

nca

NATIONAL COFFEE ASSOCIATION USA EST. 1911



U.S. Coffee Consumption Trends



Presented to the
International Coffee Organization
Promotion and Market Development Committee
September 19th, 2016
William Murray

What is the NCA?

- ❖ Founded in 1911
- ❖ Not-for-profit 501(c)(6) trade association
- ❖ 8 staff members
- ❖ 350 members: *Roasters, Growers, Importers, Transportation, NGOs, Coffee Shops, Allied Organizations, others...*



What do we do?

- ❖ Education
- ❖ Regulatory and Advocacy Work
- ❖ Science
- ❖ Networking and Business Discounts
- ❖ Market Research and Statistics



NCA National Coffee Drinking Trends

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- ❖ *Since 1950*
- ❖ *2,782 Respondents in 2016, 18+*
- ❖ *Online, bilingual (Spanish/English)*
- ❖ *Sample weighted for ethnicity, regionality, age, gender*
- ❖ *Respondents drank a beverage other than tap water in prior day*
- ❖ *Margin of Error: +/- 1.9%*



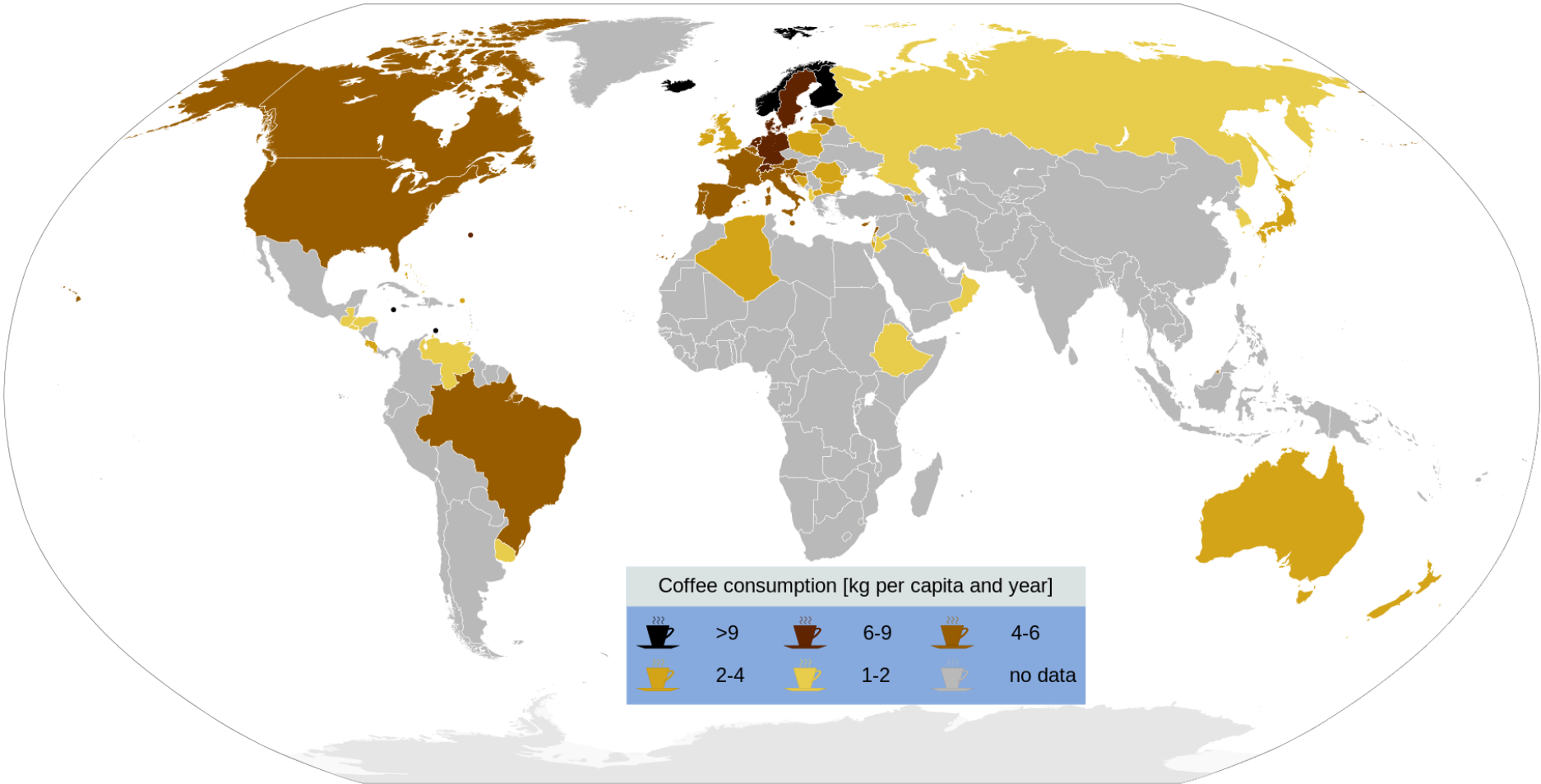
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Top Line

