

THE CASK REPORT

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by
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There's a beer revolution going on in Britain – and cask ale is right at its heart. Sales of cask beer, the number of people who drink it, breweries who make it, and festivals that celebrate it, are all increasing as good quality, flavoursome beer continues to gather mainstream interest and popularity.

People may be going to the pub less often, but when they do go, in increasing numbers they're looking for something special, something different from discounted supermarket lager brands. And that's why more of them are drinking cask ale. There are more brands, in a wider variety of style and flavours, than there has ever been before.

- Cask ale is in volume growth, outperforming the on-trade beer market by 4.5%. The UK now drinks 634 million pints of cask ale every year.
- Cask ale is increasing its rate of sale – more pubs are stocking more cask ales, and selling more as a result.
- Cask ale is increasing its market share. One in six pints of beer served in pubs is cask ale. Almost 60% of total on-trade ale is now cask, with keg share declining sharply.
- Three new breweries open every week in the UK. There are now over 1,472 breweries in Britain and the vast majority of these mainly brew cask ale.
- Cask ale is recruiting new drinkers. In most parts of the country and most styles of outlet, old stereotypes are fading. Women and younger drinkers continue to convert to cask – though some licensees are failing to recognise the evolving profile of drinkers, and the opportunities this presents.
- There's a great deal of excitement around the concept of 'craft beer' – which most drinkers define as beer from a small brewer or beer brewed in small batches or limited editions rather than by particular styles or formats. Most craft beer is cask ale – and most cask ale is craft beer.
- The pub trade is not taking advantage of the improvement in perceptions of cask ale – and growing understanding of it as a crafted product (that sits comfortably alongside other artisanal and 'slow' foods) - to position cask as a genuinely premium product.
- Despite their increased interest, drinkers don't fully appreciate the complexity of cask ale and the breadth of care and attention that goes into serving the perfect pint. This presents an opportunity to educate drinkers on the craftsmanship of cask, further improving its premium, quality image.
- The price differential between cask ale and 'craft keg' beers – not to mention versus standard lagers – is too wide and limits the income publicans can make from interesting, flavourful beer.
- High price brings higher expectations of quality and these must be fulfilled. It's vital that publicans train staff in appreciation of cask ale (e.g. by encouraging them to try it) so they can in turn educate drinkers.
- The perfect cask ale range is an equal balance between familiar and unfamiliar, local and exotic, permanent and guest. Publicans are currently rotating guest beers far more often than drinkers would like.



Foreword

Working in beer often feels like living in a busy, hyperactive bubble – less so now that beer is finally enjoying the mainstream media attention it deserves, but when we talk to each other in ‘the beer community’ – brewers, publicans, beer bloggers, writers and CAMRA activists – we often give ourselves a distorted view of the market.

This is the most exciting time in beer for at least a generation. The number of breweries in Britain continues to rocket. We have an unprecedented array of styles and flavours at our fingertips. Cask ale continues to grow and diversify, as does consumer interest in it.

We now also have the relatively new concept of craft beer, which is helping to take interesting, flavourful beer into a mainstream consumer arena that has been dominated by bland, multi-national lager for decades.

This last point causes some confusion in beer circles. Some in the industry think craft beer needs a precise technical definition, which it lacks. Some see it as a threat, others as just another glib marketing term. There is a view that craft beer is entirely separate from cask ale – a challenging, US-inspired, modern explosion of flavour served in kegs, bottles, cans, anything but a cask – or an unbalanced, over-hyped hipster fad, depending on your point of view.

**This is nonsense.
It helps no one.**

Our research does not strictly define craft beer, but does highlight its most meaningful characteristics. It shows that for most people, craft beer is not related to format, style or origin – it’s more about beer brewed by small brewers or beer brewed in small batches. That’s a description that applies equally to most of the cask ales brewed in the UK.

Four years ago, the foreword to the Cask Report was written by Brooklyn Brewery’s Garrett Oliver – one of the highest profile craft brewers in the world. He spoke about how he was inspired to become a brewer by drinking cask ale in British pubs, and described British cask ale as ‘an inspirational thread that runs through a worldwide artisanal brewing movement.’

Cask ale and craft beer are not entirely the same, but they are joined at the hip, inseparable and overlapping. The current price differential between cask ale and ‘craft keg’ beer damages both the image of the former and the sales of the latter.

The sooner the trade realises that most cask ale is craft beer, and vice versa, and prices, promotes and talks about them accordingly, the more drinkers will understand and enjoy flavourful beer in all formats, and the more publicans will benefit from it.

But they will only see sustained, real benefit if they answer expectations of higher quality by making sure their staff are knowledgeable about the beer, that they keep it well, serve it correctly, and can engage and answer drinkers who are increasingly thirsty – both for great beer and the story behind it. Then, Britain’s national drink – in all its many guises – can truly be the saviour of the British pub.

Cheers

Pete Brown
September 2014

The State of the Cask Ale Market

Cask ale is in volume growth, outperforming the rest of the on-trade beer market and accounting for one in six pints of beer sold in pubs.

Cask ale volume

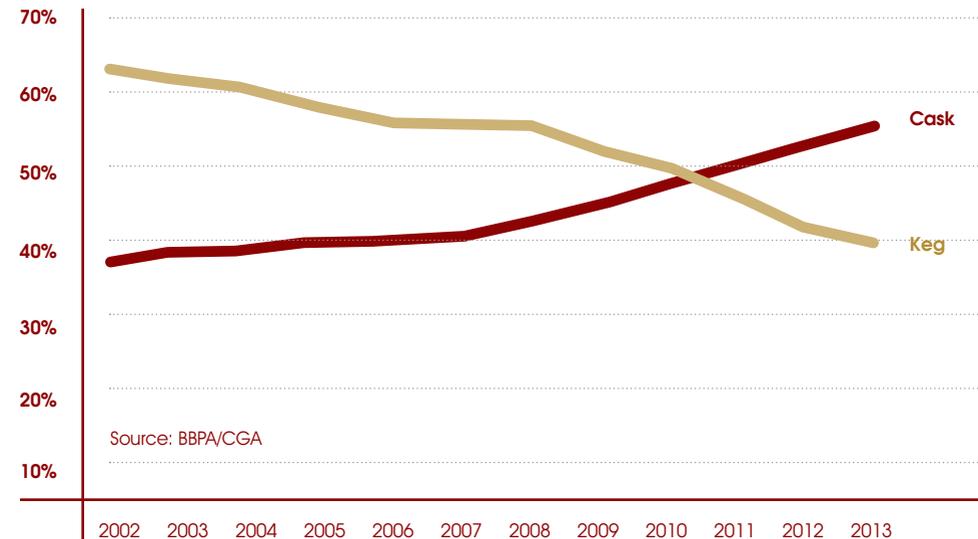
- Cask ale grew in volume by 1.1% in 2013.¹
- In 2014 that growth has continued - cask ale grew by 1.3% in the twelve months to July 2014.¹
- Total market volume is 2.2 million barrels.¹ One barrel is four firkins or 288 pints, meaning the UK drinks 634 million pints of cask ale every year.¹
- Up to June 2014, cask showed 10 consecutive months of volume growth.¹
- Growth is being driven by premium cask (over 4.1% ABV), which continues to gain momentum: up 3% in 2013, and 4.1% in the year to June 2014.¹

Cask ale value

The cask ale market is worth £1.72bn. This is up 23% since 2010, when it was worth £1.4bn.³ Since cask ale significantly drives footfall, and cask ale drinkers attract other drinkers to the pub and spend more when they visit, the value of cask ale to individual pubs is greater than the value of actual cask sales – and should not be underestimated.

“The value of cask ale to individual pubs is greater than the value of actual cask sales – and should not be underestimated.”

Cask ale as a percentage of draught ale



Comparison with the beer market

- Performance in comparison with the total beer market (including both on and off-trade) is interesting: in 2013 cask out-performed the total beer market, which was marginally down by -0.1%. But the total market is enjoying a robust 2014 – up by 3.8% in the twelve months to the end of June.¹
- However, cask continues to outperform on-trade beer: on-trade sales were down -3.4% at the end of 2013, and down by -0.6% in the twelve months to June 2014.¹
- In 2013 then, cask outperformed the on-trade beer market (including all lager, stout and ale) by 4.5%. This was the sixth consecutive year cask outperformed the total market.

