



NATIONAL COFFEE ASSOCIATION USA EST. 1911

2016 NATIONAL COFFEE DRINKING TRENDS

Preview of Results



Online data collection

Interviewing January 11 – January 26, 2016

2,782 respondents

Aged 18+

Distribution of region, age, gender, ethnicity
match census

Survey offered in both English and Spanish

Additional Data Sources

SCORES™

tests every new menu item and LTO from major chains with consumers across six key measures:

Purchase Intent (PI)	<i>would you order this item?</i>
Branded PI	<i>would you order it at this place?</i>
Uniqueness	<i>is it new and different?</i>
Frequency	<i>how often would you have it?</i>
Draw	<i>would you go there just for this?</i>
Value	<i>is it a good value at that price?</i>

THE DATABASE

SCORES™ covers 5,000 new real-world menu items and LTOs each year, spanning 2.5 million individual ratings.



DATASSENTIAL
FOOD WITH A STORY

Additional Data Sources

DATASSENTIAL BUZZ™

Datassential BUZZ™ delivers the most strategic, up-to-the-moment, and thorough analysis of consumer behavior, attitudes, and tastes. Easy to use and designed by coffee & tea experts, BUZZ gives you everything you need for great insights.



12,000 Consumers sampled daily to ensure that most up-to-date consumer trend information.



Quarterly updates with seasonal reporting. You'll get coffee and tea info that presents trends years ahead of the competition.



Consumer behavior PLUS attitudes and preferences; covering consumption, to condiments and customization.

