

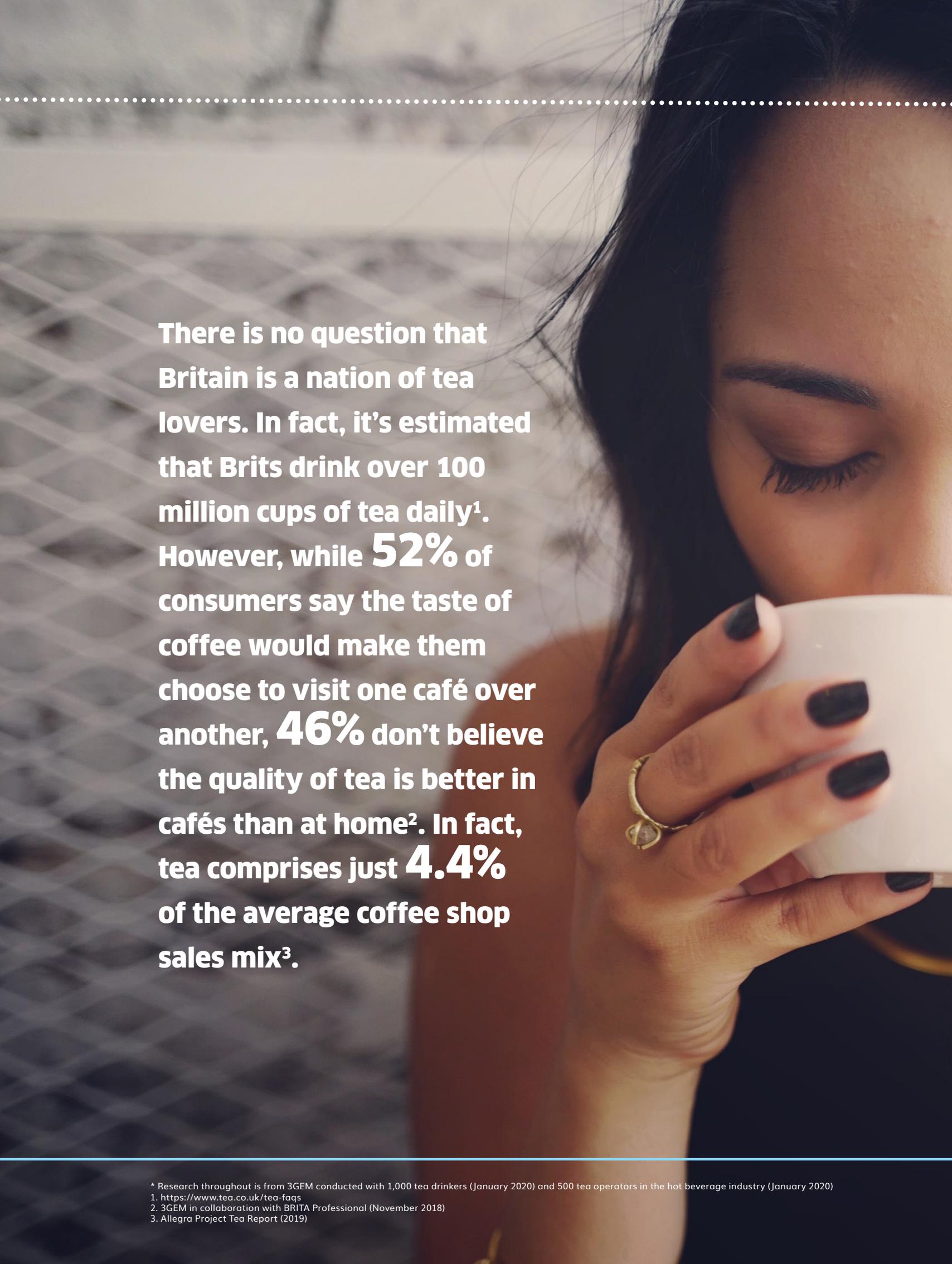
LIFE IS BETTER FILTERED

BUSINESS VITALI-TEA

MAXIMISING ON MISSED
OPPORTUNITIES IN THE
HOT BEVERAGE SECTOR

 BRITA®

LIFE IS BETTER
FILTERED



There is no question that Britain is a nation of tea lovers. In fact, it's estimated that Brits drink over 100 million cups of tea daily¹. However, while 52% of consumers say the taste of coffee would make them choose to visit one café over another, 46% don't believe the quality of tea is better in cafés than at home². In fact, tea comprises just 4.4% of the average coffee shop sales mix³.

