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National Coffee Association of U.S.A.

Founded in 1911, The National Coffee Association was one of the first trade associations organized in the United States. National Coffee Association membership is comprised of producers, importers, roasters, wholesalers/distributors, retailers and allied trade.

The National Coffee Association is the most experienced, broadly based and reliable advocate for the coffee industry, drawing on over 100 years of experience to address the multiple interests and concerns of our members.

The mission of The National Coffee Association is to be the foremost trade association representing the entire coffee industry in the United States.

We are committed to the growth and well-being of the industry through our roles as:

- A proactive advocate for the industry, acting as the industry's recognized spokesperson and voice for promoting consumption.
- An educator for our members and consumers who lead the industry in facilitating research, and gathering and disseminating relevant research data.
- A forum for interaction that addresses key issues confronting the domestic and international industry.
Background and Recent Enhancements
Since 1950, the National Coffee Association of U.S.A. has commissioned an annual survey of Americans regarding their consumption of coffee and, since 1993, their habits and practices related to espresso-based beverages, including cappuccino, espresso, latte, iced/coffee blended with ice, café mocha and macchiato.

The study provides the longest available statistical series on consumer drinking patterns related to coffee and other beverages. In the earliest years, the study was sponsored by the Pan American Coffee Bureau and then the International Coffee Organization. Since 1991, the study has been financed and conducted by the National Coffee Association of U.S.A.
Recent Enhancements

The tracking of habits and practices as they relate to the consumption of cappuccino, espresso, latte and iced/coffee blended with ice began in 1993, café mocha was added in 1999, macchiato was added in 2009, caffè Americano was added in 2014 and flat white, cold brew coffee and nitrogen carbonated coffee were added in 2016. In the past, these coffee types had been presented separately from what was historically defined as coffee: regular, soluble (instant) and decaffeinated coffee. This separation was maintained to ensure comparable historical trends. Given the increase in consumption of these coffee types, however, their data has been, since 1999, aggregated with the traditionally defined coffee consumption data in defining the total U.S. market and in tracking the consumption of total coffee. Statistics breaking out these newer additions to the market are also presented separately and titled accordingly.

As a result, since 1999, the total coffee market includes all coffee types: regular, instant and decaffeinated coffee and Gourmet Coffee Beverages, which includes gourmet (premium whole bean or ground) coffee, iced/coffee blended with ice, cold brew coffee, nitrogen carbonated coffee and espresso-based beverages, such as cappuccino, espresso, latte, café mocha, macchiato, caffè Americano and flat white.

Beginning in 2006, profiling non-drinkers of coffee was added to the study.
Previously, coffee was classified as instant or brewed. This list has been expanded ongoing. As of 2019 it includes 13 preparation options: ten are classified as brewed during the results analysis, two are classified as instant and one is classified as ready-to-drink:

### Classified as Brewed

- Drip coffee maker
- Espresso machine
- French press/plunger
- Moka stove top (style brewer) octagonal Italian
- Percolator
- A machine that uses a pre-measured, sealed disk or capsule of coffee to make a single-cup
- Coffee strainer
- Pour over (e.g., Chemex) (added in 2014)
- *Cold brewing (leaving coffee in cold water for a longer period of time) (added in 2015)
- *Bean-to-cup brewer (the machine grinds whole coffee beans to brew one cup of coffee) (added in 2018)

### Classified as Instant

- Instant coffee (adding hot water to coffee granules, powder or syrup in a cup)
- *Coffee concentrate (that you buy in a bottle and add water to) (added in 2015)

### Classified as Ready-to-Drink

- Purchased ready-to-drink in a bottle or can
Recent Enhancements (Cont’d)

Changes made in 2018 that are still present in 2019:

- Wording changes have been made to Water definitions:
  - ‘Plain bottled water (not flavored, not sparkling)’ from ‘Bottled Water (unflavored, not carbonated)’
  - ‘Plain sparkling water (not flavored)’ from ‘Bottled Water (unflavored, carbonated)’
  - ‘Flavored water without added vitamins or other nutrients (sparkling or not sparkling)’ from ‘Bottled Water (flavored, not vitamin enhanced)’
  - ‘Water with added vitamins or other nutrients (sparkling or not sparkling, flavored or unflavored)’ from ‘Bottled water (vitamin enhanced)’

- The definition of Nitro Coffee was changed to “Nitro coffee (sometimes called draft) – iced or cold brew coffee infused with nitrogen” from “Nitro Coffee (iced coffee infused with nitrogen)”

- A new brewer type was added: “Bean-to-cup (the machine grinds whole coffee beans to brew one cup of coffee)”
  - When we first introduce coffee brewing types to respondents, all brewing types are shown with an image. To reduce confusion with single-cup brewing systems, bean-to-cup brewers are always shown next to single-cup brewers for respondents to easily compare the two.

