

2013-05-26

## Principles and Practices of Bar and Beverage Management

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### Recommended Citation

Murphy, J. (2013) *The Principles and Practices of Bar and Beverage Management*, Goodfellows Publishing Ltd, Oxford, England.

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# **The Principles and Practice of Bar and Beverage Management**

**James Murphy**

**(G) Goodfellow Publishers Ltd**

**(G)** Published by Goodfellow Publishers Limited,  
Woodeaton, Oxford, OX3 9TJ  
<http://www.goodfellowpublishers.com>

British Library Cataloguing in Publication Data: a catalogue record for this title is available from the British Library.

Library of Congress Catalog Card Number: on file.

ISBN: 978-1-908999-36-8

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Design and typesetting by P.K. McBride, [www.macbride.org.uk](http://www.macbride.org.uk)

Cover design by Cylinder, [www.cylindermedia.com](http://www.cylindermedia.com)

### *Dedication*

To my friends and colleagues of the International Bartenders Association (IBA) and the Dublin Institute of Technology (DIT) who have supported and believed in me throughout my industry and academic career to date. Please accept this dedication as a small token of my deep appreciation.

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## Preface

*Principles and Practices of Bar & Beverage Management* has been designed to explain the complexities of managing modern bars, for students and/or those working on a variety of educational programmes in bar and beverage management, and for practicing bar and beverage managers, industry practitioners, in-house trainers and staff members who may wish to formalize and update their knowledge and skills in this area. The purpose of this book is to examine the wide range of subjects that come within the orbit of operational bar and beverage management and to relate these to the wider bar industry, irrespective of the style or size of the bar.

### **The bar and beverage industry today**

The bar and beverage sector worldwide has undergone considerable change in recent years as consumer expectations have changed. A pub visit can be now all about having that one special night out, once a week or twice a month, in which the bar owner and their staff members are required to provide an integrated social experience. This experience must contain the tangible elements of the products, for example food, drinks, entertainment, and the intangible elements such as the service, atmosphere, mood and value for money.

Consumers are more widely travelled now and are more aware of international foods, flavours and styles of preparation and service. Customers expect the latest hot and cold beverages to be offered and served in a professional and engaging fashion. Pubs are driving business through involvement activities which include cocktail making or cooking classes, where customers can prepare their own tasty cocktails and snacks under supervision, plus tutored wine, distilled spirits and beer tasting sessions, carried out by staff members or guest presenters who are knowledgeable, efficient and friendly.

The economic, social and technological environments in which bars function has also changed to meet these challenges. Bars are adopting marketing techniques and technology to understand the competition and to target consumers in promoting their products and services. Recent legislative changes at national and international levels, and the subsequent high costs of accidents (including costs relating to litigation and compensation) have placed serious legal implications on bar owners and on their staff members to be aware of their responsibilities in relation to food safety, the responsible service of alcohol and security. Poor standards in these areas place customers and staff at risk of serious injury if not death. Bar owners must ensure, if necessary by enforcement, that all their staff members follow proper safety and security standards.



The traditional image of the bar as an owner-managed pub premises is changing, the sector now also incorporates bars within hotels, restaurants, micro breweries, night clubs, leisure, theatre and transport complexes. Owners and managers must now operate more effectively with flexible work practices to manage their diverse workforces and operational systems for business success.

## **Overview of the book**

The chapters are each structured with specific learning aims and objectives, comprehensive indicative content, tables, illustrations and models of the significant issues surrounding the topic areas. Chapter 1 provides an overview of the origins and development of beverages and bars. It also outlines the issues involved in the design, location, ownership types, legal aspects and innovative practices currently adopted by bar owners to create the modern pub experience.

The next five chapters cover practical aspects of work in the bar. Chapter 2 highlights the role and professional duties of the modern day bartender and the organization of other beverage service personal in the bar. Chapter 3 provides a foundation knowledge of the identity, description and appropriate use of bar and food service equipment. The service of all types of beverages and the knowledge regarding how to serve them professionally and responsibly are explored in Chapter 4. The key elements involved in serving food and creating good food experiences in the bar are covered in Chapter 5. Chapter 6 considers the application of customer care skills and techniques when serving food and drinks, and also identifies the importance of culture and its influence on food offerings in the bar.

