



CASK

The Cask Report

Britain's National Drink

Volume 4: 2010-2011

By Pete Brown

Foreword by Garrett Oliver

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WHY CASK BEER MATTERS

- Cask beer is Britain's national drink – a unique beer style unequalled anywhere else in the world.
- With a myriad of styles, colours and flavours, cask beer is perfectly suited for people seeking out more interesting food and drink. But cask ale is also democratic and unpretentious – it offers quality and depth, but is open and approachable.
- No other beer combines cask ale's depth of flavour with low alcoholic strength. Relatively speaking, it's a responsible drink as well as a flavoursome one.
- Cask beer is a unique combination of heritage and modernity – a British brewing tradition now being enlivened and complemented by an air of experimentation and creativity.
- Cask beer is one of the last traditional British manufacturing industries surviving today. It's a £1.8 billion market, responsible for 45,000 jobs¹.
- In addition, cask beer raises £454 million in duty and VAT for the treasury¹.
- Cask beer is often seen by pub-goers as a guide to the standards of inn-keeping and quality across the board on the pubs that stock it.

¹ Source: British Beer and Pub Association (BBPA)



British cask beer is unequalled as a style anywhere in the world.

FOREWORD



Garret Oliver, Brewmaster of Brooklyn Brewery, author of *The Brewmaster's Table* and one of the most recognized and respected brewers in the world, reveals how cask ale changed his life, and continues to fuel a global revolution in brewing.

On September 7th, 1983, I discovered beer. It was a surprise to me, as I'd come to England to discover other things, like ska music and motorcycles. Fresh off a train from Gatwick and carrying a year's worth of luggage to supply my new expatriate life, I found myself in need of some energy. And perhaps some courage. So I went around the corner in search of a place I'd heard about – "The Pub". I walked in, ordered a pint, paid the barman, took a seat, drank my beer, and started down the path to a future I'd never imagined.

I'd gone to film school. I wanted to direct. I had big plans. Beer, it turned out, had other plans for me. And not just any beer – cask beer. But I knew beer, didn't I? Pale yellow, thin, flavourless at its best and horrid at its worst, we'd drunk the stuff by the boatload at university. We didn't like it, but it was what we had. This English 'real ale' wasn't like that – it was like great music. It was a thing of colour, vibrancy, and nuance. A great pint seemed to light up a whole room. I fell in love. I became a Fuller's Man, a Young's Man, a Samuel Smith's Man, an Adnams man.

And then, a year later, I went home to New York City, and discovered that we Americans had no beer. So I started to make my own. Five years later, I became the apprentice to a former Samuel Smith's brewer. I learned a lot about hard labour, Yorkshire syntax, and how to make magic out of four ingredients.

Today, 27 years later, I still brew cask beer. And America probably has the most interesting, vibrant beer culture in the world. How? Well, we got it from you, of course. Hundreds of American craft breweries make cask beer these days. My story is not unique, not by a long shot. We all went to England. We all learned the One True Path from Mark Dorber in the cellars of The White Horse in London. We all remember individual cracking pints from decades past, and we hope to brew as well ourselves. And you'll hear that same story from brewers in Sao Paulo, and Ibaraki, and Oslo and Cape Town. British cask beer is an inspirational thread that runs through a worldwide artisanal brewing movement. In a fast world, cask beer remains a slow drink, a thing meant to inspire actual pleasure. So if you've forgotten the beauty of cask ale, do yourself a favour. Get yourself to a genuinely good pub, order yourself a pint, and say hello to the once and future king.

THE CASK BEER MARKET

- Sustained growth in market value
- Outperforming beer market overall with steady volume – first year since 1994 there is no volume decline
- Share of total beer market at its highest for a decade
- Growth coming from food-led managed pubs
- More pubs selling cask ale, but average sales per pub are down



MARKET

Cask ale drinkers are trading up to premium products

Volume steady²

Total cask beer volume in 2009 was flat versus 2008, at approximately 2.4 million barrels. This is the first year since 1994 that cask ale has not shown a volume decline.

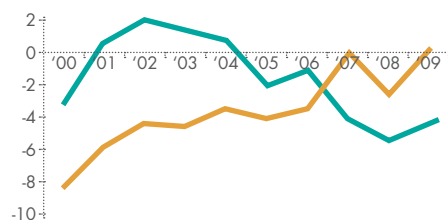
That may not sound impressive – but it is. Over the same period, the total beer market (including lager, stout, smooth beers and bottles) was down by almost 1.3 million barrels – a 4.1% decline. In the context of record pub closures, a 24% rise in beer duty in just two years, the ongoing move from pub to home drinking and general economic conditions, this is a strong performance.

While it has historically been in decline, more recently cask has consistently outperformed the beer market overall.

²All volume figures from BBPA barrelage survey/HMRC unless otherwise stated.

Cask volume now consistently outperforming the overall beer market

Annual percentage volume change 2000-2009



Source: BBPA barrelage survey/HMRC

— Total cask volume change
— Total beer market volume change

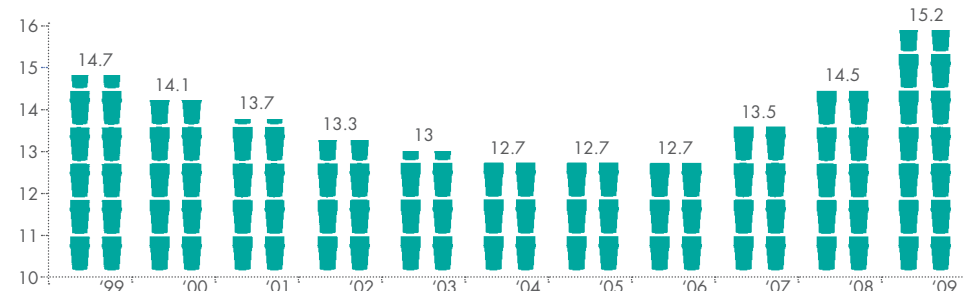
This means cask is increasing its share of the beer market. Cask ale's share of the **total beer market** is up for the third consecutive year to 7.9%.

If we look at its performance in the on-trade only – a more accurate figure, as cask is only available in pubs – it has reached its highest share of beer sold in pubs for a decade.

- Cask ale now accounts for 15.2% of **total on-trade** beer (up from 14.5% in 2008).
- It accounts for 45.3% of **total ale** volume (up from 44.1% in 2008).
- Cask ale accounts for 16.4% of **total draught beer** volume (up from 15.7% in 2008)

The Cask Revival: increasing share of total on-trade beer

Cask ale a percentage of all on-trade beer



Source: BBPA barrelage survey/HMRC

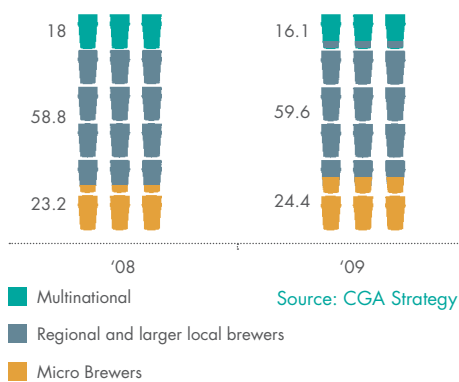
Size matters

We've always pointed out the difference in performance between multinational brewing corporations – who devote their attention to their valuable lager brands, and regional and microbrewers whose primary focus is cask ale.

Multinationals are no longer putting significant marketing support behind their cask beers on a national basis. These brewers, who once dominated cask beer production, now account for a dwindling share of the total cask ale market. Only 16% of total cask volume is now accounted for by the big brands such as John Smith's, Tetley's and Boddingtons.

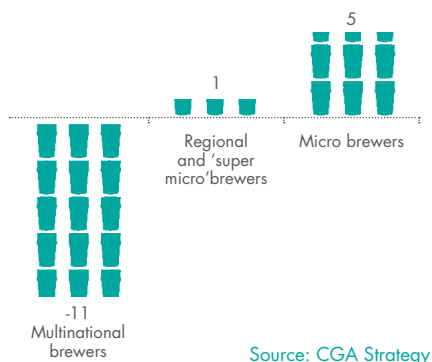
Volume transfer from multinational to regional and micro

Percentage of total cask beer volume split by size of brewer



Most brewers seeing volume growth - except multinationals

% change 2008 - 09



But these brands are in such steep decline that, if we separate them out, we can see that the rest of the market is enjoying volume growth. Micro brewers are of course growing from a smaller base than regionals – in the context of the total market, both regional and micro brewers are enjoying good growth.