Market Share

All this means that cask ale’s market share is growing steadily:

- Cask is 16.1% of all on-trade beer – one in six pints.¹
- Cask is 8.2% of the total beer market, including both on- and off-trade.¹
- Cask is 58.6% of the draught ale market, while keg ale is 41.4%. This represents a reversal of share since 2006, when these same figures were the other way round. As traditional smoothflow keg ale suffers steep decline, cask’s share growth of total ale is accelerating. The growth of new ‘craft keg’ formats is not yet large enough to reverse this trend.³

The State of the Cask Ale Market

Distribution

- Distribution of cask ale remains constant – it's in 54% of UK on-trade outlets.³

Stocking and Rate of Sale

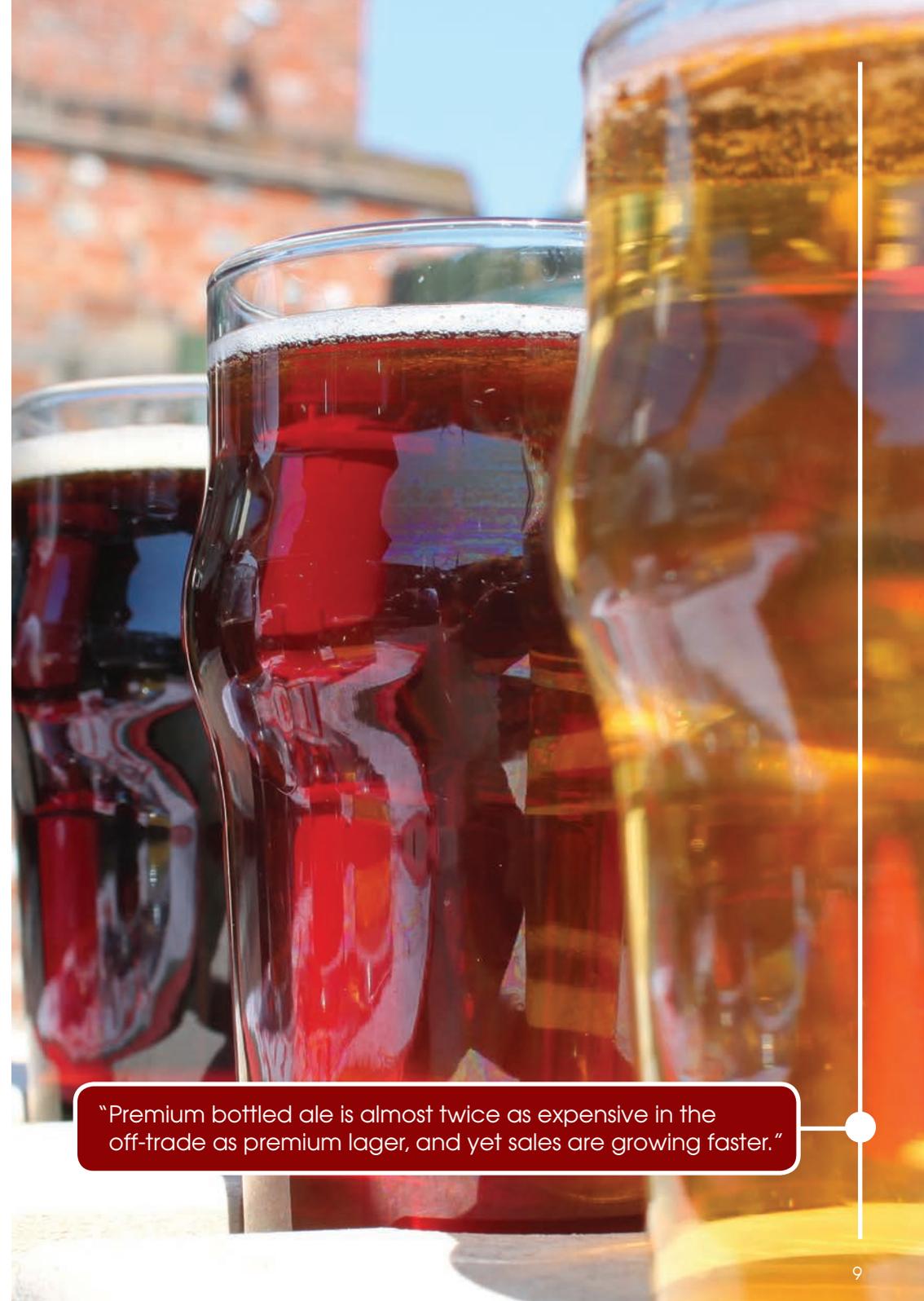
- The steady increase in cask ale volume is therefore coming from existing outlets stocking more beers and selling more of them. As we'll see later, the average number of handpumps on the bar is increasing.
- Rate of sale for cask ale was constant in 2013 at an average of 0.59 brewers' barrels per outlet per week, but in the twelve months to June 2014 this has increased to 0.61 barrels (approx. 175 pints) per week per on-trade outlet.³
- This is good news – generally, broadening the range is not having an adverse effect on sales per handpump.
- The more handpumps a pub has, the more cask ale it is likely to sell – but this is not an automatic relationship! You don't sell more simply by putting more on. More handpumps may increase overall sales, but it can decrease average rate of sale per handpump – if that goes too far, it can lead to quality issues.

A look at the off-trade

- Off-trade ales may not immediately seem to be of interest to the publican, but the off-trade offers a wider choice of beers and a freer environment in which to browse. We can therefore look at premium bottled ale to pick up some clues about people's developing tastes in quality ale – cask or bottle-conditioned or not.

- Premium bottled ale has seen 12.1% value growth – bucking a general trend in grocery towards value and budget brands.⁵
- Half a million new shoppers have started buying premium bottled ale – an increase of 7% on last year.⁵
- This is being driven by new product and packaging launches, particularly around golden ale and more unusual, eclectic craft beer styles. Premium bottled ale leads the on-trade beer market in innovation, outperforming all other beer styles.⁵
- Premium bottled ale is far more expensive than lager. At the time of writing, Tesco's average price for premium bottled ale is £3.98 per litre, while multi-packs of mainstream lager brands – not on promotion – can retail for as little as £1.65 per litre.
- 18-34 year-olds are most likely to say they intend to drink more premium bottled ale than they have been drinking.

Premium bottled ale is almost twice as expensive in the off-trade as premium lager, and yet sales are growing faster, despite a wider growth of interest in budget and value brands. People are prepared to pay more for interesting, flavourful beer, and expect to do so. If the off-trade is seeing a faster growth in ale, a greater increase in the number of people buying it, and a significant price premium versus other beer, this surely points to cask ale being significantly undervalued by the on-trade. It also suggests that there is a huge opportunity for further growth in cask ale.



“Premium bottled ale is almost twice as expensive in the off-trade as premium lager, and yet sales are growing faster.”

The Cask Ale Drinker

Cask ale is recruiting new drinkers and has shed old-fashioned negative stereotypes.

Who drinks cask ale?

As described in previous editions of the Cask Report, cask ale drinkers tend to be male, upmarket and slightly older than the population average. But cask drinkers are an increasingly diverse group: 49% of all that drink alcohol – equating to a third of all female drinkers and two thirds of all male drinkers – have tried cask.⁶

Drinking Patterns

- Of those who have ever tried real ale, 86% still drink it to some extent. However, for many it remains a rare occasion.⁶
- Among those who do regard it as a regular drink though, it really is regular – 55% say they drink it every week, visiting the pub on average 2-3 times a week. The average consumption is 3.3 pints per week. This backs up the consistent finding that cask ale drinkers visit pubs more often and spend more money while they're there.⁶

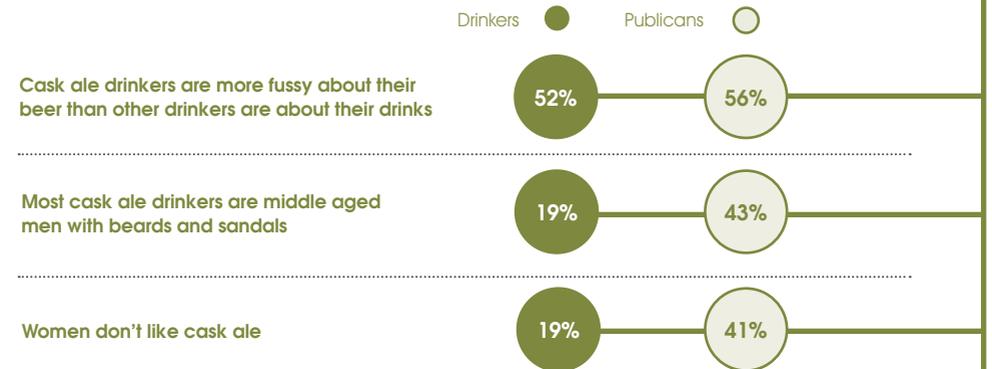
Shattering the stereotypes

We've been saying for several years now that all the research we've conducted for the Cask Report suggests that the residual negative stereotypes of the real ale drinker have all but disappeared. Some may still talk about flat caps and whippets or beardie weirdies, but when pressed most people simply don't believe this any more. Many of these stereotypes belong to a previous generation.

"15% of all cask drinkers tried it for the first time within the last three years, which proves that cask is consistently recruiting new drinkers"

There are some notable differences between drinkers and publicans on this. While everyone feels the cask drinker is more discerning, drinkers reject the old 'beard and sandals' and 'not for women' stereotypes far more decisively than publicans do.

Perceptions of cask ale drinkers



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

Overcoming the Barriers

- More than half of those who have tried and rejected cask are women – but, 75% of women who have tried cask do still drink it. There are barriers to cask that women are more sensitive to (inaccurate perceptions of calorific content, bloating etc), but these barriers are not insurmountable and there is no real reason why women should not drink cask.⁶
- Similarly, age is a factor but not a barrier to drinking cask - a third of all 18-24 year-olds have tried it.⁶
- 15% of all cask drinkers tried it for the first time within the last three years, which proves that cask is consistently recruiting new drinkers. 65% of these new recruits are aged 18-24.⁶
- We probed some negative image statements about cask and found that very low numbers of people agree with them:²
 - Cask ale is a winter drink: **15%**
 - Cask ale is served warm: **12%**
 - Slops from the drip tray are poured back into the barrel: **5%**
 - It's got bits in it: **3%**

This is consistent with all our previous research: while some people just don't like the taste, for most the only barrier to cask is that they have never been given a good reason to try it, or they simply wouldn't know where to start. Such barriers are easily overcome. Given the increasing interest in all things flavoursome and artisanal, most people who have not yet tried cask ale only need it to be presented to them in a relevant, attention-grabbing way for them to be converted.



Broader Context: Where Does Cask Ale Fit and What is Driving Growth?

Cask ale now exists within a broader surge of interest in 'craft beer'. Most cask ale is craft beer – and most craft beer (in the UK) is cask ale. But the trade is not yet leveraging the full potential of cask ale's craft credentials.