The final four chapters provide a deeper focus on the supervisory and management aspects involved in running a bar. Health, safety and security issues in the bar are explored in Chapter 7; this chapter also details techniques used to manage waste and energy in bars before considering the handling of cash and payment systems in Chapter 8. The areas central to the marketing and sales of products and services offered in bars are examined in Chapter 9, where the influence of loyalty schemes, social media and the use of QR codes are also considered. The key management issues are covered in Chapter 10, which deals with beverage control, identifies the major planning areas used to manage costs and revenue for generating profits and establishes the documentation and standard operating procedures for beverage control in your bar. The chapter also outlines the importance of stock control, and looks at the management tools used for controlling stock and the technological (POS) systems which interface with the stock, and the purchasing and ordering systems used to track sales and revenue in your bar.

It is against the background of these challenges that this book has been designed, to support learners as part of their broader based requirements in the bar, restaurant, hospitality, food and beverage and culinary management fields

of study. The book is also designed as a primary reference source in meeting the professional skills development needs of learners aspiring to a career in bar management. The chapters are each structured with an overview, specific learning aims and objectives, comprehensive indicative content, with contains relevant tables, illustrations and models of the significant issues surrounding the topic area, plus suggested Internet and visual resources to support the reader.

I hope that you enjoy reading, consulting and adopting the principles and best practices highlighted in this publication as we enter the 21st century. *Principles and Practices of Bar and Beverage Management* is dedicated to raising the standards and profile of the pub and bar industry worldwide and to remind consumers of the excellent service and quality that exists within this industry today.

James Murphy, MSc (Hosp Mgt), MA(H.Ed), Mgt Dip.

## Acknowledgements

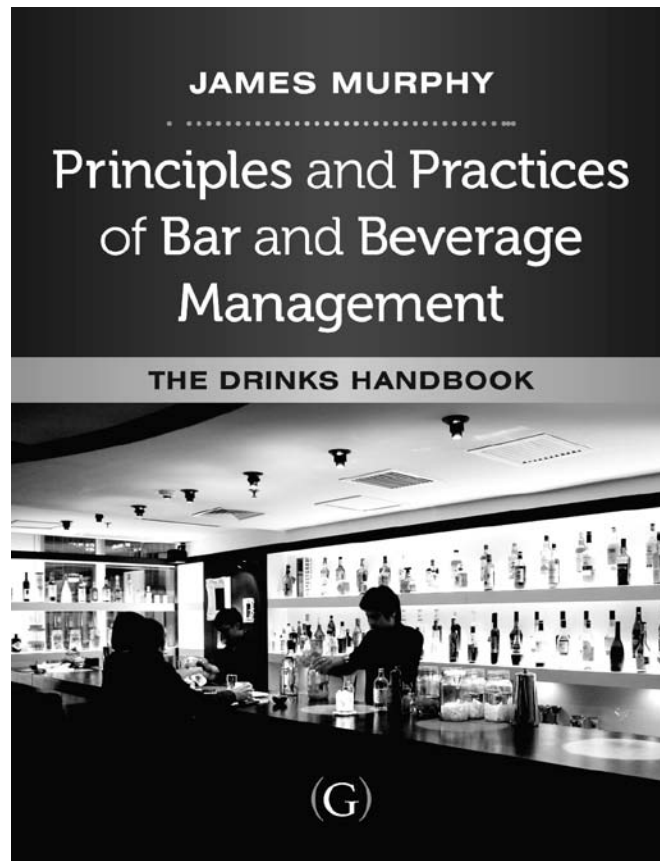
If I was to mention everyone who had assisted me in the compilation of this book then another publication would be required to include them all. So please accept a warm and affectionate thanks to all those special people, with my apologies to anyone I may have inadvertently omitted. I would however like to express my thanks in particular to:

- The incredibly hard working team at Goodfellows Publishing for their support in the development of this book especially Sally North and Tim Goodfellow.
- The trade, industry associations, government and public service bodies around the world whose collective work helps to consistently raise the standards, safety and sustainability of the bar industry.
- The international, national and local food and drinks companies for their research and innovation in bringing new products and services which enhance the bar industry and for their collective sponsorship of awards and scholarships which help to recognise excellence in the bar, its managers and the staff members worldwide.
- My academic colleagues whose support, advice and encouragement has helped me realise that I could develop this book for everyone interested in managing or owning bars and the wider drinks world.
- The authors listed in the reference, bibliography, web and visual resources sections of this publication whose help with research or in the areas of their individual specialist knowledge.
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- Figures 1.10, 3.1 - 3.8, 3.10, 3.11, 3.13 - 3.15, 3.18, 3.20, 4.1, 5.1, 7.10, 7.13, 7.15, 8.2, 9.2, 10.4 were photographed by James Murphy.

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Also available to accompany this text, *The Principles and Practices of Bar and Beverage Management - The Drinks Handbook*. A comprehensive training guide and authoritative resource that is packed with facts, explanatory illustrations and practical guidance. It provides an in-depth knowledge of the products, plus the technical skills, practices and latest developments in the bar and beverage area.

*The Drinks Handbook* provides a complete guide to beers, wines, spirit, liqueurs, ciders, hot beverages and soft drinks - where they're from, how they're made, how to serve and how to achieve maximum profits – and a detailed coverage of the World's leading brands of beers, spirits and liqueurs, an in-depth look at wines of the World and an indispensable listing of over 90 cocktail recipes.



ISBN 978-1-908999-58-0 Hardback 360pp

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# 1

# The Development of Bars

## Aims and learning outcomes

This chapter aims to provide the knowledge necessary to understand the origin and development of the bar and its alcoholic beverages, from the ancient times up to the 21<sup>st</sup> Century. It also explores the various types of ownership, designs, traditions and innovative practices which modern pubs and bars have adapted to sustain their business. On completion of this chapter the learner should be able to:

- Explain the origin of the pub/bar and its alcoholic beverages, from the ancient times to the 21st century
- Explain the development and identify the types, functions and traditions of modern bars
- Describe the modern innovative practices which bar owners are adopting to encourage business.

## 1.1 Introduction

Country bars, town bars, city bars and the 'local' pub are all social gathering places. They act as the primary focal points of most towns and cities, and they come in every size, shape and description. Although their opening times vary in different countries and cities, these establishments have existed for centuries, offering customers, travellers and tourists access to the food, drinks, music and the company of the local people. The sheer number of bars and public houses around the world and the fact that you can find one just about anywhere in some countries, may lead you to believe that certain nations are very fond of alcohol, but this is simply not true. You will find that these nations are usually very social people, and the pub is more often than not a gathering place. You will feel the pub's own particular atmosphere and personality as soon as you step through the door; some are quiet and reserved, some a little livelier, a lot like someone's home really. Most everyone's welcome, and the company constantly changes. The 'local' is the term used to indicate a customer's favourite bar – a home from home.

## 1.2 A brief history of bars and alcoholic drinks

Throughout history, there have been many names for establishments where people gather to drink alcoholic beverages. Bars or pubs, bierkellers, brewpubs, which were formally known as public houses or alehouses, are drinking establishments all of which have always been central to the national culture of a great number of countries around the world (Brandwood, Davison & Slaughter, 2004). In many areas globally and particularly in rural locations, the bar has always been the focal point and communications hub of the community (Cronin & O'Connor, 2003). The evolution of the bar is closely linked with the evolution of alcoholic drinks and the introduction of hospitality.

The consumption of alcohol lowers inhibitions, can facilitate relaxation and increase the enjoyment of dining, and has contributed towards a more sociable and convivial atmosphere between locals, invited guests and travellers for many centuries around the world (Babor, 1986). Bars have also helped change the political landscape in most countries; many individuals compare them to the coffee-houses of Asia and Eastern Europe or the restaurants of France (Austin, 1985). The uniquely different allure of bars has been that people of all classes could mix together. Early laws fixed the price that tavern-keepers could charge for drinks, so they couldn't cater just to wealthy patrons (Braudel, 1974). Bars have always been where people communicate, share their news and discuss the issues of the day. The only requirement was that you leave your rank or qualifications at the door because everyone has an equal say in the bar (Patrick, 1952).