**WHAT ARE WE
DRINKING?**



PERCENT DRINKING YESTERDAY

Percent of population 18+



Coffee

57%



Tap Water

46%

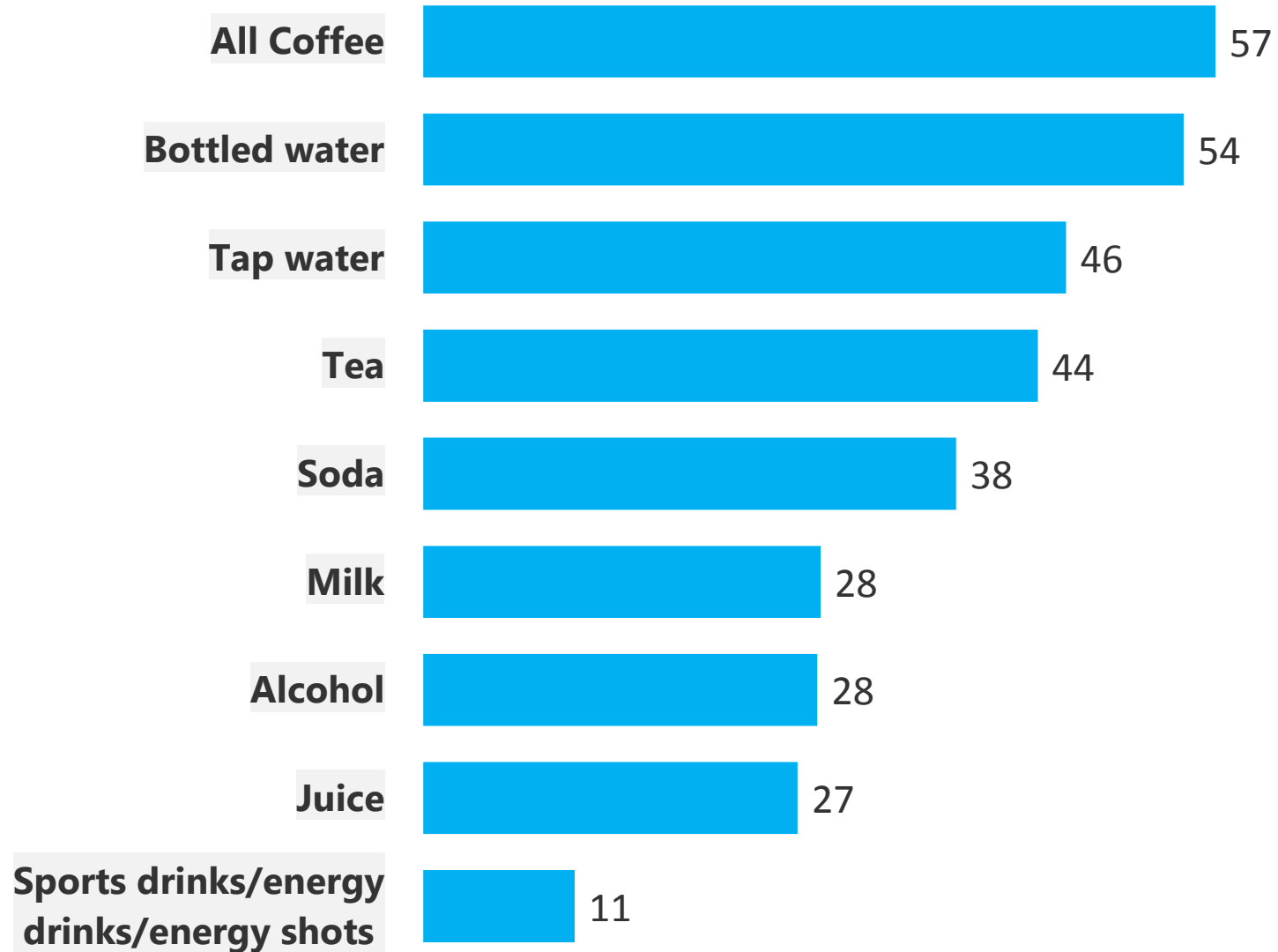


Soda

38%

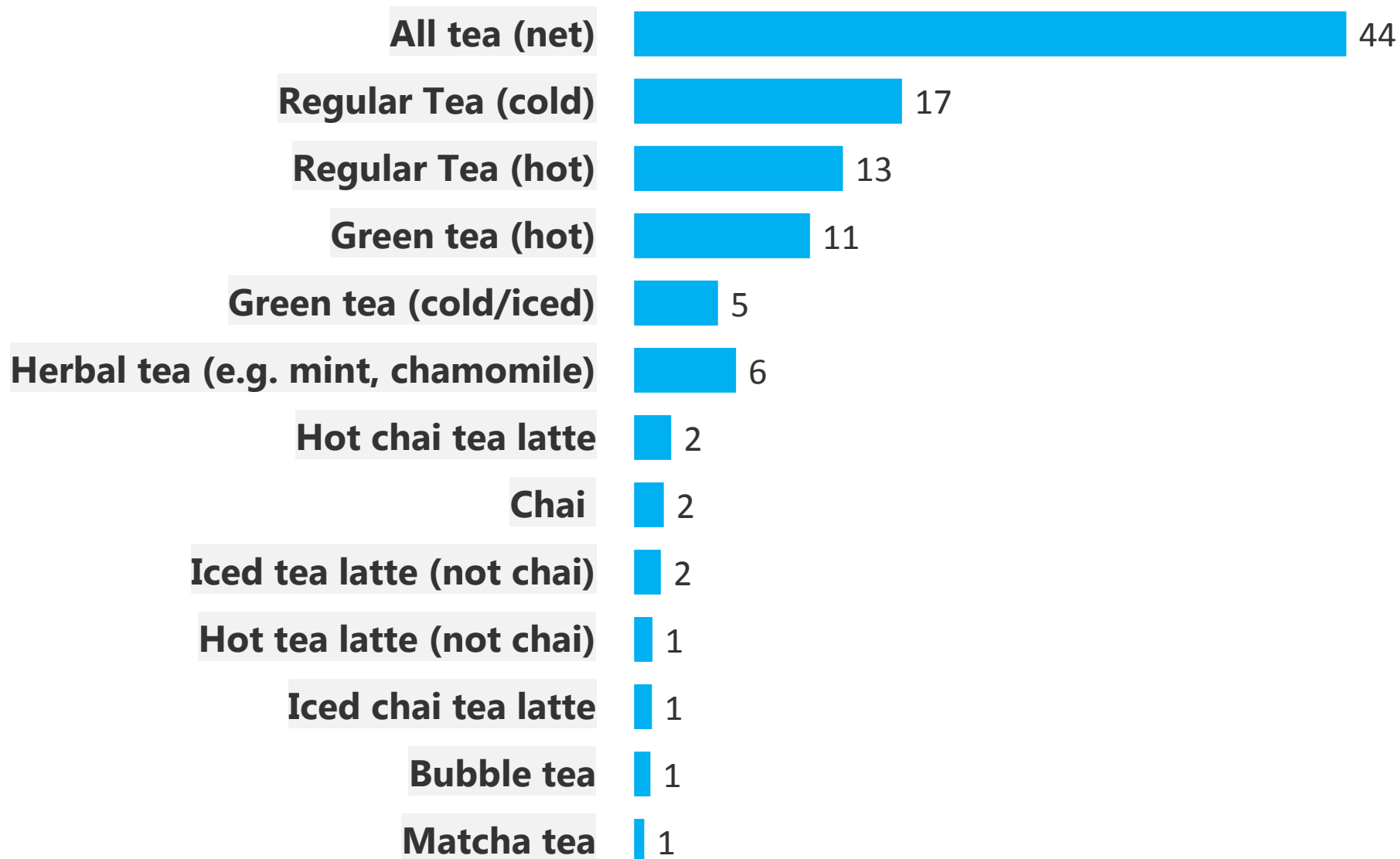
DRINKING YESTERDAY CONT'D

Percent of population 18+

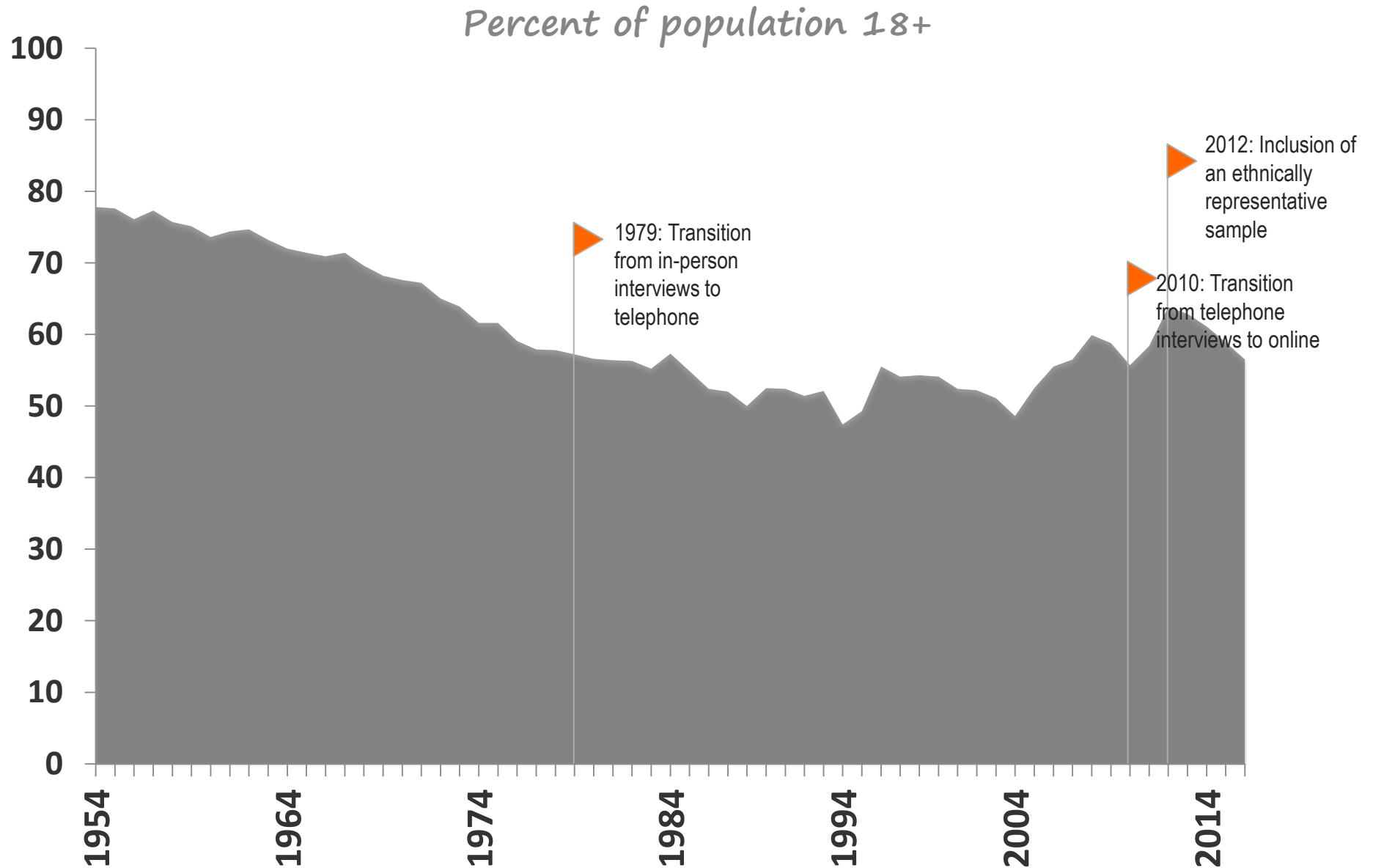


DRINKING YESTERDAY CONT'D

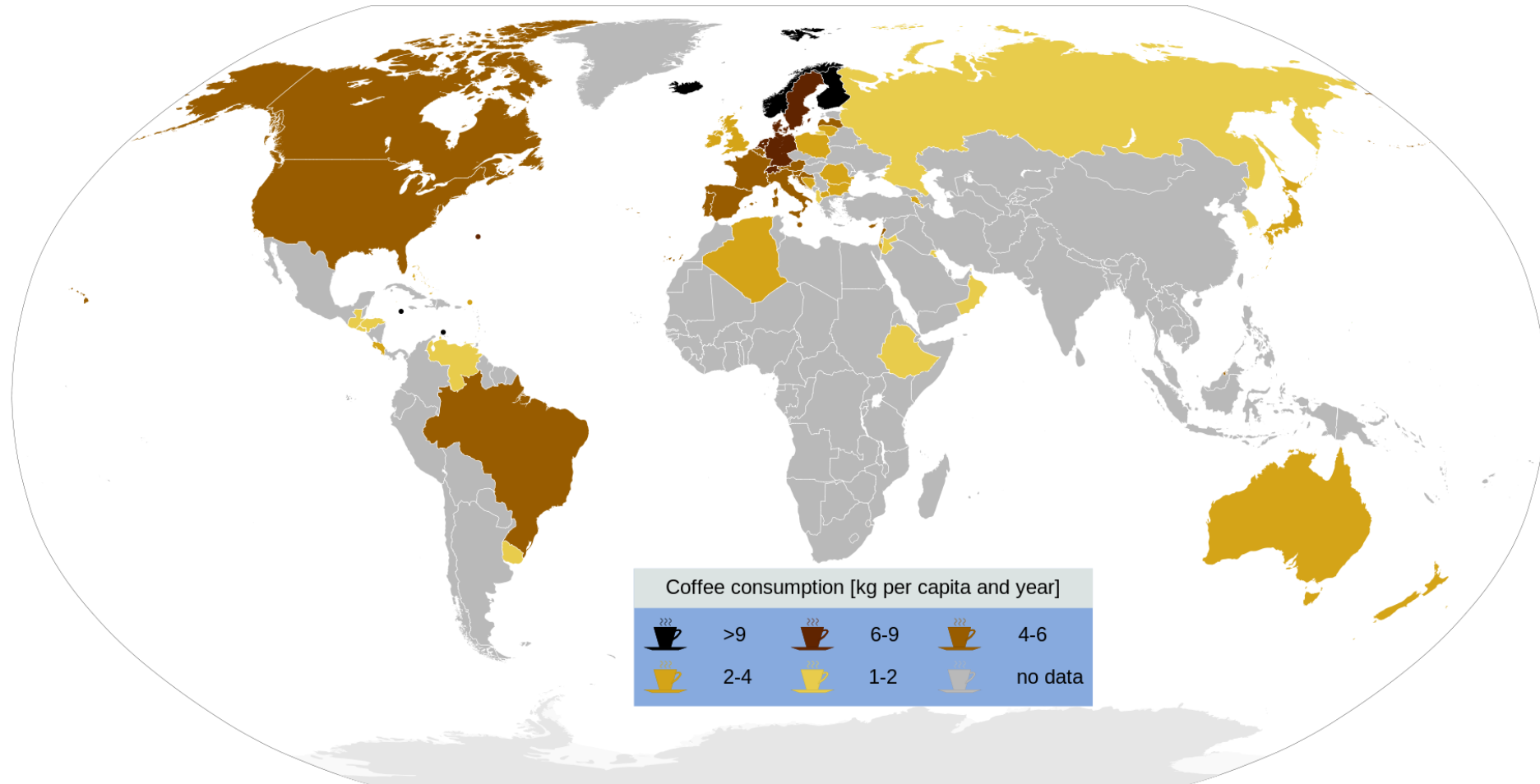
Percent of population 18+



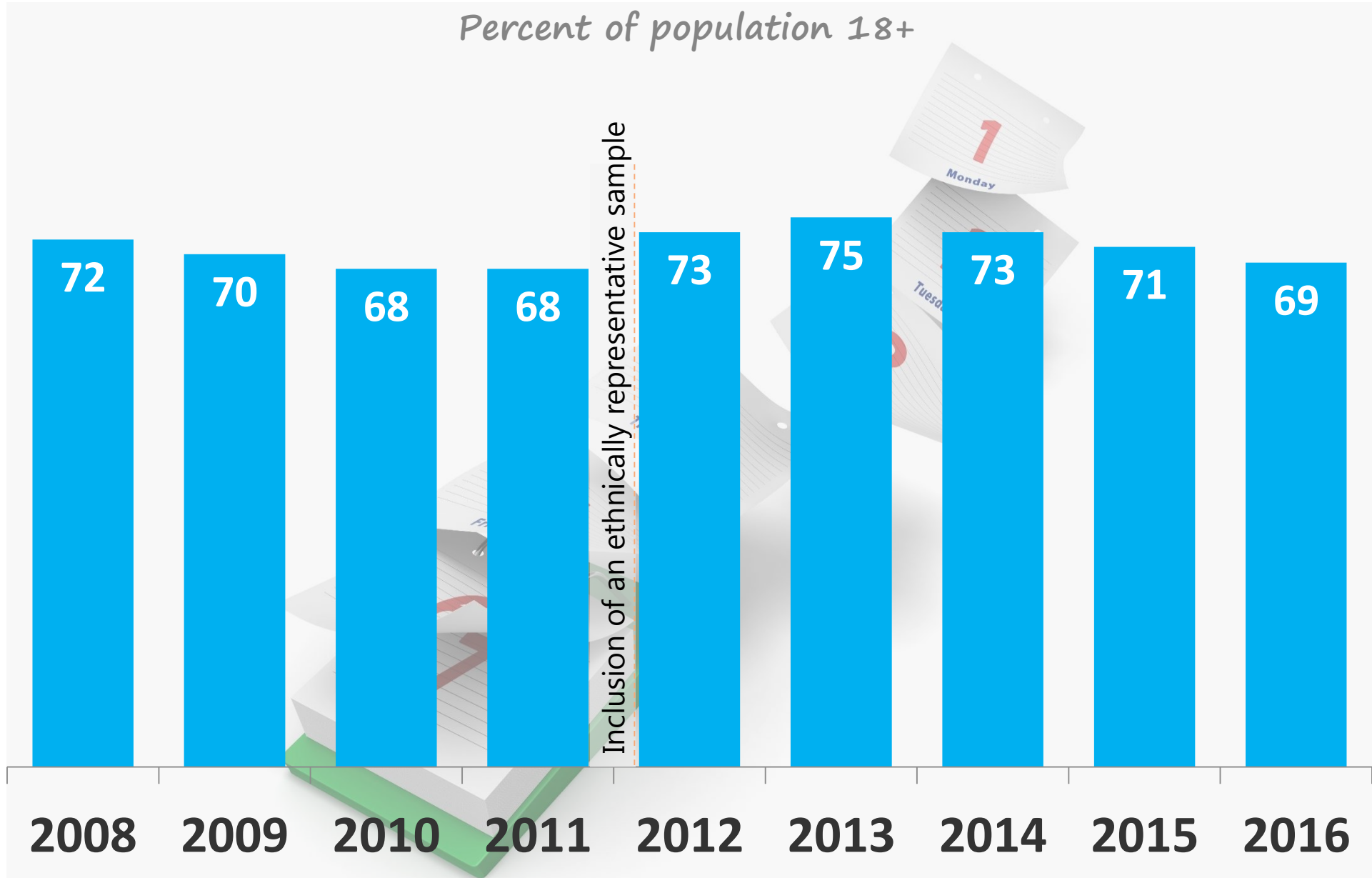
PERCENT DRINKING COFFEE YESTERDAY