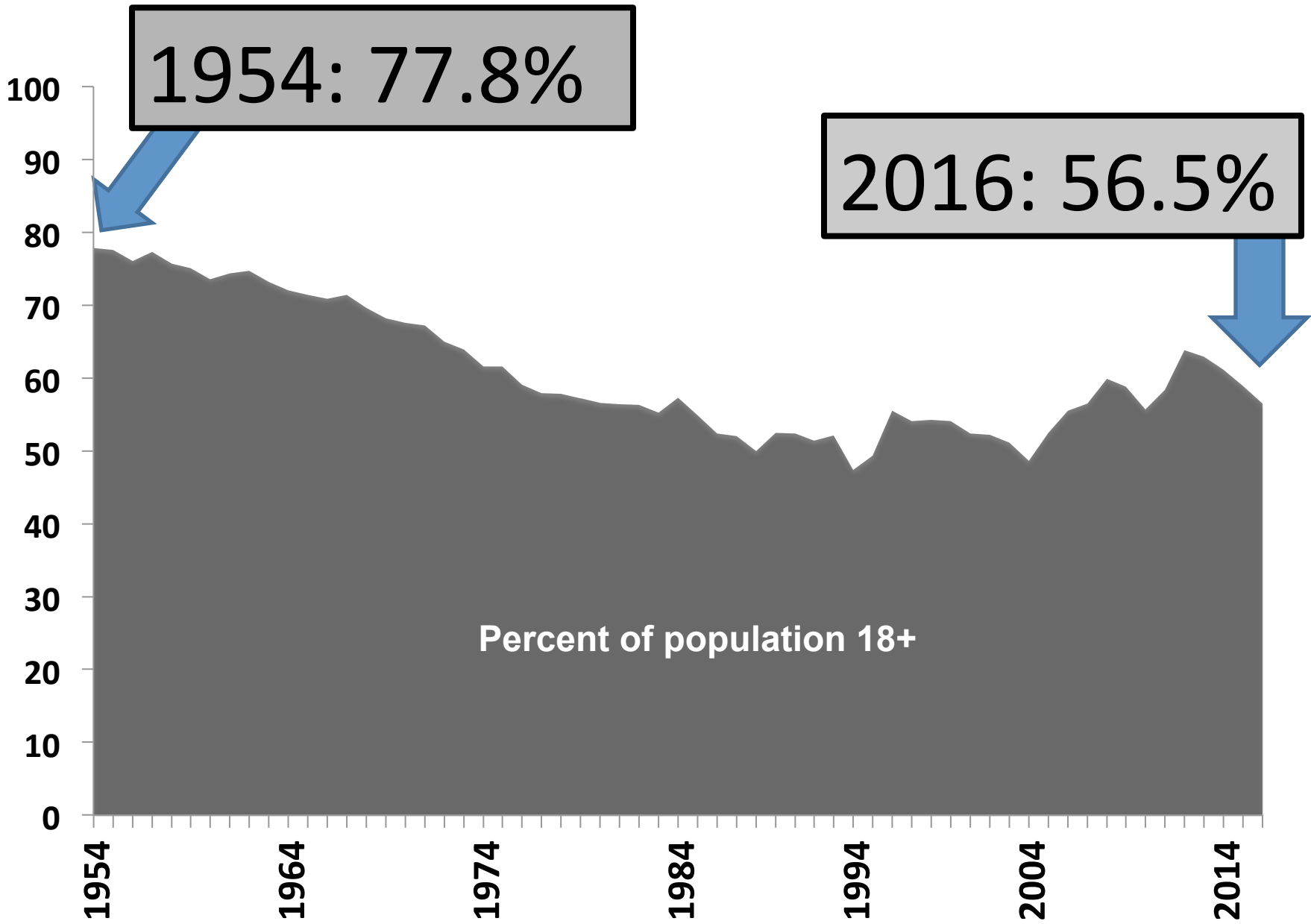
- Coffee consumption is down significantly from 65 years ago...but holding steady.
- There is an evolving preference for gourmet coffee beverages
- There are significant generational differences in what, how and where coffee is consumed.
- Some have compared this evolution to the wine drinking evolution in the U.S. during the 70's.
- Single serve remains strong – beware of click-bait headlines suggesting otherwise.
- Consumers tell us they care.