Beer got interesting

We've been talking about the growth of interest in beer for several years now. Initially this was met with some scepticism by some outside the industry, but beer's fresh, contemporary appeal is no longer arguable, and cask ale is right at its heart.

- Membership of CAMRA continues to grow, now standing at 170,000 with 200 active branches.
- The number of breweries in the UK has trebled since the millennium and has now reached 1,472. Three new breweries open every week. The vast majority of these brew cask ale as their main focus.
- The Society of Independent Brewers (SIBA) estimates that its members – which currently account for 53% of all brewers in the UK – between them brew almost 10,000 different cask ales.⁴ If we assume non-SIBA brewers have similar portfolios, this means there are as many as 18,800 different cask ales brewed every year.
- Media coverage of cask ale and craft beer continues to grow. The blackout of beer coverage in mainstream media seems to be lifting. Beer coverage in local press – where local interest stories dominate – is particularly dynamic with many new writers gaining regular coverage for breweries and pubs in their region.

Other premium products growing in the on-trade

Much is made in the media about the decline in pub-going and the rate of pub closure. But there is another side to the story. CGA research shows that when people do visit the pub, they are prepared to spend more on the fewer drinks they are having there, and want something different and more special than the normal supermarket brands.

Cask ale – available only in pubs because of its unique cellar conditioning process – is an undoubted beneficiary of this, as are products such as premium gins, sparkling wine and world lager, all of which are showing strong growth in the on-trade.

170

Number of new breweries opening in the UK last year

170,000

Number of members of the Campaign for Real Ale

18,800

Estimated number of different cask ales on sale every year in the UK

Broader Context: Where Does Cask Ale Fit and What is Driving Growth? (cont)

This is not just premiumness for its own sake – drinkers are clearly in search of new, different and more interesting flavours. Packaged ales are up 22% in the on-trade, and dark and golden rum is taking share from white spirits.³

This reflects a broader trend in food and drink – spicy Indian food is popular in the UK, and Mexican foods currently the fastest growing style in restaurants. People are moving to darker, more bitter chocolate from milk chocolate, and to more full-flavoured, bitter real coffee from instant.

We're favouring more flavourful styles of bread such as sourdough over the traditional white loaf. Sales of mature cheese and soft styles such as Brie and Camembert are growing faster than mild cheddar and processed cheese.

Not all drinkers want their beer to be challenging or flavourful. But it is no longer accurate to assume that bland drinkability is the dominant motivator in beer choice. The standard lager 'lad' of the 1980s and 1990s is ageing, and his grown-up children are looking for something a little more interesting than the beer dad drank.

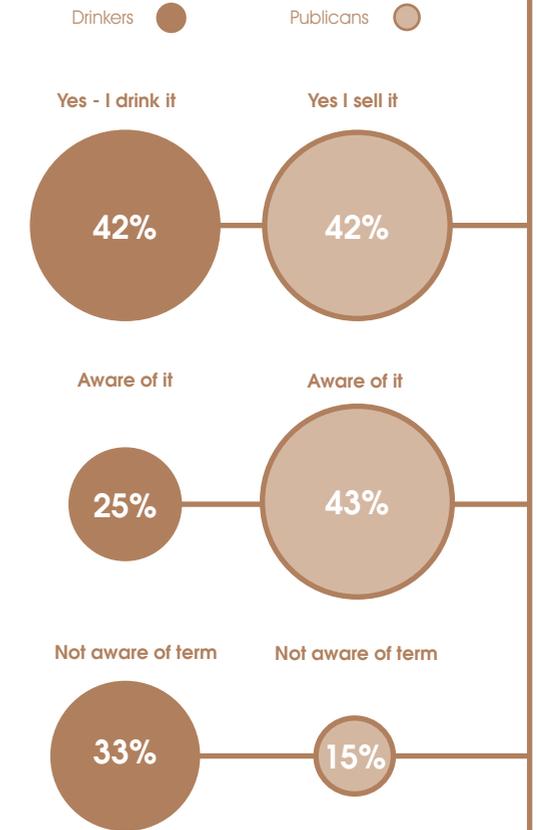
Craft Beer

A great deal of the new interest in beer focuses on the notion of 'craft beer'. The term lacks a precise definition because by its nature it describes a broad and diverse category of beers. Among beer aficionados and around the industry, there is a debate about what is and isn't craft beer which is often coloured by personal preference.

Our new research gives us an idea of the scale of the craft beer boom. And while it may not give us a strict definition, it does give us an idea of what the most widely agreed characteristics of craft beer are, which allows us to describe craft beer in a meaningful way.

- Four out of ten publicans claim to sell craft beer, and the same number of cask ale drinkers claim to drink it.
- Craft beer transcends format and packaging; while draught is the most popular format, enjoyed by 81% of drinkers, 64% have also drunk it in bottles and 20% have sampled cans. Sales of packaged craft beer in the on-trade have grown by 154% in three years, from 28,000 to 71,000 hectolitres (that is approx. 5 million to 12.5 million pints).

Awareness of craft beer



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014



"The standard lager 'lad' of the 1980s and 1990s is ageing, and his grown-up children are looking for something a little more interesting than the beer dad drank."

Broader Context: Where Does Cask Ale Fit and What is Driving Growth? (cont)

There is a view in some quarters that 'craft beer' applies solely to strong American-style beers served in keg or bottle. Our research refutes this:

- Craft beer is characterised as being from a small brewer, and/or beer brewed in small batches or limited editions
- It is also a beer that is less common than mainstream beers.
- Less than a third of drinkers believe craft beer must contain certain varieties of hops, or be served on keg, or be American in style.

What characterises craft beer?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

Cask Ale and Craft Beer

It is absolutely correct to say that craft beer has proven that beers served from keg can be flavoursome and of high quality – 19% of SIBA brewers now claim to brew 'craft keg' beers⁴, and this format has attracted most notice in the trade.

But as we have already shown, even with the excitement around craft keg, cask is actually accelerating its takeover of on-trade ale from keg ale. While cask ale has a 16% market share of total on-trade beer, craft beer in other formats (keg, bottle, can) scores only 2%.³

"Most craft beers in Britain are cask ales, and most cask ales are craft beers"

Craft beer may span all packaging and serving formats, and that includes cask ale:

- Many of the highest profile 'craft brewers' package the same beers in both cask and keg. It would be nonsensical to argue that, say, Thornbridge Jaipur or Magic Rock Human Cannonball were craft beers when packaged in keg but were not craft beers in cask.
- The most common attributes of craft beer defined above also apply to the vast majority of cask ale brewers and brands. Even brands brewed by larger regional brewers rarely have consistent distribution across the UK, and the practice of brewing 'small batch or limited edition beers' has long been practised by cask brewers creating seasonal beers.
- On the other hand, we cannot argue – as some people have – that **any** cask ale is by definition a craft beer. Only 5% of ale drinkers and 8% of publicans agree with this statement.

So while we cannot say that craft beer and cask ale are synonymous, we can say that craft beer is not defined by format or beer style. Craft beer and cask ale are not exactly the same, but there is a huge degree of overlap between them: many craft beers are cask ales, and many cask ales are craft beers.

Which leads us to the one disturbing element of the craft beer boom.

Broader Context: Where Does Cask Ale Fit and What is Driving Growth? (cont)

Craft Keg versus Craft Cask Pricing

The Cask Report has consistently argued that cask ale is under-priced versus other draught beers on the bar. Its drinkers are more affluent on the whole, and they consider the product to be more premium than lager. (There is an historical argument that good lager should be more expensive than ale because it has to be conditioned at cool temperatures for several weeks. However, most commercial lager brands are now produced just as quickly as ale.)

Counter to this, cask ale is a fresh product, with live yeast still in the barrel, and demands greater care and attention from the licensee. Even if they do not know this, data from the off-trade show drinkers regard ale as a premium product to mainstream lager.

We have shown research previously that proves cask drinkers already think they're paying an average of 30p more per pint for cask ale than they actually are. Clearly, the trade is undervaluing cask and could be selling it for more.

Craft keg beer has a significant price premium over craft cask. This has some roots in the scarcity of imported craft keg beers from the US – higher alcohol plus duty, transport and import costs create a steep price differential for, say, a 7% IPA imported from California. But domestically produced craft keg beers of average strength have taken advantage of this to artificially inflate the price of craft keg across the board.

Craft keg is a premium product and drinkers do expect to pay a price premium. But in our view the current premium is distorted. The UK average price of craft cask beer is £3.19 per pint. The UK average price of craft keg beer is £4.04 per pint.³ We believe this differential is far too high:

- Where the price premium is lower, outlets stocking craft keg beer sell more of it.³
- As we have shown, craft beer spans both cask and keg. It therefore makes no sense at all for publicans to be selling craft cask beer almost a pound a pint cheaper.
- If the average price of cask were higher and the average price of keg were lower, the publican would sell more craft keg, earn more from craft cask, and therefore sell more beer and make more money overall.
- This also provides craft beer overall with more of an insurance policy against becoming a fad – when the novelty wears off, will people still be happy paying a pound a pint more for it? It makes sense to reduce the differential now.

The opportunity for the publican is to sell more craft beer in all formats – especially cask – by taking advantage of the demand for premium, flavourful beers produced on smaller runs, stocking more of these beers, taking care of them, presenting them attractively (e.g. in the right glassware) and educating both consumers and staff about them. The next section of the report goes into more detail about how important this is, and how it might be done.