- New questions on ordering through mobile applications was added to the past-day and past-week section.

- A new section on Brewer Types was added. This section merged with questions previously appearing in the Single-Cup Brewer section. Subsequently, awareness, current ownership and gifting intent of single-cup brewers was removed. Future purchase intent of all brewer types are now included. All other single-cup questions appearing in 2017 have been kept.

- For those currently working outside of the home, a new question was added to describe the type of work environment one works in (e.g., office, store or restaurant, etc.).

- Note: The following changes were made in 2018 but not kept in 2019 Survey:
  - A new open-ended question on perceptions of why coffee is good or bad for the health has been added.
  - In the coffee consumption vs. year ago and triggers and barriers section, two new statements have been added to out-of-home coffee consumption list: “Allows me to customize my coffee (e.g., adding flavor shots or syrups or other ingredients)” and “To try new/seasonal beverages.”
  - Two new questions related to coffee and disease prevention have been added.
Recent Enhancements
(Cont’d)

Changes made in 2019:

- Wording changes have been made to the following items:
  - “Cold brewing (brewed without heat for a long period of time)” was updated to “Cold brewing (brewed without heat by soaking coffee in cold water or using cold water and coffee in a specifically designed cold water).”
  - “Bubble tea” was updated to “Bubble tea/Boba tea.”
  - “A combination of decaffeinated and caffeinated” was updated to “partially caffeinated (e.g., half caff).”
  - “Brown sugar” was added as something that might be added to coffee, and “sugar” was updated to “white sugar.”
- A new section on cold brew coffee consumption and attitudes was added.
- A new section on Ready-to-Drink coffee consumption and attitudes was added.
- A new question on familiarity of CBD (cannabidiol) was added to the survey.
- “Includes added CBD (cannabidiol)” was added as an option for things that can affect consumers’ purchase intent of coffee.
Recent Enhancements
(Cont’d)

Data collection continues to evolve to reflect the changing reality of the marketplace:

- Interviewing for the NCDT was initially conducted face-to-face.
- The study transitioned to a telephone methodology in 1979.
- Starting in 2010, the study migrated to online data collection (a self-completed online survey). This was preceded by two years (2008 and 2009) in which the same questionnaire was administered on the telephone and online.
- In 2012, the study remained online but the sample profile changed; in previous years, quotas were used to ensure that the study mirrored the U.S. population in terms of age, gender and region. Ethnicity quotas were not used. In 2012, quotas for Hispanic-American and African-American ethnicity were introduced for the first time. The study was also offered in Spanish, which allowed for the inclusion of less acculturated Hispanic-Americans, and the additional breakdown of results by level of acculturation.
- In 2013, the sample profile was structured to include a representative sample of the U.S. population with quotas for Hispanic-Americans and African-Americans without oversampling for these groups. The survey also continued to be offered in Spanish.
- In 2017, the NCDT commissioned additional youth sample (700 respondents aged 13-18) in order to examine beverage trends among this age cohort. This sample boost was structured to include a representative sample of Hispanic-Americans and African-Americans. This additional sample of young consumers is reported in 2017’s Generational Report; their responses are not reflected in the main Publication report. The age / gender / region / ethnicity sample structure for the study was also updated in 2017 to reflect the population profile from the U.S. Census Bureau’s 2016 Current Population Survey.

For additional historical context of enhancements made from 2010-2017, see the Appendix.
Research Methodology
Data Collection

The 2019 National Coffee Drinking Trends study was conducted among both males and females, 13 years of age or older, who consumed a beverage other than tap water the day prior to being interviewed. Note that this report focuses exclusively on data among consumers aged 18 and older. The sample reported in this study is representative of the population of the U.S. (252,063,800* aged 18 years or older).

