about the beer.
- Have a beer tasting for the staff to discuss their views on the flavour profiles of the beers on sales against those suggested by Cyclops.
- Use the app to identify future beers you may wish to stock and ensure you have a range of colours, ABV and taste profiles.

Do enjoy this latest piece of technology.

TEMPERATURE REVISITED

TEMPERATURE

The temperature of cask has been something of a hot issue over the last 12 months. Research in last year's report indicated that in July and August 2018, 69% of cask was being served above 13°C. Further to that, two-thirds of cask drinkers told us they would prefer their beer served cooler than the recommended temperature of between 11°C and 13°C.

There has been innovation in this area over the last year with the launch of several 'cooler' cask beers such as, Wainwright Altitude, Doom Bar Extra Chilled and Robinson's Chilled Dizzy. This has seen both new brews created and served at lower temperatures and established brands served at cooler temperatures alongside a traditional version served within the recommended range. These beers are being dispensed at temperatures between 5°C and 9.5°C.

THE PUB POSITION

So what do pubs think about the temperature of cask? Judging by our survey this year, there is a call for 'cooler' cask, but it is better suited to certain types of venue.

WOULD COOLER SERVING TEMPERATURES
(BELOW 11-13°C) HELP YOU SELL MORE BEER: YES

TOTAL SAMPLE:	18%
COUNTRY PUBS:	15%
HIGH STREET:	31%
PUBS THAT DO NOT SELL MUCH CASK:	26%
CRAFT BEER PUBS:	24%
NON-CASK PUBS:	12%

Source: Survey Monkey for Cask Report 2019

There is clearly a big difference in the views of traditional country pubs, which are more likely to have an established cask customer base, and high street/circuit venues. The latter are more likely to be higher volume and attract a younger client base. Cooler cask could be a way of bringing new people to the category and helping others to consider it as an alternative to lager.

GET IT RIGHT FIRST

While there has been a move towards serving cooler cask, the first priority for pubs and the industry must be ensuring cask is served within spec. Findings from Cask Marque show that nearly half the pints of cask (47.5%) they sampled in pubs in July this year were above 14°C. That figure drops to 27% for Cask Marque accredited pubs. Pubs manage temperature better in the cooler months. In April, only 17% of samples at Cask Marque pubs were above 14°C, compared to 31% in all pubs.



WHAT DOES THE CUSTOMER REALLY WANT?

The fact that so many people told us last year that they wanted cooler cask could also be related to cask being served above recommended temperatures and the perception that it is 'warm' beer. This year when we asked consumers, 28% told us they would drink cask if it was served cooler (OnePulse).

Further research by Cask Marque (see box right) also indicates that most customers believe that cask served between 11°C and 13°C is 'just right'. Consumers were asked to taste beer, consider if they thought the temperature was 'too warm', 'just right' or 'too cold' and then measure the actual temperature. The 14°C mark appears to be the tipping point. 89% of people described beer between 13.1°C and 14°C as 'just right' but 53% said it was 'too warm' when between 14.1°C and 15°C. This increases to nearly all (93%) when above 16°C.

~ KEY INSIGHTS AND TIPS ~

- ◆ The top priority must be getting cask temperature in spec between 11-13°C
- ◆ Cool cask could work in certain types of venue and attract new people to the category
- ◆ Trial it alongside regular cask
- ◆ Trial it in the summer, when 65% of ale drinkers change their drinks preference (Marston's)
- ◆ Get a thermometer and test beer temperature at the start of every session

RATING BY TEMPERATURE

TEMP BAND (°C)	RATING	% BY RATING
< 10	TOO WARM	0
	JUST RIGHT	50
	TOO COLD	50
10 - 10.9	TOO WARM	0
	JUST RIGHT	67
	TOO COLD	33
11 - 13	TOO WARM	1
	JUST RIGHT	95
	TOO COLD	4
13.1 - 14	TOO WARM	10
	JUST RIGHT	89
	TOO COLD	1
14.1 - 15	TOO WARM	53
	JUST RIGHT	47
	TOO COLD	0
15.1 - 16	TOO WARM	74
	JUST RIGHT	26
	TOO COLD	0
> 16	TOO WARM	93
	JUST RIGHT	6
	TOO COLD	1

Survey by Cask Marque, 1,132 samples

RANGING

IT MAY BE STATING THE OBVIOUS, BUT WITH CONSUMERS DEMANDING MORE CHOICE, IT IS IMPORTANT PUBS HAVE A RANGE OF CASK BEER THAT GRABS THEIR ATTENTION.