* Research throughout is from 3GEM conducted with 1,000 tea drinkers (January 2020) and 500 tea operators in the hot beverage industry (January 2020)
1. <https://www.tea.co.uk/tea-faqs>
2. 3GEM in collaboration with BRITA Professional (November 2018)
3. Allegra Project Tea Report (2019)

MAXIMISING THE MISSED OPPORTUNITI-TEAS



52%

OF CONSUMERS SAY THE TASTE OF
COFFEE WOULD MAKE THEM CHOOSE TO
VISIT ONE CAFÉ OVER ANOTHER²

46%

DON'T BELIEVE THE QUALITY OF TEA
IS BETTER IN CAFÉS THAN AT HOME²

TEA COMPRISES JUST
4.4%
OF THE AVERAGE COFFEE
SHOP SALES MIX³

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There is clearly space for tea to grow in the hot beverage sector. As an industry we need to capitalise on the importance of tea to our customers and evaluate how we can improve our offering so that tea sales out of home rise.

We know that many consumers see tea as a drink to be enjoyed in the comfort of their own home. However, often less considered are the potential wellbeing benefits of taking a tea break out of the house, as well as the social advantages of drinking a cuppa in a public space.

To help navigate the missed opportunity tea presents in the hot beverage industry, at BRITA Professional we've conducted in-depth,

independent research on the views of 1,000 tea drinkers and their thoughts and preferences when drinking tea out of home.

The following report will analyse the challenges facing the hot beverage sector, as well as provide practical advice on how to make the most of the opportunity tea presents.

Sarah Taylor

Managing Director of BRITA



**THE
MISSED
OPPORTUNI-
TEA?**

ACCORDING TO TEA OPERATORS THE TOP REASONS FOR PEOPLE NOT CHOOSING TO DRINK TEA OUT OF THE HOME ARE:



THE QUALITY OF TEA USED

64%

LACK OF TRAINING ON HOW TO MAKE GOOD TEA

40%

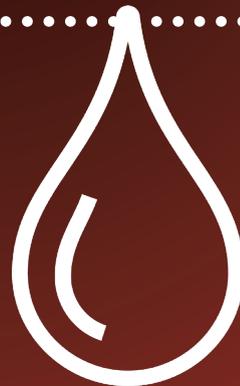


THE WAY THE TEA IS SERVED

39%

THE QUALITY OF WATER USED

29%



COMMENTARY

WHY HOT BEVERAGE BUSINESSES NEED TO FOCUS ON TEA AS WELL AS COFFEE

At Harris + Hoole we live and breathe coffee but we are also passionate about ensuring we are serving the best quality tea as well.

Although our tea offering has always been strong, we have as a business in the past struggled to ensure quality is always consistent. Tea is roughly 17% of our drinks sales so to ensure the best experience we source high quality teas, use BRITA water filters to deliver high quality flavours in our teas and, most importantly, train our teams on how best to serve them.

Much like coffee we celebrate the uniqueness that comes with every different tea and enjoy being able to highlight the characteristics of each tea we serve. We do this by making sure that we are using the correct water temperatures and brew times appropriate for each tea we serve and communicate this to our customers. This care and attention sees our customers returning to us just for tea (or maybe even a cheeky afternoon tea) time and time again.

Stacey Canning
Harris + Hoole

..... BUSINESS VITALI-TEA

RRIS + HOOLE





BEHAVIOURS WHEN DRINKING A BREW

94% OF CONSUMERS
USUALLY DRINK THEIR
TEA AT HOME,
COMPARED TO **44%**
WHO TYPICALLY DRINK
TEA IN A CAFÉ OR
COFFEE SHOP

When asked what would make them more likely to consume tea out of the home, respondents answered...

1
IF THERE WAS A SEPARATE TEA
MENU WITH MORE CHOICE OF TEA

.....

2
A NOTICEABLE DIFFERENCE TO TEA
YOU CAN BREW AT HOME

.....