The methodology for the online survey was:

- Nationally representative sample of 2,815 people aged 18 years and older.
- Respondents randomly selected from online panels.
- Interlocking quotas were used for age, gender, region and ethnicity (with three specific ethnicities tracked – Non-Hispanic-American and Non-African-American, Hispanic-American and African-American).
- Within the Hispanic-American sample, quotas were established for languages spoken at-home (English dominant, bilingual and Spanish dominant). This was used as a proxy for acculturation.
- The survey was available in English and Spanish.
- All respondents drank a beverage other than tap water past-day. Drinking coffee is not a requirement to participate in the research.
- Data collection: mid-to-late January 2019, with daily quotas to ensure a balanced mix of days of the week. This is consistent with 2015-2018 and earlier than in previous years, when field dates tended to be late January to late February.

* Based on United States Census Bureau: https://census.gov/data/tables/2017/demo/popest/nation-detail.html#tables
Ethnic Sample and Weighting

In order to obtain a solid read of coffee consumption and attitudes among the Hispanic-American population, a total of n=490 Hispanic-American consumers aged 18+ were interviewed in the 2019 NCDT.

The final dataset was weighted based on age, gender, region and ethnicity to match the U.S. population based on the U.S. Census Bureau’s 2016 Current Population Survey. Because the sample profile was structured to mirror the population on these attributes, the weighting did not significantly affect the sample distribution.

<table>
<thead>
<tr>
<th>Base – Unweighted</th>
<th>Percent – Unweighted</th>
<th>Base – Weighted</th>
<th>Percent – Weighted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2,815</td>
<td>100</td>
<td>2,793</td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Non-Hispanic</td>
<td>2,325</td>
<td>83</td>
<td>2,308</td>
</tr>
<tr>
<td>Total Hispanic-American</td>
<td>490</td>
<td>17</td>
<td>486</td>
</tr>
<tr>
<td>Caucasian-American</td>
<td>1,899</td>
<td>67</td>
<td>1,885</td>
</tr>
<tr>
<td>African-American</td>
<td>358</td>
<td>13</td>
<td>355</td>
</tr>
<tr>
<td>Asian-American and Other</td>
<td>206</td>
<td>7</td>
<td>204</td>
</tr>
<tr>
<td>Hispanic Country of Heritage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Puerto Rican</td>
<td>97</td>
<td>3</td>
<td>97</td>
</tr>
<tr>
<td>Mexican</td>
<td>230</td>
<td>8</td>
<td>230</td>
</tr>
<tr>
<td>Cuban</td>
<td>37</td>
<td>1</td>
<td>36</td>
</tr>
<tr>
<td>Dominican</td>
<td>14</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>Some other Hispanic or Spanish-speaking ethnicity</td>
<td>126</td>
<td>4</td>
<td>122</td>
</tr>
</tbody>
</table>
Online data collection
January 7 – January 22, 2019
n= 2,815 respondents

Respondents were screened to meet the following criteria:

- Aged 18+.
- The weighted sample reflects the American population 18+, with interlocking quotas for age, gender, region and ethnicity.
- All respondents drank a beverage other than tap water past-day (drinking coffee is not a requirement to participate in the research).
- Also, there were daily quotas to ensure a balanced sample by day of week.
Significance Testing

Data in this report have been tested for statistical significance.

- Numbers that are significantly higher (at the 95% confidence level) are indicated with an oval.
- Numbers that are significantly lower (at the 95% confidence level) are indicated with a rectangle.

When numbers are tested across columns in a table, the following notation is used:

<table>
<thead>
<tr>
<th>Row</th>
<th>Column A</th>
<th>Column B</th>
<th>Column C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>70</td>
<td>42</td>
<td>41</td>
</tr>
<tr>
<td>2</td>
<td>55</td>
<td>30</td>
<td>41</td>
</tr>
<tr>
<td>3</td>
<td>32</td>
<td>27</td>
<td>37</td>
</tr>
</tbody>
</table>

The 70% in Column A is significantly higher than both Column B and Column C.

The 37% in Column C is significantly higher than only Column B.