A GLOBAL PERSPECTIVE



PERCENT DRINKING COFFEE YESTERDAY



1954: 77.8%

2016: 56.5%

Percent of population 18+

PERCENT DRINKING YESTERDAY

Percent of population 18+



Coffee

57%



Tap Water

46%

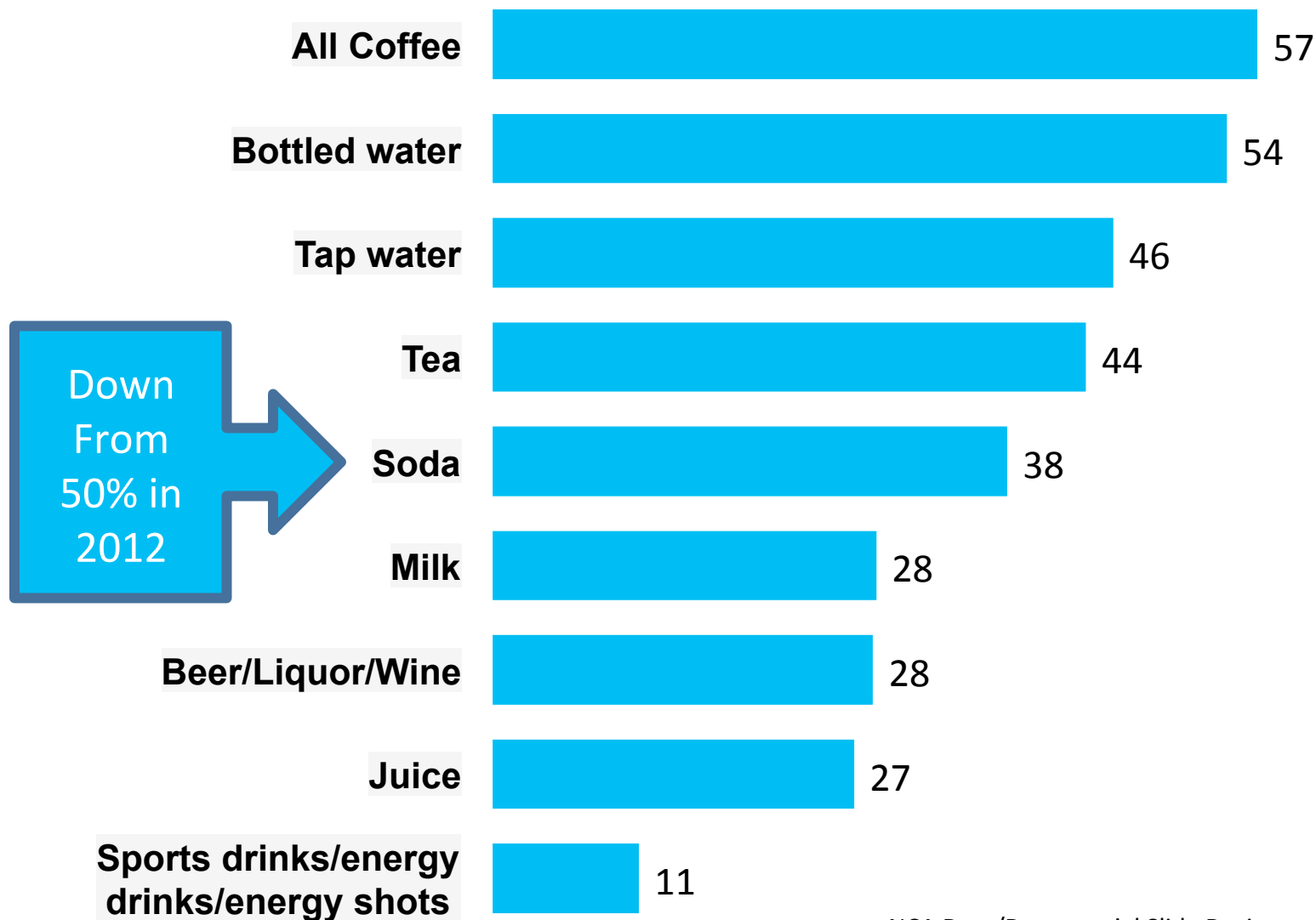


Soda

38%