3
USING FILTERED WATER TO
MAKE TEA



The research tells us how important it is to provide variety of choice and a quality cuppa to encourage consumers to drink tea out of home. Jane Pettigrew from the UK Tea Academy gives her five top tips on developing a tea menu that stands out to consumers:

1 Offer a selection of different types of high-quality loose-leaf tea so that there is something for everyone

2 Include a couple of popular flavoured teas

3 Give a little background to each tea with tasting notes to help customers choose

4 Describe each tea so that it sounds irresistibly wonderful and enticing: take a lesson from the wine trade when choosing words to describe the flavour

5 Offer advice on how long each tea should brew and whether or not to add milk

It's not just a variety of teas customers are looking for, they also expect the water used to be of the highest quality. While a lot of thought may go into choosing the tea on offer, the water isn't often given the same attention – despite it making up to **98%** of the cup. Using a water filter removes unwanted particles, metals, minerals and chlorine, meaning operators can ensure the brew they're serving is a perfect tasting cup of tea every time.

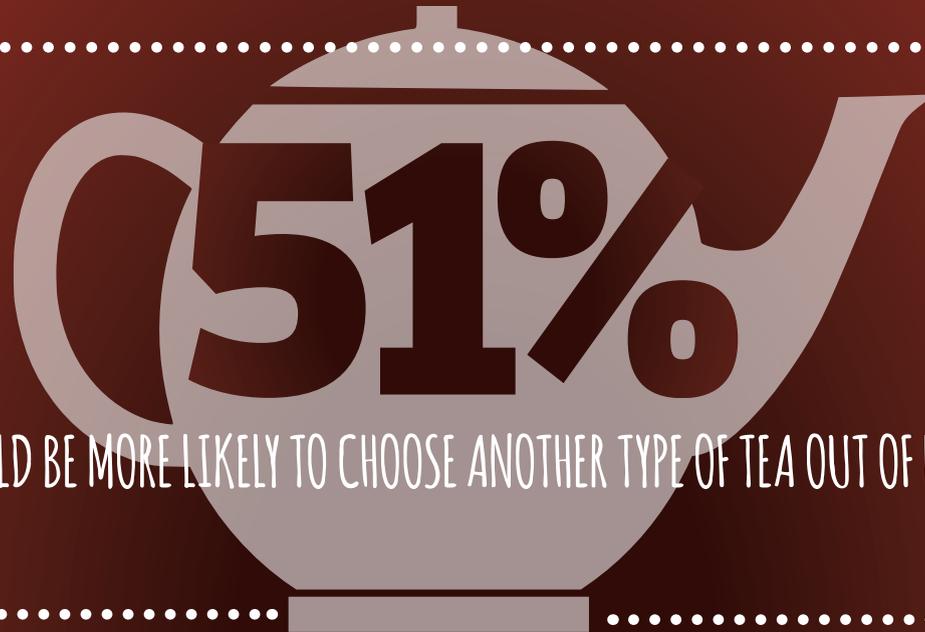
Research shows that the majority of operators already know this and with **79%** believing that using filtered water has a positive impact on the taste and appearance of tea, it's clear that the hot beverage sector understands the benefits of filtered water. What needs to be developed is how this is communicated to the consumer. If customers know why the quality of the tea is so good, they'll keep coming back for more.



THE EMERGING TRENDS IN TEA



While English Breakfast Tea is often seen as the most popular choice of tea at many cafés, coffee shops and hotels