Obviously at least some of that growth is coming at the expense of the big brewers – with pubs simply switching, say, a Boddingtons hand pump for a beer from a regional or micro brewer. At the moment, growth in two sectors is simply cancelling out volume decline in the other. But there are signs that this is not all that's happening.

A more valuable beer

One of the absurdities of cask ale is that, as the most crafted, quality drink on the bar, it is often the cheapest. If we compare premium sausages to mass-produced mechanically recovered meat sausages, farmhouse cheese to processed cheese, real coffee to freeze-dried granules, we routinely expect the premium version to cost more.

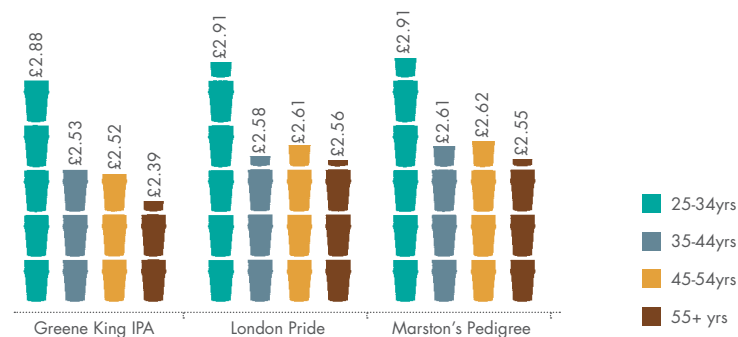
The fact that cask is cheaper is doubly absurd because cask drinkers actually expect and are prepared to pay more for cask beer – especially the younger drinkers the category is so keen to recruit. Research by HPI Cardinal for Greene King says that drinkers of all ages consistently expect to pay more for a pint of cask ale than a pint of standard lager – they believe it is worth more.



Nine out of ten pubs in the UK sell cask ale at a lower price than lagers of the same strength. And yet, research conducted for Wells & Young's shows that where cask is priced the same as lager, it is selling better than where it is cheaper!

Cask beer drinkers expect to pay more for their pint

In an average pub where Carling was £2.50 a pint, what would you expect to pay for a pint of...



Source: HPI Cardinal Consumer Brand Tracker (3000 ale drinkers) for Greene King



But cask is enjoying a steady trend towards premiumisation, with people opting for slightly stronger, more expensive beers. Two years ago (reporting 2007 figures) we saw small value growth in the market.

Last year that slipped back into a small decline – much smaller than the volume decline. But in 2009, cask ale showed strong value growth – the only sector of the beer market to do so.

- The value of cask market increased by **5%**, to £1.4billion³.
- Cask accounts for 12.4% of the value of the **total on-trade** beer market (up from 11.6% in 2008).
- This means cask is worth **47%** of the **total ale** market (up from 46.7% in 2008). Cask is higher in value (47%) than it is in volume (44.1%).
- Cask accounts for **13.8%** of the value of the **total draught beer** market (up from 13.1% in 2008).

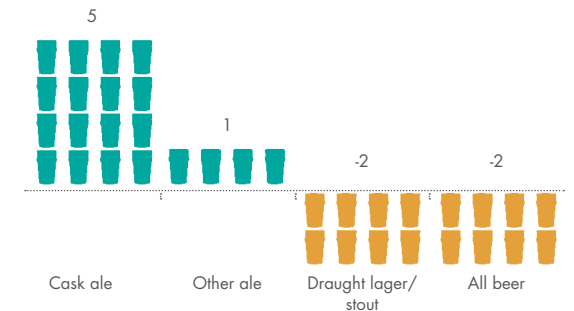
Cask ale sells more when it is the same price as lager - NOT cheaper!

Annual change in rate of sale of cask ale split by price of cask ale relative to lager



Cask ale is in value growth

% value change 2008 - 2009



Source: CGA Strategy

³Value figures from CGA Strategy



Cask around the country

It may come as a surprise to those who view it as a traditional working man's pint, but 41.8% of all cask volume is sold in London and South East. In the South East in particular, the share of total cask beer is much higher than the share of the total population who live there

– people in this region are on average significantly more likely to drink cask ale than people elsewhere. Northern regions consistently show a lower share of total cask ale drunk than share of total population. In its south-east heartland, cask is showing strong volume growth. But this is masking declines elsewhere.

Cask ale under-performs in the north

Cask ale volume split by region

Source: CGA Strategy

■ % total cask ale volume
■ % total population



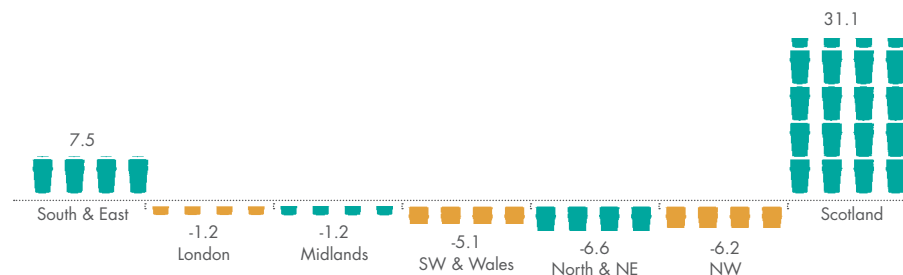
It's worth noting that brands such as John Smith's, Tetley's and Boddingtons – owned by the multinational brewers – traditionally had a northern bias.

So it's no surprise, given the 11% decline in volume from the multinationals, that the north of England is hardest hit.

Regional Growth Trends

Source: CGA Strategy

Cask ale year on year volume changes by region



Scotland traditionally has had far less cask ale than the rest of the country. But since the first year of this report, we've seen incredible growth north of the border. Although it's growing from a small base, and is still proportionally

smaller than any other region, 31% growth in a year is an undeniable testament to Scotland's burgeoning craft brewing industry.

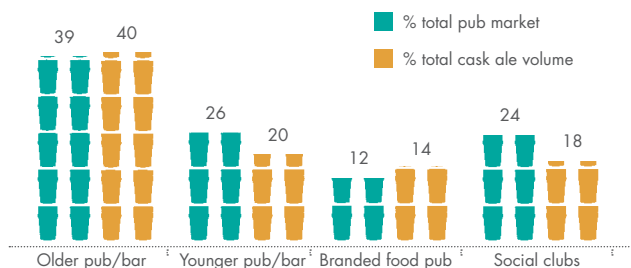
Cask ale by type of pub – the importance of food

For the first time in the *Cask Report* we can segment pubs according to a rough classification of type, and look at how important cask is to each.

“ The future of the pub is in food - and cask ale is demonstrably an integral part of the pub meal. ”

Cask ale volume by pub type

Cask ale year on year volume changes by region



Source: Greene King/CGA Strategy

39% of the nation's pubs are described as older venues, such as traditional community pubs. Cask is well represented in these. As you might expect, it is under-represented in younger pubs and bars, such as large town centre drinking environments – though brewers are making efforts to increase cask's presence in such places, with eye-catching new, modern fonts from brands such as Bombardier, Deuchars, Greene King and Marston's Pedigree all looking entirely fitting for modern, urban venues.

This data also shows the importance of social and sports clubs to cask ale. Cask is underrepresented in an environment where keg ale is stronger than average (partly because of the throughput in places like sports clubs that are only open at weekends, making it more difficult to keep cask well.). Cask is in small volume decline here, but clubs – including working men's clubs, sports and social clubs – still account for almost one in five pints of cask ale. It's a segment of the market that is seldom talked about, but which brewers ignore at their peril.



Cask ale is booming in pub visits where food is served

But where cask really over-performs is in branded food pubs. This is encouraging for cask because an increasing number of drinking occasions involve food. According to the *Key Note Market Report Plus* on restaurants, pubs now account for 35% of the total UK eating out market, valued at £13bn in 2009. This figure represents a rise of 82% over the last decade. Even in recession, where eating out is one of the first things on which people economise, pubs take share from more expensive restaurants.

