BEER QUALITY REPORT 2016

THE PROFIT OPPORTUNITY IN THE DRAUGHT BEER CATEGORY
“WITH 50% OF THE BEER WE PRODUCE BEING DRUNK IN PUBS THE PARTNERSHIP BETWEEN THE BREWERY AND THE PUB IS CRITICAL TO ENSURE QUALITY BEER ALL THE WAY TO THE BAR. AT A TIME OF GREAT EXCITEMENT AND INTEREST IN BRITISH BEER WE, ALONG WITH OUR PARTNERS RUNNING PUBS, MUST DO ALL WE CAN TO SHARE THE KNOWLEDGE ON WHAT MAKES GREAT BEER AND MAKE SURE WE DELIVER THIS TIME AFTER TIME.”

ALEX BUCHANAN
Export and Marketing Manager, Thornbridge Brewery
Welcome to the first Beer Quality Report – the definitive assessment of draught beer quality in the on-trade.

Consumers across the spectrum are demanding higher quality products, and nowhere is this more evident than in the beer sector where, as revealed in the recent Beer Quality Survey 2016 survey from Cask Marque, quality is at the top of the consumer agenda.

This report brings together data from two organisations at the heart of quality in the beer sector – Vianet and Cask Marque – and demonstrates that the delivery of consistent quality across the sector is patchy at best, with individual licensees, pub owners and brewers losing out, not only on brand equity, but also in terms of profit. The report conservatively estimates that this figure is in excess of £333 million. This is the first of what will become an annual report on quality, combining Vianet's ability to monitor quality remotely 24/7 365 days a year with Cask Marque's bi-annual visit data, which reviews the whole operation, from cellar to glass. It gives an interesting and stimulating break down across the key drivers of quality, raising a number or important questions for the industry.

Quality is Key

Customers today are more demanding than ever when it comes to spending their leisure pound, with value for money topping the list of requirements.

While value is often thought to refer just to money, it is also about the quality of experience.

In most pubs, beer represents over 70% of wet sales, but does the category get the attention it deserves to ensure that the offer exceeds customers' expectations? The 2016 Cask Marque Beer Quality survey revealed that nearly 95% of customers would stop using a pub if the beer quality was poor, proving how important quality is to the market. Our CaskFinder app is used over 70,000 times a month by consumers looking to find Cask Marque pubs with an excellent beer offering, and it is clear from our research that quality directly affects sales and margins. For example, Enterprise Inns’ pubs with Cask Marque quality accreditation grew beer sales by 4.4% last year over non-accredited pubs, with yields increasing by over 7%.

The key element in delivering a quality product can be split between premise and practice. Premise is the cellar and equipment and practice is the staff knowledge. Both areas play a part in providing a quality beer offering and need investment.

We believe this report highlights the key issues – how we are performing as a sector and the learnings we can gain to do things better and make our pubs more profitable. The report can also be used for benchmarking performance and for training purposes.

Exciting times are ahead for both consumers and the pub industry, with a wider variety of beer styles being brewed and new, innovative brewers continuing to emerge. We can make this momentum continue by focusing on improving the quality of beer available in our pubs, ensuring that consumers experience the beer as the brewer intended.

Paul Nunny, Director, Cask Marque
INTRODUCTION

THE ROLE OF TECHNOLOGY AND INSIGHT IN DELIVERING QUALITY

Technology has a profound impact upon all of our lives every day. It continues to provide us with new possibilities that we could not have envisaged five or ten years ago. This technology however has brought with it an information overload, leaving us with a lack of time to digest all of the facts and figures available to us. What really matters is that we use the insight that technology brings to make informed decisions that drive great results. We are proud to have worked with Cask Marque to produce this key report, providing insight into the opportunities that driving quality can bring to the draught beer category.

This critical category has many innovative technologies available to it, helping brewers to make great beers and allowing operators to serve the perfect pint. The opportunity at the heart of these technologies is the ability to consistently deliver quality throughout the supply chain.

The team at Vianet is passionate about great pubs and great beer. We have been working with our customers across the industry for many years, helping to drive quality and retail standards across the largest multiple operators through to independent sites. Day in, day out, we see the significant impact that effective management of these key areas has on pub customers in terms of great quality and improved profitability for the licensed retailer. Quality really does matter and our insight across the whole industry clearly shows that where great retail standards are being consistently delivered, profit growth follows.

QUALITY MATTERS FOR YOUR CUSTOMERS AND IS CRITICAL IN DRIVING GREAT RETURNS FOR YOUR BUSINESS.

Vianet has a long history of working with Cask Marque to bring its practical and impactful approach to quality management alive with Vianet’s real time draught quality and waste management solutions. We both look forward to sharing this insight across the industry to help bring great retail standards to the benefit of all.

Steven Alton, Managing Director, Vianet Limited
MARKET OVERVIEW

THE MOVE TO QUALITY
Graeme Loudon, commercial director at CGA Strategy, looks at the challenges and opportunities in the UK’s on trade beer market

The on trade marketplace has been in a huge state of flux over the past 10 years, our market has changed almost beyond all recognition.

Although the number of outlets in the on trade universe is flat year on year, growing by 51 outlets to December 2015 (source CGA Outlet Index December 2015), we have seen 21,000 drinks led outlets shut their doors over the past decade – a difficult headwind for the beer market to navigate, and it has had to evolve.

At its peak, pubs were closing at a net of 52 per week, and although this has slowed down to 27 per week, our traditional boozers and beer’s traditional home has many challenges remaining. When the dust settles on the MRO we may yet see more pubs go.

“Better quality outlets being here to stay means there will be an on-going requirement for good quality beer to be served in the right way.”

Over the same decade we have seen 8,600 food led outlets open their doors, driven in part, by a need to diversify post smoking ban, open new revenue streams through the recession and more recently by the casual dining boom.

Beer doesn’t have as natural a fit in these new openings. Our analysis shows that beer accounted for 60% of the sales mix in the closed outlets, but is 40% of the sales mix in the openings, so beer needs to work harder in these new outlets to drive relevance and ultimately sales.

This can be achieved through giving the customer a premium and new experience, stocking brands which will match well with food, and of course serving the beer correctly to maximise the great flavour which beer can deliver.

Yet, against this tricky backdrop, arguably it has never been a better time for beer and to be a beer drinker.

“... it is imperative that beer is served correctly in order to match the food and to help cement the connection.”

NEW ON TRADE

The new on trade is awash with breadth and quality, both in terms of outlets and beer. We have seen the emergence of craft beer bars, bringing a new spectrum of beer styles in both cask and keg format to a whole new consumer set. We have more breweries now than since the 1930s, and pockets of excellence are popping up not just in London but into new heartlands of Manchester, Yorkshire and beyond.

With a higher focus on outlet quality, a demand for a premium World Beer has emerged. World lager volumes have grown by 5.7% over the last year, outperforming the beer market which has seen volume fall by 3.6%.

The category has successfully transitioned from the fridge to the front bar and even now is offering growth through unpasteurised brewery fresh tank beer. This has offered a point of difference in outlet, giving the consumer the wow factor.

CATEGORY MAT VOLUME PERFORMANCE
Source: CGA Brand Index to Dec 15

WORLD LAGER 5.7%

TOTAL BEER -3.6%
Casual Dining Operators Grow Craft

Craft has definitely created a buzz within the industry; our view of the market is that it currently stands at 798khl, growing at +37% per year in volume terms and even quicker in value (source CGA Brand Index to Dec 15).

Around 40% of consumers are willing to trade up to a better quality beer (source CGA Peach Brand Track), and outlets offering a range of trade up options in both keg and cask format can reap the benefits of extra cash in the till.

The casual dining boom has given craft beer a further avenue from which to grow. These outlets want to offer consumers something different and often ethically sourced from their country of origin (in a similar way to world lager).

A number of outlets are trying to drive the connection between beer and food, often as an alternative to wine through food pairings. These outlets are aware that 40% of meals involve an alcoholic drink and that 52% of people say alcohol range is an important driver of where to eat (Source CGA Peach Brand Track). Of course, it goes without saying that with the beer flavour playing such a crucial role in this dynamic, it is imperative that the beer is served correctly in order to match the food and to help cement the connection.

Range Carefully

Outlets are increasing their ranges of beers to ensure they are capturing the trade up opportunity and demonstrating the breadth of the category. However, there is a very real danger of outlets putting on more beers than they can maintain.

In these instances throughputs are not enough to sustain a quality product and consumers receive an inferior version of the liquid and this may put them off returning to the outlet, or even worse give them second thoughts about continuing their journey into the beer category.

It is also important for outlets to ensure beer lines are cleaned at regular intervals and that equipment is well maintained to ensure that the consumer is getting the quality product they are willing to pay more for.

Quality Climb

The future of the market seems to be a continuation of current trends, with premiumisation within outlets and drinks categories and casual dining growth and craft becoming more mainstream. Premiumisation in drinks categories, and to an extent, craft are nothing unique to beer, we see the same trends within spirits, which means we have consumers with raised expectations of their drinks and surroundings and beer needs to ensure it keeps up with this trend.