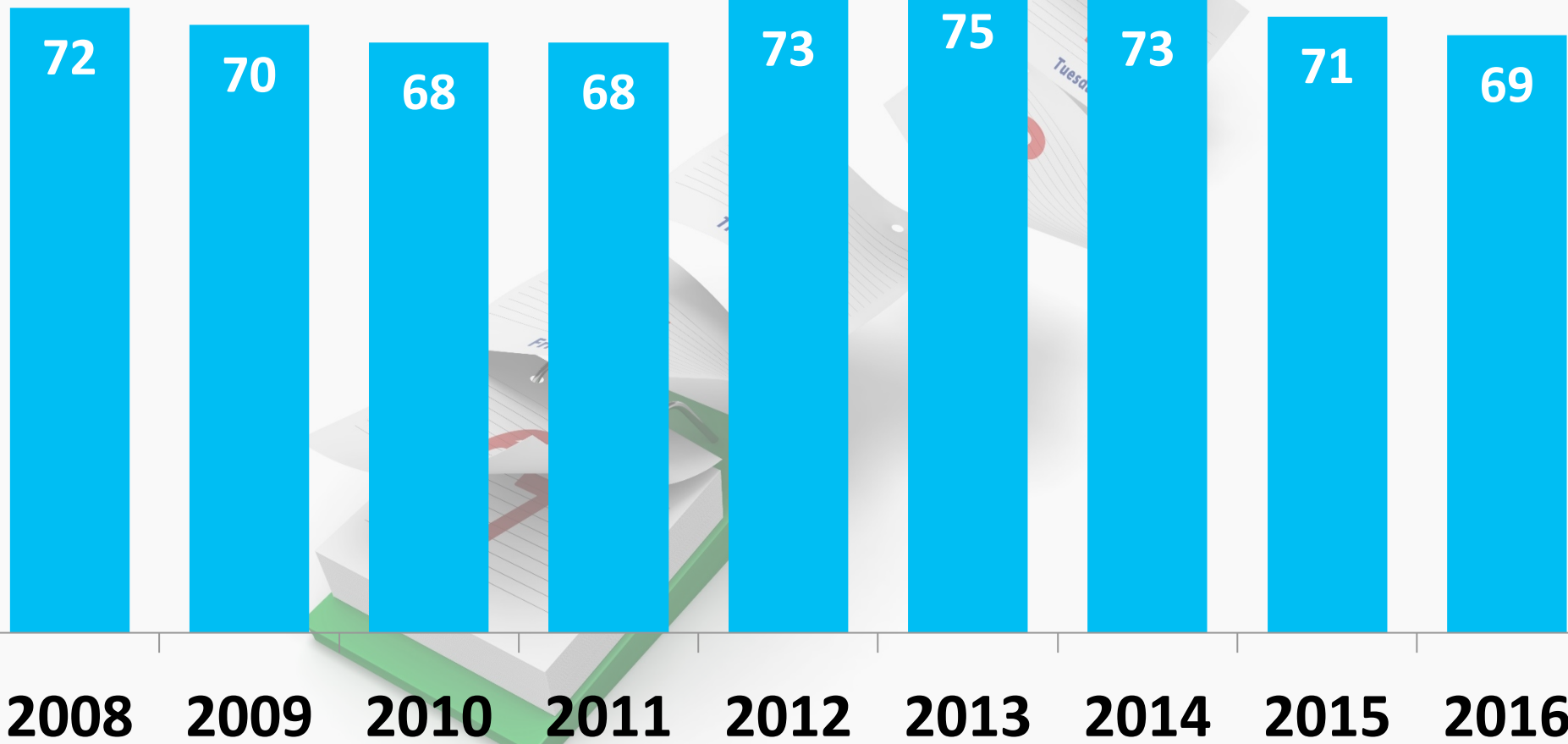
DRINKING YESTERDAY CONT'D

Percent of population 18+



PERCENT DRINKING COFFEE PAST-WEEK

Percent of population 18+



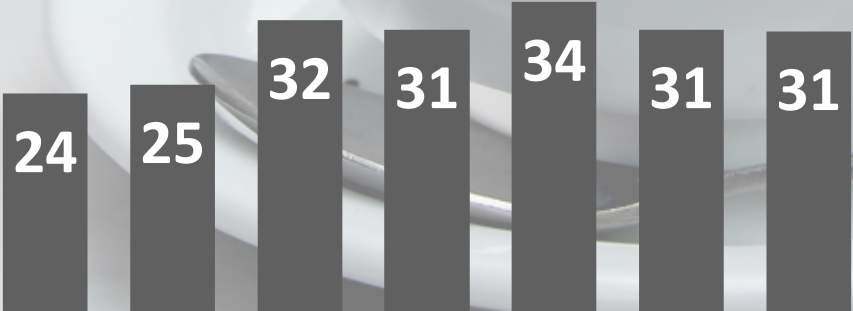
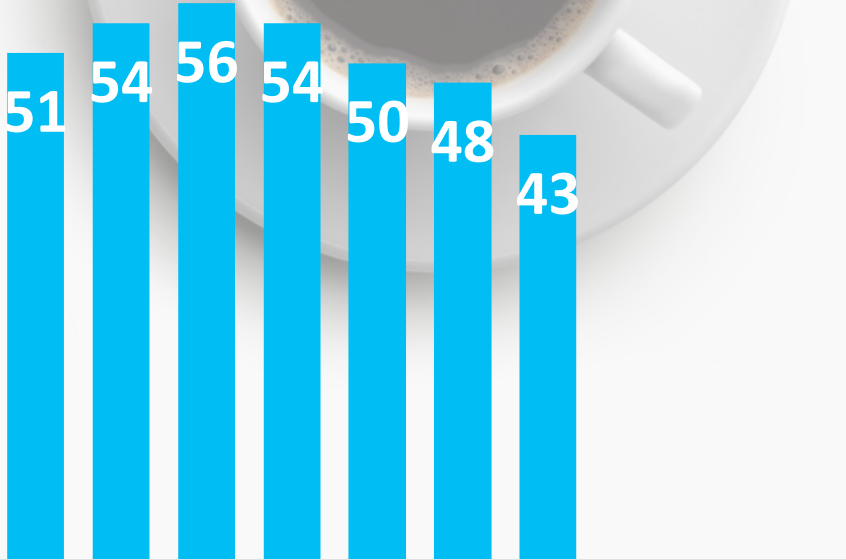
DRINKING YESTERDAY