### Alcohol in the ancient times

#### Neolithic period

One of the earliest drinks known to have been produced is beer and dates back to the late Stone Age. The discovery of beer jugs has established the fact that intentionally fermented beverages existed at least as early as the Neolithic period around 10,000 BC (Patrick, 1952). Molloy (2002) supports this contention and adds that during this period wild barley was first domesticated and systematically harvested in the Fertile Crescent region of modern day Turkey, Iran and Iraq.

#### 'Code of Hammurabi' – the oldest recorded hospitality laws

Hammurabi was one of the first dynasty kings of the city of Babylon (1810 – 1750 BC). The Louvre Museum in Paris contains a large diorite stela with the inscriptions commonly known as the Code of Hammurabi. O'Gorman (2010) contends that within the ancient inscriptions, there are laws governing commercial hospitality from at least 1800 BC. He adds that hostels and inns in Mesopotamia were in the business of supplying drinks, women and accommodation for strangers. Drinks included date palm wine and barley beer, and there were strict regulations against diluting them (p. 5). Driver and Miles (1952) in a further translation of the same stela show that the punishment for watering beer was death by drowning.

## The Egyptians

Wine clearly appeared as a finished product in Egyptian pictographs around 4000 BC (Lucia, 1963a) and one of the oldest beer recipes can be directly dated to 1800 BC. Brewing dates from the beginning of civilization in ancient Egypt. Osiris, the god of wine, was worshiped throughout the entire country and the Egyptians believed that this important god also invented beer (Allen, 1936). Both beer and wine were offered to gods. Cellars and wine presses even had a god whose hieroglyph was a winepress (Wissler cited by Mok, 1932).

The ancient Egyptians made at least 17 varieties of beer and at least 24 varieties of wine which were used for pleasure, nutrition, medicine, ritual, remuneration and funerary purposes for use in the after-life.

## Chinese drinking traditions in ancient times

A variety of alcoholic beverages have been used in China since prehistoric times (Granet, 1957). In ancient times people drank when holding a memorial ceremony, offering sacrifices to gods or their ancestors, pledging resolution before going into battle, celebrating victory, before feuding and official executions, for taking an oath of allegiance, while attending the ceremonies of birth, marriage, reunions, departures, death, and festival banquets in China. Around 1116 BC, alcohol was one of China's treasuries largest sources of income and was widely used in all segments of Chinese society as a source of inspiration, and hospitality and for combating fatigue.

## Greece – from mead to wine

The first alcoholic beverage to obtain widespread popularity in what is now Greece was mead, a fermented beverage made from honey and water. However, by 1700 BC, wine making was commonplace, and during the next thousand years, wine drinking assumed the functions so commonly found around the world: it was incorporated into religious rituals, it became important in hospitality, it was used for medicinal purposes and it became an integral part of daily meals (Babor, 1986). As a beverage, it was drunk in many ways: warm and chilled, pure and mixed with water, plain and spiced (Raymond, 1927).

## The Romans

A consequence of the massive expansion of the Roman Empire, following the fall of Greece, was the substantial and widespread development of viticulture and brewing throughout Europe. Beers were produced by the fermentation of different grains and the development of brewing was most rapid in countries where the soil and climate were not suited to viticulture. There were also beer-like drinks such as mead, made from honey and grain. The Romans also further developed the concept of the *taberna* (taverns).