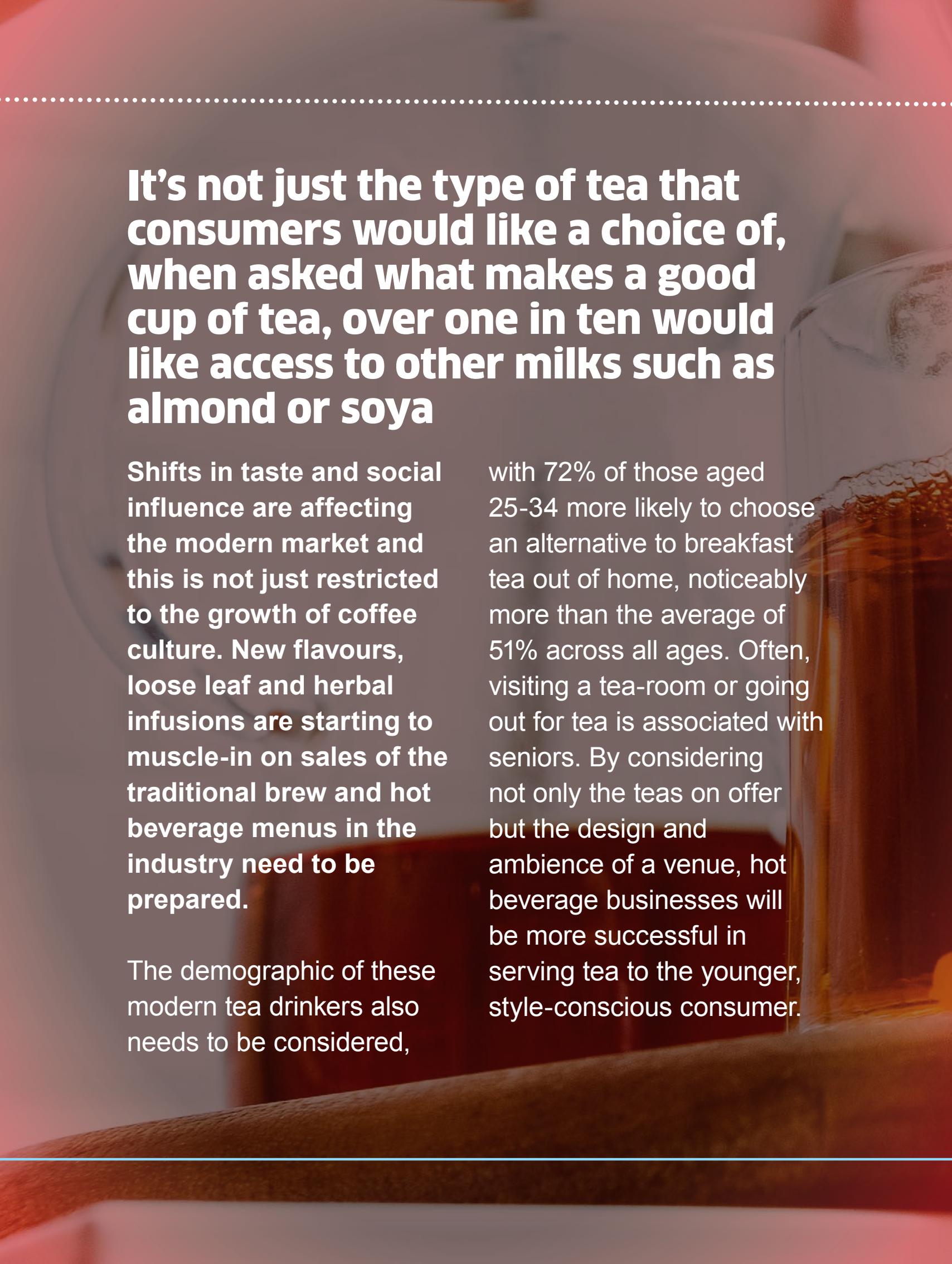


WOULD BE MORE LIKELY TO CHOOSE ANOTHER TYPE OF TEA OUT OF HOME

Of those likely to choose another tea, the most popular choices are:



* Tea that has been blended with dried fruits, dried flowers, dried herbs or dried spices (or a mixture of these additional ingredients)

A hand holding a white teacup and saucer with a glass of tea on a wooden table. The background is a warm, reddish-brown color with a dotted line at the top.

It's not just the type of tea that consumers would like a choice of, when asked what makes a good cup of tea, over one in ten would like access to other milks such as almond or soya

Shifts in taste and social influence are affecting the modern market and this is not just restricted to the growth of coffee culture. New flavours, loose leaf and herbal infusions are starting to muscle-in on sales of the traditional brew and hot beverage menus in the industry need to be prepared.