Perfect Cask Ale Stocking Policy

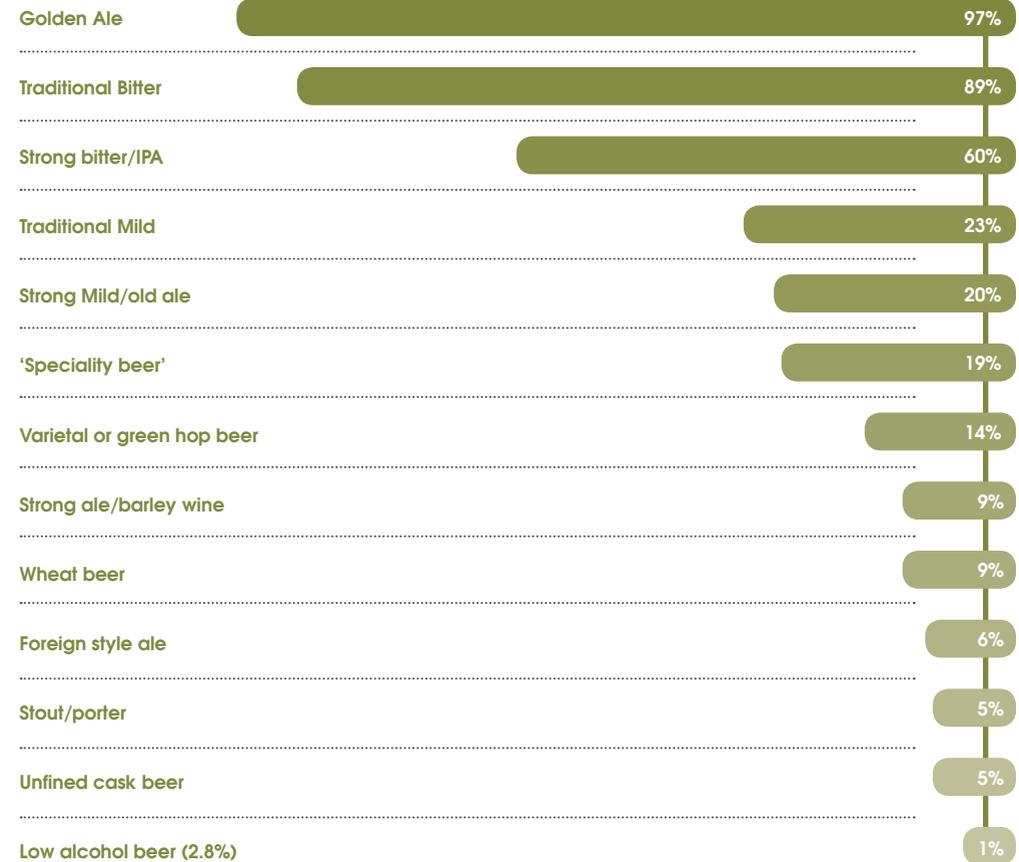
The range of cask ales available to publicans is bigger than ever, both in sheer number and in terms of style and flavour. How do you choose the optimal range for your pub? A large part of this comes down to your understanding of the tastes of your specific clientele – no one else knows them better. But our research helps make the best of what's available – and also suggests that publicans and their punters don't always see things the same way...

A huge range of availability

- SIBA estimates that its members – who account for almost 780 of Britain's 1,472 brewers – brew 4,000 permanent cask ale brands and as many as 5,800 seasonal and special cask ales every year, with breweries producing an average of eight different beers on an annual basis.⁴
- This figure rises to 18,800 with non-SIBA brewers added in.
- The variety of styles brewed continues to grow. While most cask ale volume is in traditional bitter, more brewers are brewing a greater number of styles.

Beer styles in regular production

Percentage of SIBA member brewers producing each style

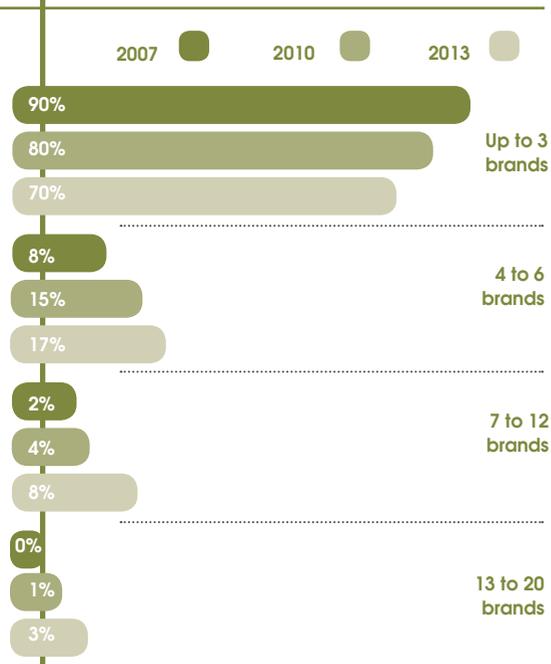


Source: SIBA Beer Report

(n.b. graph doesn't reflect total volume of each beer style brewed – just the number of brewers who brew it.)

Perfect Cask Ale Stocking Policy (cont)

Percentage of outlets stocking brands over a 4 week period



Source: CGA Brand Index

How many pumps and brands do publicans stock?

Unsurprisingly the number of different brands being stocked by cask ale publicans is growing.

In 2007 – when we launched the first edition of the Cask Report – 90% of cask ale outlets sold only 1-3 different brands over a four-week period. While this is still the most popular ranging strategy, the proportion stocking 1-3 brands fell to just 70% by 2013. More cask ale pubs are stocking more brands – both by increasing the number of handpumps, and by increasing the proportion of those pumps that stock guest ales rather than permanent brands.

This intuitively feels like good news for the discerning cask ale drinker. But what drinkers want and what publicans think they want isn't always the same.

When ordering real ale in pubs you regularly visit, what do you prefer to see?



Base: all drinkers who have ever tried real ale
Source: TNS research for CAMRA

"If they find a beer they like one week, they'd still like it to be there the next couple of times they go in."

What's the optimum trade-off between choice and quality?

Both publicans and drinkers recognise that there comes a point when there is a trade-off between the number of brands stocked on the bar and the ability to keep the range at a consistent high quality – after a given point more beers on the bar means lower throughput and less fresh beer.

But drinkers are more conservative than publicans on the optimal trade-off: the mean score from our research shows drinkers are happiest with an average of 4.9 beers over a 4-week period, versus an average of 7 for publicans.²

So are you stocking too many beers?

We showed last year that publicans and drinkers have different perspectives on how often guest ales should be rotated. Publicans felt they should be rotating guest beers once a week, while drinkers wanted to see them on the bar for longer.

Our new research bears this out: 76% of cask ale drinkers want to see some beers changing over time, but not as often as you might think.

We're going to the pub less often. Apart from the most die-hard cask drinkers, most people visit the pub once a week or less. If they find a beer they like one week, they'd still like it to be there the next couple of times they go in.

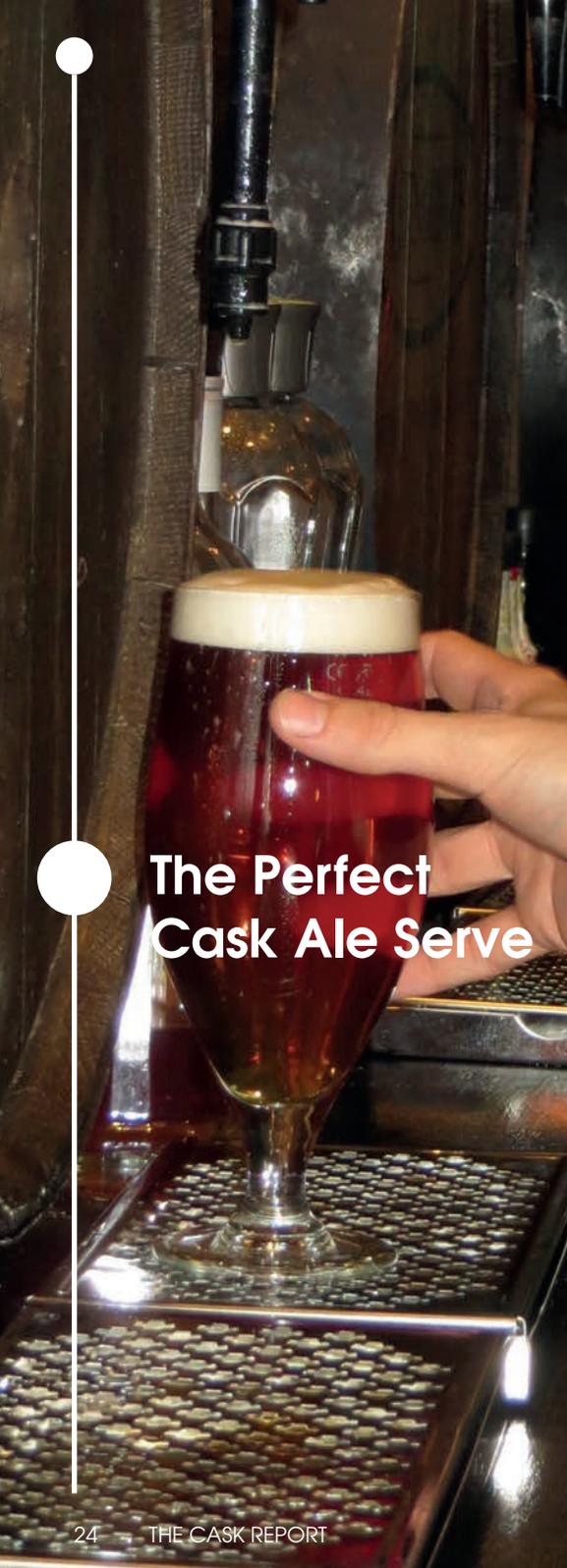
What's the perfect balance within a range?