## **The British tavern (alehouse)**

The iconic British tavern can trace its origins back to this period when the invading Roman armies that first brought Roman roads, Roman towns and Roman pubs, known as tabernae, to the United Kingdom's shores in 43 AD (Mahon, 2006). Such tabernae were quickly built alongside Roman roads and in towns to help quench the thirst of the legionary troops. Ale, however, was the native British brew, and after the fall of the Romano-British kingdoms, the Anglo-Saxons established alehouses (usually out of domestic dwellings) to provide the locals with their favourite tippie, and the Roman word taberna eventually became corrupted to tavern. These taverns or alehouses not only survived but continued to adapt to an ever changing clientele, through invading Angles, Saxons, Jutes and both Danish and Scandinavian Vikings (Banks & Binns, 2002). The Anglo-Saxon alewife would put a green bush up on a pole to let people know her brew was ready. These alehouses formed meeting houses for the locals to gather and gossip and arrange mutual help within their communities. Here lie the beginnings of the modern pub. These alehouses became so popular that around 970 AD one Anglo-Saxon King, Edgar, even attempted to limit the number of alehouses in any one village. He is also said to have been responsible for introducing a drinking measure known as the peg as a means of controlling the amount of alcohol an individual could consume. This origin of the expression to take (someone) down a peg may be related to this (Hudson, 1920).

## **Drinking in the middle ages**

### **Monastic influences**

The period of approximately one thousand years between the fall of Rome and the beginning of the Renaissance era in the 1500s, brought many developments in drinks. In the early middle ages, mead, rustic beers, and wild fruit wines became increasingly popular, especially among Celts, Anglo-Saxons, Germans, and Scandinavians. The art of brewing essentially became the province of monks, who carefully guarded their knowledge. Monks brewed virtually all beer of good quality until the twelfth century. Around the 13th century, hops (which both flavour and preserve) became a common ingredient in some beers, especially in northern Europe (Cherrington, 1925). Ale, often a thick and nutritious soupy beverage, soured quickly and was made for local consumption. By the millennium, the most popular form of festivities in England was known as ales, and both ale and beer were at the top of lists of products to be given to lords for rent. As towns were established in twelfth-century Germany, they were granted the privilege of brewing and selling beer in their immediate localities. A flourishing artisan brewing industry developed in many towns, about which there was strong civic pride (Austin, 1985).

## Middle Ages pubs

Some local inns and bars have a rich historical background and have been in existence or operational since the Middle Ages, for example the Jerusalem pub in Nottingham, England was built in the rock under the castle. It dates back to 1189 AD and is said to have acted as a recruitment centre for volunteers to accompany King Richard I (The Lionheart) on his crusade to the Holy Lands.

Other famous early inns include The Brazen Head in Dublin, Ireland since 1198 and the oldest pub in the USA, The White Horse Tavern in Newport, RI which has been serving patrons since 1673. Payment for drinks amongst early tavern owners in some 13th century taverns was made with 'beer or wine tokens' which were usually minted by the tavern owner because of the shortage of coinage in some countries. In the 13th century the Normans also introduced weights and measures for wine, ale and corn in the Magna Carta which was promulgated in England by King John in 1215 (Justice, 1707).



**Figure 1.1:** White Horse Tavern, USA.



**Figure 1.2:** Brazen Head, Ireland.



**Figure 1.3:** Jerusalem Pub, England.

## Distillation, the wonder of the middle ages

Although the process of distillation was known in the East long before it was introduced into Europe, it was Albertus Magnus (aka Saint Albert the Great 1193-1280) who had first clearly described the process which made possible the manufacture of distilled spirits (Patrick, 1952). Knowledge of the process began to spread slowly among monks, physicians and alchemists, who were interested in distilled alcohol as a cure for ailments; they called it aqua vitae, 'water of life'.

## Public houses and licenses

Alehouses, inns and taverns, which provide food and drink to their guests, became known collectively as public houses (pubs) around the reign of King Henry VII (the first Tudor king of England). These wine merchants (tavern owners) were more commonly known as vintners. In 1552, an Act was passed that required innkeepers to have a licence in order to run a pub, and by 1577 there were some 17000 alehouses, 2000 inns and 400 taverns in England and Wales. Taking into account the population of the period, that would equate to around one pub for every 200 persons.

## Early modern period

### 16th Century

As the end of the middle ages approached, the popularity of beer spread to England, France and Scotland and beer brewers were recognized officially as a guild in England.