Having the right range is a key driver of sales. More than half of licensees who are passionate about cask (52%) said that their success is due to having an interesting range of beers. That figure drops to 29% for those who do not consider themselves passionate about cask.

With so much to take into consideration, when it comes to ranging, the tricky bit is knowing where to start.

THROUGHPUT

This is as good a place as any because with margins tight and the quality of beer imperative to both sales and a pub's reputation, it is vital not to overstock on cask and under-deliver on experience.

Unfortunately, it appears that too many pubs are doing just that.

Last year's report revealed that 26% of cask pubs had seven or more handpumps (Survey Monkey licensee survey for Cask Report 2018). When you consider that, according to CGA, only 10% of cask brands in managed houses are being sold with enough regularity to maintain quality, the issue becomes clear.

However, CGA research also shows that two years ago, where stocked, there was an average of 4.4 cask ale brands per bar. This has now fallen to an average of 2.8. This indicates that some pubs are realising the benefits of quality over quantity.

STYLE

One of the beauties of cask is the range of styles and flavours brewers produce.

Amber beer remains the colour with the largest volume share (67%) while golden is the style that has experienced the most growth recently – up two percentage points in volume over the last two years. Golden performs even better in the spring when volumes are up 13.4% against the rest of the year (Marston's Beer Report 2019). Dark beers account for the least volume but grow significantly over the winter months (up 33%).

Not only is it a case of what combination of styles pubs should go for but also how this should be considered throughout the year.



STRENGTH

It is unlikely that many customers will approach the bar specifically thinking 'what I really want now is a 4.2% ABV cask beer,' but alcohol strength is a factor in customer choice. The growth in no and low alcohol products on the market validates this point.

Customers will also choose different strength beers at different times of the week. 40% will drink a lower ABV beer at lunchtimes and 30% will drink a higher ABV at the weekend (Marston's Beer Report 2019). With rate of sale also likely to grow towards the end of the week, licensees may want to consider not only the strength of the beers on offer but also increasing the number available at this time.

The most popular ABV's with customers are between 3.9% and 4.6% ABV. Beers below 3.9% ABV deliver the second highest rate of sale. Premium cask, as defined by the BBPA as anything between 4.2% and 7.5% ABV, are proving more robust with sales growth in April, May, June and July this year.



GEOGRAPHY

Customers like a mix between cask ales produced locally and brands they recognise and trust.

Local ale accounts for 44% of cask sales but this varies across the country. In Scotland that figure rises to 71% and further still to 74% in the South West of England. (Marston's Beer Report 2019)

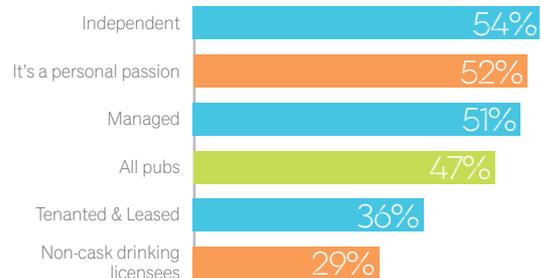
The key, as with all of this, is to know your own customer base and what will work for them.

82% of customers want a nationally recognised cask brand on the bar. The implication is that trusted brands deliver consistency.

ROTATION

Information from Molson Coors indicates that pubs that stock a mixture of permanent and rotational cask ales experience the greatest average daily sales. Higher than those that just stock permanents or just rotate their beers. To maximise the opportunity Cask Marque recommends rotating at least one cask every two to three weeks. Only 8% of customers like to see a beer on for a matter of days before it is replaced.

CASK SELLS WELL IN OUR PUB BECAUSE WE HAVE A VARIED AND INTERESTING RANGE



Source: Survey Monkey for Cask Report 2019

“IN OUR PUB THE CAMRA IDEAL OF LOTS OF GUEST BEERS HAS COME TO AN END AND WE NOW FIND OURSELVES USING FEWER LINES WITH REGULAR BEERS ON, WITH AN INCREASED TURNOVER AND THEREFORE BETTER QUALITY.”