In terms of the mix of range – the types of beers on the pumps – attitudes among drinkers and publicans are more uniform. If a particular pub were to have four cask ales on the bar, on average:

- Drinkers would like 2 of those beers to be permanent, and two guests. Publicans are slightly less conservative – they think they should be stocking a mean of 1.7 permanent beers and 2.3 guest beers.²
- Both drinkers and publicans would like to see, on average, a 50-50 split between beers that are local and beers from further afield.²
- Both drinkers and publicans would like to see, on average, a 50-50 split between brands that are familiar to them and new brands they have not seen before.²

A dynamic range will mix all these attributes: local brands may be new, guest beers may be local, familiar brands may not be permanent, and so on.

It's the mix of all these factors – plus seasonality and a mix of beers styles and strengths – that makes the perfect selection and keeps cask drinkers interested. By managing the range of cask beers using these principles instead of passively putting whatever is in the cellar onto the pumps next, it's not necessary to stock a massive range to make it varied and maximise rate of sale.



The Perfect Cask Ale Serve

Many factors contribute towards the perfect pint of cask ale. But drinkers seem less aware than publicans of how much goes into it. There's an opportunity to educate drinkers and further improve the quality perceptions of cask.

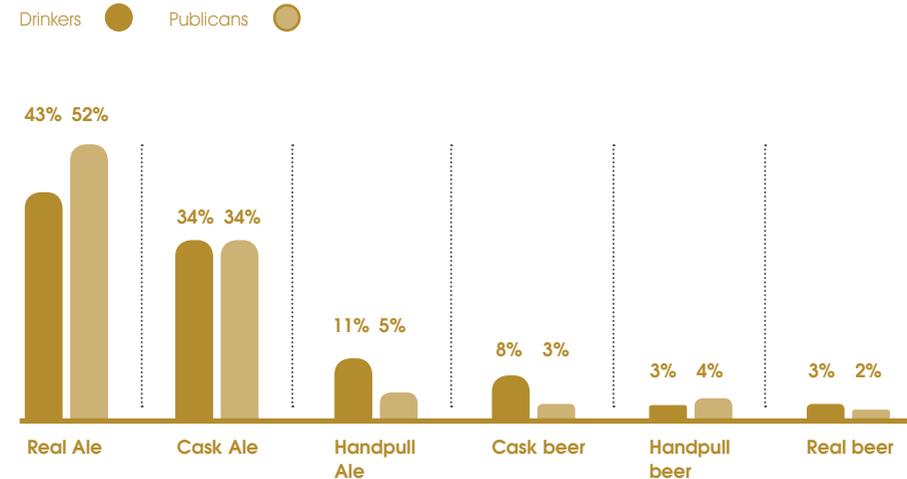
Terminology: what should we call it?

Cask ale goes by many names, but there are some clear favourites among drinkers – 'cask ale' and 'real ale' are interchangeable. But it's interesting to note that it's definitely 'ale' rather than 'beer'. Previous qualitative research for the Cask Report has shown that while 'ale' may have old-fashioned, quaint associations for older drinkers, among a younger generation it stands for traditional, artisan quality and is seen very much as a positive word.

How difficult is it to keep and serve cask?

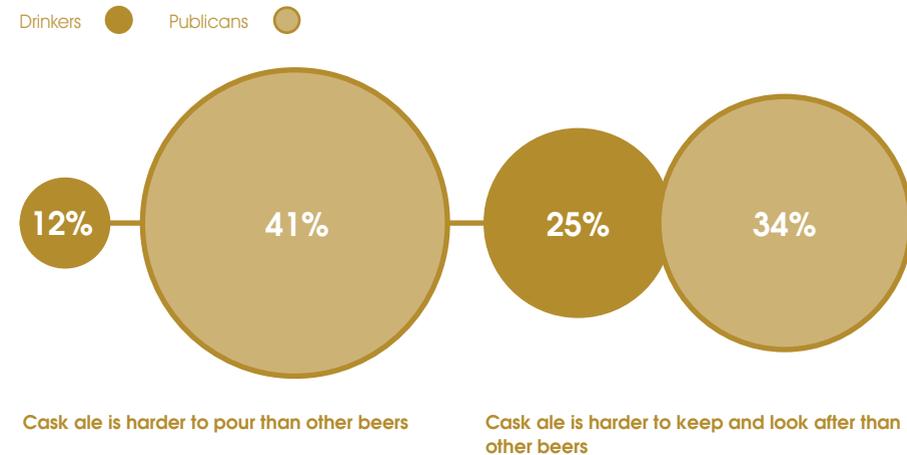
There is a perception in the trade that cask ale is a little harder to look after and serve well than other beers. (It's common to find publicans who won't let part-time temporary staff change cask ale barrels, for example.) But in our research, less than half of publicans agreed that cask ale was actually difficult to keep and to serve. What's striking is that only a small minority of drinkers think it is.

What do you call it?



Source: Cardinal Research for the Cask Report, July 2014

How difficult is it to keep and serve cask ale?



Source: Cardinal Research for the Cask Report, July 2014

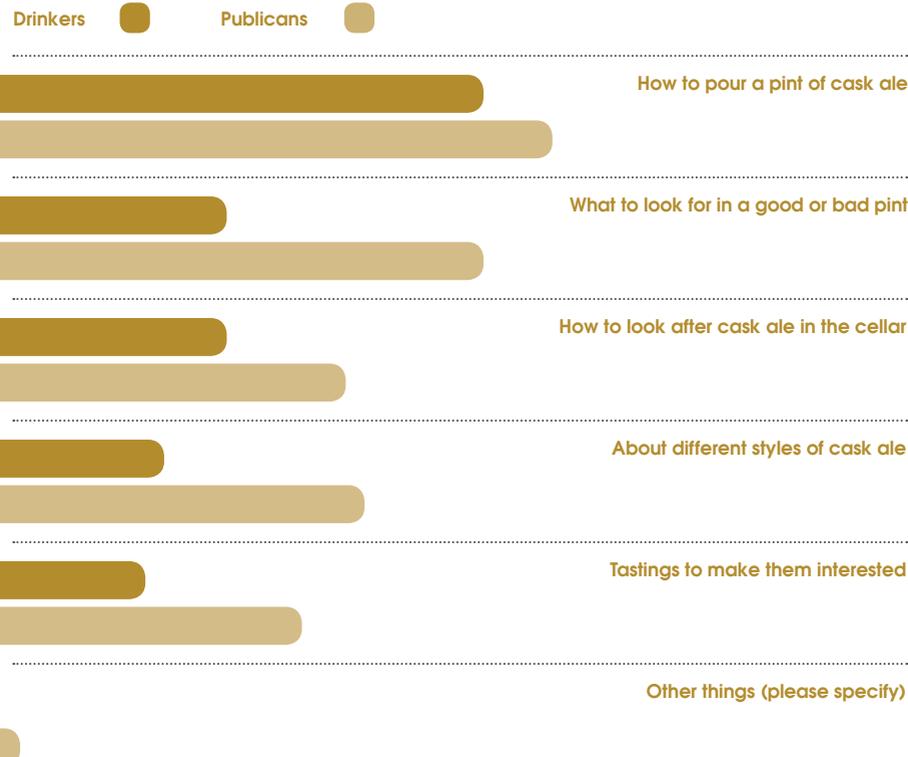
The Perfect Cask Ale Serve (cont)

Training staff in cask ale

This difference in perceptions of cask ale grows wider when we ask about the training given to bar staff to keep and serve it. Drinkers and publicans have almost opposite points of view on how much training is given in cask ale compared to other beer styles.

Drinkers and publicans are roughly in agreement about what aspects of cask ale training is given on. But consistently, drinkers believe much less training is given than publicans claim. Beyond the basic pouring of a pint, drinkers believe staff are given very little training in how to tell a good or bad pint, and how to look after cask ale.

What kind of training do you think bar staff are given in cask ale?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

How much training do you think bar staff are given in cask ale?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

There are only two ways to explain the difference in perceptions of training and serving of cask ale, and how difficult (or not) it is to keep and serve: either publicans are deceiving us (and perhaps themselves) on how much they care for cask, or drinkers don't realise how much care and attention goes in to presenting the perfect pint.

Undoubtedly, there are some pubs where cask ale is not kept and served well, and staff are not trained around it. Anyone who has drunk cask ale in pubs has horror stories of the resistance when taking back a dodgy pint ("no one else has complained", or "It's real ale, it's meant to smell like that") or has seen pubs where all the pump clips are turned around because no one on duty knows how to change a cask. This is why less than half of cask ale drinkers believe staff are trained in what to look for in a good or bad pint.

We also find it surprising that only 57% of publicans say they encourage the staff to taste cask ale to learn more and become interested in it – it's difficult to see how staff can recommend ales to customers if they have no idea what it's like.

But it is undeniable that overall, the quality of cask ale is improving. And it is hard to believe that most publicans responding to our research would lie about what they do.

"It's difficult to see how staff can recommend ales to customers if they have no idea what it's like."

The Perfect Cask Ale Serve (cont)

We believe that the main message behind these differences of opinion is that even dedicated cask ale drinkers do not fully understand what a crafted product cask ale is: that casks have to be tapped and vented, that the beer has a shorter shelf life, that the brewing process is essentially completed in the cellar by the publican and his or her staff. There's a huge opportunity here for customer education.

But there's also a need for more staff training. If publicans charge a higher price the drinker has higher expectations regarding quality, serve and staff knowledge. That's why from October 2014, Cask Marque will be offering free online e-learning modules to train bar staff on the keeping and serving of cask ale. Customer education and staff training both present the chance to further increase the premium image – and therefore the profitability – of cask ale.