Many industry commentators believe the future of the pub is in food, and we're seeing that most noticeably in the relative success of managed branded pubs, many of which focus on food. When we look at cask's performance by outlet type, this is the type of pub estate where it is really prospering.

Cask ale volume declined by 9% in 2009 in PubCo owned licensed and tenanted pubs. But it increased by an incredible 14% in managed pubs – many of which are branded food pubs. The value of cask beer in managed food pubs increased by 16%⁴.

Pub operator M&B runs food-led brands including Vintage Inns and Toby Carvery. Rachel Evans, M&B's Drinks Quality Manager, says, "Cask ale is a fantastic match to food, with natural ingredients and strong flavours which complement many of the dishes on our menus. We take time to choose the right ales and also promote ranges of ales collectively to encourage customers to appreciate what is on offer in the UK, whether seasonally or geographically."

The future of the pub is in food – and cask ale is demonstrably an integral part of the pub meal.

⁴Source for all value figures in this section: CGA Strategy



Distribution and sales by pub

Overall cask presence in UK pubs is up 4% year on year, with almost 3,000 new licensed premises stocking it. This is crucially important, because it means that the growth of regional and micro breweries is not just substitution for multinational brands being taken off the bar.

But if so many more pubs are stocking it, why is cask ale not in growth?

Pubs serving cask ale are not selling as much of it as they did. The average cask ale pub sells 22.68 gallons of it a week – down 5% from 23.76 gallons per week in 2008. Partly this is a function of new distribution – pubs starting to sell cask ale for the first time will often (though not always) sell less than established pubs. It must be stressed that the average throughput for beer overall is down too – pubs have more beers on the bar but the total amount of beer the average pub is selling is down by 5%⁵.

Cask may be faring better than other beer styles, and cask drinkers may visit pubs more and spend more while they're there, but this isn't enough to counteract a general move away from the pub in difficult economic times. If anything, this demonstrates the increased importance of cask ale to pubs facing declining custom.

Most of this decline in throughput has come from the multinational brands, and in declines in average sales in the North West, South West and Wales. Average weekly sales in Scotland are up by a healthy 13%, from 14.04 to 15.84 gallons per week, showing that the gains there are not simply distribution-led – people are drinking more cask ale per pub, per week.

Comment: Cask ale – a model to save the economy?

In July 2010, after studying the history of the UK brewing industry, Professor Peter Swann of the prestigious Nottingham University Business School announced that businesses should look to the cask ale industry for inspiration in giving the economy a much-needed boost.

He describes how a move away from geographical concentration towards greater diversity and geographical dispersion in beer production shows the way for other industries. "In technical terms, this represents horizontal product differentiation and a reduction in the importance of the economies of scale. That's basically a clever way of saying variety is the spice of life and that more discerning tastes can be good for the economy."

"We're often told that small businesses will be key to the UK's financial recovery," says Prof Swann, citing the "fall and rise" of British ale brewing as a perfect example. "And I say that as a man who doesn't even like beer," he adds.

⁵Source: CGA Strategy

THE CASK BEER DRINKER

- Number of drinkers continues to increase
- 17% increase in younger drinkers
- Cask beer drinkers are more curious and experimental in a broader sense

Who drinks cask beer?

Numbers of cask ale drinkers continue to increase. In 2009, 8.6 million people claimed to drink cask, an increase of 1.4%. After doubling between 2007 and 2008, the number of women drinking cask fell very slightly, but this is more than compensated for by the steady increase in men drinking it.

Over 8.6 million cask ale drinkers

Number of people who claim to drink cask ale

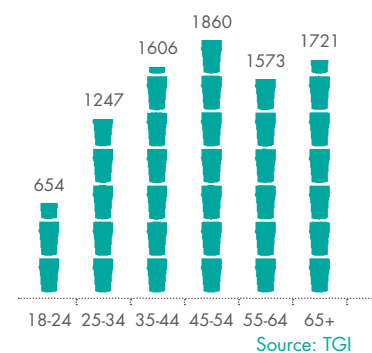


Cask ale drinkers tend to be upmarket (68.5% are social grade ABC1). They are more comfortable about their financial situation, and tend to be at a life stage with fewer financial commitments. They therefore have more disposable income, and visit pubs more often – they're good drinkers to attract.

In terms of split by age:

- The number of 18-24s drinking it remains low – but increased by 17% year on year.
- There were slight declines in 25-44 year olds, and healthy increases among 45-54 year olds and the over 65s.
- 1.9 million cask ale drinkers – 20% of the total – are aged 18-34. Cask ale is recruiting younger drinkers.

Cask ale drinkers by age



“ Cask ale is recruiting younger drinkers. ”

The number of under-24s drinking cask ale increased by 17% last year

The Campaign for Real Ale

Membership of CAMRA rose 14% in the last year and has more than doubled in the last decade. CAMRA members represent only a small minority of all real ale drinkers (membership currently stands at 120,000) but they are arguably the most committed, enthusiastic drinkers, so it's interesting to see what this huge increase in membership reflects.

Perhaps surprisingly, 23.4% of CAMRA members are women – surprising because women only account for 15% of all real ale drinkers. The women who do drink cask ale are pretty enthusiastic about it.

The average age of CAMRA membership is also getting younger. In 2005 the mean age of CAMRA membership was 53. It's now 49. (To put this in context, the mean age of the population as a whole is 46.) 18.3% of CAMRA members are under 35.



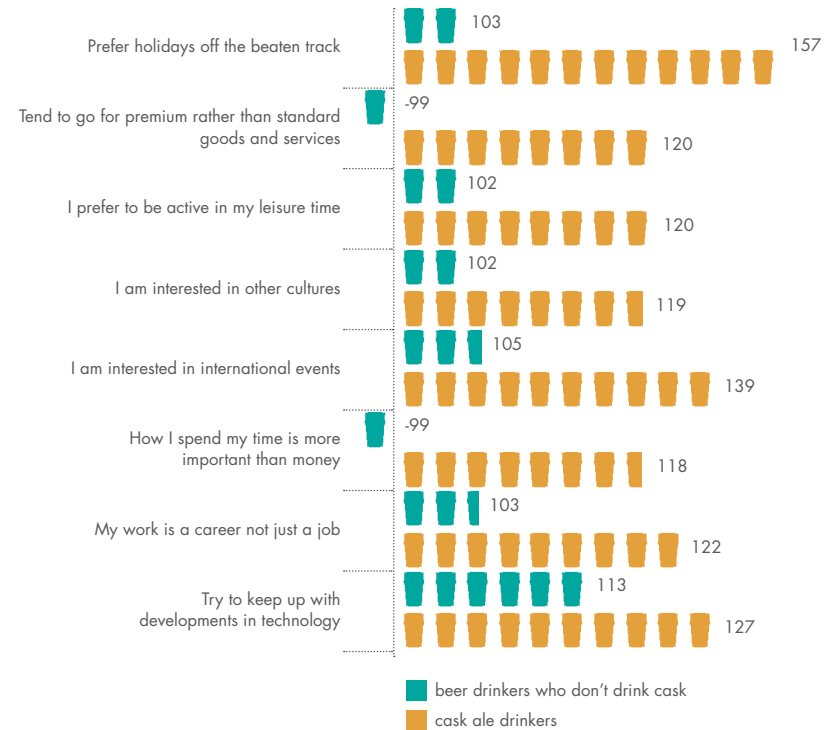
What are cask ale drinkers like?

Analysing the attitudes and lifestyles of cask ale drinkers and comparing them to beer drinkers who do not drink cask ale can be quite revealing as to the motivations for drinking cask ale.