A GLOBAL PERSPECTIVE

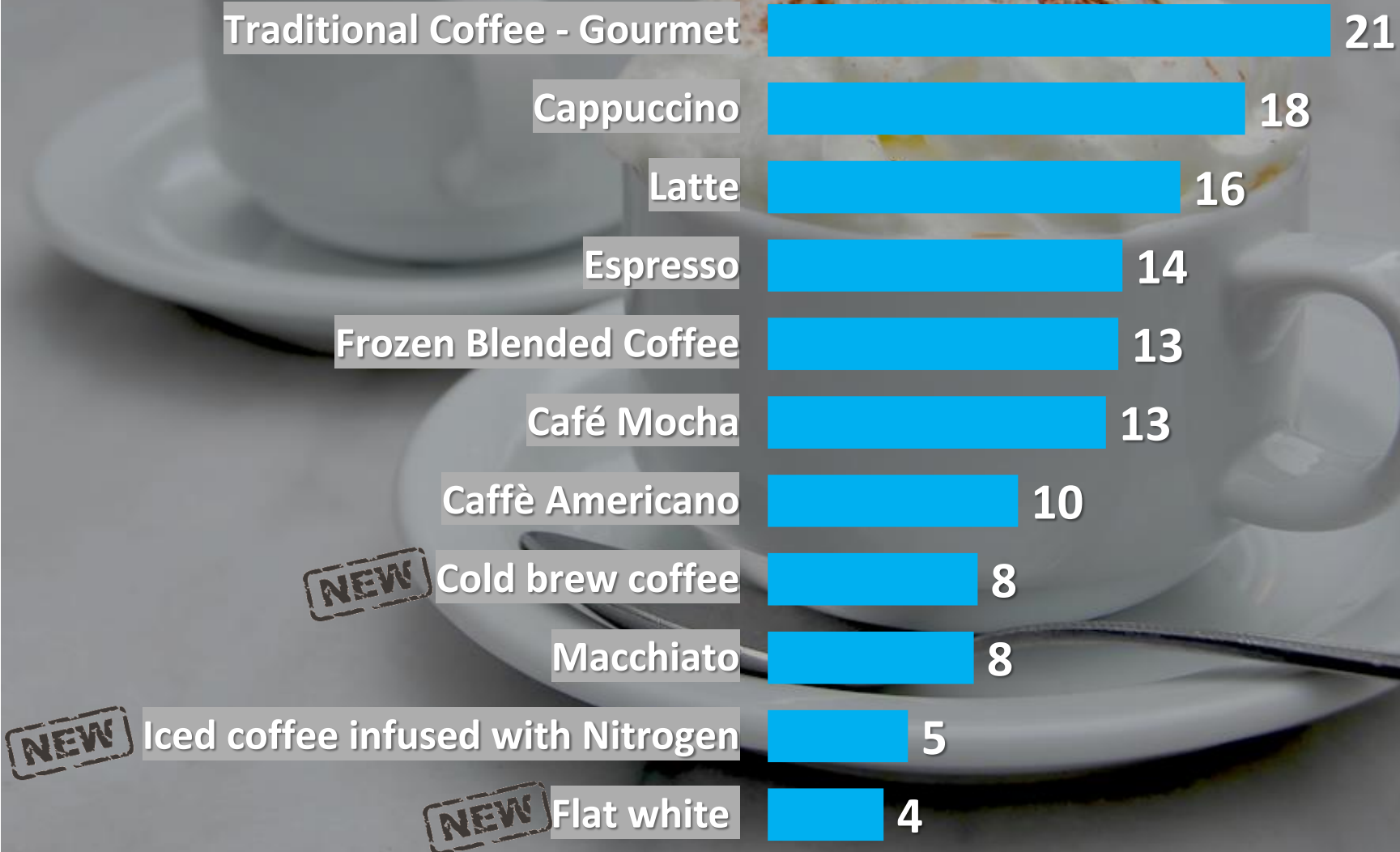


PERCENT DRINKING COFFEE PAST-WEEK



TYPES OF GOURMET COFFEE BEVERAGES DRUNK PAST WEEK

Percent of population 18+



Although most consumers have heard of different specialty coffee drinks, only a minority truly know what they are. This indicates a significant gap in knowledge and a potential need for greater specialty coffee education.

FAMILIARITY WITH SPECIALTY COFFEE

	Can Define It	Know It (but not able to define it)	Heard of It (but not sure what it is)	Not At All Familiar