Cask pub, East Anglia

CREATING A RANGE

- ◆ Don't over-range. The result will be a lack of quality or beer being thrown away
- ◆ Know your own customers and what works best for them
- ◆ If you are not sure, arrange tasting events to find out more
- ◆ Consider changing your range for different times of the week and special occasions
- ◆ Strike a balance with styles, strengths and local and nationally recognised brews
- ◆ According to SIBA 35% of consumers say cask can be craft ale and a further 48% don't know the difference between the two. Consider how cask works as part of your overall beer range
- ◆ Make sure people know what's on and what's coming up in venue and on your social media channels

“CURIOUS DRINKERS WILL ASK WHAT'S ON TAP. SOME MEAN CASK, OTHERS DON'T. THE AVERAGE CUSTOMER DOESN'T KNOW ABOUT CASK OR KEG. WHY MAKE IT A THING?”

Cask-loving bar manager, London



A PUB WITH RANGE: THE CROWN POSADA, NEWCASTLE

As a student keen to explore a new environment through its pubs and beer, I believed that hand-crafted tradition was the preserve of embroidery and pottery, not ale. But the Crown Posada's 1880-vintage, Grade II-listed, very existence is cloaked in tradition – and traditional cask ale. One enhances the other.

Today, six handpulls stand to attention – the majority fiercely loyal to the North East of England but supplemented by guests from elsewhere. Expertly cellared and beautifully presented Allendale Pennine Pale and Tyneside Blonde from Hadrian Border Brewery enjoy permanent status, while other local breweries rotate, such as Three Kings, Cullercoats and Two By Two. Ales from Bristol-based Moor, Rat (Huddersfield) and Bad Co from North Yorkshire add yet more interest and variety.

Landlord Andrew Nicholson says he feels privileged and genuinely happy for customers who come back for another pint of whatever cask ale they've just drained.

“Great brewers are really proud of their beer,” he says. “It's like an artist who's proud of his painting. You can't help being enthusiastic about it!”

And we should never confuse tradition with banality. Rat Brewery often unveils new styles in the Newcastle Quayside pub and ultra-progressive Wylam Brewery matured its Imperial Macchiato Stout in an oak cask as an exclusive. The 10% ABV ale was priced at £10 a pint. It sold out in one day.

By Alastair Gilmour

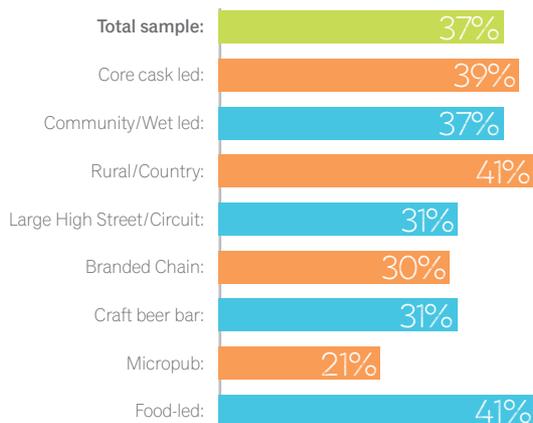
THE COST OF CASK

CASK BEER IS ARGUABLY UNDER-PRICED ON THE BAR AND UNDER-VALUED BY CUSTOMERS PARTING WITH THEIR CASH.

Margin is a serious issue for licensees who can struggle to make money from a product that requires skill and passion to present it at its best.

More than one in three of the licensees that we asked said that a better profit margin would help them sell more cask. This varies depending on the style of the venue.

WOULD A BETTER PROFIT MARGIN COMPARED TO OTHER BEERS HELP YOU SELL MORE CASK? YES



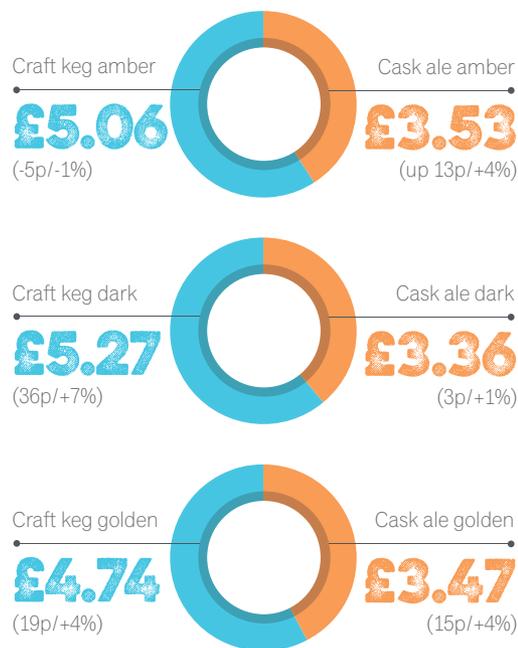
Source: Survey Monkey for Cask Report 2019

The findings suggest that the more important cask is to a venue, the greater need there is for help around margin. The exception to this is micropubs, where overheads are likely to be lower than at food-led and community pub businesses.