Better quality outlets being here to stay means that there will be an on-going requirement for good quality beer to be served in the right way, at the right temperature. This will mean that consumers are willing to trade up and keep the pub trade tills ringing.

UK Beer Market Facts

- Mintel’s Pub Visiting Report 2015 shows 64% of adults visited the pub for a drink in 2014/15.
- Cask is forecast to account for 20% of all on trade beer sales by 2020 according to the Cask Report 2016.
- Lager remains the most popular type of beer, according to the Mintel Beer Report 2015, while ales, bitters, stouts and porters were drunk by one in five adults in the six months to October 2015 and craft beer by 20% in the same period.
- 62% of beer drinkers state they drink beer on a weekly basis, with 30% doing so a few times a week (Mintel Beer Report 2015).
- Quality awards are an enticement to 25% of beer drinkers (Mintel Beer Report 2015).
- Global information company the NPD Group predicts that the UK foodservice market will grow visits by 1.6% in 2016 and a further 1.2% in 2017, due to increasingly confident consumers and a potential further boost from the UEFA Euro Championship and the Rio 2016 Olympic Games.
BEER QUALITY UNDER THREAT

VIANET AND CASK MARQUE

Opportunity knocks in the on-trade beer market for quality beer experiences, with Cask Marque’s Beer Quality Survey Report 2016 showing that nearly...

Heineken's new 'Enjoy Heineken Responsibly' campaign research also shows that Millennials prioritise taste (41%) and quality (32%), when selecting alcoholic drinks, so for operators who are getting both right, sales will follow from this new generation of drinkers.

As CGA reports, the pub and on-trade beer markets remain a challenging trading environment with pubs still closing and beer competing more fiercely for a share of the drinks action in new, more food-led openings.

Vianet’s research, which is based on insight from over 200,000 Vianet devices, including iDraught, which currently tracks consumer experience on 730 million pints of beer every year in UK pubs, also shows that on-trade draught beer volumes decreased in all types of pub in 2015 by an average 3.45%, with the biggest decline in leased and tenanted pubs.

ON-TABLE BEER SALES

OVERALL YEAR ON YEAR PERFORMANCE 2015 V 2014 DRAUGHT BEER VOLUMES

Source: Vianet Business Insight

- TENANTED & LEASED: -3.80%
- MANAGED & INDEPENDENT: -3.33%
- REGIONAL BREWER: -3.24%

Research by the British Pub & Beer Association (BBPA) shows that overall on-trade beer sales fell by 1.5% in 2015, with 114 million pints lost from pubs, bars and restaurants.

But although on-trade beer volumes are still in decline, the rate of decline has reduced, with BBPA figures showing the average rate of decline over the past 10 years is 4.5%, so 2015’s slope is a positive slow-down and beer still accounts for a very important 70% of total on-trade alcoholic drink sales.

COMPETING WITH THE OFF-TRADE

Off-trade volumes have been more resolute than the on-trade in the past five years and in 2014, BBPA figures showed annual volume sales in the off-trade topped out of home sales for the first time while they remained stable in 2015.

Mintel’s Beer Quality Report 2015 shows that only 29% of beer drinkers are prepared to spend more than £4 a pint, reflecting the enduring price-sensitivity of the out of home market and that unable to compete on price, the quality and range of product and experience is where pub operators can win over the off-trade.

As Good Beer Guide editor Roger Protz says: “Pubs offer a different experience than buying beer in supermarkets. You won’t find the exciting range of beers in supermarkets as in bars such as the Draft House in London, as many come from small craft brewers who can’t afford supermarket discounts.”

Martin Hilton, Managing Director of Pure Craft Bar & Kitchen, Birmingham, winner of Best Beer Pub in the Great British Pub Awards 2015, adds: “Great cask beer is the one thing you can’t replicate at home, so operators need to be brilliant at it.”

Arguably there has also never been a more exciting time in the UK draught beer market with the of UK breweries, breadth of styles and wealth of products on offer, giving operators lots to play for.

“IN MY OPINION THERE ARE FAR TOO MANY PUBS WHO ARE HAPPY TO LET THE CUSTOMER DO THEIR QUALITY CONTROL FOR THEM AND JUST WAIT FOR BEER TO BE HANDED BACK WHEN DEEMED UNSATISFACTORY, BUT HOW MANY CUSTOMERS SAY NOTHING AND NEVER RETURN?”

NIEL BAIN
Brewery Director, Joules, winners of Publican Awards Best Brewing Pub Company 2015
QUALITY AT ITS BEST

As Vianet and Cask Marque’s research, based on its 9,000 accredited pubs shows, there is also a wealth of great pub operators that are delivering significant beer quality experiences.

HIGHEST NUMBER OF CASK MARQUE ACCREDITED PUBS BY TV REGION

1. WALES/WEST COUNTRY
2. CENTRAL
3. MERIDIAN
4. ANGLIA
5. LONDON
6. YORKSHIRE
7. GRANADA
8. WEST COUNTRY
9. BORDER
10. SCOTLAND
11. TYNE TEES
12. NORTHERN IRELAND

There is also a quality link between best quality beer and food hygiene, with Cask Marque research showing that 87.1% of Cask Marque accredited pubs also have a four or five star food hygiene rating with non Cask Marque pubs awarded an average 67.7% rating.

“With 50% of the beer we produce being drunk in pubs the partnership between the brewery and the pub is critical to ensure quality beer all the way to the bar. At a time of great excitement and interest in British beer we, along with our partners running pubs, must do all we can to share the knowledge on what makes great beer and make sure we deliver this time after time.”

ALEX BUCHANAN
Export and Marketing Manager, Thornbridge Brewery

IMPACT OF POOR BEER QUALITY

PROFIT LOSS
The average difference in beer volumes between a pub that cleans its lines and one that doesn’t is 50 barrels, which is 14,400 pints and at £3.50 per pint is a loss of £50,400 per year. (Vianet Business Insight)

YIELD LOSS
The pub industry is missing out on an annual pouring yield of £111,886 million, which could be achieved by improving yield by just 2%. (Vianet Business Insight)

LOST CUSTOMERS
Nearly 95% of consumers would stop visiting a pub if beer quality was consistently poor (Cask Marque).

REPUTATION DAMAGE
69% of people say that if they were served a poor quality beer in a pub, they would not drink it, complain and tell their friends about the experience. 12% would not complain about it, but would not drink it and would tell their friends, while 12% would mirror this though also share their views on social media.


BEER SALES AND PUB PROFITS UNDER THREAT

With Cask Marque’s Beer Quality Survey showing nearly 90% of consumers say beer quality is essential or very important when selecting a venue, ensuring beer quality is spot on every time is imperative.

Making sure beer is kept and served in optimum condition, at the correct temperature, dispensed through clean beer lines, served in clean glassware by well-trained staff is the only way Britain’s pub operators can ensure beer doesn’t lose more ground. These measures may even drive on trade volume growth.

Vianet and Cask Marque research shows that beer quality is under threat, with an increasing number of pub operators losing profits and customers by not getting cleaning, range, throughputs, beer temperature, equipment maintenance and training right to enable them to deliver the beer quality that today’s consumer expects and deserves.

Vianet insights revealed that one in three pints served to a UK consumer is via an unclean beer line and Cask Marque research shows on a visual inspection only 71% of beer lines are perfectly clean.

A focus on getting practices right in key areas including beer line cleaning is key to avoid a downward sales and profit spiral.

Operators that have already got the quality focus on their draught beer offer right, or work hard to get it right, will be in a strong position to capitalise on the many exciting opportunities 2016 offers the beer and pub markets.
TRADING INSIGHTS

Pubs score with rugby

Rugby has been among the most powerful drivers of beer trading peaks in the past two years; with the BBC reporting a 10 million audience for the England and France game on Super Saturday (March 21) when Wales and Scotland also competed.

The Rugby World Cup had an even bigger impact on average draught beer volumes in late September and October. 11.6 million viewers tuned in for England v Wales game on 26 September, the largest rugby audience in the UK since the 2007 final and the highest peak audience for a sporting event since the 2014 football World Cup. (Source ITV).

THE RUGBY WORLD CUP HELPED OCTOBER 2015 ACCOUNT FOR 8.72% OF PUBS’ TOTAL ANNUAL BEER SALES.

MERRY MONTH OF MAY

Vianet research, based on average site volumes for 2015, shows that after the festive season, which accounted for 9.5% of annual beer sales, double bank holiday month May was the second strongest performing month with an average 9.25% of the year’s trade going through pub tills.

YEAR ON YEAR CHANGE 2015 V 2014

Source: Vianet Business Insight

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YEAR ON YEAR CHANGE 2015 V 2014

Source: Vianet Business Insight
**BEER VOLUMES BY REGION**

There has been a relatively consistent decline in beer volumes across all regions of the UK, but Vianet’s research shows Scotland as seeing the largest decline, feeling the impact of the drink drive limit changes, which came in to force in December 2014 and reduced the legal alcohol limit from 80mg to 50mg in every 100ml of blood.