The demographic of these modern tea drinkers also needs to be considered,

with 72% of those aged 25-34 more likely to choose an alternative to breakfast tea out of home, noticeably more than the average of 51% across all ages. Often, visiting a tea-room or going out for tea is associated with seniors. By considering not only the teas on offer but the design and ambience of a venue, hot beverage businesses will be more successful in serving tea to the younger, style-conscious consumer.

notNeutral

BUSINESS VITALI-TEA



A photograph of a man and a woman sitting at a round wooden table in a cafe, laughing and talking. The man is on the left, wearing glasses and a plaid shirt, holding a black mug of coffee. The woman is on the right, wearing a denim jacket, holding a white cup of tea. On the table are a black teapot, a small white vase with a plant, and a menu. The background shows other people in the cafe.

**TAKING
TIME
FOR
TEA**

Consumers agree that taking time to have a cup of tea has a positive effect on their mental health:

64%

ADMIT IT HELPS THEM
TO FEEL RELAXED

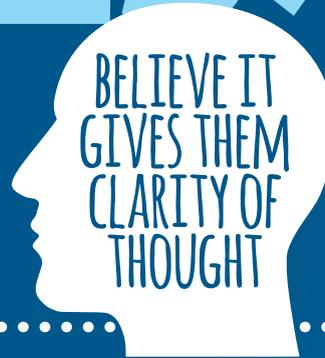


41%

AGREE THAT IT HELPS THEM
CALM DOWN AND REDUCES
STRESS LEVELS

25%

BELIEVE IT
GIVES THEM
CLARITY OF
THOUGHT



22%

THINK THAT IT HELPS TO
REDUCE ANXIETY



What's clear from the research is that hot beverage businesses need to encourage consumers to use tea as an opportunity to take a break from day-to-day stresses and relax, and surroundings have a big impact on this:

41%
SAID THE AMBIENCE OF THE LOCATION WAS ONE OF THE BIGGEST DRIVERS TO ORDERING TEA OUT OF HOME

TAKING TIME TO HAVE
A CUP OF TEA IS IMPORTANT

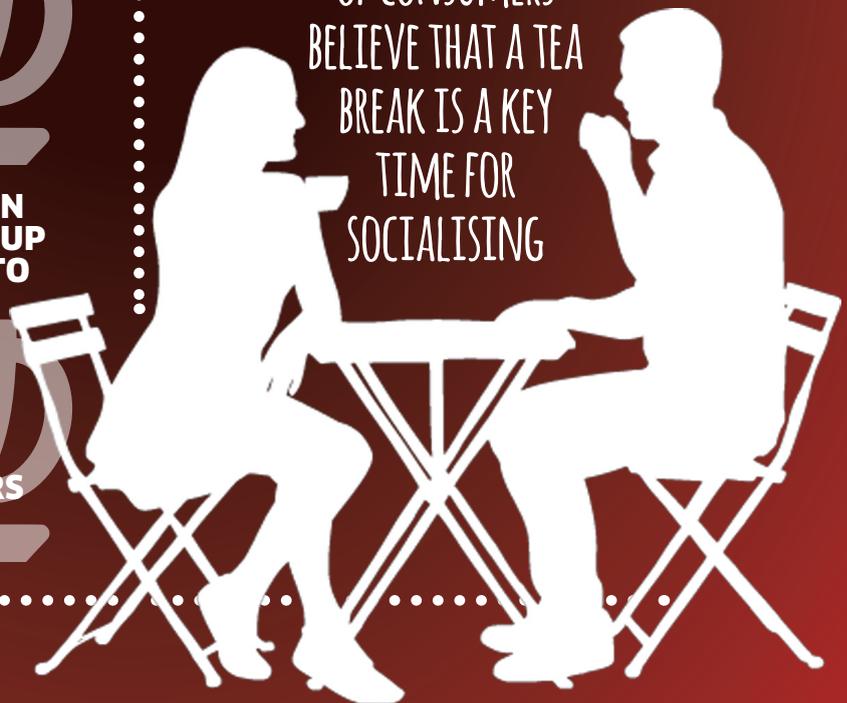
89%
OF CONSUMERS

PREFER TO SIT DOWN
AND RELAX WITH A CUP
OF TEA COMPARED TO

77%
OF COFFEE DRINKERS

31%

OF CONSUMERS
BELIEVE THAT A TEA
BREAK IS A KEY
TIME FOR
SOCIALISING



“In order to be able to relax with a cuppa, tea needs to be served in a serene, calming atmosphere with a sense of community. Café design should reflect this desire: with comfy chairs or sofas, mellow background music to encourage conversation and plenty of space for socialising.”