Cask ale drinkers are more thoughtful, inquisitive and curious about the world

Agree with statement: index v UK population as a whole

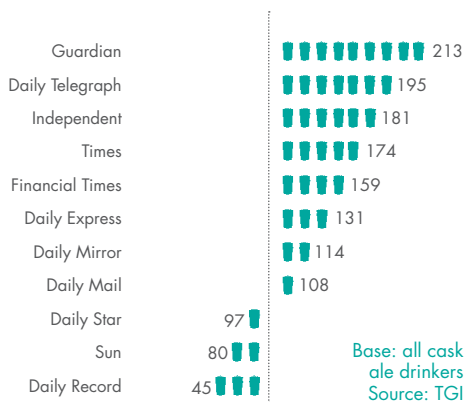


Source: TGI

In terms of broad attitudes towards the world, careers and technology, cask ale drinkers tend to agree with statements that are more thoughtful, inquisitive and curious. They are active in their leisure time, interested in what goes on in the world, and like to stay informed about everything from international events to developments in technology.

Cask ale drinkers are more likely to read quality newspapers

Newspaper readership: index v total UK population



This attitude is also reflected in the fact that they read a lot of newspapers. They're twice as likely to read quality dailies like the *Guardian*, *Telegraph* and *Independent*, but more likely to read any newspaper overall apart from the *Star*, *Sun* and in Scotland the *Daily Record*. (It's worth noting here that coverage of beer in quality newspapers has shown a steady increase over the last year – a sign that newspapers are beginning to recognize the importance of cask beer to their readers.)

Focusing on food and drink, we can see this curiosity coupled with a desire for quality.

Food and drink are clearly very important to them. They pay attention to where their food comes from, buy quality ingredients and enjoy going to restaurants.

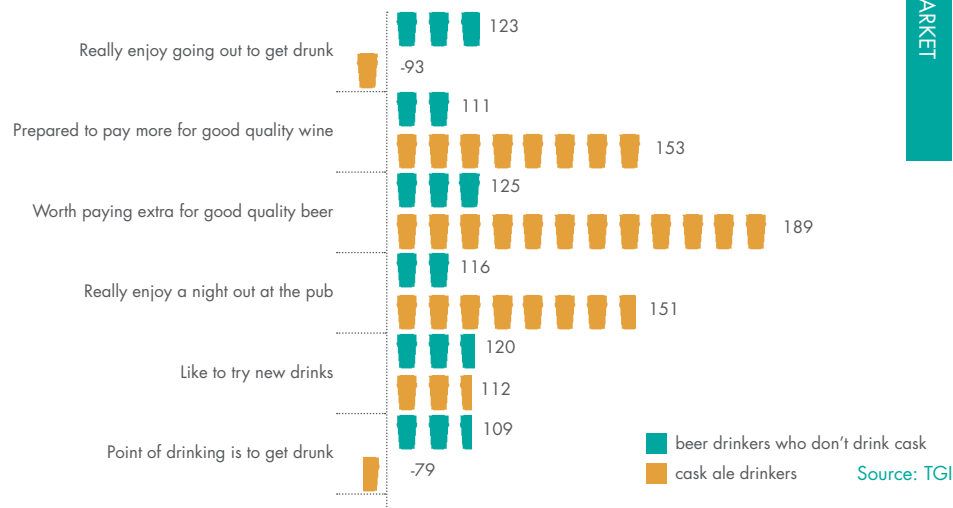
When it comes to drink specifically, cask ale drinkers look for quality rather than quantity. They certainly enjoy a drink, but not to get drunk.

This overall attitude of quality and open-mindedness makes perfect sense for a drink that's as crafted and has as much diversity as cask ale.

In drinks marketing there tends to be an assumption that when drinkers reach their mid-thirties, they become set in their ways and don't change their brand preferences. Anyone who has spent time with committed cask drinkers will know that they turn this stereotype on its head.

Cask ale drinkers look for quality, and drink responsibly

Agree with statement: index v total UK population



Research consistently proves that it tends to be younger novice drinkers, who don't know as much about beer, who stick with tried and trusted beers.

Older, more experienced drinkers love to experiment and constantly seek out new beers they haven't tried before, benchmarking them against the familiar beers they know. This explains why guest ale programmes are so successful in many pubs.

Promoting responsible drinking

It's clear from everything in this section that cask beer is drunk responsibly, in well-run community pubs, by people not seeking to get drunk and behave anti-socially but the opposite – to use alcohol in a way that enhances sociability and creates community bonds.

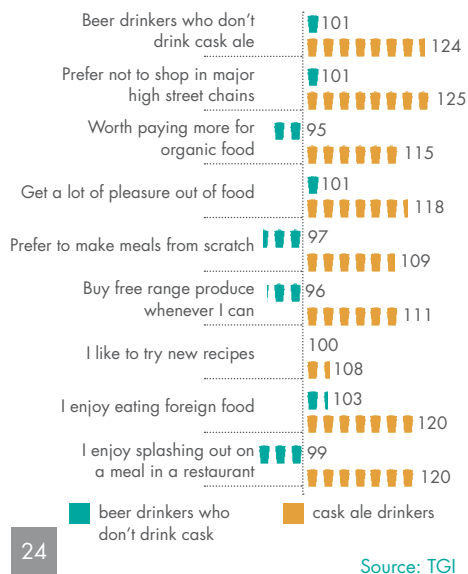
It's therefore galling that, in a political and social climate that's incredibly concerned by the spectre of binge drinking, cask ale bears a much higher tax burden than drinks that are consumed irresponsibly.

Research for the BBPA by Oxford Economics reveals that the current UK tax regime penalises beer, which is both low-strength and overwhelmingly UK-produced. Alcohol in the form of beer costs 42p per unit on average, compared to 37p for vodka, 38p for gin, and 33p for cider. Oxford Economics says that 29,500 jobs would be created, mostly in pubs and the wider hospitality sector, if the duty system were rebalanced so that drinks were taxed according to their alcohol content.

It simply makes no sense that drinkers are currently penalised for making a choice that is more responsible on a personal level – and gives greater support to the UK economy on a broader level.

Cask ale drinkers are more interested in food and drink generally

Agree with statement: index v total UK population



Case study: Project William

A regional brewer's innovative scheme to rescue failed pubs is rebuilding communities with cask beer at its heart.

The Chesterfield Arms was boarded up two years ago, another statistic in the forty pubs a week that are closing down. But on a humid Thursday night in August, there isn't a spare seat inside or out. Indeed, the refurbishment of an old barn just across the yard, slated for a couple of years hence, had to be hurriedly brought forward once the scale of business became clear.

"This place used to be all mass-produced lager brands, pool and fruit machines before it closed," says licensee Dave Brown, who reopened the pub in February 2009 after an extensive refurbishment by Everards as part of their 'Project William' scheme. "Now we've got ten real ales on here, which make up about seventy-five per cent of our total beer business."

Project William began in 2007, aiming to revitalise community pubs in residential areas that had closed down or were failing. Everards works with passionate real ale fans like Dave and local microbreweries who can't finance the acquisition of pubs on their own. The properties are cheap enough for Everards to buy, invest in, and charge a reasonable mix of rent and wet income. Crucially, they leave the licensee free of tie on cask ales, meaning local small brewers can make a William pub their brewery tap. There have been nineteen such acquisitions so far. With one pub still not quite there, the other eighteen have transformed failing or boarded up pubs into booming businesses, with turnover doubling, and continuing strong month-on-month growth.

Dave also has a second Project William pub, the Crown in Beeston, Nottingham, managed by his son James. It's a similar transformation. Cask ale has gone from a negligible part of the business to being the main driver. Again, there are ten hand pumps on the bar. But the ever-increasing turnover (it's been higher each consecutive month since opening in September 2009) doesn't just come from cask ale.

"Blokes come in now and they see the pub looking homely and welcoming, and they say 'this is somewhere I could bring the Mrs'. They come back with their wives and drink real ale. Some of the wives drink it too, but most of them opt for wine. We've seen wine sales quadruple since we became a specialist real ale pub."

Back in Chesterfield, James' dad Dave is clear on the reasons for both pubs' success. "We just go back to the basics of great beer and good conversation, that's what good pubs have always been about. And real ale is vitally important in that. We get the whole community drinking in here, people who haven't seen each other for years, now socializing again. We get young and old every night and we never have any trouble. The police say that if every pub was like this one, they'd be out of a job!"