NCA Data/Datassential Slide Design

Traditional Coffee

Gourmet Coffee Beverages

Percent of population 18+

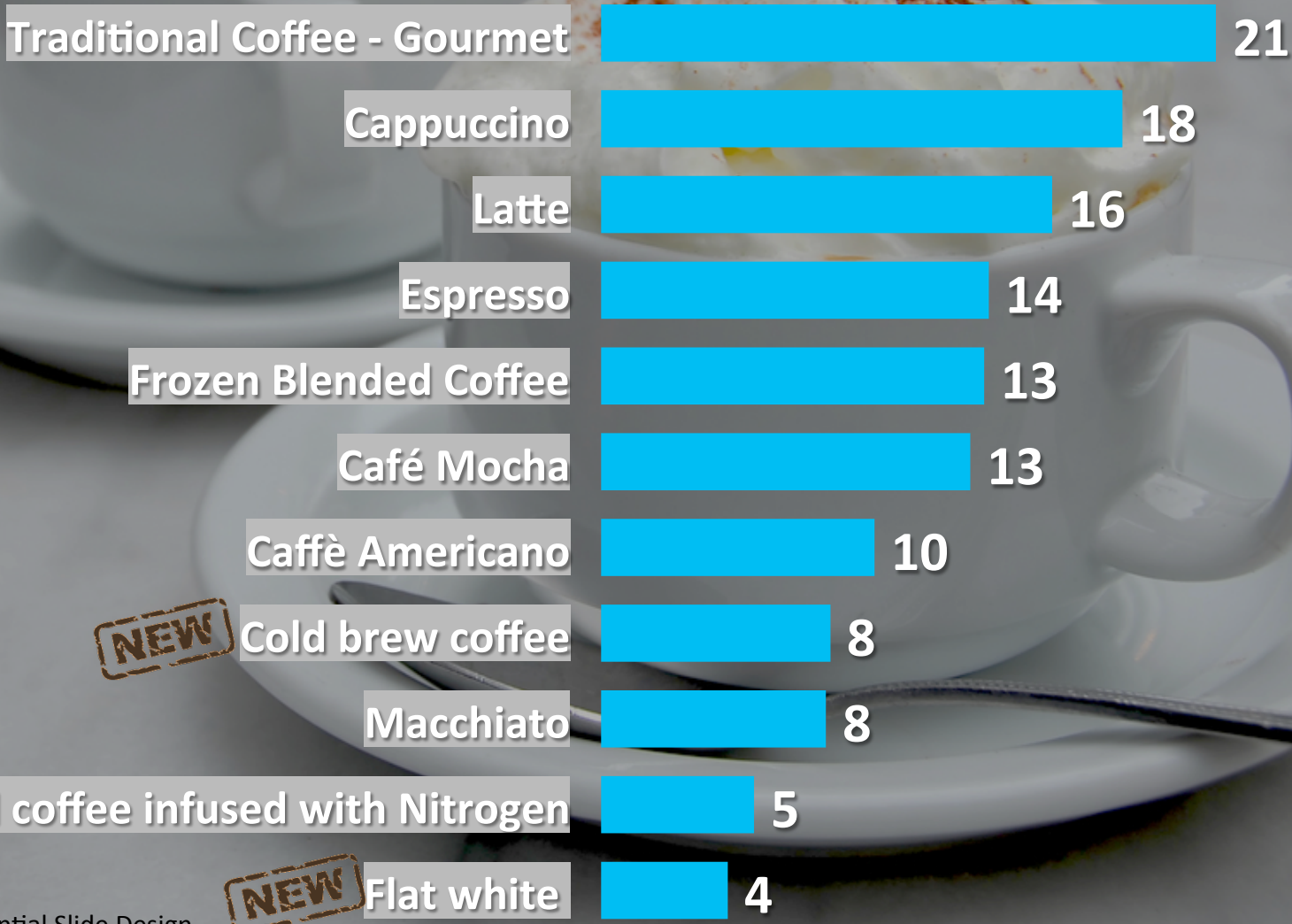


2010 2011 2012 2013 2014 2015 2016

2010 2011 2012 2013 2014 2015 2016

TYPES OF GOURMET COFFEE BEVERAGES DRUNK PAST WEEK

Percent of population 18+