**SCOTLAND’S NEW DRINK DRIVE LAW IMPACT**

Vianet research shows the biggest volume decline in Scottish pubs since the new legal limit was introduced was either on a Sunday evening, as people were perhaps more focused on their morning commute to work, and Friday lunch time as people reduced their alcohol consumption with their lunch.

The Friday ‘after work’ pint saw a slight volume increase in trade, perhaps as consumers now looked to Friday and Saturday as the only days to relax on. Low ABV beers also initially saw a slight increase.

Overall results show that the reduction in the Scotland Drink Drive limit had a negative effect on pub trade, with year on year decline also 1.4% higher in Scotland compared to the rest of the UK.

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**HIGHEST VOLUME TRADING DAYS**

Based on overall beer volumes

<table>
<thead>
<tr>
<th>TRADING DATE</th>
<th>DAY OF WEEK</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>19/12/2015</td>
<td>Saturday</td>
<td>Saturday before Christmas</td>
</tr>
<tr>
<td>24/12/2015</td>
<td>Thursday</td>
<td>Christmas Eve</td>
</tr>
<tr>
<td>18/12/2015</td>
<td>Friday</td>
<td>Friday before Christmas</td>
</tr>
<tr>
<td>31/12/2015</td>
<td>Thursday</td>
<td>New Year’s Eve</td>
</tr>
<tr>
<td>18/04/2015</td>
<td>Saturday</td>
<td>Key football match</td>
</tr>
<tr>
<td>21/03/2015</td>
<td>Saturday</td>
<td>6 Nations - England, Scotland, Wales played</td>
</tr>
<tr>
<td>30/05/2015</td>
<td>Saturday</td>
<td>FA Cup Final</td>
</tr>
<tr>
<td>31/10/2015</td>
<td>Saturday</td>
<td>Halloween/Rugby World Cup Final</td>
</tr>
<tr>
<td>26/09/2015</td>
<td>Saturday</td>
<td>Rugby World Cup England v Wales</td>
</tr>
<tr>
<td>08/08/2015</td>
<td>Saturday</td>
<td>Football season kicks off</td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight

**TOP TEN TRADING DAYS**

Based on number of pubs who had these days in their top ten

<table>
<thead>
<tr>
<th>TRADING DATE</th>
<th>DAY OF WEEK</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>24/12/2015</td>
<td>Thursday</td>
<td>Christmas Eve</td>
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<tr>
<td>31/12/2015</td>
<td>Thursday</td>
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<td>18/12/2015</td>
<td>Friday</td>
<td>Friday before Christmas</td>
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<tr>
<td>31/10/2015</td>
<td>Saturday</td>
<td>Halloween/Rugby World Cup Final</td>
</tr>
<tr>
<td>05/04/2015</td>
<td>Friday</td>
<td>Easter weekend</td>
</tr>
<tr>
<td>19/12/2015</td>
<td>Saturday</td>
<td>Saturday before Christmas</td>
</tr>
<tr>
<td>26/12/2015</td>
<td>Saturday</td>
<td>Boxing Day</td>
</tr>
<tr>
<td>08/08/2015</td>
<td>Saturday</td>
<td>Football season kicks off</td>
</tr>
<tr>
<td>26/09/2015</td>
<td>Saturday</td>
<td>Rugby World Cup England v Wales</td>
</tr>
<tr>
<td>30/08/2015</td>
<td>Sunday</td>
<td>Bank holiday weekend</td>
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Source: Vianet Business Insight

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**BEER QUALITY REPORT 2016**

**TRADING HOTSPOTS 2015**

<table>
<thead>
<tr>
<th></th>
<th>JANUARY</th>
<th>FEBRUARY</th>
<th>MARCH</th>
<th>APRIL</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
<th>OCTOBER</th>
<th>NOVEMBER</th>
<th>DECEMBER</th>
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<tbody>
<tr>
<td>TENANTED &amp; LEASED</td>
<td>7.30%</td>
<td>7.18%</td>
<td>8.16%</td>
<td>8.57%</td>
<td>9.11%</td>
<td>8.11%</td>
<td>8.69%</td>
<td>9.11%</td>
<td>7.92%</td>
<td>8.60%</td>
<td>7.72%</td>
<td>9.54%</td>
</tr>
<tr>
<td>MANAGED &amp; INDEPENDENT</td>
<td>7.04%</td>
<td>7.33%</td>
<td>8.41%</td>
<td>8.54%</td>
<td>9.40%</td>
<td>7.70%</td>
<td>8.11%</td>
<td>8.57%</td>
<td>7.86%</td>
<td>9.07%</td>
<td>8.34%</td>
<td>9.63%</td>
</tr>
<tr>
<td>REGIONAL BREWER</td>
<td>7.34%</td>
<td>7.21%</td>
<td>8.19%</td>
<td>8.69%</td>
<td>9.25%</td>
<td>8.17%</td>
<td>8.81%</td>
<td>9.18%</td>
<td>7.92%</td>
<td>8.49%</td>
<td>7.40%</td>
<td>9.33%</td>
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**% OF YEAR’S TRADE**

<table>
<thead>
<tr>
<th></th>
<th>HIGH</th>
<th>LOW</th>
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<tbody>
<tr>
<td>Trading hotspots 2015</td>
<td></td>
<td></td>
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**% CHANGE YOY**

<table>
<thead>
<tr>
<th></th>
<th>GREATER LONDON</th>
<th>SOUTH EAST</th>
<th>HOME COUNTIES</th>
<th>SOUTH WEST</th>
<th>EAST MIDLANDS</th>
<th>NORTH EAST</th>
<th>NORTH WEST</th>
<th>WEST MIDLANDS</th>
<th>YORKSHIRE &amp; HUMBERSE</th>
<th>EAST ENGLAND</th>
<th>SCOTLAND (NORTH)</th>
<th>SCOTLAND (SOUTH &amp; CENTRAL)</th>
<th>WALES (NORTH)</th>
<th>WALES (SOUTH)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-6%</td>
<td>-5%</td>
<td>-3%</td>
<td>-2%</td>
<td>-1%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
<td>-7%</td>
<td>-6%</td>
</tr>
</tbody>
</table>
**Euro 2016 – What History Tells Us**

Euro 2016 kicks off in France on Friday, 10 June 2016 and presents a big opportunity for the pub trade to boost beer sales, with the tournament offering a £60m sales opportunity for pubs, according to Carlsberg UK research.

England is in Group B, along with Russia, Slovakia and Wales with England’s first game on Saturday, June 11 against Russia at 8pm.

Vianet research shows operators should plan their tactics carefully as there is currently a downwards trend from the World Cup 2010, with generally less volume driven by the national team.

Win or lose, it is the quality of the teams playing one another that draws crowds and drives beer volume.

<table>
<thead>
<tr>
<th>Group B</th>
<th>England</th>
<th>Russia</th>
<th>Slovakia</th>
<th>Wales</th>
</tr>
</thead>
</table>

**Average Volumes Per England Game**

<table>
<thead>
<tr>
<th></th>
<th>Drew</th>
<th>Lost</th>
<th>Win</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Cup 2010</td>
<td>322.50</td>
<td>297.87</td>
<td>280.50</td>
<td>305.92</td>
</tr>
<tr>
<td>World Cup 2014</td>
<td>122.76</td>
<td>240.80</td>
<td>215.88</td>
<td>202.53</td>
</tr>
<tr>
<td>Grand Total</td>
<td>227.89</td>
<td>252.47</td>
<td>237.13</td>
<td>239.54</td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight

**What History Tells Us**

- England versus Wales on Thursday, 16 June at 2pm will be the highest volume game if England fail to reach the knockout phases.
- England games drive an additional 50% of volume – getting the offering right here versus the competition should be the main focus.
- There is little evidence of teams outside the home nations generating a similar volume. Pubs should focus on these and then simply cover Friday and Saturday games – with a focus on the best teams.
- Timing matters; games on weekdays or even Sundays appear to show some customers will watch these at work or in the office. Concentrate on games where customers are likely to be out.
- If England are out of the competition; general interest is adversely affected with a 10% drop in beer volumes on matches post this; even the finals of competitions compare poorly with any England games.

Source: Vianet Business Insight
**THE HOT ISSUE**

**THE ISSUE**

Vianet research shows

**ONE IN 10 PUBS IN THE UK HAS AT SOME POINT IN THE TRADING YEAR, HAD AN ISSUE WITH BEER BEING SERVED TO CONSUMERS TOO WARM**

Source: Vianet Business Insight

**FOR NEARLY 90% OF CONSUMERS BEER QUALITY IS ESSENTIAL OR VERY IMPORTANT WHEN SELECTING A VENUE**

Source: Cask Marque Beer Quality Survey 2016

**ONE IN FOUR CONSUMERS RATE THE QUALITY OF BEER BEING SERVED AT THE RIGHT TEMPERATURE AS JUST SATISFACTORY**

Source: Cask Marque Beer Quality Survey 2016

**THE IMPACT**

“THE BIGGEST CRIME AGAINST BEER IN PUBS IS AN OLD BUG BEAR, BUT A VERY RELEVANT ONE — TEMPERATURE CONTROL. KEG BEER THAT IS TOO COLD AND CASK BEER THAT IS TOO WARM. THERE IS NOTHING MORE DISAPPOINTING THAN RECEIVING A BEER THAT IS NOT THE CORRECT TEMPERATURE.”