“ We just go back to the basics of great beer and good conversation, that's what good pubs have always been about. ”

TRENDS ANALYSIS: DRIVERS OF CASK BEER GROWTH

- Positive imagery now surrounds cask beer
- No significant barriers to trial – just a general lack of knowledge/reason to try
- Post-recession interest in 'back to basics' traditional pursuits, growth of social networking and acceptance of the need to make ethical purchasing decisions all create an environment that suits cask ale growth
- Continued strong marketing activity helping to make cask ale a relevant choice for a broader market – but there's still a lot to do
- Clear opportunities for growth – but it doesn't happen automatically

In the 2007 Cask Report, *The Intelligent Choice*, we examined the social trends that seemed to support the revival of cask ale. At a demographic level, we looked at how an ageing and increasingly affluent population potentially creates a bigger cask ale market. We highlighted increased interest in local producers, an appetite for more adventurous food and drink, the increasing proportion of drinking occasions that are with food, awareness of binge drinking and even the smoking ban as things that could increase demand for cask ale – but pointed out that this was not something that would happen automatically. Cask ale was well placed to take advantage, but would need to make its case.

Trends tend not to change that much over a twelve month period, but in three years – which have seen a deep recession – things have developed significantly, and there are new trends that both help explain the revival of cask ale and also illustrate opportunities for further growth.

But growth does not happen automatically – these trends present opportunities, but they are opportunities that need to be acted upon by brewers or pubs seeking growth in cask ale sales.

The image of cask ale

Like it or not, image is everything. And cask ale and cask ale drinkers have traditionally been painted in a less than flattering light by the mainstream media, as old men in flat caps, or bearded eccentrics with questionable dress sense. These things matter: image conscious younger drinkers could be put off if they think drinking cask ale would make others associate them with these stereotypes.

But every bit of evidence suggests that in the real world, these stereotypes have simply faded away. Research by HPI Cardinal created a word map of image attributes of cask ale. The size of the word reflects the frequency with which cask ale drinkers used it to describe cask ale, and it's overwhelmingly positive.

“ Image statements such as ‘It’s an old man’s drink’, ‘It’s not fashionable’ and ‘It’s not for women’ were collectively chosen by only 6% of non-drinkers as reasons for not drinking cask ale. ”

But what about non-drinkers?

We asked people who have never tried cask ale why that might be, and forced the issue of image.

When given options including ‘It’s an old man’s drink,’ ‘It’s not fashionable’ and ‘It’s not for women’, collectively these image statements were chosen by only 6% of non-cask ale drinkers as reasons for rejecting it.

The negative stereotype of cask ale and cask ale drinkers has disappeared. In its place, we have a drink that’s seen as traditional and English (and in Scotland, British) – and these are attributes that are deemed desirable, thanks to broader trends in society.



Social Trend: 1. Simple pleasures and the new frugality

The trend

The recession forced us all to tighten our belts. But many of us found that in parts we actually enjoyed doing so – it felt good. Allied to this, people look to traditional values during a recession, looking for stability and continuity in uncertain times. The new frugality is not about going without; it's about rejecting needless consumption and rediscovering – or reinventing – simpler, more traditional pursuits. Ethical issues, price consciousness, the slow food movement and interest in smaller, more artisanal producers have combined to make a back to basics approach positively aspirational.

The evidence

- Research by the Social Issues Research Centre in 2009 showed people are spending less money on clothes, entertainment and unnecessary luxuries, and focusing on paying down debt. Over 70% of people said they'd continue some or all of these behaviours in the future, regardless of what happens in the economy.
- 27% of Britons say they are more likely to buy British after the recession.

- Sales of home baking ingredients are up by 35%, and the Women's Institute reports a strong rise in applications for cake baking courses. Sales of Waitrose Cook's range of herbs, oils and stocks are up 21%. Sales of Morrison's cake mix are up 54%.
- 2009 was the year of the 'Staycation', but as economic recovery sees Britain starting to take foreign holidays again, a renewed interest in camping – often given a glamorous makeover to become 'glamping' – shows no signs of abating. Membership of the Camping and Caravanning Club rose by 24% in 2009 to reach an all-time high of 480,000. Punk Publishing, which publishes the *Cool Camping* guidebooks, has seen sales double in four years.
- Visitor numbers at National Trust attractions were up 18% in 2009 – doubling in some places.



The impact on cask ale

Anything that describes itself as 'craft' is booming: baking, bread making, knitting, paper craft and cooking are all prospering. The global boom in craft brewing is part of this trend towards simple quality, away from mass-market standardization and hype, a rejection of globalisation. If we refer to real ale/cask beer as 'craft beer' it gains a whole new potential market.

However, SIRC shows that part of this trend is that people are visiting pubs and restaurants less than they used to. Cask ale brewers and pubs need to work to state their case and engage people, and persuade them that there are exciting reasons to visit the craft beer pub.

Comment: Britain's Got Cask



Kevin Georgel, Managing Director of Admiral Taverns, writes about the importance of cask ale to the UK's largest independent tenanted and leased pub company.

The last five years has seen a number of key issues seriously affecting wet-led community pubs. Firstly the smoking ban, the rise of cheap alcohol in supermarkets and the recession, and secondly a growth in food and a strong move toward higher quality locally produced product. But what does this mean for a company such as ours with predominantly wet-led pubs whose major income stream is beer?

Well, thankfully, the last five years has also seen a renaissance in cask ale with the same bias towards locally produced product and a major rise in local and micro brewers producing ever more interesting ales.

For pubs this is a fantastic opportunity helping to combat both the move to food and the rise of the off-trade and drinking at home. Cask ale has always been a central part of the majority of British pubs sales. But this recent renaissance is to be welcomed as it helps meet the needs of the modern consumer – quality products that provide interest, differentiation and value for money.

It allows the licensee to put on a range of products attracting not only the traditional cask ale drinker, but also those who want to try out different styles and tastes, and it is encouraging to see all ages and both genders enjoying cask ale in our pubs.

Within Admiral we will continue to encourage and promote cask ale via our 'Britain's Got Cask' scheme and we remain totally committed to supporting and promoting this vibrant and important category within our business.

2. Social networking and new communities

The trend

When we wrote our first report in 2007 Facebook was known mainly as a university network and Twitter did not exist. Now, increasingly, Britain is a nation of virtual communities, with large groups talking, playing and interacting online. A decade ago it was generally believed that people who spent a lot of time online were anti-social geeks. In fact, successive studies show that those who socialise online are more likely to socialise in the real world too. Virtual communities enhance – not replace – real world interaction, and in some cases create new friendships and communities in the off-line world. The impact of this on marketing is arguably the most significant development since the birth of commercial television.

The evidence

- Facebook has 18 million users in the UK – almost a third of the entire population.
- Facebook users globally send 1 billion messages per day.
- There are an estimated 400 million active blogs on the internet.
- Twitter has 105 million users worldwide. The number of users increased 109% in the year to June 2010.

- The number of tweets sent per day increased by 1400% last year and now stands at 65 million per day.
- 20% of tweets contain references to a product or brand.
- 37% of Twitter users use it from their phone – the internet has truly gone mobile.

The impact on cask ale

It's already been huge. In Wikio's rankings of 'Wine and Beer' blogs, eighteen of the top twenty (including all of the top ten) are blogs specifically about beer. The Internet has linked up beer fans who trade news, information, tasting notes and opinions on their passion, spreading beer appreciation particularly among a younger audience. And the online conversation about beer is not about big lager brands – it's about interesting, flavoursome beer – craft beer.

As Garret Oliver shows in his foreword to this report, cask beer has a global reputation – and the beer community is global in its scope.

More and more beer brands and pubs are online engaging in a dialogue with these beer fans. One or two brewers have even built quite successful brands by doing so, with little need for conventional offline marketing. Pubs that tweet daily any specials on

the menu or cask ales that are coming on the taps see a marked increase in business as a result. And with 37% of users accessing social networks from their mobile phones, fans can share their drinking experiences with each other in real time, creating an incredible, real-time opportunity to engage with drinkers while they're in the pub.