The 30% in Column B is significantly lower than both Column A and Column C.

When more than one year’s data is reported on one chart, upwards/downwards triangles are used to indicate the number is significantly higher / lower than previous year (at the 95% confidence level).
Dayparts

Each respondent was interviewed regarding the beverages that they consumed “yesterday”—i.e., the day before being contacted. Specifically, consumption information was collected for each of six time periods:

- **Breakfast**: defined to respondents as “the first meal after rising, even if you only had fruit juice or coffee”
- **Morning**: defined as “between breakfast and lunch”
- **Lunch**
- **Afternoon**: defined as “between lunch and dinner”
- **Dinner**
- **Evening**: defined as “after dinner”

If coffee was consumed during one or more of these time periods, details of coffee consumption practices for each time period were collected. In addition to this time-period-specific information, coffee drinkers were asked, in detail, about more general coffee consumption practices, as well as attitudes and perceptions with respect to coffee beverages.
Nomenclature

**Total Coffee:**
Includes all coffee types.

**Traditional Coffee – Not Gourmet (TC-NG):**
Traditional Coffee (Traditional Coffee, drunk hot or iced) that is not brewed from premium whole bean or ground varieties.

**Instant Coffee:**
Instant coffee from a can or jar (adding hot water to coffee granules or syrup in a cup) or instant coffee from single pre-measured stick pack (adding hot water to coffee granules in a cup). Instant coffee also includes coffee made from coffee concentrate.

**Decaffeinated Coffee:**
A cup of coffee that was decaffeinated or partially caffeinated (e.g., half caff).

**Gourmet Coffee Beverages (GCB) (NET):**
Traditional Coffee – Gourmet, Espresso-Based Beverages, Non-Espresso-Based Beverages, and ready-to-drink coffee.

**Traditional Coffee – Gourmet (TC-G):**
Traditional Coffee drunk hot or iced that is brewed from premium whole bean or ground varieties.

**Espresso-Based Beverages (EBB):**
Cappuccino, espresso, latte, café mocha, macchiato, flat white and cappé Americano.

**Non-Espresso Based Beverages (NEBB):**
Frozen blended coffee, cold brew coffee (not traditional iced coffee - made by steeping coffee in cold water for several hours) and nitro coffee (sometimes called draft) - iced or cold brew coffee infused with nitrogen.

**Café con leche can be included in:**
Traditional Coffee – Gourmet; or Traditional Coffee – Not Gourmet. The distinction is based on the respondent believing that the Café con leche was or was not gourmet coffee — that is, brewed from premium whole bean or ground varieties. Café con leche is not included in Espresso-Based Beverages.

**Ready-to-drink coffee (RTD):**
Purchased ready-to-drink in a bottle or can.

“Daily” or “Past-Day” penetration refers to respondents who drank coffee or Gourmet Coffee Beverages the day before they were interviewed. These respondents may not necessarily consume coffee or Gourmet Coffee Beverages every day.
Past-Week and Past-Year Consumption

All survey participants were asked about the length of time since last drinking coffee:

- For each coffee beverage not consumed yesterday, respondents were asked if they consumed each beverage in the past-week. For each coffee beverage consumed in the past-week, they were asked about the details of their past-week consumption.
- For each coffee beverage not consumed yesterday or in the past-week, respondents were asked if they consumed each beverage in the past-year.
- Finally, a demographic profile of all survey participants — whether coffee drinkers or not — was collected.
The region breaks used in this report are based on the U.S. Census Regions and Divisions. The states within each region are shown in the map.
Caveat

Data collected using different methodologies should be compared with caution, as the data collection methodology itself can affect the results.

The NCDT data collection methodology used in 2012 and later is different vs. previous NCDT research because previous ethnicity imbalances have been corrected. The survey is now offered in Spanish and there are quotas within the Hispanic-American sample for language use at-home.

As such, any changes in reported coffee behavior in 2012 vs. previous years may stem from the different sample profile and not from changes in the market. For the most part, data included in this report trends from 2013 onwards.

Readers with access prior to 2012: Please refrain from making direct comparisons between 2012 data and data from previous years.

Comparisons can however be made between 2012 – 2019 data.
Single-Cup Brewing
2019

The National Coffee Association of U.S.A.

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