DAN ROWNTREE
Founder, Craft Beer Rising

**WHY IS THIS HAPPENING?**

Beer temperatures rise due to cellar issues such as cooler problems or not having the right equipment such as jacketed beer engines for cask. Cask Marque research shows currently a third of pubs don’t have such equipment to deliver beer in spec both in summer and winter. Brewers recommend beer should be served in the glass at the following temperatures:

- Cask: 11–13°C
- Keg beer: 5–8°C
- Lager: 5–8°C
- Extra cold: 2–5°C

**% DRAFT BEER SERVED TOO WARM**

<table>
<thead>
<tr>
<th>BEER</th>
<th>% OF PINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALE – CASK</td>
<td>5%</td>
</tr>
<tr>
<td>ALE – KEG</td>
<td>7%</td>
</tr>
<tr>
<td>CIDER</td>
<td>4%</td>
</tr>
<tr>
<td>PREMIUM LAGER</td>
<td>6%</td>
</tr>
<tr>
<td>STANDARD LAGER</td>
<td>5%</td>
</tr>
<tr>
<td>STOUT</td>
<td>10%</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight
As temperatures increased last summer, so did warm beer issues. In June, July and August 2015, Vianet research shows overall all types of products were served an average 7.5% too warm.

In June and July, 8% of pints of cask measured, were too warm; in August, 7% of pints were too warm.

Premium lagers and ale (keg) are the products most impacted across all types of pubs. Stout is the biggest product casualty of being served too warm in managed, independent, tenanted and leased pubs.

7% of premium and standard lager was served out of recommended temperature specification over the same period and 13% of stout.

“The average pub is not getting temperature right. I don’t drink in a local pub because they always serve the beer too cold. It’s an issue that needs to be cracked. Also if your cellar is too warm, beer is being ruined.”

SOPHIE ATHERTON
Beer Writer and Sommelier

REGIONS WITH HIGHEST % OF BEER TOO WARM

SCOTLAND
YORKSHIRE & HUMBERSIDE
NORTH WEST
GREATER LONDON
EAST ENGLAND
WALES
NORTH EAST
EAST MIDLANDS
SOUTH WEST
HOME COUNTIES
WEST MIDLANDS
SOUTH EAST

Source: Vianet Business Insight

COOL OPERATORS

Customers are most likely to be served a pint at the brewer recommended temperatures in York and a warm pint in Wakefield.

MOST LIKELY

YORK
SWINDON
SOUTHAMPTON
TORQUAY
NORTH WEST LONDON
STOKE-ON-TRENT
REDHILL
CHESTER
WARRINGTON
BRIGHTON

Source: Vianet Business Insight

LEAST LIKELY

WAKEFIELD
SOUTH WEST LONDON
MANCHESTER
GLASGOW
LEEDS
CREWE
LUTON
BROMLEY
EDINBURGH
CHELMSFORD

Source: Vianet Business Insight

KEEPING COOL

On a weekly basis check the temperature of all beers and casks.

Ensure coolers are topped up. Cask Marque research shows 33% of ale pythons are low on water.

Ensure beer lines are cooled to the point of dispense.

Ensure cellar cooling is set to the correct temperature of 11–13°C and vents are free from dust and obstructions.

Source: Cask Marque
QUALITY OVER QUANTITY

THE ISSUE

Data from Vianet shows that British pubs are over ranging by an average of 5 pumps.

PUB CUSTOMERS PRIORITY
BEER QUALITY OVER RANGE

Cask Marque’s Beer Quality Survey 2016 shows 60% of consumers would rather be offered a smaller range of beers served at better quality than have a bigger choice.

WHY IS THIS HAPPENING?

When it comes to food and drink, consumers are continuing to demand a wide choice. However, when it comes to beer, quality is equally, if not more, important to ensure consumers are getting the best out of their visit. At present there is a temptation for operators to entice customers with a wide range of exciting beer options, forgetting that quality, not quantity, is the main sales driver.

With beer sales still accounting for around 70% of the average pubs’ wet sales, an increased consumer interest in localism/regional brands and growing demand for cask and craft beers, it isn’t hard to understand why operators have pumped up the volume on the number of taps on offer, trying to cater for what they think customers might want – yet is this the right decision?

THE IMPACT

Stocking too many draught beers can have an adverse impact on quality and yield – if products don’t sell in time the lack of throughput affects the quality of the beer thus affecting sales which then causes wastage and a loss of yield which seriously damages sales and profitability.

At present in the UK there are simply too many beer taps on bars, and all types of pubs from leased and tenanted to independents through to managed have a tendency to over tap.

“YOU HAVE GOT TO MAKE SURE YOU ARE PUTTING BEERS ON YOUR BAR THAT SELL AND SELL IN GOOD TIME. QUALITY COMES FIRST AND RANGE COMES AFTER.”

SOPHIE ATHERTON
Beer Writer and Sommelier

AVERAGE TAPS BY PRODUCT TYPE

<table>
<thead>
<tr>
<th></th>
<th>Tenanted &amp; Leased</th>
<th>Managed &amp; Independent</th>
<th>Regional Brewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ale – Cask</td>
<td>4.3</td>
<td>4.2</td>
<td>4.6</td>
</tr>
<tr>
<td>Ale – Keg</td>
<td>2.4</td>
<td>3.0</td>
<td>2.1</td>
</tr>
<tr>
<td>Cider</td>
<td>2.1</td>
<td>2.4</td>
<td>1.9</td>
</tr>
<tr>
<td>Premium Lager</td>
<td>2.6</td>
<td>4.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Standard Lager</td>
<td>3.9</td>
<td>5.2</td>
<td>2.6</td>
</tr>
<tr>
<td>Stout</td>
<td>1.5</td>
<td>1.5</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight
**AVERAGE TAP COUNT**

<table>
<thead>
<tr>
<th>Region</th>
<th>Ale - Cask</th>
<th>Ale - Keg</th>
<th>Cider</th>
<th>Premium Lager</th>
<th>Standard Lager</th>
<th>Stout</th>
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</thead>
<tbody>
<tr>
<td>East England</td>
<td>4.4</td>
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<td>1.7</td>
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<tr>
<td>East Midlands</td>
<td>4.8</td>
<td>2.5</td>
<td>2.2</td>
<td>2.3</td>
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<td>Greater London</td>
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<td>Home Counties</td>
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<td>1.3</td>
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<tr>
<td>North East</td>
<td>3.3</td>
<td>3.7</td>
<td>2.9</td>
<td>2.6</td>
<td>5.1</td>
<td>1.4</td>
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<tr>
<td>North West</td>
<td>4.1</td>
<td>2.4</td>
<td>1.7</td>
<td>2.4</td>
<td>3.7</td>
<td>1.4</td>
</tr>
<tr>
<td>Scotland</td>
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<td>2.7</td>
<td>1.8</td>
<td>2.0</td>
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<td>1.5</td>
</tr>
<tr>
<td>South East</td>
<td>4.4</td>
<td>1.9</td>
<td>1.9</td>
<td>2.8</td>
<td>3.3</td>
<td>1.4</td>
</tr>
<tr>
<td>South West</td>
<td>4.4</td>
<td>2.2</td>
<td>2.8</td>
<td>2.5</td>
<td>2.7</td>
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<td>Wales</td>
<td>4.2</td>
<td>2.6</td>
<td>2.4</td>
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<td>3.9</td>
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<td>4.8</td>
<td>2.5</td>
<td>2.5</td>
<td>2.2</td>
<td>4.2</td>
<td>1.5</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>4.9</td>
<td>2.9</td>
<td>2.1</td>
<td>2.2</td>
<td>4.6</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight

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**GETTING THE RANGE RIGHT**

- 49% of consumers look for well-known brands when buying beers
  
  Source: Mintel Beer Report 2015

- Cask Marque recommends a useful rule of thumb is not to stock an additional hand pump unless existing pumps are selling a firkin (nine gallons) on three days or less

- Rotate guest beers monthly not weekly as not all your customers will visit the pub every week and if they discover a beer they like they will want to purchase it on their return

---

**“IF YOU ARE CONCERNED ABOUT WASTAGE AND QUALITY ON DRAUGHT, THE ANSWER TO ME IS QUITE SIMPLE. THERE IS AN OVERWHELMING CHOICE FOR YOUR CUSTOMERS, HOWEVER DON’T BE OVERWHELMED YOURSELF. GO BACK TO BASIC MARKETING, FIND OUT OR JUDGE WHAT YOUR CORE CUSTOMERS WANT AND GIVE THAT TO THEM. LIKE SOCIAL MEDIA, YOU DON’T HAVE TO DO IT JUST BECAUSE EVERYONE ELSE IS.”**

MARK MCCULLOCH
Branding and Marketing Expert, CEO WE ARE Spectacular

---

**TOP 10 UK PRODUCTS**

- Carling
- Fosters
- Carlsberg
- Guinness
- John Smiths Extra Smooth
- Bulmers Strongbow
- Stella Artois
- Kronenbourg 1664
- Tennent’s Lager
- San Miguel

Source: Vianet Business Insight – based on overall draught volumes 2015 – based on insight from over 200,000 Vianet devices, including iDraught, which currently track consumer experience on 730 million pints of beer every year in pubs across the UK, the equivalent to £2.5 billion of consumer spend.
GO WITH THE FLOWS

THE ISSUE – TOO MANY TAPS

Evidence from both Cask Marque research and Vianet Business Insight shows that there are just too many beer taps on Britain’s bars, for the amount of beer that is collectively being pulled through the lines.