However: it's vital that brewers and licensees recognise that social networking is a two-way medium. It's a dialogue, not another channel to broadcast information. On Twitter in particular, brands that establish a presence and then ignore direct communication from their followers are routinely outed and criticised. Social networks offer any business, regardless of size or resource, the opportunity to build a real relationship with a dedicated customer base. But it's vital to use the medium in the right way.

Chris Lewis, marketing director for Wells and Young's, says "From a brands point of view, we've found Twitter to be very powerful when talking to pubs. We've been able to help pubs who need some support behind our brands, and help publicise their events and gather feedback on initiatives. In terms of communicating with our consumers there's never been a tool like it. For the first time, we can ask our consumers questions directly and receive answers almost immediately. Pubs can easily publicise their events or highlight last minute offers to an engaged group of people. And best of all, it's a FREE tool!"

Social media is fuelling a new generation's interest in cask ale

3. Ethics and the environment

The trend

The pressure to be an ethical consumer is simply not going away. The specific focus may change – one minute it's about food miles, the next it's dolphin-friendly fishing, or packaging, or carbon emissions, or recycling – and it can become confusing. We don't make big changes until we're forced to do so, but trying to make more enlightened decisions while shopping is something that's increasingly widely accepted.

The evidence

- 77% of UK adults agree with the statement "I make a conscious effort to recycle".
- 60% say they take positive steps to reduce energy used.
- 43% say they would make lifestyle compromises to benefit the environment.
- 33% say they are prepared to pay more for environmentally friendly products.
- 44% say they buy free range products whenever they can⁶.

The impact on cask ale

People are becoming more ethically and environmentally aware because they have to. But shopping ethically is a confusing area that involves extra effort in something that's already a chore. Rather than educate themselves and make a conscious effort to change their behaviour, people want manufacturers to do the hard work for them.

Cask ale has relatively low food miles when compared to imported beers and wines – casks are, of course, an inherently recyclable form of packaging. In June 2010 Mike Berners-Lee, a leading expert in carbon footprinting, calculated that a pint of cask ale served from a local brewery in a pub has a carbon footprint one third the size of a bottle of imported lager bought in a supermarket: the pint of cask ale has a carbon footprint of 300g of CO₂ equivalent, while the bottled lager has a footprint of 900g. Separately, it's been calculated that a bottle of Bordeaux bought in London had a carbon footprint of 1200g. Cask ale brewers now need to make this point much more strongly to provide drinkers with a clear greener choice.

“A pint of cask ale served from a local brewery in a pub has a carbon footprint one quarter the size of a bottle of Bordeaux wine.”

⁶All figures TGI.

Case study: The Plough, Norwich

Geoff Wright worked for a variety of regional cask ale brewers before founding his own microbrewery, Grain in Norwich, in summer 2006. The brewery grew quickly, to the point where the team felt they needed a pub of their own to showcase their beers.

They looked in Norwich, and found the Plough, a pub that had been closed for nine months. "Before it closed it was the best place in Norwich to buy smack and coke, and the occasional pint of smoothflow bitter," says Geoff. "It had been a pub since 1822 and had some good landlords over that time, but over the last twenty years it had become more and more run down until it closed its doors."

Geoff and his team stripped the pub back to its original structure, painted it in neutral colours and reopened it in Spring 2010 as a basic, understated but very stylish pub focusing on Grain's beers and rotating guest ales.

But the Plough does not describe itself as a cask ale pub – just a good pub. "Most of our customers just want great beer in a nice environment with interesting people to talk to. They're not cask ale purists, it just so happens that cask ale fits the bill."

The pub also specialises in premium spirits brands, such as Hendrick's gin over Gordon's. "We don't compromise on any of our products. Whatever we stock, we stock because it's the best."

Cask ale at the Plough then is not about giving cask special emphasis – it's about cask being a premium, discerning product that sits naturally alongside premium brands in every other category.

After being open for just 150 days, the Plough sells between 20 and 25 barrels of cask ale a week, compared to six or seven of lager, and is already making a healthy profit.

The clientele are mainly local, of all ages, and are united by a search for something a little different from the norm. "People still like to go out and treat themselves in a recession," says Geoff. "They might not go on foreign holidays or buy a new car, but they still want to go and drink something a little bit special."

Case study:

Thatchers Arms, Mount Bures, Essex

When Mitch Adams took over in 2006, the Thatchers Arms was a glorified fish and chips shop with very little trade.

The new team focused on good value fresh, locally sourced food and local ales from a mix of regional and micro brewers, a move which increased interest in cask ale in the local area.

The pub is in the countryside and is not served by public transport, so most customers drive (or are driven). This means it's a real destination pub, and cask ale is one of the reasons, along with the food, that people choose to travel to it instead of walking to their local. The pub has Cask Marque accreditation, two beer festivals a year, and has regular guest ale promotions which are extensively promoted on Twitter, Facebook, and www.yourround.co.uk.

Mitch believes cask ale serves several purposes in building a profitable and popular pub. "A large percentage of our small number of locals moved from Guinness or lager to real ale when we took over," he says. "Keeping locals drinking at the bar is essential in my eyes for creating a proper pub atmosphere and making sure we don't get tarnished with the 'Gastropub' tag."

And cask ale's relationship with food is vital too. "Cask ale does two things for our food reputation. Firstly, if you serve well kept cask beer, it lifts the reputation of your kitchen too – it's a major quality indicator. Secondly, if there's a table of four or six people and one of them is a cask ale drinker, he's the person who has the influence over what pub the whole table chooses."

The results speak for themselves. In the first three months of trading, cask ale accounted for 50% of beer sales. In the last three months, total draught beer sales have more than trebled from their 2006 level – and cask ale now accounts for 60% of the total. In a pub where food accounts for 60 per cent of total turnover, cask is a vital business driver.

The marketing of cask beer

We wrote last year about how the emphasis on innovation and news in the beer market seems to have moved away from lager, which is increasingly commoditised, towards cask beer, where there are many new ideas and interesting marketing campaigns.

This has gone from strength to strength. See over for a taste of the vibrancy and variety of cask ale activity.

In addition to the activities of brewers themselves, National Cask Ale Week happened for the second time between 29th March and 5th April 2010, with over 7,000 pubs participating. The event gained almost 200 press articles and was supported by a 16-page supplement in *The Independent*. Cask Ale Week 2011 has been confirmed for 26th March to 3rd April and will focus on a widespread 'try before you buy' scheme to encourage new converts to cask ale and generally raise its profile among drinkers.

NATIONAL Cask Ale WEEK

26th MARCH - 3rd APRIL 2011

This year Cask Ale Week also saw the introduction of a CaskFinder app for iPhone that helps users find Cask Marque accredited pubs and see what beers are being served. iPhone's location service means that wherever you are in the UK, you can simply press a button and find the nearest Cask Marque pubs to you. The app was downloaded by 5000 users in its first eight weeks.

The Great British Beer Festival continues to surge in popularity. The event had 40,000 visitors in 2000; in 2010 this had grown to 68,000. This is also typical of beer festivals around the country, which now have far longer queues to get in than they did just a few years ago.

And J D Wetherspoons' twice yearly beer festival continues to grow each successive year. The April 2010 festival saw the chain sell just under 3 million pints of cask ale over two and a half weeks through its 752 pubs.

CASK BEER MARKETING: DYNAMIC, FRESH, ENERGETIC



TRENDS ANALYSIS: BARRIERS TO CASK BEER GROWTH

- The people who are most likely to drink cask ale in pubs also have the largest repertoire of alternative pursuits they could be doing instead – cask ale must be in more places
- Non-drinkers simply lack the knowledge and don't know where to start – education and trial are key to growth
- Cask ale is unique to pubs – and pubs remain under severe pressure

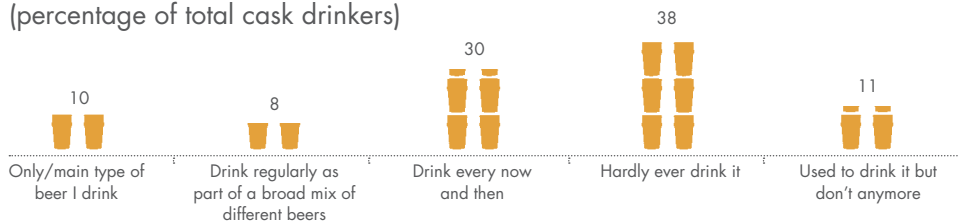
More people are drinking cask ale. And cask ale is available in more pubs. So why is it not in strong volume growth? Despite all the factors in its favour, clearly there's something obstructing growth. If we can understand what they are, we can overcome these barriers.