HOW MUCH?

The price of a pint has gone up this year, but cask remains at the lower end of the spectrum when it comes to beer. Despite many customers considering cask to be craft, or not knowing the difference between the two (SIBA), there is a notable gap when it comes to the average price of a pint. Financially at least, cask is positioned far closer to mainstream lager than craft beer.

AVERAGE PRICE OF A PINT



Source: Average price May/June 2019 CGA



The price of cask also fluctuates across the country – rising in some places and falling in others. In some parts of the UK cask is considerably cheaper than standard lager.

AREA	CASK	STANDARD LAGER
LONDON:	£3.99 (+20p/+5%)	£3.78 (+9p/+2.4%)
SOUTHERN:	£3.74 (+5p/+1%)	£3.65 (+5p/+1.4%)
SOUTH WEST ENGLAND:	£3.38 (+14p/+4%)	£3.48 (+9p/+2.7%)
SCOTLAND:	£3.70 (-2p/-1%)	£3.31 (+7p/+2.2%)
EAST ANGLIA:	£3.46 (+7p/+2%)	£3.43 (+4p/+1.2%)
NORTH EAST:	£3.37 (+8p/+2%)	£3.01 (+5p/+1.7%)
MIDLANDS:	£3.34 (+7p/+2%)	£3.24 (+1p/+0.3%)
YORKS:	£3.23 (+7p/+2%)	£3.21 (+7p/+2.2%)
LANCS:	£3.07 (+4p/+1%)	£3.13 (+5p/+1.6%)
WALES:	£3.03 (+11p/+4%)	£3.17 (+16p/+5.3%)

Average selling price May 2019 and price change since May 2018 (CGA)

THE CUSTOMER ISN'T ALWAYS RIGHT

What's more, as we found in last year's Cask Report, customers do not always know how much they are paying for a pint of cask or how it compares to other beers on the bar. More than half (55%) of committed cask drinkers said it should be pitched at a higher price point. This year 31% of the consumers we asked said that they would drink more cask if it was cheaper than other beers, potentially indicating a lack of awareness about the relatively low price point of cask in comparison to other beers on the market.

Age is a factor when it comes to the significance of price. The highest proportion of those who said they would consider drinking more cask if it was cheaper than other beers was in the 21 to 24-year-old demographic (47%), followed by those aged over 65 (40%). It was considerably less of a factor for those in between these groups.

THE MONEY BOX

- ◆ There is a gap to bridge between the price of cask and craft
- ◆ To do this the emphasis must be placed on treating cask as a quality premium product
- ◆ Educate staff with tastings so they have the tools to honestly describe and recommend cask – and can then produce the perfect pint
- ◆ Ensure glassware is not only correct but in pristine condition
- ◆ A range should still include an appropriately priced entry-level cask beer
- ◆ Previous Cask Report research has shown that over the course of a year, cask drinkers spend more in the pub than any other customer – in excess of £1,000

“PEOPLE IN GENERAL ARE MORE PRICE SENSITIVE, BUT NOT ABOUT THINGS THAT ARE DIFFERENT OR INTERESTING.”

(non-cask drinking publican, North West)

A PUB WHERE MONEY CAN COME FOR FREE: THE BASKETMAKERS, BRIGHTON

The Basketmakers is the place where Brighton leaves messages for itself. Tucked inside the vintage tobacco tins that cover almost every inch of the pub's walls, there are small folds of paper, tiny twisted notes that reveal something of the city's heart.

They contain seaside jokes, dirty-weekend limericks or scribbled pictures, whilst many are full of the beer-drenched wisdom you only ever find in the pub. Sometimes there are declarations of love – clandestine or designed to be discovered – and even the occasional proposal of marriage. I once found some money, wrapped in a note that read:

'If you have no cash for beer, please use this. If you can live without it, please leave it here for someone who really needs it.'