87% OF CASK HANDPULLS ARE DISPENSING
LESS THAN 144 PINTS PER WEEK
AND 30% LESS THAN 20 PINTS PER WEEK

VIANET RESEARCH SHOWS THAT

80% OF KEG TAPS ARE DISPENSING
LESS THAN 144 PINTS PER WEEK AND
30% LESS THAN 20 PINTS PER WEEK

VIANET RESEARCH SHOWS THAT

THE IMPACT

EACH WASTED TAP COSTS EACH PUB AROUND
£200 PER ANNUM
(CLEANING WASTAGE AND RUNNING COSTS)

AND

COSTS THE INDUSTRY AROUND
£52,750,000 PER ANNUM
(52,750 PUBS X 5 TAPS TOO MANY X £200)

72% OF CONSUMERS IF SERVED A POOR QUALITY BEER IN A PUB WOULD NOT DRINK IT AND COMPLAIN, ASKING FOR A DIFFERENT PRODUCT
(CASK MARQUE BEER QUALITY SURVEY 2016)

“It is a difficult decision to make for any licensee to pull a beer tap off, however, too many times I have purchased a beer that has been on just that little bit too long. This disappoints not only the customer in their expectations of how you operate but may also damage the reputation of the brewery in some instances if not challenged. Often the beer is a victim of the fact that the bar has so many offerings of beer.”

SHANE MCNAMARA,
Beer Sommelier, Beer Academy

(Cask Marque consider low throughput to be less than 144 pints per week)
WHY IS THIS HAPPENING?

All beers have a sell by date and once broached the quality will quickly deteriorate, particularly with cask, with the taste of the beer detrimentally impacted, costing you sales and your pub’s reputation for a great pint.

Prior to being prepared for sale, cask is sealed. Once open, if cask beer isn’t sold within three days, then oxygen starts to impact the quality of beer and the product begins to deteriorate.

Many pubs have increased their beer range too much to be able to get the required throughputs to ensure the quality of the beer is maintained.

All types of pub have too many taps and Vianet Business Insight research shows that to get the best throughput, all pubs could actually reduce the number of taps on offer significantly, with 11 taps the ideal for tenanted and leased, 10 for regional brewers and 15 for managed and independent pubs. This needs to be assessed regularly to take into account seasonal peaks and localised trade issues – you always need a buffer – and typically 20% of taps do the majority of the volumes in most pubs anyway.
### IDEAL TAP LINE-UP

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<td>4</td>
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**OVERALL**

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<td>1.3</td>
</tr>
</tbody>
</table>

Regional brewers and managed and independent pubs have five taps over the ideal line-up and tenanted and leased six taps.

### IMPROVING THROUGHPUT

- Review your range and try and meet recommended throughputs.
- Pricing can have an influence on throughputs.
- Reduce your range of cask in quiet trading periods of the week or in quieter times of the year.

Source: Vianet Business Insight
The average difference in beer volumes between a pub that cleans its lines and one that doesn’t is around 10%. This minor difference adds up to a significant yield reduction. Each missed cleaning escalates wastage and ultimately drives operators’ quality and profits downwards.

Stopping regular cleaning starts a downwards spiral. You get an increase in waste, driving an even poorer yield as the consumer looks elsewhere for a quality product, lowering your overall revenues and GP.


Why is this happening?

Operators stop cleaning for two main reasons:

YIELD: Pubs generally have little visibility of the true causes of poor yield as they simply cannot see everything happening behind the bar 24/7 365 days a year. While the problem may be due to wastage issues or incorrectly tilted drinks, it can be tempting for operators to try to recover the yield by ceasing cleaning, allowing them to reduce the wastage that would usually incur.

TIME: Many operators also feel that the brewer recommended seven-day line-cleaning takes up too much time when running a busy pub. Those who haven’t received any complaints from customers about poor quality beer may see this as a reason to keep line-cleaning to a minimum.

Yield reduction

But new Vianet research shows what many people have often thought but struggled to prove - that stopping regular cleaning is a false economy and actually drives operators’ quality and profits downwards.

Not sticking to the recommended line-cleaning times has a big impact on yield. When a clean is overdue wastage levels increase due to the lower quality beer, causing a lower yield. This bounces back the moment a clean takes place.

Stopping regular cleaning starts a downwards spiral, you get an increase in waste, driving an even poorer yield as the consumer looks elsewhere for a quality product, lowering your overall revenues and GP.
One in every two pints in these towns and cities is being served through unclean beer lines with Reading in Berkshire the worst place for crimes against beer cleaning and Doncaster the best place to enjoy a perfect pint, with beer drinkers having less than a one in five chance of being served a bad pint.

North/South Quality Divide

Although the industry average is a third, the quantity of beer going through unclean lines can increase up to 65% in managed and independent sites in some regions.

Beer drinkers in the North are more likely to be served a perfect pint, with a significantly lower average of unclean beer lines than in the South, even though according to the Good Pub Guide 2016 research drinkers in the South pay 82p extra a pint than Northerners.

The South East and the Home Counties, which rank as the third and fourth worst regions for unclean beer lines are also among the top regions for beer prices, with the Good Pub Guide 2016 research showing that the average price of a pint in London is £3.92 per pint and Surrey and Buckinghamshire also ranking in the most expensive counties for beer.

London and the South East also had two of the highest failure rates of Cask Marque audits in 2015.

Improving Beer Line Cleaning

- All brewers recommend that operators clean beer lines every seven days. Make it a fixed day of the week so it becomes part of the team’s routine.
- It is essential to use a reputable line cleaning solution because if it is not as effective it will result in poor line cleaning. Ask your brewer for their recommendation.
- Follow the manufacturer’s instructions. Don’t take short cuts as you will only be cheating yourself.
- Ensure that no yeast is left in the fob detectors by carrying out a visual check.
- Always clean the keg couplings before connecting a new keg so no bacteria grows and taints the beer.
- Soak and clean thoroughly all beer taps after use so that they are ready when needed.

Source: Cask Marque
THE ISSUE

“Bubbles, cleaning residue and grease all have a detrimental impact on the quality of the beer. It is like creating great food but putting it on a dirty plate. We are geeky about glassware. We focus on it at site design stage and look at how many glasses we will need for a peak session, how long they are going to take to dry etc, so they are at the right temperature for service.”

MARTIN HILTON
Managing Director, Pure Craft Bar, Birmingham.
Winner of the Great British Pub Awards’ Best Beer Pub 2015

THE IMPACT

- There is no point working hard to keep your beer in perfect condition and serving it at the ideal temperature to then let customers down by serving their beer in dirty or damaged glassware.

- Not cleaning your beer glasses can lead to dirty and unhygienic glasses. This can cause flat beer and poor beer head retention, due to the head being killed off by a protein film left by beer which is only removed by “renovation.”

- Chemicals from glassware left on the glass from excessive use of rinse aid and detergent stick to the glasses and can affect the quality of the beer.

- Poor cleaning will cause streaks and spots to be left on glasses, resulting in etching or permanent damage to the glass, all of which are unacceptable to customers.

- Presentation is a crucial part of a customer’s quality beer drinking experience, and if operators don’t deliver they will go elsewhere. You need to deliver class with your glass.

1 IN 5 CONSUMERS RATE THE CLEANLINESS OF THE GLASSWARE THEIR BEER IS SERVED IN AS ONLY SATISFACTORY OR POOR

(Cask Marque Beer Quality Survey 2016)

33% OF GLASSES ARE DIRTY

AND

25% OF GLASSWASHERS ARE UNHYGIENIC

CASK MARQUE RESEARCH SHOWS:

1 IN 5 CONSUMERS

RATE THE CLEANLINESS OF THE GLASSWARE THEIR BEER IS SERVED IN

AS ONLY SATISFACTORY OR POOR

(Cask Marque Beer Quality Survey 2016)

ONLY 67% OF pubs in Cask Marque’s Scores on the Cellar Doors GET AN EXCELLENT RATING FOR THEIR GLASSWARE

Source: Vianet Business Insight
WHY IS THIS HAPPENING?

Operators tend to forget that they need to renovate their glassware on a regular basis to remove invisible protein haze that is left on the glass by beer.