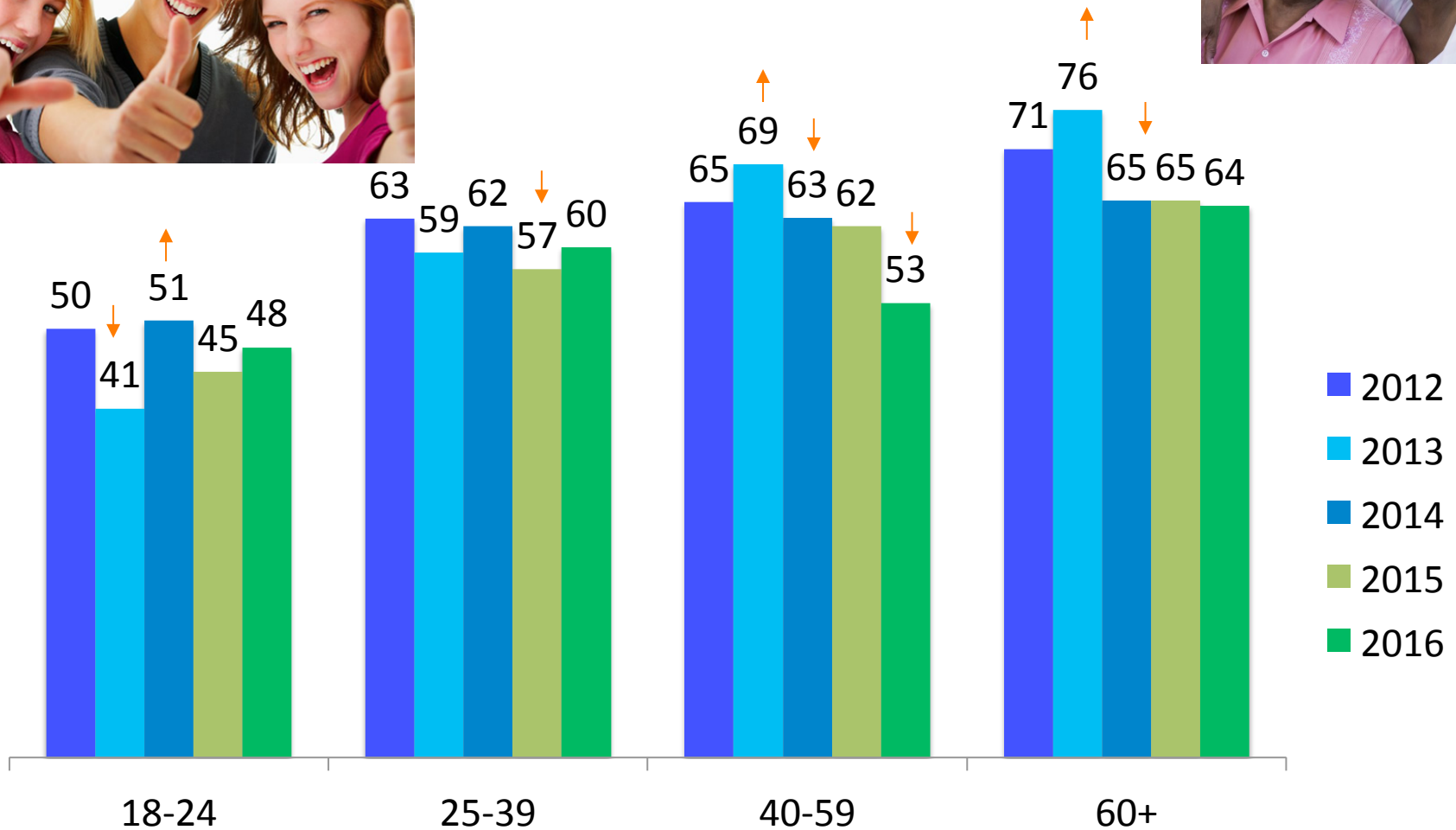


Familiarity with Specialty Coffee

	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	41%	45%	12%	2%
Latte	37%	43%	18%	3%
Shot of espresso	35%	36%	22%	7%
Café Mocha	34%	42%	20%	5%
Macchiato	19%	33%	31%	17%
Café Au Lait	18%	25%	28%	28%
Café Americano	18%	25%	30%	26%