The issue with curious, experimental people

The issue with people who enjoy a wide variety of food and drink and are constantly trying new things is that when their behaviour doesn't work for you, it works against you. Cask ale drinkers are also more likely to drink wine and spirits, more likely to go to restaurants as well as pubs. Which may explain why when we asked cask ale drinkers how often they drink it, the answer was a little surprising.

Only 18% of cask ale drinkers drink on a regular basis

"How would you describe your own cask ale consumption?"
(percentage of total cask drinkers)



Base: All those who say they drink cask ale

Source: CAPI Omnibus/CAMRA

The Cask Report 2010-11



Most non-drinkers just lack information and knowledge about what to try

Only 18% of cask ale drinkers claim to drink it on anything like a regular basis. Almost half of people who previously claimed to drink cask ale, on further questioning, said they hardly ever drink it or had stopped drinking it altogether.

This still means there are more than 1.5 million regular, dedicated cask beer drinkers. But for a clear majority of those 8.6 million drinkers, cask ale is an occasional drink. This is perhaps why we're seeing average throughput per pub decrease.

A great deal of effort has been made in recent years to encourage trial of cask ale. But the job does not stop there. Among people who have drunk it, it has to be made more relevant, and available on more occasions and in more places. Cask ale should be sold at theatres, cinemas, restaurants, outdoor events, shows and festivals and sporting events if it is to achieve its true potential. We are starting to see real progress on this – cask ale is available at an increasing number of sporting venues, such as Twickenham and Lords, and sells well where it is present, and it sells phenomenally well at music festivals such as Latitude and Green Man. But lager, wine and spirits are already sold in most entertainment venues – cask still has a lot of catching up to do.

Britain's National Drink

fastcask™: One possible solution

In March 2010 Marston's announced the launch of fastcask™ – a revolutionary new treatment of cask beer in which the live yeast in the beer is in the form of gel beads which are naturally heavier and fall to the bottom of the cask immediately whenever it is moved or disturbed. This means it doesn't require the 24-hour settling time normal cask ale does. It can be delivered and immediately put on sale (though crucially it does need to be tapped and conditioned like any other real ale). It can be knocked, moved or stored on its end and will still be suitable for sale. While fastcask™ beer doesn't need to replace conventional cask in pubs that serve it well, it extends the potential of cask ale to places without full cellar facilities, giving cask a much broader reach.

“ Cask ale should be sold at theatres, cinemas, restaurants, outdoor events, shows and festivals and sporting events if it is to achieve its true potential. ”

Lack of product knowledge

If we look at the real reasons people who have never tried cask ale have not done so, the spread of answers is revealing.

We've already established that image is not really the problem – and neither are the clichés about perceptions of the product. No one is rejecting it because they think it will be too warm. And only 11% are rejecting it because they think it will be flat or too bitter.

The main reason given is that they simply prefer other drinks – but how do they know this if they have never actually tried it?

What respondents are really telling us here is that they simply haven't been given a good reason to try it, to challenge their preference for other drinks. Given that the second most popular answer is people 'don't know' why they've never tried cask ale, and the third answer is that they don't know what it is, it's quite clear that the real problem cask ale faces is a lack of product knowledge, saliency and general awareness. It needs greater *currency*.

This was further illustrated by recent CAMRA research that asked, "If there were simplified real ale tasting notes on the bar and on other promotional material explaining what the beer looked, smelled and tasted like, would these be of use to you..."



“ The only real problem cask ale faces is a lack of products knowledge, saliency and awareness. ”

Non-drinkers of real ale just don't know enough about it

What's the main reason you've never tried real ale?
(percentage of non-drinkers)



Base: all those who say they don't drink cask ale
Source: CAMRA/CAPI OmniBus

... when deciding which real ales to buy?"

(to all who have tried real ale)

Yes - 71%

No - 27%

... would you try real ale?"

(to all who have never tried real ale)

Yes - 23%

No - 66%

The Cyclops scheme offers a standardised framework for tasting notes and descriptions of beer, and is now used by 212 breweries to describe over 1100 different beers. So its simplicity itself for pubs to now offer simple information about cask beer, solving one of the biggest potential issues cask beer faces.

Cask ale's attraction is its diversity, complexity and variety. But cask ale brewers are smaller concerns than big multinational brewers with multi-million pound advertising budgets. Education and awareness about cask ale remain crucial priorities if it is to achieve its potential.

Consistently, when pubs use trial and sampling programmes, or hold beer festivals, we see greater take-up of cask ale and conversion among people who never thought about drinking it before to become new fans. We've highlighted the need to make cask ale more relevant to everyone – including those who drink it occasionally – but 46% of the UK population have still never tried cask ale. Trial and education remains a huge opportunity.

“ Education and awareness about cask ale remain crucial priorities if it is to achieve its potential. ”

“ The right cask beers, handled well, can give pubs a real advantage over their competitors and drive future growth. ”



Pressures on pubs

The ‘perfect storm’ of a 26% duty increase on beer, the smoking ban, recession, cheap supermarket prices, excessive bureaucracy and a hostile and sensationalist media approach to ‘binge drinking’ has been responsible for thousands of pub closures. But the number of pubs closing every week appears to have peaked. The figures calculated by CGA Strategy rose as high as 50 per week during 2009, but have now fallen back to 39 per week.

But this is still a devastating rate of attrition for the pub industry. Cask ale is currently unique to pubs, and if pubs suffer, cask ale suffers too.

But there is a paradox here – it’s not a clear area to explore. Because while there are 40-50 fewer pubs in Britain

each week, cask ale is now stocked in 3000 more pubs than it was a year ago. And we have previously demonstrated how cask ale makes pubs more profitable, and therefore more resilient to closure, because cask ale drinkers are more affluent, visit pubs more often and spend more money when they’re there. The right cask beers, handled well, can give pubs a real advantage over their competitors and drive future growth. This year we feature several case studies that demonstrate this effect in practice.

Pub closures reflect the fact that overall, fewer people are visiting pubs, and those who are visiting do so less often. This is bound to have some inhibiting effect on cask ale growth – that’s obvious. But in acknowledging this, we must stress that pubs serving cask ale are not hit as badly as those that do not.

The cask beer value chain: More drinkers. More pub visits. Higher spend per visit



CASK BEER AND QUALITY: THE ISSUES

- Ensuring top product quality is key to cask ale's success
- Extra work compared to other beers – but it pays back

Cask ale last enjoyed growth in the early 1990s – but it grew too fast. It went into pubs that did not know how to keep and serve cask beer well. Quality suffered, and cask as a whole gained a reputation for being unreliable. Combined with a lack of staff knowledge, situations where drinkers complained about a pint tasting of vinegar only to be told "It's real ale, it's meant to taste like that," soon saw this period of growth reverse sharply into decline.

We touch on quality issues every year in the *Cask Report* – but it's vital to the continued health of cask ale and the pubs that serve it that we do so.

Some aspects of quality are common across any beer style, while others relate specifically to cask. Here are the main watch outs.

Any time and money costs incurred by regular line cleaning are more than saved by reducing wasted beer

Ordering

Order the correct size of cask that will allow you to sell it in three days after being placed on sale. Any longer than this, and the beer will start to lose its condition and suffer compromised quality.

Lines

Lines should be cleaned at least weekly, and ideally every time a barrel is changed. Dirty lines affect the quality of any beer. They don't just hamper the taste of beer, they can cause fobbing and cloudiness. Any time and money costs incurred by regular line cleaning are more than saved by reducing wasted beer.

Cellar temperature

Whoever said cask beer should be kept at room temperature did so when the average room was much cooler than in today's age of universal central heating. Cask ale should be kept consistently at an ideal cellar temperature of 11-13 degrees Celsius.