In addition, Britain has predominantly hard water, which means that the detergent by the glasswasher is not as effective as it should be. Look online to find out how hard the water is in your area and if necessary, install a water softener, and if you already have one, don’t forget to top it up! Water softeners also mean you will not need to use as much detergent, thus saving money and at the same time obtaining clean glassware.

IS YOUR GLASSWARE DIRTY?

Try these tests:

- Take a moist white serviette and wipe the inside rim of a supposedly clean pint glass. If there is a brown deposit showing then there is protein build up on the glass. Or fill a glass with water and make sure the outside is dry and then turn the glass upside down. If the water droplets roll in a straight line down the glass it is clean. Any grease or protein build up will cause the water to run off at an angle.

- If there is a film of bubbles on the inside of a pint glass when full, then it is a sure sign that the glass is not clean. The bubbles will only stick to impurities. Ideally all bubbles should originate from the base of the glass.

- Check your glasswasher and look for beige, pink or even black film deposits (built up by growing yeast cells) around the door and door hinges. If this exists then it will transfer to all glasses and give poor results.

HOW TO SHINE

- Clean the nozzles on the glasswasher daily just like the sparklers on the beer taps.

- Leave the machine door open overnight. This will allow the bacteria and algae to dry out and then usually it will die. The machine should also then be easier to keep clean.

- Renovate your glassware to bring it back to a satisfactory condition. Liquid renovate is recommended as it is not caustic and can be used as frequently as every wash cycle or as rarely as once a month.

- Ensure the rinse aid is of good quality and never overdosed.

WANT TO FIND OUT MORE?

For more tips download the Glassware Troubleshooting Guide at www.cask-marque.co.uk

Source: Cask Marque
YIELD: THE SILENT ENEMY

THE ISSUE

British pubs are missing an achievable pouring yield and till yield by an average of 2% in each area. (Source: Vianet Business Insight)

THE IMPACT

Missing out on 2% of a pouring yield equates to an annual missed profit opportunity of £111m*.

*(£111,866, 400)

Missing out on 2% of till yield equates to an annual missed profit opportunity of £222m.

*Source: Vianet Business Insight

Why is this happening?

Operators can lose as much as 7% yield due to the impact of unclean beer lines on their ability to pour. (Vianet)

Poor pouring technique by bar staff leads to beer wastage in drip trays.

Theft – not all pints poured are being rung through tills.

At the moment, yield loss is invisible and therefore seems unmeasurable.

% sites not achieving target yield all products

- Tenanted & Leased: 92%
- Managed & Independent: 75%
- Regional Brewer: 96%

% of sites not achieving target yield on standard lagers

- Tenanted & Leased: 62.3%
- Managed & Independent: 44.5%
- Regional Brewer: 61.7%

Source: Vianet Business Insight

Regional picture: North yields success

As with beer line cleaning there seems to be a divide between the North and South on yields being achieved, with a 2% swing between pubs in the North East and South East.

This 2% is worth a huge amount to any operator. Many Northern drinkers prefer their pints with a good head on, so it could be worth Southern operators promoting a head on a pint to boost their yields too.

Regional brewers

- Tenanted & Leased: 96%
- Managed & Independent: 61.7%
- Regional: 62.3%

Source: Vianet Business Insight

Tim Tomlinson, BII Licensee of the Year 2015 finalist, uses iDraught to monitor yields at his two Lancaster pubs. He says:

“It has given us a direct bottom line benefit in product yields, with cost savings equal to £8,000 per year, just from beer wastage.”

SUCCESSFUL YIELDS BY REGION

1. North East
2. Scotland (South & Central)
3. Yorkshire & Humberside
4. North West
5. Scotland (North)
6. West Midlands
7. Wales (North)
8. East Midlands
9. Greater London
10. Home Counties
11. East England
12. South West
13. South East
14. Wales (South)

Source: Vianet Business Insight

This could be caused by any of the issues highlighted to date in terms of poor cleaning of beer lines, low throughputs, beer dispensed at the wrong temperature and dirty glassware or beer dispensed incorrectly. However the operator doesn’t know which of these it is.

There is a widespread lack of knowledge and misconceptions about yield in the industry. It is in the interest of operators to maximise the yields from their beer sales because this directly affects bottom line profitability.
## Top 8 Regions by Product Type

<table>
<thead>
<tr>
<th>ALE – CASK</th>
<th>CIDER</th>
<th>PREMIUM LAGER</th>
<th>ALE – KEG</th>
<th>STANDARD LAGER</th>
<th>STOUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>North East</td>
<td>North East</td>
<td>Yorkshire &amp; Humberside</td>
<td>Yorkshire &amp; Humberside</td>
<td>North East and Home Counties</td>
</tr>
<tr>
<td>North East</td>
<td>East Midlands</td>
<td>Yorkshire &amp; Humberside</td>
<td>North East</td>
<td>Scotland</td>
<td>East England</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>North West</td>
<td>Scotland &amp; Wales</td>
<td>North West/ East Midlands</td>
<td>Wales/ North East</td>
<td>East Midlands/Greater London</td>
</tr>
<tr>
<td>North West</td>
<td>Yorkshire &amp; Humberside</td>
<td>North West and Greater London</td>
<td>Wales</td>
<td>North West</td>
<td>Yorkshire &amp; Humberside, North West, West Midlands &amp; Wales</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Wales</td>
<td>West Midlands</td>
<td>East England</td>
<td>West Midlands</td>
<td>Scotland</td>
</tr>
<tr>
<td>Greater London</td>
<td>West Midlands</td>
<td>East Midlands</td>
<td>Greater London</td>
<td>East Midlands</td>
<td></td>
</tr>
<tr>
<td>Wales &amp; Home Counties</td>
<td>Greater London</td>
<td>Home Counties</td>
<td>Home Counties</td>
<td>Greater London</td>
<td></td>
</tr>
<tr>
<td>East Midlands &amp; East England</td>
<td>East England</td>
<td>East England</td>
<td>Scotland</td>
<td>Home Counties</td>
<td></td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight

### Most/Least Successful Areas

#### Most Successful Yield

1. Cleveland
2. Wolverhampton
3. Huddersfield
4. Leeds
5. Edinburgh
6. Wakefield
7. North West London
8. Sheffield
9. Bradford
10. Manchester

#### Least Successful Yield

1. Salisbury
2. Taunton
3. Bromley
4. Tunbridge Wells
5. Southend-on-Sea
6. Bristol
7. St Albans
8. Exeter
9. Kingston upon Thames
10. Southampton

Source: Vianet Business Insight

### Yield More

- Don’t cut corners with beer line cleaning – it is false economy.
- Ensure beer is being served at the right temperature.
- Make sure you aren’t over-ranging, to give you good throughputs.
- Train to gain: reduce wastage by improving staff pouring techniques. Staff can take a free e-learning programme, Cask Beer Uncovered to do this.
- Use tilting stillages in cellar on cask to ensure there is as little sediment as possible left in the finished cask.
NOT EQUIPPED FOR QUALITY

THE ISSUE

Warm beer gives customers a poor quality experience and operators potential wastage and loss of further sales. Cask Marque’s Beer Quality Survey 2016 says, 61% of people would not drink poor quality beer if served in a pub, and would complain about it and tell their friends.

Cask beer needs to be at the right temperature to condition correctly. Too warm and it becomes over-conditioned, too cold and it lacks condition which can causes a chill haze and looks unappetising.

If not maintained properly, equipment can break down at pressure points – usually at the pub’s busiest time, leading to disappointed customers and loss of sales.

Technical service call outs aren’t cheap.

THE IMPACT

Cooler failures & maintenance reports can increase by 100% over Easter and Summer and are very temperature dependent.

The recommended cellar temperature is 11 – 13°C if beer gets too warm it causes fobbing which leads to a reduction in yields & profits.

“WE ALSO SEE A DRAMATIC INCREASE IN COOLER MAINTENANCE CALLS RELATING TO SIGNIFICANT EVENTS, SUCH AS THE WEEKEND THE SCHOOL HOLIDAYS START WILL BE 50% HIGHER THAN THE WEEKEND BEFORE”

Source: Vianet Business Insight

Source: Innserve

Source: Innserve
**WHY IS THIS HAPPENING?**

There are not enough regular checks on cellar temperature and core cellar equipment. Equipment in the cellar and bar needs regular servicing to prevent breakdowns. Routine maintenance is preventative maintenance.

If coolers and remotes are not topped up with water and maintained properly, they become ineffective and can breakdown leading to warm and fobbing beer.

The average star rating for Cask Marque’s Scores on the Cellar Doors scheme is three stars - satisfactory. The scheme’s 11-point audit includes beer line cleanliness and equipment maintenance. Four or five stars is the rating Cask Marque says all good pubs ought to achieve.