PERCENT DRINKING COFFEE YESTERDAY – BY

Percent of population 18+



↑↓ Significantly higher / lower vs. previous year

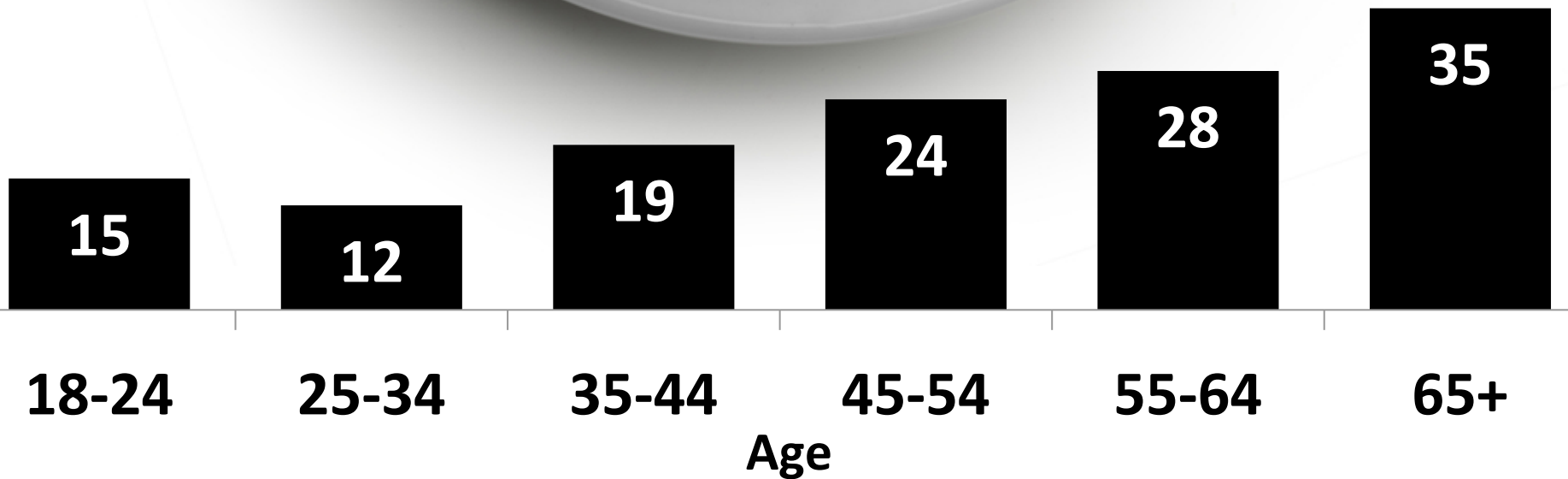
ADDITIVES

Percent of past-day coffee drinkers 18+



BLACK

Percent of past-day coffee drinkers 18+



PLACE OF CONSUMPTION