Cappuccino	42%	44%	12%	2%
Latte	38%	43%	16%	3%
Shot of espresso	37%	35%	21%	7%
Café Mocha	33%	43%	19%	5%
Café Americano	21%	28%	27%	24%
Macchiato	20%	35%	30%	15%
Café Au Lait	20%	24%	27%	28%

GetGo's Breakfast Blend, may have suffered from the lack of specificity.

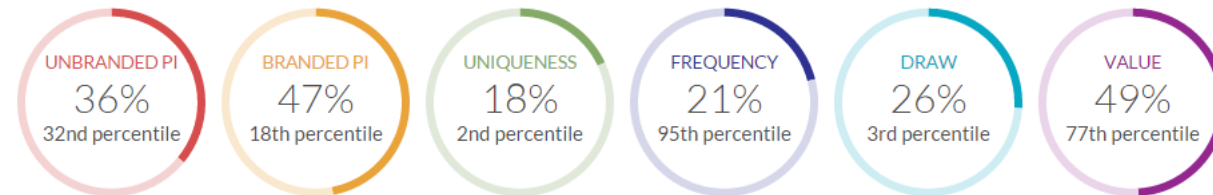


Breakfast Blend Coffee

By GetGo | New Item | CONVENIENCE STORE | OCT 2015

The new Breakfast Blend is bright, lively and smooth.