The notes are small missives from one drinker to the next, sometimes passed between friends, often left for strangers. And, like the pub itself, they draw you into a still small space at the very centre of the world's wider storm.

I've been drinking cask ale at The Basketmakers since I moved to Brighton more than a quarter of a century ago. I once had a girlfriend who lived 20 short steps away from the pub door and, some time later, I spent a year or so living just a few yards in the opposite direction. But wherever my home has been, The Basketmakers has always felt local.

By Emma Inch, the British Guild of Beer Writers, Beer Writer of the Year 2018

WHAT CUSTOMERS WANT

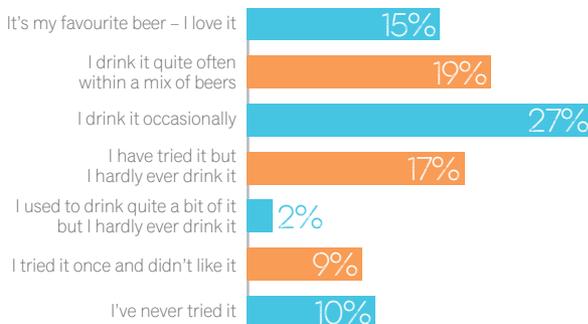
ONE THING WE KNOW FOR SURE IS THAT CUSTOMERS DEMAND QUALITY AND THAT THIS IS A KEY AREA FOR PUBS AND THE CASK BEER INDUSTRY TO FOCUS ON. BUT THERE ARE OTHER AREAS THAT CAN HELP PUBS ATTRACT AND GROW THEIR CASK CUSTOMER BASE.

Our survey of 1,000 consumers (*OnePulse, Cask Report 2019*) reveals that cask is just one of many drinks that cask drinkers enjoy in the pub. The cask drinker is more specifically someone who enjoys cask among a wider repertoire of beer and other drinks in general. Very few people rule it out completely, which is potentially good news for publicans. On the other hand, few consider it their favourite drink. It is somewhere in the middle ground. In an era when people generally go out less frequently but will treat themselves more when they do, this may not be the best place for cask to be.

People who do drink cask are well worth having in the pub. We know they spend more than the average customer (more than £1,000 per year on food and drink) and, according to CAMRA, they also make more

friends. Its research suggests that 30% of real ale drinkers, compared to 16% of all pub-goers, make five or more friends when visiting the pub. This means that cask drinkers do more than most to create that other vital factor in successful pubs: atmosphere.

WHICH STATEMENT BEST DESCRIBES YOU AND CASK ALE?

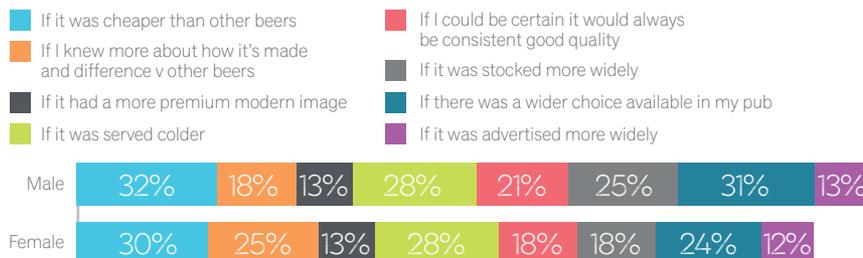


Source: OnePulse consumer survey for Cask Report 2019

WOMEN AND CASK

It will come as little surprise than women are less likely to drink cask than men. According to last year's Cask Report, more than a third of women (35.2%) had never even tried cask. The main reasons being it 'never occurred to me' and 'I don't think I would like the taste'. There is a potentially huge untapped market for cask but it has to overcome negative perceptions around it.

WHICH, IF ANY, OF THESE MIGHT MAKE YOU DRINK MORE CASK ALE THAN YOU CURRENTLY DO?



Source: OnePulse consumer survey for Cask Report 2019



The standout figures on the chart (opposite page, bottom) (*OnePulse for Cask Report 2019*) are around price, temperature, and knowledge.

A third of both men and women say they would drink more cask if it was cheaper than other beers. This suggests they do not know that, generally speaking, it already is.