The Perfect Presentation of Cask Ale

There are many different aspects to the perfect cask ale serve. But which ones make the most difference to drinkers?

Branded glassware is arguably where cask brewers spend the most time and money on improving the presentation of their beer.

- Both trade and consumers agree on the importance of branded glassware: 68% of publicans and 66% of consumers prefer cask ale to be served in a correctly branded glass. Interestingly though, around a quarter would still prefer it to be served in a plain glass.²
- What is perhaps surprising is that, given the range of branded glassware in the average pub, only around half of drinkers think it is important for their beer to be served in the right branded glass. This is of much greater importance to publicans and brewers.

Still, branded glassware is undeniably an important part of the perfect cask ale serve. But when we then asked about a whole range of different aspects of the serve, this puts branded glassware into perspective.

In our survey, both drinker and publicans said, obviously perhaps, that the most important aspects of a great pint are:

- Taste
- Smell
- Temperature

Beyond that, publicans indicate a broader range of factors than drinkers do. They are far more likely to say that a good pint should be clear and should have the correct-sized head. They rate every single attribute of the serve – including serving the pint in a dry glass without foam running down the sides, staff recommendation and branded glassware – higher than drinkers do.

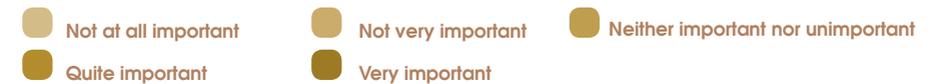
This suggests that staff are more aware of what makes a great pint than drinkers are, and again suggests the image of cask ale – and the pubs that serve it – could be benefitted by further consumer education.

If you have branded glassware, how important is it that beer is served in the right branded glass?

Cask Drinkers



Cask Publicans



Educating the drinker

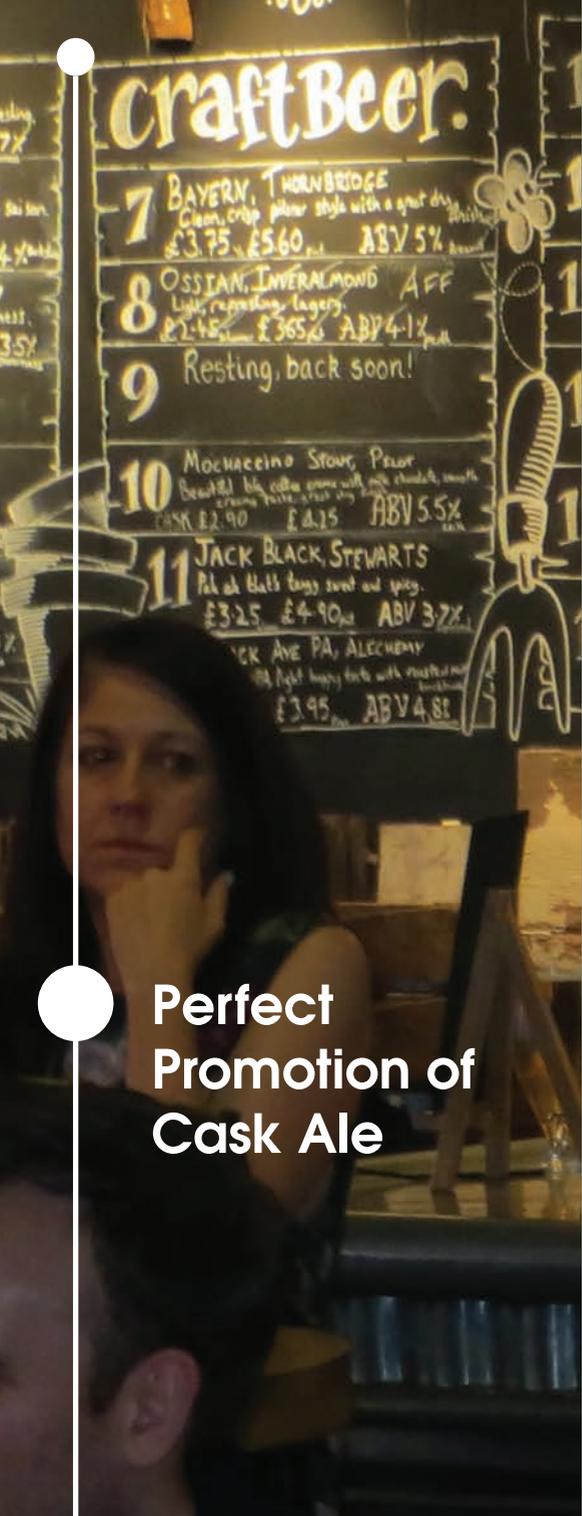
The technical definition of cask ale does not lend itself to snappy soundbites. The drinker might appreciate the subtlety and depth of flavour that cask conditioning brings, and may well be attracted to cask for its heritage, tradition and craftsmanship. But talk of live yeast in the cask, tapping and venting, and cellar or cask conditioning is simply not that interesting to many drinkers.

Professional big industry marketers distinguish features from benefits, and decide which are of most interest to their consumers. At times, either or both have a role to play. But in cask ale we tend to describe the process and the detail more than we talk about what this means for the drink and the drinker. Here are some things we could say to those who are less interested in the technicalities than the benefits of that care and craft.

Cask ale is:

- **Natural** – contains only natural ingredients
- **Free from chemicals or added gas**
- **No chemicals** - the alcohol and the carbonation are the product of natural fermentation
- **Unpasteurised** – the difference between cask ale and mainstream keg beer is comparable in many ways to the difference between fresh and UHT milk.
- **Not quite finished until it's matured in the pub cellar**
- **Live** – it's still working in the cellar

- **Fresh** – that's why it has a short shelf life (around three days)
- **Slow** – as in the Slow Food movement – it takes time and patience to bring cask ale to its best
- **Environmentally friendly** – there's no packaging waste – the empty container goes back to the brewery to be cleaned and refilled. Sourdough bread is another useful if limited comparison. People recognise that it is tastier, more natural, and slightly harder to make, because it undergoes a natural fermentation that gives it greater complexity and depth.



craft Beer.

- 7 BAYERN, THORNBRIDGE
Clean, crisp pilsner style with a great dry finish.
£3.75 - £5.60 ABV 5%
- 8 OSSIAN, INVERARND AFF
Light, refreshing lagers.
£2.45 - £3.65 ABV 4-1%
- 9 Resting, back soon!
- 10 Mochaicino Stout, Pezot
Beautiful, big coffee aroma with nice chocolate smooth cream taste. Great dry finish.
£2.90 - £4.25 ABV 5.5%
- 11 JACK BLACK, STEWARTS
All at that long sweet and spicy.
£3.25 - £4.90 ABV 3.2%

Perfect Promotion of Cask Ale

The Cask Report has long advocated Try before You Buy (TBYB) schemes as the most effective method of promoting cask ale. That's because it works. The biggest barrier to trying cask is not poor image or taste perception, but simple lack of knowledge and not knowing where to start.

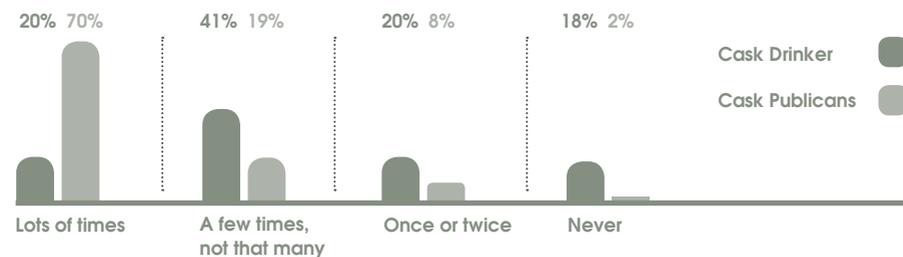
Happily then, 94% of publicans stocking cask ale say they actively encourage TBYB and 61% of drinkers agree.²

Obviously, those drinkers who feel comfortable asking for TBYB do so much more often than those who don't – meaning publicans are more likely to say they have been asked for TBYB than drinkers are to say they have asked for it.

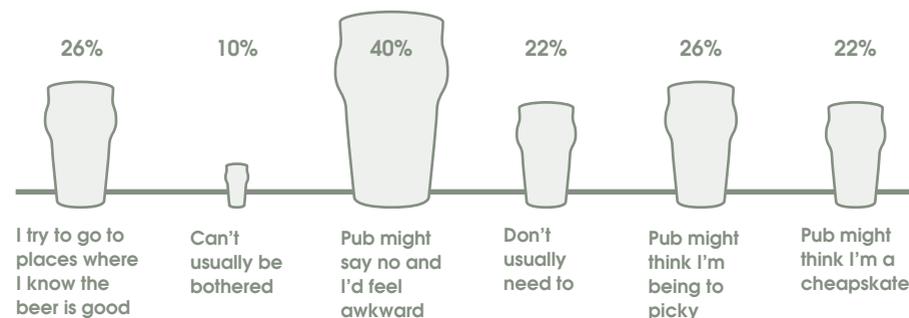
Among drinkers who don't ask for it, there are a variety of barriers. None are especially strong, but the main one is the worry that the pub might say no, causing the drinker some embarrassment.

In reality such fears are unfounded: very rarely is a TBYB request refused.