\$1.55

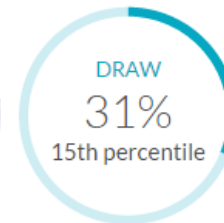
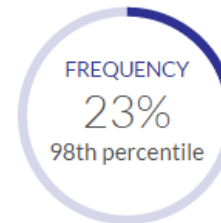
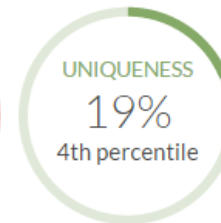
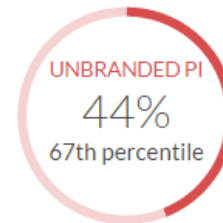


Wawa's Signature Blend Coffee scores well among away from home consumers. Call outs include "toasty aroma" and "100% Arabica Beans."

Signature Blend Coffee

By Wawa | New Item | [CONVENIENCE STORE](#) | DEC 2014

Savor the toasty aroma and smooth taste of our new Signature Blend Coffee! Made with 100% Arabica Beans.



Beverages like Eat'n Park's Caramel Macchiato generate far more interest among consumers.

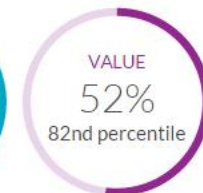
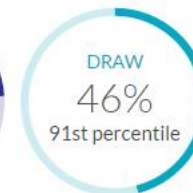
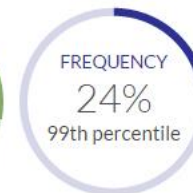
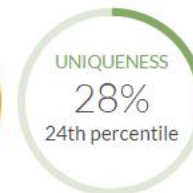
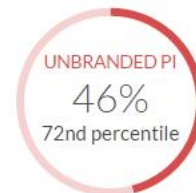


Caramel Macchiato

\$2.99

By Eat N' Park | Limited Time Offer | MIDSCALE | DEC 2015

Our newest beverage addition is sure to warm you up even on the coldest of days! It's the perfect blend of steamed milk, espresso, and French vanilla syrup topped with a rich caramel sauce. Enjoy this tasty treat (and one free refill) for only \$2.99!



DRINKING YESTERDAY

Percent of past-day coffee drinkers 18+



92%

Hot Coffee



9%

Cold / Frozen

CUPS PER DAY

Among past-day coffee drinkers 18+

3.0 cups

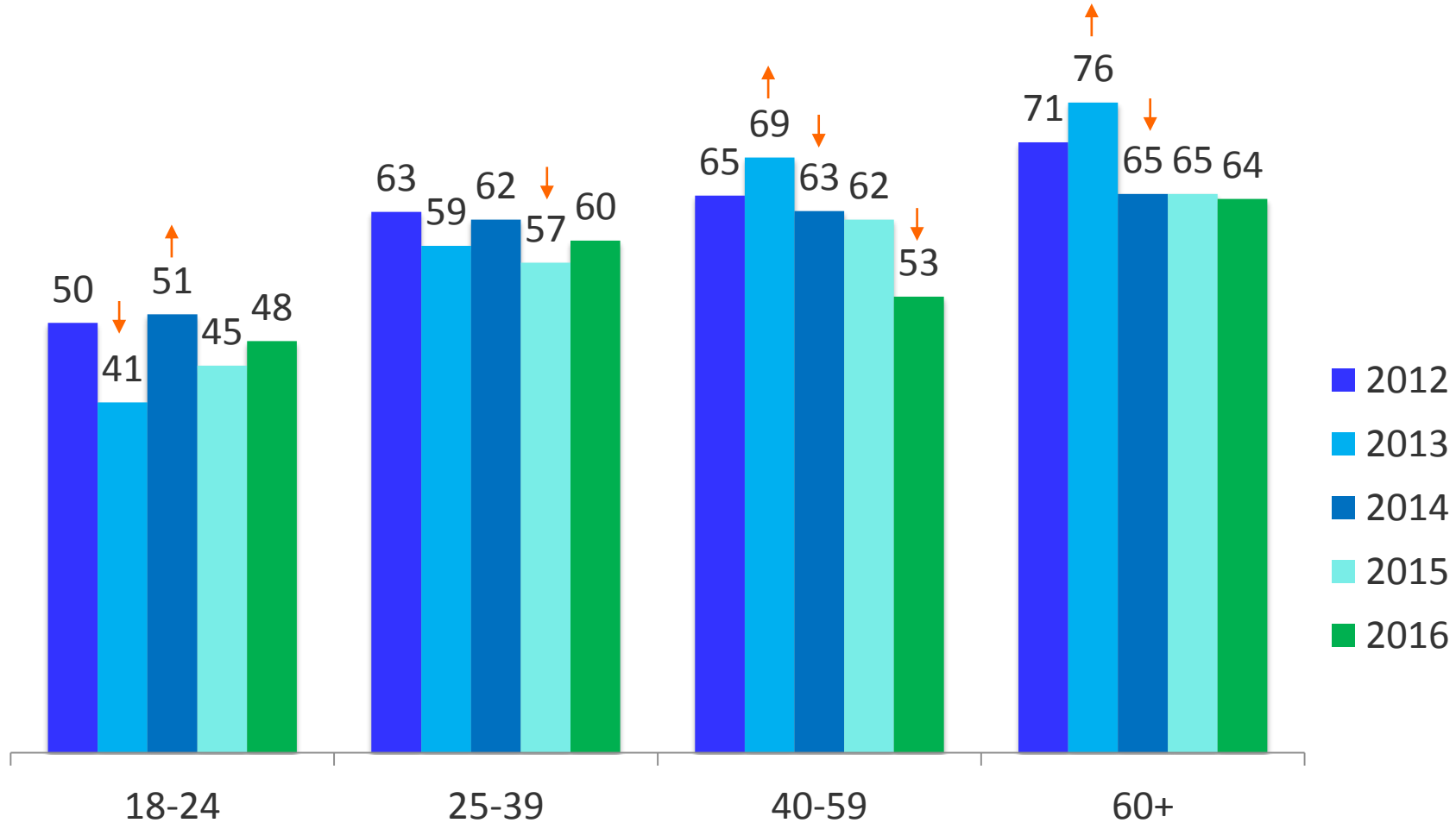


WHO IS DRINKING?




PAST-DAY PENETRATION OF COFFEE BY AGE

Percent of population 18+



↑↓ *Significantly higher / lower vs. previous year*

A photograph of two white ceramic coffee cups on a light-colored, possibly marble, surface. The cup in the foreground is filled with a coffee beverage topped with a thick, fluffy swirl of white whipped cream, which is dusted with a fine layer of reddish-brown powder, likely cinnamon. A silver spoon rests on the white saucer in front of the cup. In the background, another similar cup is visible, also topped with whipped cream and powder, but it is slightly out of focus. The lighting is soft, creating gentle shadows.