Alexandra du Sart-Murray

Mental Health Team at BRITA Professional

.....

ALTHOUGH MANY PEOPLE BELIEVE THERE ARE MORE POPULAR ‘TEA TIMES’ THROUGHOUT THE DAY, OUR RESEARCH SUGGESTS THERE IS ACTUALLY A CONTINUOUS DESIRE FOR TEA...





TOP TIPS TO SERVING GREAT TEA

It is clear that hot beverage businesses need to add the 'wow' factor to tea to make it an out of home occasion for consumers. According to tea drinkers, the key factors to serving a great cuppa are:

51%

It is served in a teapot

HAVING THE
OPTION
TO CHOOSE
HOW LONG IT IS
BREWED FOR



29%



IT IS MADE WITH FAIRTRADE
TEA OR TEA WITH
OTHER CERTIFICATIONS

(E.G. RAINFOREST ALLIANCE
OR SOIL ASSOCIATION)

26%

IT IS MADE BY SOMEONE
KNOWLEDGEABLE ABOUT TEA

26%



IT IS
MADE
WITH
FILTERED
WATER

So there is no
residue in the tea
or on the mug
and the full
flavour and
aroma comes
through

22%



TOP TIPS TO SERVING GREAT TEA



Reflecting on the research, businesses need to be aware that environmental and ethical considerations are not just limited to coffee. For the ever-conscious consumer, all suppliers associated with making tea need to have sustainable attributes.

With a quarter believing that having tea made by someone knowledgeable is important, consumers are no longer just looking for experienced coffee baristas. Training is becoming increasingly important in the tea industry.

It doesn't need to be complicated or daunting – just simple guidance so that operators understand why certain brewing parameters are essential.



**JANE PETTIGREW
FROM THE
UK TEA ACADEMY
REVEALS HER
TOP TIPS ON
DEVELOPING THE
PERFECT BREW:**

WATER

Bitter components in tea are extremely soluble in boiling water, therefore different teas need to be brewed at different temperatures.

When we brew tea in boiling water, more of the bitter tasting ingredients are drawn out quickly. This can be fine for strong black teas, but when brewing more delicate variants such as white, yellow, green and the greener jade oolongs, the temperature should be lower, so the bitter components don't overwhelm the subtle sweet and aromatic character of the tea.

TEAPOT

Teas need room to brew properly, and some tea leaves expand in hot water to several times the size of the dry leaf. Tea bags tend to inhibit tea's ability to take in water, expand in size and gently give colour, strength and flavour to the water. So it's best to set the tea free and brew the loose leaves in a teapot that gives it plenty of space. Some teapots have infuser baskets that make it easier to separate the leaf from the brewed liquor, but do make sure that the basket is deep enough and wide enough to allow the tea enough room.

STEEP

The quantity of tea used should be 2.5-3grams to 200ml of water. If too much tea is used, the brew will be stronger than recommended; if too little tea is used, the brew will be thin and weak. At the end of the recommended steep time, always remove the leaf from the water to prevent it from continuing to brew and causing it to become too strong and too bitter. I would recommend giving customers a mini hourglass, that way you can advise on their steep time, while giving them the option of personal preference.

BREWING TEMPERATURES OF DIFFERENT TEAS

WHITE TEA



YELLOW TEA



GREEN TEA



OOLONG TEA



BLACK TEA



DARK TEA
E.G. PUREAH



RECOMMENDED STEEP TIMES OF DIFFERENT TEAS

WHITE TEA



**5
MINUTES
PLUS**

YELLOW TEA



**2-3
MINUTES**

GREEN TEA



**CHINESE
2-3
MINUTES**

**JAPANESE
0.5-1
MINUTE**

OOLONG TEA



**3
MINUTES**

DARK TEA
E.G. PUREAH



**2-3
MINUTES**

BLACK TEA



**SMALL
PARTICLES
1.5-2
MINUTES**



**MEDIUM LEAF
2-3
MINUTES**



**LARGE LEAF
3-5
MINUTES**



THE WATER RECIPE

*Buffer capacity (otherwise known as alkalinity) has a strong influence on the development of the tea's flavour

Both consumers (22%) and tea operators (79%) are aware that filtered water is a key ingredient in a good cup of tea.