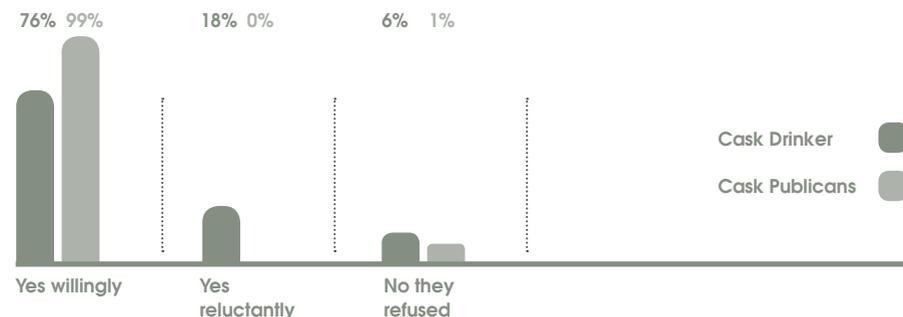
Drinkers: How many times have you asked for TBYB?
Publicans: How often have you been asked?



Drinkers' barriers to TBYB



Drinkers: When you asked for TBYB, did the publican give it?
Publicans: when asked for TBYB, did you give it?



Perfect Promotion of Cask Ale (cont)

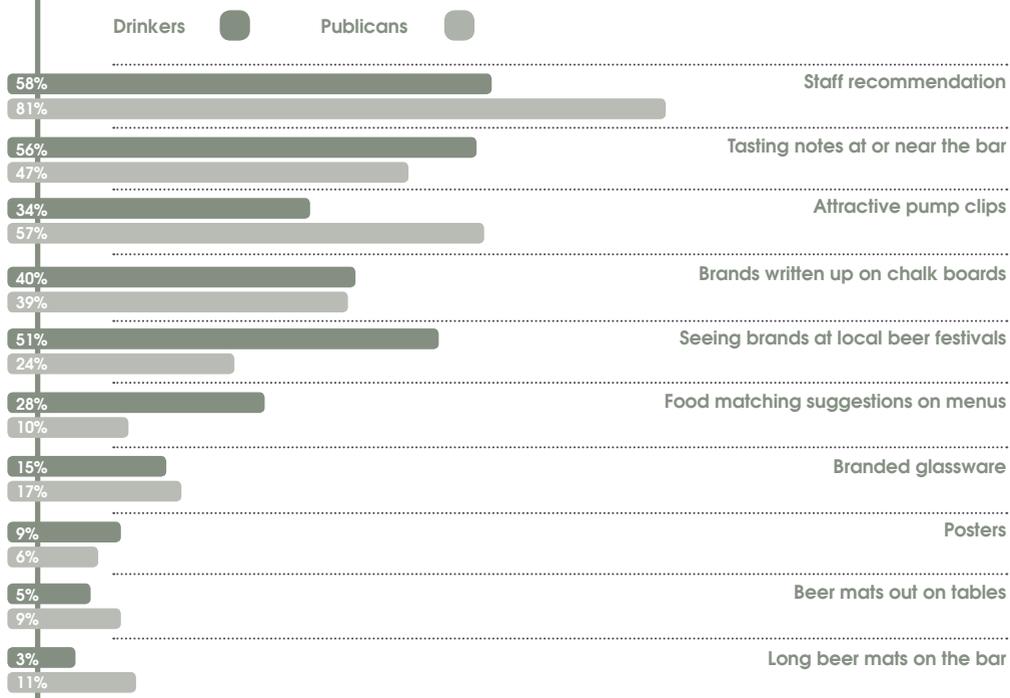
Successful Promotional Tactics

Apart from TBYB, over the past few years we've advocated a range of promotional tactics to help sell more cask ale. Now, we can see which ones publicans think are most effective compared with what drinkers say attracts them.

Publicans put more store by staff recommendation than do drinkers – unsurprising given the finding that drinkers feel staff are not trained in appreciation of cask beers. But it's still the most powerful way of helping someone choose. Tasting notes, chalk boards and attractive pump clips are important.

But one of the biggest differences in perspective is the importance of beer festivals. This is where drinkers explore and experiment, trying beers they've never had before. Publicans are less appreciative of this – but it suggests pubs running their own beer festivals is a promotional tool undervalued by the trade.

What promotional activities attract you to cask ale?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014





Industry Bodies and Schemes to Help Promote Cask Ale

There are many different bodies and schemes which aim to encourage awareness, quality and education around cask ale. Attitudes towards them are generally very positive, and all have something to offer the cask ale publican.

SIBA

SIBA are an important body for the publican to be aware of. SIBA has nearly 780 independent brewery members who between them brew 1.4 million barrels – or 403 million pints – of beer between them, the vast majority of which is cask ale.

As well as acting as an influential lobbyist on beer and pub issues, SIBA operates a Direct Delivery Scheme (DDS), which buys 2,500 draught and bottled beer brands from 526 participating SIBA breweries, and sells to twenty pub companies and off-trade retailers, supplying 2,400 outlets across the UK with beers brewed locally to them. 82% of SIBA breweries say they are actively involved with their local pubs.

Cask Marque

An impressive 94% of publicans stocking cask ale are aware of Cask Marque. Over 9,000 pubs now hold the Cask Marque award, and research shows that pubs holding the award enjoy a 3% higher growth in total beer sales than those without it.

71% of cask ale drinkers are aware of Cask Marque.² They use the Cask Marque app, Caskfinder, 70,000 times a month to find Cask Marque pubs. Publican and drinker are united in thinking it is a useful organisation that helps publicans keep good quality ale and helps show drinkers where it is. But both think it is doing such a good job, it should promote itself a bit more.

What do you think of Cask Marque?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

Industry Bodies and Schemes to Help Promote Cask Ale (cont)

What do you think of CAMRA?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014

Cyclops

Cyclops is less widely known than some other industry initiatives. Only a third of drinkers are aware of it, compared to 71% of cask ale publicans. But among those who are aware of it, opinions are very favourable.

91% of real ale drinkers and 92% of cask ale publicans who are aware of Cyclops feel it is clear and helpful. This suggests that Cyclops should be given much greater publicity by the trade, both as a tool for bar staff and an educational resource for drinkers.²

CAMRA

The impact of the Campaign for Real Ale on cask beer cannot be overstated. In its 40-year history it has saved cask as a beer style. CAMRA is unique among the organisations discussed here in that it is a consumer movement rather than an industry body.

Perceptions of CAMRA are very positive. Over a third of cask ale publicans are members themselves. Among those who are not members, many still admire what CAMRA do, with only a small minority being critical.

Publicans stocking cask ale should therefore work closely with their local CAMRA branch and keep them informed of the range of cask ales available.

MAULDONS BREWERY
SUFFOLK PRIDE

STYLE | PREMIUM ALE | ABV 4.8%

SEE | AMBER GOLD

SMELL | SWEET, BANANA, FRUITY

TASTE | GRAPEFRUIT, WARMING, DRY

BITTER |

SWEET |

"Cask Ale Week is much more effective as a business driver than publicans think."

Cask Ale Week

Cask Ale Week has similar, slightly higher awareness levels to Cyclops: 37% of cask ale drinkers and 78% of cask ale publicans are aware of it.²

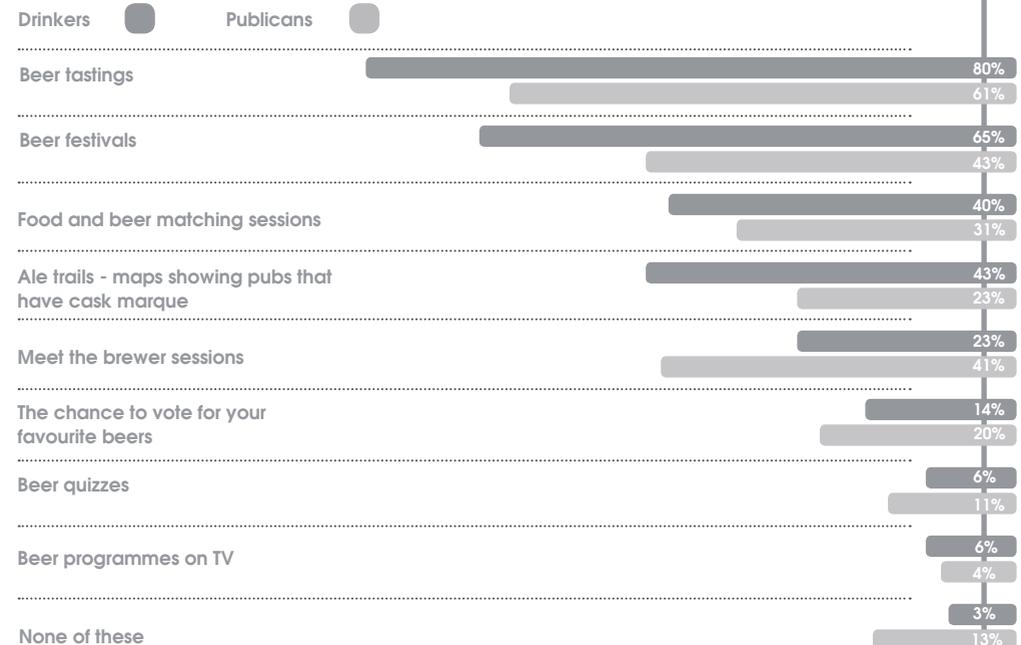
Overall, both drinkers and publicans see Cask Ale Week as a great idea for promoting cask ale and encouraging more people to drink it, and they believe it should be advertised much more widely.

Among those who are aware of it, there's a divergence of opinion on which aspects of Cask Ale Week are most interesting.

Tutored beer tastings are the most important factor. But once again, we see drinkers rating beer festivals as far more important than publicans believe.