---

### CASK COOLERS

<table>
<thead>
<tr>
<th>PUB TYPE</th>
<th>AVERAGE DAYS PER MONTH RUNNING TOO HIGH</th>
<th>AVERAGE DAYS PER MONTH RUNNING TOO LOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEASED</td>
<td>4.6</td>
<td>3.7</td>
</tr>
<tr>
<td>MANAGED &amp; INDEPENDENT</td>
<td>2.4</td>
<td>7.0</td>
</tr>
<tr>
<td>REGIONAL BREWER</td>
<td>2.8</td>
<td>2.2</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>4.1</strong></td>
<td><strong>3.5</strong></td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight

### REMOTES

<table>
<thead>
<tr>
<th>PUB TYPE</th>
<th>AVERAGE OF HIGH DAYS PER MONTH</th>
</tr>
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<tbody>
<tr>
<td>LEASED</td>
<td>3.3</td>
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<tr>
<td>MANAGED &amp; INDEPENDENT</td>
<td>4.2</td>
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<tr>
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</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3.3</strong></td>
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</tbody>
</table>

Source: Vianet Business Insight

### CELLAR TEMPERATURES

<table>
<thead>
<tr>
<th>PUB TYPE</th>
<th>AVERAGE DAYS PER MONTH CELLARS ARE RUNNING TOO WARM (OVER 14°C)</th>
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<tbody>
<tr>
<td>LEASED</td>
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<tr>
<td>MANAGED &amp; INDEPENDENT</td>
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<tr>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>4.0</strong></td>
</tr>
</tbody>
</table>

Source: Vianet Business Insight
KEEPING COOL

Check cellar temperatures and beer in the glass on a weekly basis to see if within spec. If not, ring technical services. Have a wall thermometer to check cellar temperature.

Regularly check water level in coolers and remotes so they function correctly.

Ensure vents and grills on the cellar cooler and remotes are free from dust, and make sure no boxes obstruct the air flow around coolers.

Source: Cask Marque
### Cellars Only

#### Average of High Days

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
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<tbody>
<tr>
<td>EAST ENGLAND</td>
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<td>EAST MIDLANDS</td>
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<td>GREATER LONDON</td>
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<tr>
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<tr>
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<tr>
<td>WALES</td>
<td>3.55</td>
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<td>WEST MIDLANDS</td>
<td>3.9</td>
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<tr>
<td>YORKSHIRE &amp; HUMBERSIDE</td>
<td>3.3</td>
</tr>
</tbody>
</table>

**Overall Average**
- Tenanted & Leased: 4.2
- Managed & Independent: 3.7
- Regional Brewers: 2.5

### Cask Coolers Only

#### Average of High Days

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
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<tbody>
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<tr>
<td>HOME COUNTIES</td>
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<tr>
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<tr>
<td>YORKSHIRE &amp; HUMBERSIDE</td>
<td>1.9</td>
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</tbody>
</table>

**Overall Average**
- Tenanted & Leased: 4.6
- Managed & Independent: 2.4
- Regional Brewers: 2.8

### Remotes (Incl Glycol)

#### Average of High Days

<table>
<thead>
<tr>
<th>Region</th>
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</tr>
</thead>
<tbody>
<tr>
<td>EAST ENGLAND</td>
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<td>3.7</td>
</tr>
</tbody>
</table>

**Overall Average**
- Tenanted & Leased: 3.3
- Managed & Independent: 4.2
- Regional Brewers: 3.2

---

“We also see a dramatic increase in cooler maintenance calls relating to significant events, such as the weekend the school holidays start will be 50% higher than the weekend before.”

Tim Heenan
Innserv
BII Licensee of the Year 2015 Keith Marsden runs the Prince of Wales and Dark Horse pubs in Moseley, Birmingham, and both have iDraught installed.

He uses the system to drive his bottom line and make changes to his businesses.

“It’s shockingly good, really. We’ve used iDraught to add £8-10,000 to our bottom line.”

Keith says: “It’s shockingly good, really. For us it’s about managing all the details to improve our bottom line profitability and we can use technology, and Vianet in particular, to help us do that.”

He uses the iDraught system to monitor beer yield on a daily basis and to make sure that, on his craft lagers or any products that have oversized glasses, staff are only pouring a perfect pint.

He adds: “When you’re doing such high volumes (£1.5 million net), about 60% of that is beer sales, so every little 1% we can improve our yield by gives us around £8-10k extra profit on the bottom line.”

William Robinson, Managing Director of Robinsons pubs, which has 330 pubs across the North West and Wales, says: “For us, iDraught is about the ongoing value it adds to the business. Our BDMs are provided with detailed management information, and they are using it over and above pub level to help licensees boost their businesses”.

He adds: “Our main reason for installing it into our pubs is to help our licensees understand why they aren’t getting profit they should from their beer, as there is a massive unspoken problem about yield with pubs across the UK.

“The iDraught system can show licensees that yield problems are costing them money, and we can then help implement training to improve performance.”

Robinson says one of the biggest benefits to the company is in terms of technical services, as the system allows licensees to see core cellar temperature, temperature at point of dispense, and can analyse the dispense issues over time.

“There is a massive unspoken problem about yield with pubs across the UK.”

He adds: “We can use this valuable information to potentially rectify any issues on that site, by talking the licensee through possible solutions over the phone, meaning a better service for the licensee and a more cost effective service for Robinsons.”
Hydes has reported a 2.2% increase in cask beer yields in its managed estate following the roll out of a newly designed training programme.

Beer School is a ‘Train the Trainer’ led initiative developed in conjunction with Cask Marque.

A ‘Beer Champion’ from all managed sites attended a half-day training course at Hydes covering the commercial importance of the cask beer category, how to promote cask beer, how to improve quality and how to run tutored sessions with their teams back on site.

Beer School was trialled with four sites early in 2015, and after monitoring yield performance, volume and staff knowledge, the programme was rolled out to the rest of the managed estate in September.

All sites completed a series of pre-training exercises, which included taking the ‘Cask Beer Uncovered’ e-learning programme developed by the Cask Matters group.

James Robinson, Training Manager at Hydes says:

“Our aim with Beer School was to ensure cask beer is at the heart of all our pubs, and the sites fully understand how commercially important cask is.”

He adds: “From the outset, we recognised that some managers and their teams are not cask drinkers, but we wanted to ensure they had a sound knowledge of what the product is and the importance of this category, which in turn would enable them to recommend the product to their customers. We are delighted with the outcome and the positive results we are seeing.”

Annabel Smith, training consultant at Cask Marque says: “We wanted the Beer Champions to be able to deliver all the learning outcomes and information back on site. For this reason, when the Beer Champions attended the course at the brewery, we armed them with a series of exercises and training tools which they could easily replicate with their staff.”

All the sites now have access to a Cask Beer online training folder where they can download quizzes and worksheets to use with their own teams.

Roger Ryman, Head Brewer at St Austell, explains why they are the best tenanted pub group for beer quality in the glass:

**OUR KEY INGREDIENTS:**
- Investment in cellars and equipment including cooling jackets
- Having a Trade Quality Brewer

**SUPPORT FOR NEW TENANTS INCLUDES:**
- BII cellar management training
- A visit from the technical services team in week one to check equipment and cleaning regime
- A visit from a quality brewer in the first month to instil practices
- Cask Marque six monthly visits to monitor quality standards

Roger recommends operators: “Ensure a strong cleaning programme and stock turnover.”
CASK MARQUE

Raising beer quality standards

Cask Marque has helped put beer quality on the pub retailer’s agenda and all the major brewers and retailers have committed to improve and maintain quality standards. We know the quality and presentation of food served in pubs is important, so should the quality and presentation of beer and other drinks matter?

Cask Marque has 9,690 pubs with our award and beer quality is monitored in these pubs by 40 assessors who make over 22,000 pub visits a year.

Training is key to quality and Cask Marque are the number one providers of cellar management training in the UK. To reinforce best practice, Cask Marque have now developed a cellar audit where pubs gain a star rating called Scores on the Cellar Doors.

“Within the next 12 months Scores on the Doors will become a major driver to improve quality standards”

Cask Marque is not only concerned with what happens in the pub, but also the supply chain and the brewery. The Distributor Charter and SALSA+Beer accreditations cover these key areas. This is all part of the Cask Marque Grain to Glass best practice initiative.

Consumers know which the good pubs are and 56% of beer drinkers are now aware of the Cask Marque plaque. Therefore quality does matter.

We would like to take this opportunity to also thank all those retailers who have supported Cask Marque over the years. They can take credit in driving up standards in pub retailing.

“THE SUPPORT CASK MARQUE GIVES OUR CUSTOMERS AND THE FOCUS THEY BRING TO CASK CONDITIONED ALE IS AN ESSENTIAL PART OF ENSURING A QUALITY SERVE EVERY TIME.”

MARK CROWTHER
Chief Executive, Liberation Group

“CASK MARQUE HAS BEEN THE FORCE MOST RESPONSIBLE FOR DRIVING UP STANDARDS OF CASK ALE QUALITY UNIVERSALLY IN PUBS. IT IS NO COINCIDENCE THAT THE NOTED GROWTH OF THE ALE SECTOR HAS MIRRORED THIS QUALITY INITIATIVE OVER THE LAST TWO DECADES.”