However, until recently the quality of water in tea has not been considered in the same way as the water for coffee. In order to create the high-quality drink that the consumer is seeking, operators must understand the importance of water as a key ingredient in tea.

If the ideal water is not used in tea, its delicate notes cannot be realised. This means that consumers could have a bad experience with even the best teas. Simply put, bad water will equal a bad cup of tea.

The UK Tea Academy recently uncovered the key ingredients of water that impact tea and, most importantly, defined a water specification that applies to all the types of tea tested.

The pH of water has often been determined as having an important impact on the quality and colour of the tea infusion. However, this research shows that it is something called the buffer capacity*, or alkalinity, that is the dominating factor.

The table below sets out the ingredients of water that will have a significant impact on the flavour, aroma and appearance of tea, as well as the recommended levels of each element, all of which can be achieved through water filtration:

PARAMETER	EFFECT ON TEA	TARGET	ADDITIONAL INFO
Chlorine	Changes aroma profile	0 mg/l	-
Odour	Causes off-flavour	None	-
Total hardness	Causes turbidity and tea scum	4° dH	Max. 9° dH
Buffer capacity	Influences pH of tea and therefore taste, colour and turbidity	3° dH	Reasonable Range 2-5° dH

*Buffer capacity (otherwise known as alkalinity) has a strong influence on the development of the tea's flavour



“MAXIMISING ON” THE MISSED OPPORTUNI-TEAS



1. Consumers want choice

Hot beverage operators need to stay on trend, provide choice and great quality tea to encourage consumers to drink out of home, whether that's by developing a tea menu or offering the latest herbal variants. Moreover, these attributes need to be marketed to customers, so they know why they should keep coming back for more.

2. It's all about the ambience

Operators can capitalise on making their establishments appeal to tea drinkers. By making the ambience suit the 'tea moment', consumers will be able to relax, increase the time they spend and as a result may be more likely to purchase other items.

What's more, the opportunities extend further, with 60% of consumers typically making additional food purchases alongside their tea⁴.

3. Serving great tea

Serving great tea isn't just about choice in varieties. Hot beverage businesses will benefit from training their teams in the serve, the steep time, the temperature of water and the water used when making a brew. All in the name of serving a tip-top cuppa to consumers out of home.

4. Allegra Project Tea Report (2019)

SUMMARY

The potential of the out of home tea sector offers a huge opportunity to hot beverage businesses.

From conducting research into what consumers expect from a good cuppa and speaking with experts in the field for this report, it's clear that businesses simply need to do more to encourage customers to convert to drinking tea out of home.

By educating Brits in why having tea in a café, coffee shop or other business environment could be beneficial to their wellbeing, or why the quality of tea may be better out of home, the hot beverage industry has the potential to flourish in a whole new sector.

Sarah Taylor

Managing Director of BRITA

TEA

If you would like to gain more advice on finding the right water filtration to meet the recommended tea specification and improve your tea offer, please contact a BRITA Professional expert at brita.co.uk/professional or call 0845 674 9655

BRITA WAS FOUNDED MORE THAN 50 YEARS AGO AND IS ONE OF THE LEADING EXPERTS IN THE FIELD OF WATER FILTRATION.

BRITA Professional's products are designed to produce the best filtered water for food and beverages by reducing particles, metals, minerals and chlorine that have an unfavourable impact on the taste, appearance and aroma of the final product. BRITA filters – which are part of BRITA's zero to landfill initiative and don't produce water wastage or use electricity – improve machine longevity by reducing limescale build-up and deposits of unwanted minerals. By guarding against potential damage, businesses can not only improve the reliability and sustainability of equipment, but also cut down on energy costs.

BRITA fully acquired Vivreau UK in 2016. Today, BRITA Vivreau is the global leading innovator in the manufacture of environmentally positive purified drinking water systems, supplying a wide range of products dispensing chilled still, sparkling, ambient and boiling water.

LIFE IS BETTER FILTERED:
WHAT'S COMING UP

Want to hear more tips and advice from industry experts? Look out for our next phase of exciting activity. 'Business Vitality: Business Fuel' will be launching later this year.

Watch this space!

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