A similar percentage of both men and women told us that they would drink more cask beer if it was served colder. This not only highlights the potential for 'cooler' cask options but it also indicates that there is a negative perception around the temperature cask beer is currently served at, which is often above recommended temperature guidelines.

One area which scores higher with women than men is around 'knowing the difference about how cask is made and how it differs from other beers'. The benefits and beauty of cask beer have not been made clear enough and there is a thirst for more knowledge. It is up to pubs and the wider industry to deliver this.

GENERATION GAP

When we look at age, we can also see varying reasons that may encourage people to consider cask. We have already seen (see *The Cost of Cask* p25-27) how price is more of a factor for those aged between 18 and 24 and those aged 65+.

Younger customers also want to know more about the beer they are drinking and how it differs from other products. One in four (24%) of 25 to 34-year-olds cited this as something that would make them drink more cask, compared to just 11% of 55 to 64-year-olds, who may already feel that they understand the category.

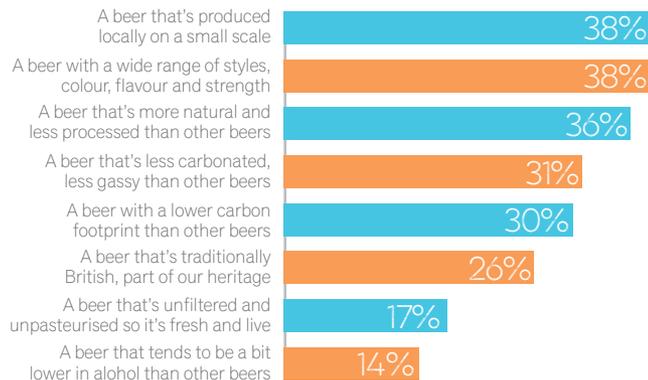
A quarter (26%) of 18 to 20-year-olds said they would drink more cask if it was advertised more widely. The highest scoring age group for that option. This suggests there is either not enough noise around cask or the channels being used may not be reaching a younger audience.

BRITISHNESS AND THE LANGUAGE WE USE

The messages we continue to communicate about cask are not necessarily ones that customers find engaging. For example, 'Britishness' is often seen as an important factor in promoting cask. This is clearly the case with licensees, who said its status as 'Britain's National Drink' is the second most important reason for its success in their pubs. It was cited as a factor by 54% of those we asked, putting it just behind 'it's what people want in a pub like ours' (64%) as a driver of sales. That 54% rises to 68% for licensees who describe themselves as passionate about cask.

However, when we asked customers, Britishness and tradition did not score highly as something customers were particularly interested in.

WHICH OF THESE SOUNDS LIKE SOMETHING YOU MIGHT FIND INTERESTING AND WANT TO LEARN MORE ABOUT?



Source: OnePulse consumer survey for Cask Report 2019

Pub customers are more interested in beer being 'produced locally on a small scale' than its inherent Britishness.



Further to that, customers are interested in the qualities of cask but perhaps not the way we, as an industry, are communicating them. Describing cask as a beer that's 'unfiltered and unpasteurised' is less engaging than describing it as 'natural and less processed' or simply saying it is less 'gassy'.

Significantly, one in three (30%) of respondents said 'a beer with a lower carbon footprint than other beers' was something they wanted to find more about. With environmental awareness growing, this could become an even more relevant part of cask beer's story. The percentage of those interested in the green qualities of cask is higher among women (34%) and younger drinkers (39% of 21 to 24-year-olds).

“CASK ALE IS SEEN AS UNIQUELY BRITISH, AN ESSENTIAL PART OF THE PUB. WE MUST GET THE DIALOGUE ABOUT GOOD BEER, NOT CASK, CRAFT, LAGER, ETC. INTERNAL DIVISIONS WILL ONLY CONTINUE THE DECLINE.”

Licensee, Wales

A GREAT FIND: THE DEVONSHIRE ARMS, BEDFORD

Halfway to North Hykeham in Lincolnshire, while visiting family, we often stop off for lunch.

Usually, we end up somewhere near Peterborough. On this occasion, we made sure we visited a pub. I needed to read through the something I had written for someone. And I needed to do that with a pint.

I sought comfort. And, sometimes, a roadside Little Chef just doesn't quite cut it. Not in the same way as a pub. So, I looked online, tapping in beer, pubs nearby and found one with a star rating that far exceeded others. This is where customer reviews and ratings count. On the pub website there was a page dedicated to their beers. Nothing too outlandish, but it showed me enough to feel reassured that this was a decent place to while away some time.