HAMISH ELDER
Executive Chairman, Harveys of Lewes

KEY FACTS

- 9,690 pubs hold the Cask Marque award for beer quality.
- 56% of cask ale drinkers recognise the Cask Marque plaque (NOP Survey).
- CaskFinder app is used over 60,000 times a month to find Cask Marque pubs.
- 40 assessors make 22,000 pub visits a year checking beer quality.
- 15 trainers plus our assessors deliver over 300 courses on cellar management.
- Cask Marque offers a free e-learning training programme for bar staff called Cask Beer Uncovered.

GET IN TOUCH

Please contact Paul Nunny by calling 07768 614065 or email paul@nunny.fsbusiness.co.uk

www.cask-marque.co.uk
VIANET

Game-changing solutions from Vianet

iDraught is the global-leader in draught beer quality and waste management systems, driving a direct and measurable impact on gross profit and is currently tracking consumer experience on 777 million pints of beer every year across the globe, approx. £2.5 billion in consumer spend.

The iDraught solution supports licensed retailers across the leisure sector with real time actionable data on all the key elements of delivering a great draught product to your customers every time – from beer temperature, line cleaning standards to pouring the perfect pint.

It has a direct and measurable impact on gross profit by monitoring cash in the till – monitoring shrinkage and minimising any giveaways; and by focusing on beer wastage – reducing over pouring and wastage through incorrect cleaning practice.

It also measures the precise temperature of every pint as it is dispensed, the time taken to dispense each drink, and automatically identifies line cleaning solution allowing customers to know exactly when lines are cleaned and how effective it is. Wherever they are, operators can stay in control through accessing their information on a secure website and through intelligent alerts allowing real time issues to be actioned rapidly.

“The insight delivered through iDraught also allows customers to benchmark performance expectations across their estate from site level, individual product level and also assessing the impact of investment and promotional activity.”

From using real time data to allow you to manage issues that matter to your customers, and your profit, to crafting your business plan or just giving it an overhaul, we have all the information you need.

“USING iDRAUGHT AS A CRUCIAL MANAGEMENT TOOL IS CRITICAL FOR ENSURING QUALITY DISPENSE AND A GREAT CUSTOMER EXPERIENCE”

CHRIS WELHAM
Chief Executive, Wadworth & Co Ltd

“Using iDraught data strategically as business intelligence is the real USP for pub companies.”

DANIEL WILKINSON
Ex Head of Commercial and Compliance at Greene King, now Stonegate’s Director of Corporate Affairs

GLOBAL BUSINESS

Vianet Group plc is involved in the provision of real-time monitoring systems and data management services globally. Working closely with its customers it uses its real actionable data alongside its strategic insight to drive profit growth in their operations.

Machine Insite is an international amusement and Amusement With Prizes (“AWP”) machine management company. Working with clients right across Europe, it currently manages over 38,000 machines and delivers a range of services, from simple data provision and reporting through to complex machine management, live machine intelligence and supply chain contract negotiations.

Vendexpert is a pan-European leading provider of telemetry solutions and data applications to the vending industry – for all vending management needs, whether they are in operations, sales, category management, field services or senior management. Our services allow our customers to efficiently plan and execute their operations. In addition Vianet’s cashless payment services are allowing its customers to grow their sales leveraging customers use of contactless payment methods.

“iDraught has reduced my wastage by up to 30% and increased bottom lines by at least 8%.”

CHRIS HARTWELL
Landlord of the Fountain Inn, Young’s

“It’s shockingly good, really. We’ve used iDraught to add £8–10,000 to our bottom line”

KEITH MARSDEN
BII Licensee of the Year 2015

WANT TO FIND OUT MORE?
Please contact us by calling +44 (0)1642 358800 or email sales@idraught.com
www.vianetplc.com

VIANET PARTNERS

**Casio:** Casio and iDraught have come together to create a single solution that places all of the control required to efficiently manage a business conveniently at the point of sale. The flexibility of the V-R7000's Android operating system enables the incorporation of market leading iDraught software to run on its rugged 15” screen.

Instantaneous cloud storage of all transactional and stock data allows managers and estates alike to keep closer control on their businesses. Convenient, easy to use and infinitely expandable, the new Casio Solution really is better for business.

**CPL:** has recently teamed up with iDraught to provide an e-learning platform for the system.

CPL Online are creators of online and interactive services, which include e-learning platform design and development, web design and development, database design, web service development, software development and mobile app development.

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## Problem Area: Ranging

<table>
<thead>
<tr>
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Monitor tap usage to increase efficiency and optimise sales
Understand brand popularity and sales trends
Track the impact of your promotional activities in real-time
Monitor your brands 24/7 365 days a year
Understand the true impact of promotions at peak times
Ensure your promotions are being run effectively
Understand brand performance against the range

## Problem Area: Throughput

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Monitor your brands 24/7 365 days a year
Monitor tap usage to increase efficiency and optimise sales
Understand brand popularity and sales trends
Improve quality and consumer experience via a reduction in taps

## Problem Area: Line Cleaning

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Monitor line cleaning performance
Know your performance output based on best-in-class
Exception reporting when your standards are not met
Intervene early and triage with easy-to-use data
The missing link in supply chain management
Dedicated account team and support from a cellar management trained ABCQ (Award in Beer & Cellar Quality) team

## Problem Area: Product Temperature

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Monitor product temperatures
Dedicated account team and support from a cellar management trained ABCQ (Award in Beer & Cellar Quality) team
Exception reporting when your standards are not met
Intervene early and triage with easy-to-use data
The missing link in supply chain management
Know your performance output based on best-in-class

## Problem Area: Equipment

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Monitor the engines of beer quality in cellar and cooling equipment
Exception reporting when your standards are not met
Intervene early and triage with easy-to-use data
Dedicated account team and support from a cellar management trained ABCQ (Award in Beer & Cellar Quality) team

## Problem Area: Yield

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Cash in the till: monitor shrinkage and minimise giveaways
Beer wastage: Reduce over pouring and wastage
Beer wastage: Track beer wastage in the cleaning process
Know your performance output based on best-in-class
Exception reporting when your standards are not met
The missing link in supply chain management
"THE BIGGEST ISSUE WITH BEER QUALITY IN UK PUBS IS A LACK OF UNDERSTANDING AROUND RANGE ROTATION AND THROUGHPUT."

ROBYN BLACK
Deputy Editor, Inapub magazine

"THE BIGGEST THREAT TO BEER QUALITY IS SERVING CASK BEER TOO COLD. SERVE IT TOO COLD AND THE BEER GETS A CHILL HAZE, LACKS AROMA AND FLAVOUR AND CAN BE FLAT."

ROGER PROTZ
Beer Writer and Editor of The Good Beer Guide

"I THINK THE BIGGEST ISSUE WITH BEER QUALITY IN UK PUBS IS PEOPLE CASHING IN ON CRAFT BEER WITHOUT COMMITTING TO PROPER SYSTEMS OR DRAUGHT TRAINING FOR THEIR STAFF. THE LATTER IS ONE THAT HAS THE BIGGEST IMPACT — WITH CLUELESS STAFF, YOU INEVITABLY GET A SUBSTANDARD PINT."

SARAH WARMAN
Winner of the Guild of Beer Writers Best Beer Broadcaster 2015

"FOR TODAY’S BREWERS TO SUCCEED IN AN INCREASINGLY COMPETITIVE ENVIRONMENT THEIR BEERS NEED TO BE INTERESTING, COVER A RANGE OF STYLES, FOCUS ON EXCELLENCE AND TICK EVERY BOX ON QUALITY, FROM GRAIN TO GLASS. BEER DRINKERS WILL ACCEPT NOTHING LESS IF THEIR REPEAT CUSTOM IS TO BE ASSURED."

MIKE BENNER
Managing Director, SIBA

"THE BIGGEST CRIME AGAINST BEER IN PUBS IS QUALITY. OPERATORS NEED TO BUY THE BEST BEER THEY CAN GET AND ENSURE IT IS CELLAURED CORRECTLY TO THE HIGHEST STANDARDS. DON’T BE SHY ABOUT ASKING BREWERS FOR ADVICE ON THEIR BEERS. THERE ISN’T A ‘ONE SIZE FITS ALL’ WAY TO KEEP BEER."

SOPHIE ATHERTON
Beer Writer and Sommelier

"I'M OFTEN DISAPPOINTED WHEN I GO OUT AND SOME PLACES ARE TOO AMBITIOUS IN WHAT THEY ARE TRYING TO ACHIEVE. THERE IS STILL A DISPARITY BETWEEN THE QUALITY THAT COMES INTO A PUB AND HOW QUALITY GETS MAINTAINED AND ENHANCED."

MARTIN HILTON
Managing Director, Pure Craft Bar

"THE QUALITY OF A PINT OF CASK ALE DEPENDS ON THE JOURNEY FROM BEER CELLAR TO GLASS. A PERFECT PINT REFLECTS WELL ON ALL INVOLVED. THE OPPOSITE CAN DESTROY REPUTATIONS NOT ONLY OF THE PUB OR BREWER BUT ALSO OF CASK ALE GENERALLY."

IAN FOZARD
Chairman, Rooster’s Brewery
Beer Quality Report 2016 – protecting and growing the UK draught beer category