As to the commercial impact of Cask Ale Week, opinions differ. Only 39% of publicans say they see extra trade during Cask Ale Week. But 65% of drinkers claim they visit the pub more often as a result of it.² Unless drinkers are exaggerating, Cask Ale Week is much more effective as a business driver than publicans think.

What aspects of Cask Ale Week are you most interested in?



Base: male cask ale drinkers, publicans stocking cask ale
Source: Cardinal Research for the Cask Report, July 2014



Making the Most of Cask Ale

Each year the Cask Report strives to give all the essential information a publican needs to make a profitable business from stocking cask ale.

But different publicans have different needs and different levels of knowledge – some will be reading this report for the first time, others for the eighth consecutive year.

It's therefore necessary to repeat basic information for those who haven't seen it before at the same time as giving new insight for experienced cask publicans.

Last year, using new research conducted independently by Adsearch Ltd, we spoke to cask ale publicans at all levels of experience and in all parts of the country to produce a guide in three sections. A fuller version of this section is in last year's report, available for download at www.cask-marque.co.uk/caskreport.

But here is a brief summary of our top tips:

- Information for cask novices who wish to master the art of stocking and serving cask ale
- Information for established cask publicans who wish to develop it further in their business
- Information for cask experts who may still be able to learn a few tricks from their peers.

Stocking Cask Ale: a Beginner's Guide

You're a publican who has just decided to take cask ale seriously and invest in a few hand pumps. Or you've just taken over an established cask ale pub, or started working in one. Where do you start?

- **Training** – beyond the basics, use quiet time to learn more and teach staff about aspects such as beer style and ABV. Many bar staff coming to cask ale for the first time are indifferent towards it to begin with, but find they become genuinely passionate about it as they learn more! Find out about external training open to you from a variety of bodies including breweries, PubCos, the BII, Cask Marque and the Beer Academy.
- Correct **branded glassware** is important. 66% of cask ale drinkers would prefer to see their beer in a branded glass. A pint of cask ale in a branded cider or lager glass not only ruins the presentation, it may also ruin the beer, as these glasses are often nucleated to help create an aggressive fizz completely unsuitable for cask ale. Glassware should be renovated regularly.
- **Cellar temperature** should always be kept between 11 and 13 degrees Celsius.
- **Line cleaning** is essential – ideally water should be pulled through lines every time a barrel is changed. But at a minimum, lines should be cleaned thoroughly once a week.
- **Accept wastage**. Yield from a barrel of cask ale will be lower than that for lager or keg beer. Taking old, tired beers off sale, offering Try Before You Buy samples, and not serving the dregs of a cask may all reduce yield, but all add to your reputation for quality and will improve profitability in the long term.
- Look for a **balanced mix** across the range – think about variety in terms of familiar and unfamiliar brands, local versus 'exotic', far away beers, a mix of style, colour and ABV.
- Consider joining **Cask Marque** – as well as helping you ensure high standards, Cask Marque is now recognisable by 71% of ale drinkers and signifies to them that you keep your ale to a high standard. And 98% of existing Cask Marque licensees would recommend other licensees to gain a Cask Marque accreditation.
- **Promotion** of cask is essential. As well as traditional point of sale, we strongly recommend use of chalkboards in the pub and use of social media outside it. Pro-active offering of Try Before You Buy samplers to uncertain customers is a tried and tested route to increasing cask ale sales and is the single most important driver of trial.

Stocking Cask Ale: an Established Cask Pub's Guide

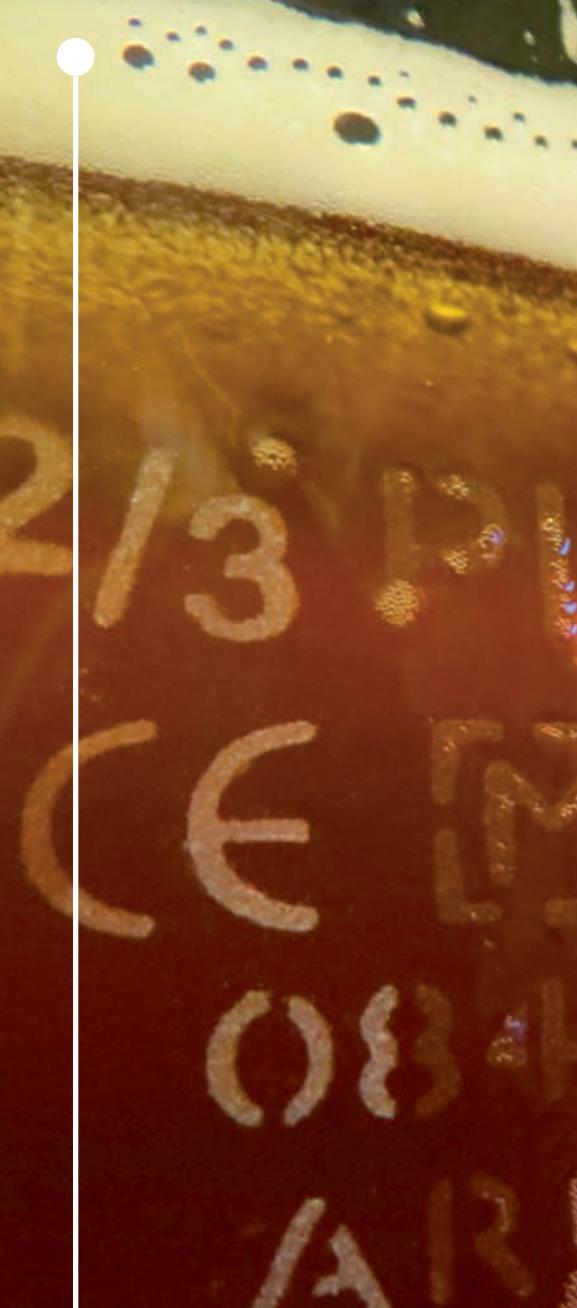
You've mastered the basics of cask ale and are comfortable keeping and serving it. You've probably got Cask Marque, or at least are up to the standard required of it. Cask plays an important role in your business – but how can you make it work harder for you?

- Use **social media** – Twitter is perfect for announcing new beers (not to mention food specials) and events, allows drinkers to make their own suggestions, and overall keeping you top of mind. But remember Twitter is a conversation rather than a broadcast!
- Hold occasional **beer festivals** – drinkers tell us this is their favourite way of trying new beers but only a third of pubs have held their own beer festival in the last 12 months.
- Use paddles for **tasting flights** – offering three thirds of three different beers is an increasingly popular and effective measure for driving trial.
- **Always have someone on duty who knows about the cellar** – especially at busy times. Many licensees keep cellar duties to themselves, but if you're not on duty it looks terrible at busy times if pumps are turned around each time a barrel is finished. It's also important to have someone knowledgeable to answer customer queries and to be able to correctly identify faults perceived by drinkers.
- If serving food, **use your regular ales in the food menu** for example a golden ale in the batter for fish and chips, or a darker beer in a steak and ale pie.

Stocking Cask Ale: an Expert's Guide

Your business is an ale shrine – cask ale is your lead selling point, it's what sets you apart. You may even have a few awards framed behind the bar. You're on first-name terms with local brewers and may even have brewed the odd beer yourself. But are there any ideas your peers are putting into action that you haven't thought of?

- Genuine knowledge and passion allows for **greater experimentation with range** – use your knowledge to sell a wider range of beers, differentiating your pub from others that sell cask.
- With more knowledgeable staff looking after your cellar and sales, you don't have to be as involved with the day to day. Use the extra time to think ahead and plan an **events strategy** that pushes cask throughout the year, e.g. tying in with holidays and quirky commemorative days (Pumpkin ale on Halloween? Dark beers on International Goth Day?)
- As you are likely to attract interested, regular cask drinkers, increase the frequency of their visits with **talks and tastings** from meet the brewer events to themed tutored tastings to talks from beer writers or other industry figures. This may even take the form of a 'cask ale club' run by the pub with regular promotions and offers.
- Introduce **beer and food matching evenings**. You might get guest chefs or industry figures to put the matches together. Hardcore cask drinkers love these events, and they also introduce new trialists to cask, who come along because they're novel and fun.



Information and Further Contacts

Information and Further Contacts

The Cask Report is supported by:

Adnams

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

The Cask Marque Trust

Non-profit organization 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)

Representing over 780 small, local and independent brewers
www.siba.co.uk

Caledonian

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

CarlsbergUK

Brewers of Tetley Bitter
www.carlsberg.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 4,300 pubs
www.punchtaverns.com

Robinsons

Family brewers based in Stockport
www.robinsonsbrewery.com

St Austell

Cornish family brewery
www.staustellbrewery.co.uk

Thwaites

North West family brewery
www.thwaites.co.uk

Wadworth

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

Wells & Young's

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

The Cask Report is compiled each year by beer writer Pete Brown

<http://petebrown.blogspot.com>

In addition to the valuable help provided by the partners above, thank you to the British Beer and Pub Association, CGA Strategy and Cardinal Research for their invaluable help in compiling this report.

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Cask Matters

To download copies of the Cask Report, or find out more about the issues it explores, visit the new Cask Matters website from Cask Marque at www.cask-marque.co.uk/caskmatters

This is the one-stop shop for the cask ale publican, offering free online staff training, information, insight and news.

You can also find out more about the many breweries and industry bodies that support the Cask Report.

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CGA Strategy

Established in 1991, CGA Strategy is the specialist on trade research consultancy in the UK. Our aim is to provide innovative solutions for clients designed to fit their individual business needs.
www.cgastrategy.co.uk

Target Group Index (TGI)

www.bmrb-tgi.co.uk
With thanks to Grey London for access
www.grey.co.uk

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