Pubs emit warmth. In wood panelling. In chalkboard messaging. In the smiles that welcome you through the door.

That's how the Devonshire Arms on Dudley Street in Bedford became my bolthole for a few hours. It was halfway between home and heartache.

A glass of liquid mahogany held down the corner of my piece of paper. My handwritten note, telling stories of times gone by blurred in front of me. At each paragraph, I sipped. Each mouthful slowing my pulse to a rhythmic throb. My mindset readjusted.

By the time my glass was empty, my heart was full again.

Order a great pint of cask ale in an unassuming pub and you'll never want to order anything else. It's a hard act to follow.

By Jessica Mason

KEY FINDINGS AND TIPS

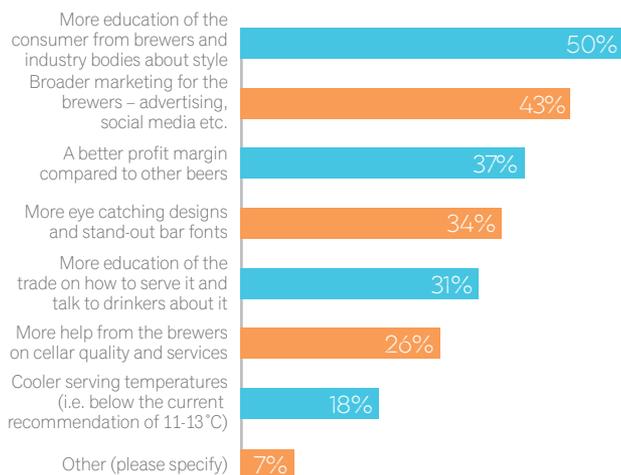
- Customers are thirsty for more information about cask, including its carbon footprint
- Provide that information with beer menus, chalkboards and staff who are trained and confident enough to make recommendations
- Many customers will find you online first so ensure your digital channels also include updated news and images of your beer offer
- Allow trusted staff to post on your social media channels to potentially engage a wider audience
- Think about the language you use and the messages you are communicating around beer. Traditional messaging may not be the way to go. Be bold



INDUSTRY ACTIONS

CASK BEER IS AN ESSENTIAL ELEMENT OF MANY PUB BUSINESSES. IT CAN BRING NEW PEOPLE TO A PUB AND KEEP THEM THERE FOR LONGER. BUT TO GET THE FULL BENEFIT, PUBS NEED SUPPORT FROM THE WIDER INDUSTRY.

WHICH, IF ANY, OF THE FOLLOWING WOULD HELP OR ENCOURAGE YOU TO SELL MORE CASK ALE?



Source: Survey Monkey for Cask Report 2019

Pubs are looking for help to improve what they do around cask, we know this because 50% want the industry to provide more information to customers around style and flavour. This could come in the form of wider advertising, accessible information on pump clips and point of sale and by implementing training programmes for staff so they are armed with the information needed to educate and advise customers.

The pub is the key middle player here between the 'industry' and the 'consumer' because this is the place where most people are likely to have their eyes opened to cask beer.

WE SELL A LOT ALREADY BUT...

Pubs that already sell a lot of cask are more demanding when it comes to support. More than a third (39%) want the trade to help further educate them and their staff about how to serve and talk about cask. It indicates that the best cask pubs are always looking for new ways to get even better.

Here the industry can provide a wealth of information on correct glassware, perfect serve and descriptors to help licensees and bar staff find the right words to talk about their beers. Describing a beer being 'hoppy' or 'malty' doesn't add much, so what are the key flavour profiles of your beers and are they relatable for drinkers? Colour is also key. Do you want your beer to be described as 'golden', 'amber', 'dark' or 'brown'? Encourage pub teams to use your choice of words for consistency.

Use the same language when talking about your beers on social media, which is a medium cask needs to further embrace to engage the next generation of pub goers.

43%

OF THE PUBS WE SURVEYED WANT BREWERS DOING MORE ADVERTISING AND SOCIAL MEDIA



“IT'S IMPORTANT, IT'S TRADITIONAL BUT IT HAS AN IMAGE OF AN OLD MAN'S DRINK AND CHANGING THAT COULD BROADEN THE SPECTRUM OF DRINKERS.”