The age profile is different when we look within coffee type.

How COFFEE IS PREPARED AND CONSUMED



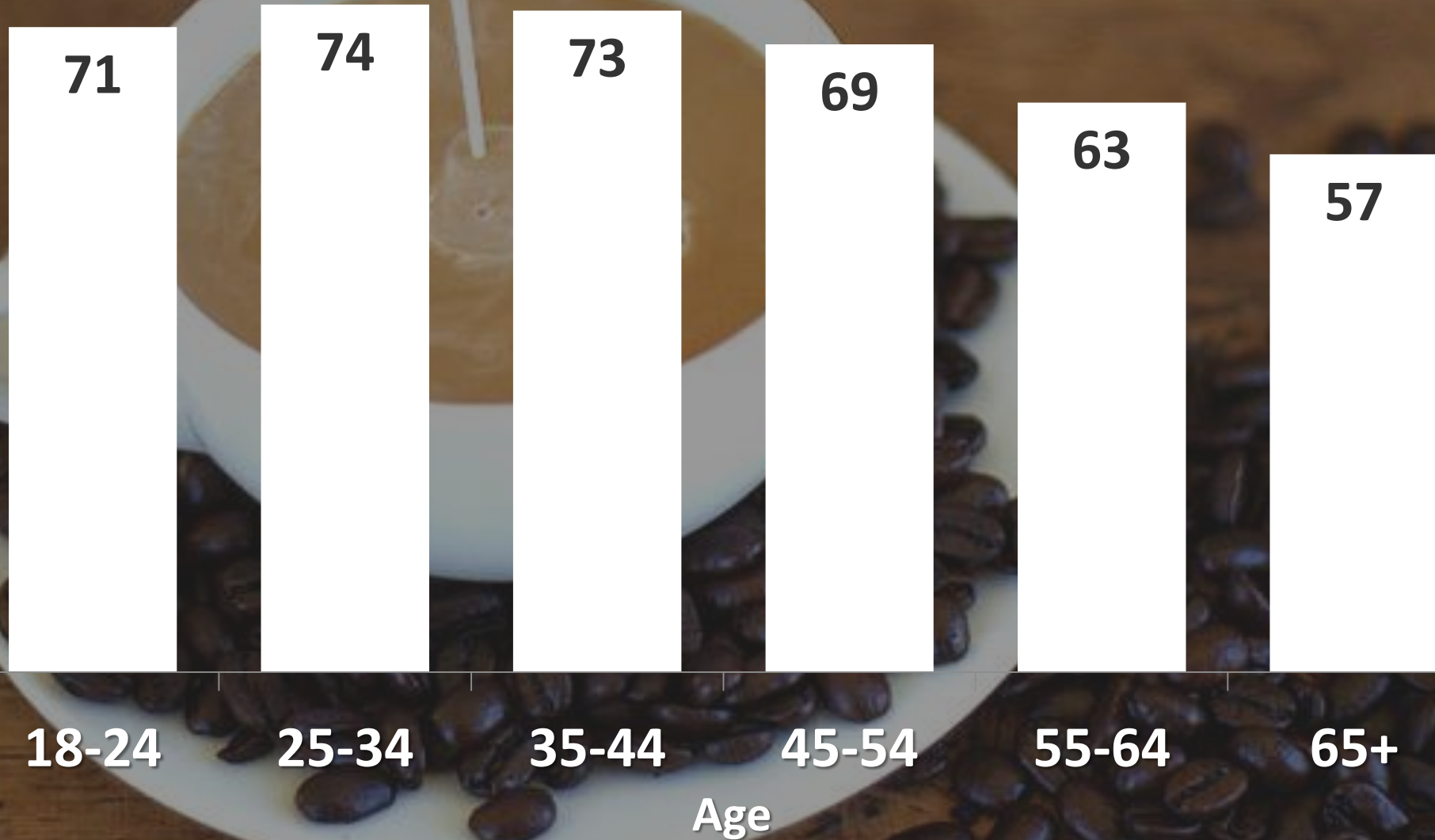
ADDITIVES

Percent of past-day coffee drinkers 18+



WHITENING

Percent of past-day coffee drinkers 18+



WHERE AND WHEN COFFEE IS CONSUMED



PLACE OF CONSUMPTION

Percent of past day coffee drinkers 18+

A woman with blonde hair and bangs is lying down, wearing a white t-shirt and blue jeans. She is looking towards the camera with a slight smile. A white coffee cup is visible in the background.