Conditioning

When cask beer is delivered to the pub cellar, the final part of fermentation still needs to take place. It normally takes two or three days, sometimes longer depending on the beer. Beer sold before it's properly conditioned is not at its best and can occasionally be unpleasant. Licensees should check with supplying brewers if unsure how long to condition beer for.

Glassware

Ensure glassware is clean, free of detergent and scratches. This doesn't just affect the appearance of the beer – a clean glass allows proper head formation and retention, and dirty glasses can badly affect the taste of the beer. Glassware needs to be renovated as over time beer leaves a film which affects appearance and gives poor head retention.

Apart from that, enthusiasm, interaction and the willingness to engage with drinkers, to talk to them about beer, reaps volumes.



Clean glassware doesn't just look better; it keeps the beer in better condition

CARING FOR CASK BEER: TRAINING STAFF

Cask ale does require a little extra effort to keep well – but the effort is worth it. And no matter what kind of pub you run, help is a hand. There's no reason why anyone with the right cellar facilities cannot serve perfectly kept cask ale. Here's a list of resources available.

Beer Academy
www.beeracademy.co.uk
020 7290 6087

More about the appreciation of beer than the cellaring of it, Beer Academy courses are nevertheless useful for anyone wanting to learn more about beer and appreciate it more fully. Useful for encouraging a genuine love and enthusiasm for beer among staff – which translates into passion and knowledge behind the bar.

BII
www.bii.org/home
01276 684449

The professional body for the licensed retail sector. Runs courses including the one-day Awards in Beer Cellar Quality (ABCQ) at over 600 locations throughout the UK.

Brewers/PubCos

Most regional brewers offer training to licensees operating their pubs and many offer training to licensees stocking their beers outside their own estate. Ask your BDM or sales representative for details.

CAMRA
www.camra.org.uk
01727 867201

The Campaign for Real Ale has recently published a new edition of its *Cellarmanship Guide*, by Patrick O'Neill.

Cask Marque
www.cask-marque.co.uk
01206 752212

The industry's largest provider of cellar management training and responsible for the Cask Marque award for beer quality, recognised by 46% of cask beer drinkers.

Institute of Brewing and Distilling
www.ibd.org.uk
020 7499 8144

Focuses on the brewing rather than serving of beer but nevertheless offers a variety of potentially interesting courses.



Help is always at hand to enthuse bar staff about cask ale

GLOSSARY

Explaining the sometimes confusing terminology surrounding cask beer

Ale:

Generally recognised today as meaning beer that has been brewed with a brisk, warm fermentation during which the yeast sits at the top of the vessel – a 'top-fermented' beer. Served between 11-13 degrees. Often dark brown as opposed to lager's gold, but not necessarily – golden ales are increasingly popular and ale can be red or very dark too. Also commonly known as 'bitter' thanks to its pronounced hoppy character. Ales tend to have a greater range and expression of flavour than lagers of the same strength because they have more residual sugars and a wider array of types of malt and hops – the key components of beer.

Bitter:

See 'ale'.

Cask ale:

Beer that has not been filtered or pasteurised, and has live yeast in the cask. This means the beer is undergoing a slow, secondary fermentation that contributes greater depth of flavour and a natural soft carbonation. Also sometimes referred to as cask

beer, real ale, hand-pulled ale, cask-conditioned beer – all these terms refer to the same product and are used interchangeably.

Cask beer:

A term interchangeable with cask ale that is felt by some to be a more appropriate description: although the vast majority of cask beers are ales, it's quite possible – increasingly so – to find cask-conditioned stouts and even lagers. This term recognises that cask conditioning is a process rather than something pertaining to one specific beer style.

Cyclops:

Named because of the sight-smell-taste graphics that create an image of a one-eyed face, this is a system that clearly and simply describes the taste and character of beer in a few words and graphics, giving both bar staff and consumers a framework for understanding what a given beer will be like.

Hand pump/hand pull:

Archaically known as the beer engine, a system that draws beer from the cellar, straight from the cask. A glass chamber creates a vacuum that pulls the beer up through the pipe and then pumps it into the glass. Because most beers are now in pressurised kegs and served with either CO2 or nitrogen, only cask beer is served with handpulls. The handpull is therefore symbolic of the care and tradition surrounding cask beer.

Keg beer:

Beer that has been pasteurized and/or filtered to remove any yeast, before being sealed in a pressurized container. It is then dispensed with the aid of CO2, nitrogen or a mix of the two to give fizz or 'smoothflow' texture.

Lager:

Beer that has been brewed with a slow, cold fermentation and – traditionally – conditioned at low temperatures for several weeks (the word 'lager' is derived from the German 'to store'). Usually gold, but can be amber or even black.

Real ale:

A term for cask ale/cask beer coined by CAMRA in the early 1970s. A reaction against the industrial mass-production methods that rose to dominance in the 1960s, it recognizes that cask conditioning is the traditional, craft method of making beer.

Smoothflow beer:

Dispensed with nitrogen at cold temperatures for a smooth, silky texture. Guarantees greater consistency of product at the expense of flavour and character.

Stillage:

Device by which casks are held steady on their sides so that finings and yeast can collect in the belly of the cask and allow the beer to clear.

Stout:

Technically an ale, in that it's brewed with top-fermenting yeast, stout has effectively become a separate beer style in the eyes of drinkers. Guinness dominates the market and is brewed with charred barley for a deep roast character, and dispensed with nitrogen for its creamy body. This image of stout defines the category, but there are an increasing number of 'real stouts', conditioned naturally like cask ale, readily available.

Further Information

The Cask Report is supported by: The Cask Marque Trust

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

The Campaign for Real Ale (CAMRA)

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

The Independent Family Brewers of Britain (IFBB)

Body representing 28 of the UK's family-owned brewers.
www.familybrewers.co.uk

The Society of Independent Brewers (SIBA)

Representing over 450 small, local and independent brewers.
www.siba.co.uk

Adnams

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

Caledonian

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

Fuller's

London-based regional brewer and owner of an estate of managed and tenanted pubs.
www.fullers.co.uk

Greene King

East Anglia-based regional brewer and owner of an estate of managed and tenanted pubs.
www.greeneking.co.uk

Marston's

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

Wells & Young's

Bedfordshire-based regional brewer and owner of an estate of managed and tenanted pubs.
www.wellsandyoungs.co.uk

The *Cask Report* is written each year by Pete Brown, author of several books about beer, and regular contributor regarding beer to trade and consumer press, TV and radio. Pete also has a background in beer marketing and works as a consultant to the beer and pub trade. He has no formal affiliation with any of the companies or bodies backing the report.
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www.jollybutchers.co.uk

Data Sources

The British Beer and Pub Association (BBPA)

The UK's leading organisation representing the brewing and pub sector.
www.beerandpub.com

CGA Strategy
www.cgastrategy.co.uk

Established in 1991, CGA Strategy is the specialist on trade research consultancy in the UK, providing innovative solutions for clients designed to fit their individual business needs.

Following a strategic partnership with the Nielsen Company in August 2009, CGA offer an unmatched selection of specific products tailored precisely to the needs of the market. Core products - Brand, Outlet, Consumer and Trading Index - are supplemented by a flexible approach to bespoke and ad hoc data and research requirements.

Target Group Index (TGI)

The world's leading provider of marketing and media surveys.
www.bmrb-tgi.co.uk



THE CASK REPORT 2010-2011

- Strong increase in market value of cask beer – 5% growth versus a 2% decline for all beer
- Cask beer volume steady in 2009 – the first year since 1994 with no volume decline, in a beer market down by 4.1% overall
- Cask beer now accounts for 15.2% of on-trade beer – it's highest market share for over a decade
- Cask beer is a £1.8bn industry, responsible for 45,000 jobs and contributing £454 million annually in duty and VAT
- Over 8.6 million cask beer drinkers – cask is recruiting younger drinkers
- Cask beer appeals to people looking for crafted, traditional British products – a booming area post-recession as people seek out simplicity and authenticity
- Cask beer appeals to the environmentally aware consumer – a bottle of Bordeaux wine has a carbon footprint four times greater than a pint of cask ale
- Cask beer is being drunk in more pubs by more people – but lack of knowledge remains the biggest barrier to trial and strong volume growth