Freehouse, Midlands

QUALITY

There is no greater issue for pubs when it comes to cask. The industry needs to demand quality from pubs and make it 100% clear how they expect their products to be looked after and presented. Pubs must be further educated about the necessity of weekly line-cleaning, tasting their beer at the start of every session and ensuring correct cellar and beer temperature. In turn, the industry must question if it is doing everything it can to ensure beers are delivered efficiently and at the correct temperature.

EVENTS

In a market that competes with home entertainment, pubs have to put on more events to drag people away from their settees. The industry can be part of this by getting even more involved in tutored tasting sessions and meet the brewer nights. This can be furthered in the pub with beer and food matching sessions to help menu development.

Also, can breweries play a more active role in encouraging pubs and their teams to visit them to see and learn about the process of brewing cask beer?

IMAGE

We know from consumer research that cask has an image problem, with many still believing it to be 'warm, brown and old-fashioned' (Cask Report 2018). This in part comes down to the language we use when describing cask but also how beer is marketed.

The tricky bit here for the industry could be tailoring different approaches to different styles of venue. For example, the managed houses we surveyed are more interested in eye-catching fonts and cooler serving temperatures than the majority of pubs. Can the industry take a more bespoke approach to the support it provides without diluting brand messaging? The pump clips that work in a traditional venue may not grab the eye in a busy high street bar.



“SOMETIMES THE PUMP CLIPS ARE TOO MODERN A DESIGN FOR OLD STYLE PUBS. IF THE NAME OF THE BEER IS TOO DIFFICULT TO PRONOUNCE THEN THE CUSTOMER WILL AVOID ASKING FOR IT. ONE BREWER MADE "PRETTY" PUMP CLIPS WITH NAMES WE HAD NO IDEA WHAT THEY MEANT. I FOUND IT HARD TO SELL THEIR BEER SO NO LONGER ORDER IT.”

Cask loving publican, South West

FINAL THOUGHTS



STOCKING CASK ALE CAN DAMAGE YOU COMMERCIALY IF YOU DO NOT HAVE THE CARE AND PASSION TO MAKE CASK ADD VALUE TO YOUR BUSINESS.

Cask ale drinkers are an asset to you. They spend twice as much as other drinkers and frequently call the tune when deciding the pub they or their friends should drink in. The typical cask ale drinker is also very vocal about their choice of venue and if your pub is vetoed it will affect your reputation. With social media today word spreads quickly.

Quality is king, more so today than ever. This means having good throughputs of cask, a seven-day line cleaning regime and as highlighted in this report, the beer in the glass needs to offer great refreshment and be served between 11 and 14°C. You should be checking temperatures at least weekly and even more regularly in the summer.

In a number of previous reports we have talked about the stocking matrix (see diagram). It is vital you sell cask beer in three days. Remember it is a live product. If you are struggling to deliver the three-day rule with the number of beers on the bar, in quieter periods, say on a Monday to Thursday, reduce your range. Stocking policy should deliver a range of ABV's, styles and both familiar and guest ales.

If you cannot deliver the above, you should think seriously about destocking cask. Focus on other USP's for your pub. It is sad to say this but it may be better for your business with less wastage, reduced line cleaning and less worry. You can't always be a winner with cask – but get it right and it can deliver great reward for both you and your customers.

Paul Nunny
Cask Marque

THE STOCKING MATRIX

NO OF HAND PULLS	>144 PINTS / WEEK	>288 PINTS / WEEK	>432 PINTS / WEEK	>576 PINTS / WEEK
1	●			
2	●	●		
3	●	●	●	
4	●	●	●	●

- Tried and trusted
- Tried and trusted or respected regional
- Tried and trusted, respected regional, local specialist or guest



THE CASK REPORT TEAM

Editor, Matt Eley
matt@memywords.com

Head of research, Pete Brown
petebrownsemail@gmail.com

Copy editing and PR, Frances Brace
frances@redflamcommunications.co.uk

Photography, Matthew Curtis
matthew@pelliclemag.com

Design, Michael Smith – Alphaprint
www.alphaprint.co.uk, 01206 795546

Contributors

Pete Brown, Matthew Curtis, Matt Eley, Alastair Gilmour,
 Emma Inch, Jessica Mason, Adrian Tierney-Jones

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