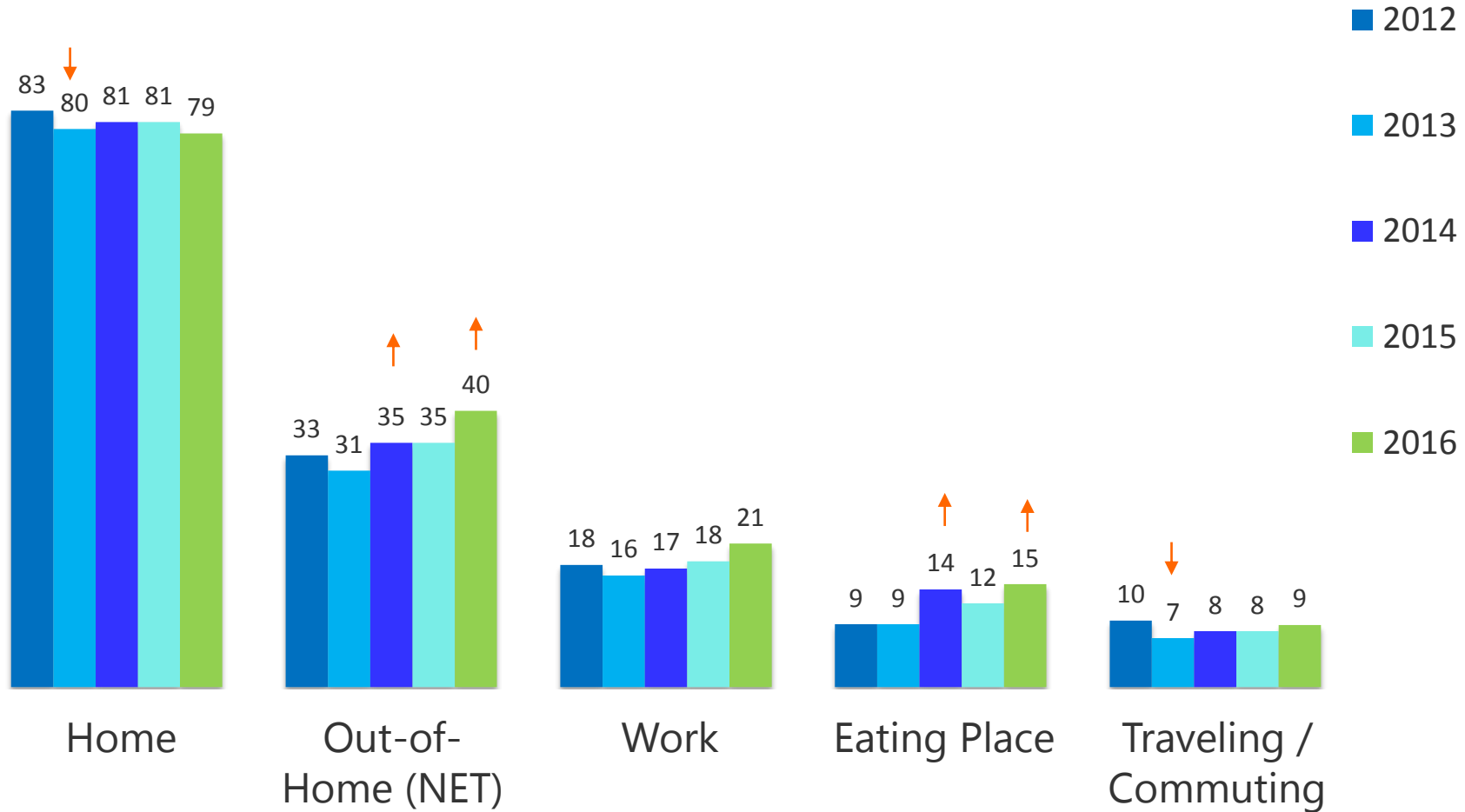
79%
Drinking
In-Home

A woman with long brown hair is sitting at a table in a cafe. She is wearing a red and black top and has her hand near her face. A glass of coffee with a cream top is on the table.

40%
Drinking
Out-of-Home

PLACE OF CONSUMPTION

Percent of past day coffee drinkers 18+



↑↓ Significantly higher / lower vs. previous year

SHARE OF BREWED COFFEE AWAY FROM HOME

Commercial: LSR	58%
Coffee shop	19%
Donut shop	12%
C-store	10%
QSR	10%
Bakery Café	2%
Supermarket deli	2%
Food truck / stand	1%
Dessert shop	1%
Fast casual	1%
Commercial: FSR	7%
Midscale dining restaurant	4%
Casual dining restaurant	2%
Fine dining restaurant	1%
Upper casual restaurant	1%
Buffet	0%
On-Site	16%
Work	10%
Cafeteria	3%
Lodging	1%
Casino	1%
Hospital	0%
Recreation venue	0%
Long-term care facility	0%

Coffee shops, donut shops, QSR's, and c-stores are leading AFH coffee venues, collectively establishing the limited service channel as the most common source for AFH coffee.

Full-service restaurants contribute much less volume. Within FSR's, the midscale segment is most prominent – owing largely to its inclusion of breakfast offerings.

Workplace occasions drive the majority of On-Site coffee, far ahead of cafeterias, lodging, healthcare, and other segments.

SHARE OF SPECIALTY COFFEE AWAY FROM HOME

Commercial: LSR	84%
Coffee shop	47%
Donut shop	12%
Fast food restaurant	6%
C-store	6%
Bakery Café	4%
Dessert / shop	3%
Food truck / stand	3%
Fast casual	2%
Supermarket deli	1%
Commercial: FSR	6%
Midscale dining restaurant	2%
Casual dining restaurant	1%
Buffet	1%
Upper casual restaurant	1%
Fine dining restaurant	1%
On-Site	6%
Cafeteria	3%
Work	1%
Lodging	1%
Casino	0%
Recreation venue	0%
Long-term care facility	0%
Hospital	0%

Coffee shops are clearly the most common AFH source for specialty coffee. Donut shops also contribute sizeable volume.

Comparatively little specialty coffee volume moves through full-service restaurants.

Similarly, specialty coffee is also less common in On-Site venues. Whereas the workplace segment represents a major share of AFH brewed coffee volume, it currently has a much smaller impact on specialty coffee.

BREWING METHOD TRENDS



BREWING METHOD YESTERDAY

Percent of past day coffee drinkers 18+



SINGLE-CUP BREWER OWNERSHIP

Percent of population 18+



29%

of US households claim to own
a single-cup brewer as of 2016.

SINGLE-CUP BREWER PURCHASE INTENT

Percent of those aware of single-cup brewers and do not own one aged 18+

10%

of those who know single-cup brewers and do not currently own one say that they will definitely or probably buy one in the next 6 months.

They are more likely to be:



Aged 18-39



Live in a major city



Have kids in HH

MOST COMMON SC ASSOCIATIONS

*Aware of single cup brewers aged 18+
Percent agree completely / somewhat*

%
Agreement

A single-cup brewer is able to make a wide variety of coffee flavors or roasts

77%

A single-cup brewer is a fast way to make coffee

75%

NEW

No one has to compromise
– we each have whatever coffee we want

72%

A single-cup brewer is able to make a wide variety of beverages

68%

LEAST COMMON SC ASSOCIATIONS

Aware of single cup brewers aged 18+
Percent agree completely / somewhat

%
Agreement

With a single-cup brewer I would visit coffee shops less often

36%

Single-cup brewers are reasonably priced

35%

A single-cup brewer makes better tasting coffee than other
brewing methods

33%

NEW

A single-cup brewer is the only way I know
how to make coffee

18%

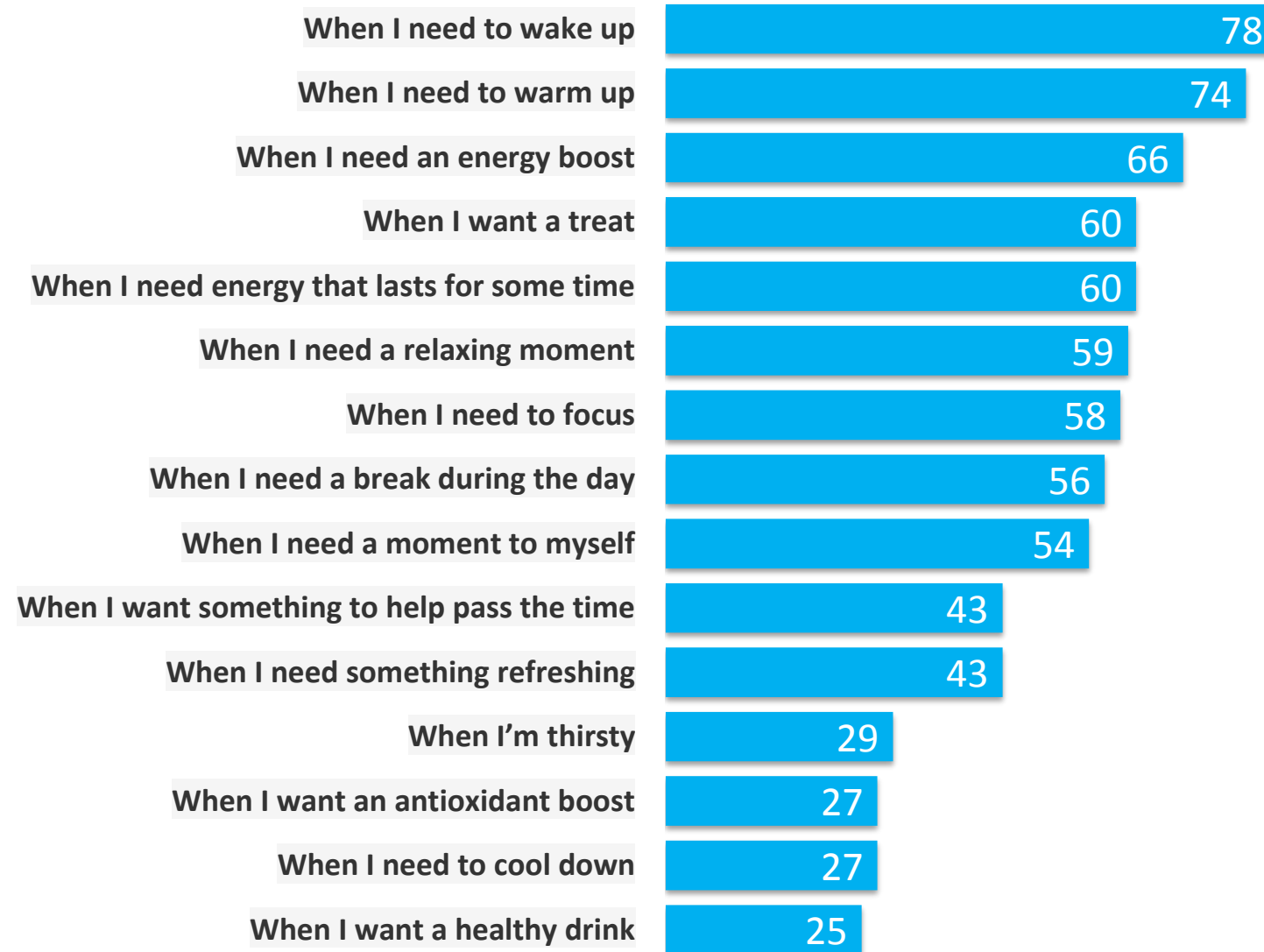
INFLUENCING BEHAVIOR



REASONS DRINKING COFFEE

Coffee drinkers aged 18+

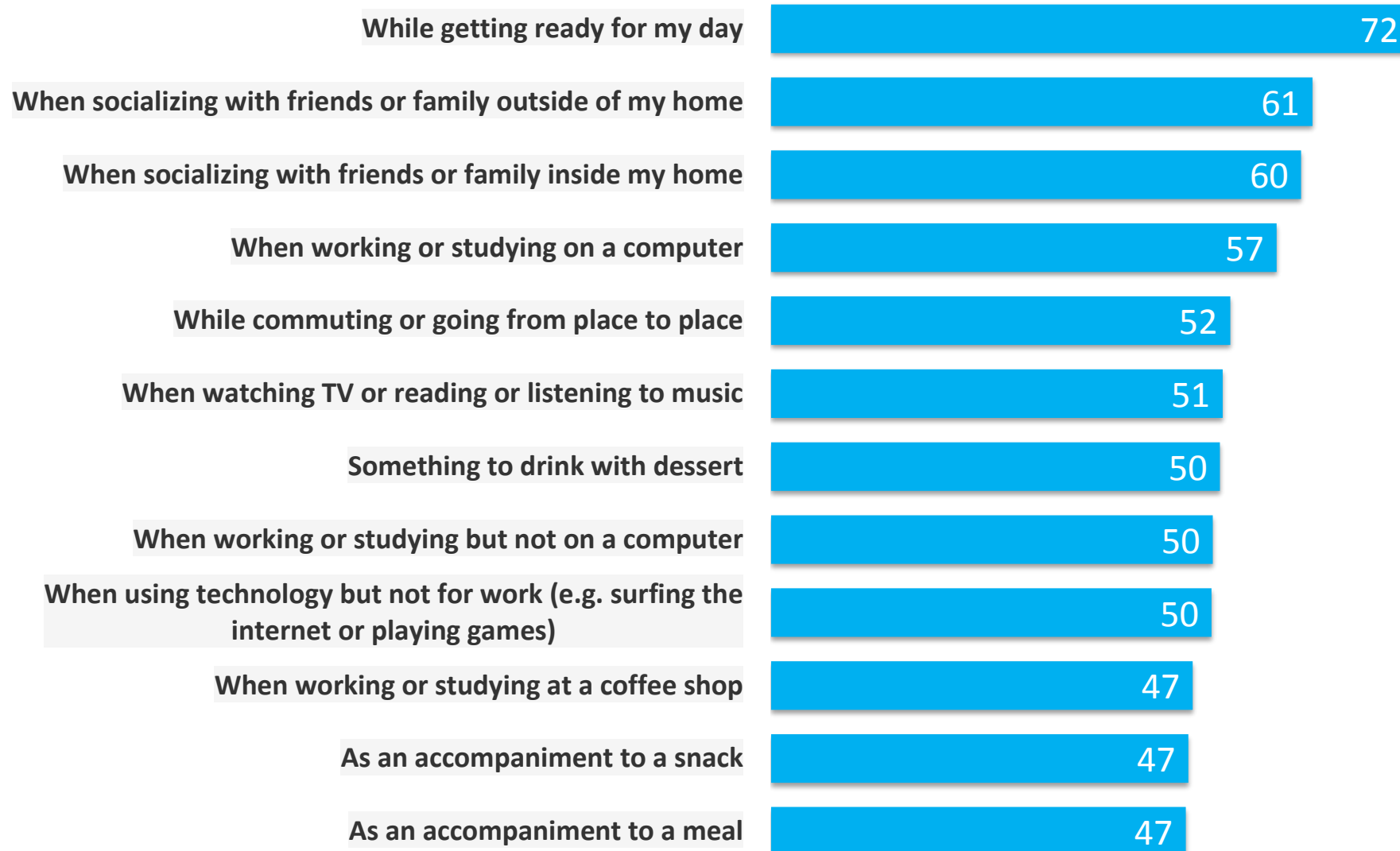
Percent very often / sometimes drink coffee for this reason



SITUATIONS DRINKING COFFEE

Coffee drinkers aged 18+

Percent very often / sometimes drink coffee in this situation





nca

NATIONAL COFFEE ASSOCIATION USA **EST. 1911**