NCA Data/Datassential Slide Design

Percent of past day coffee drinkers 18+



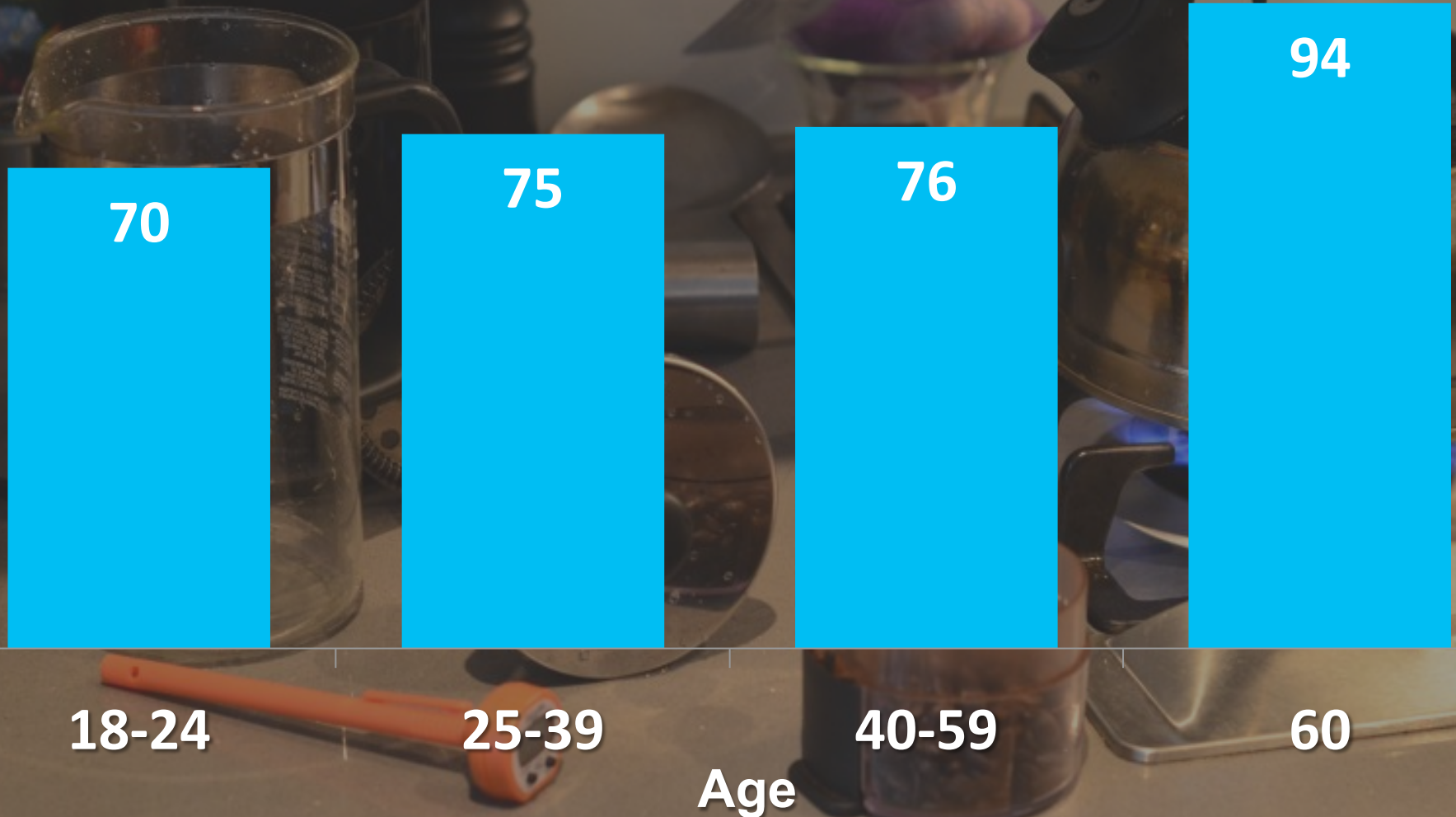
79%
Drinking
In-Home



40%
Drinking
Out-of-Home

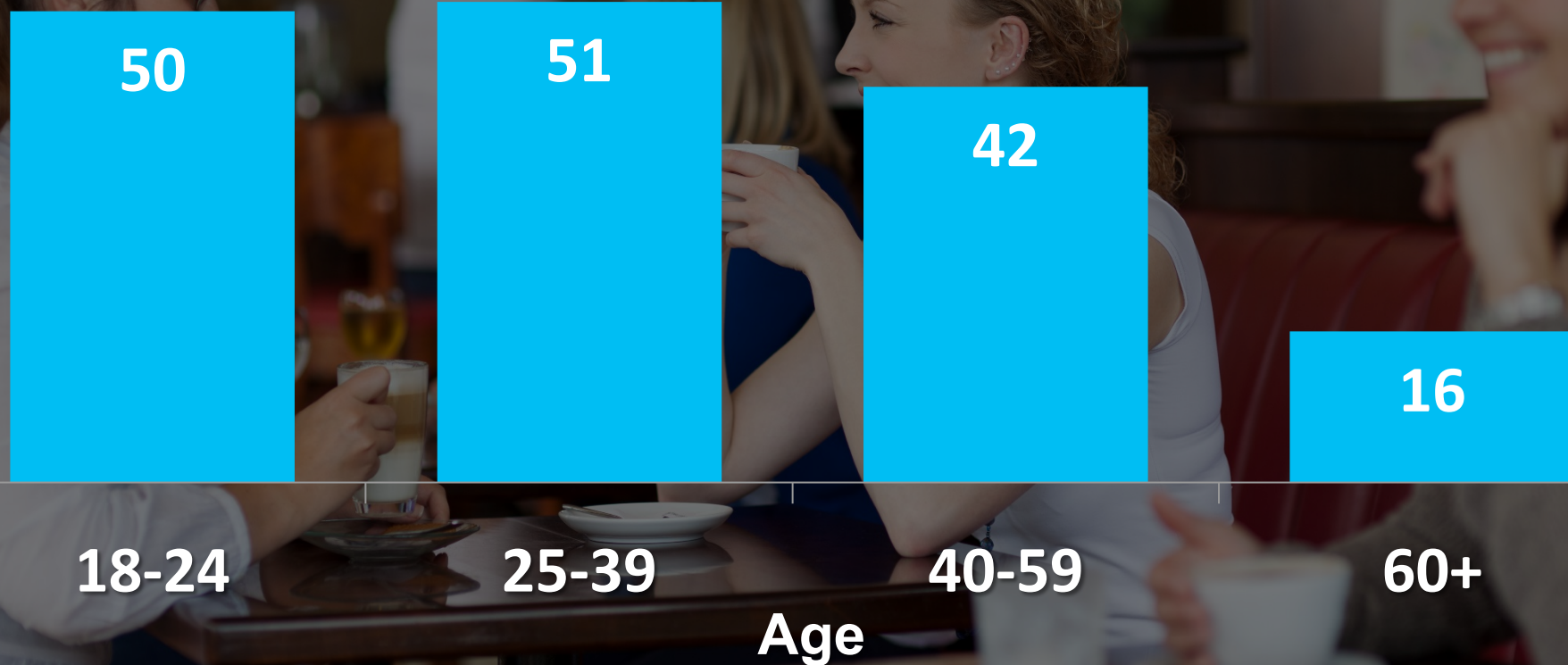
WHO IS PREPARING AT-HOME?

Percent of past day coffee drinkers 18+



WHO IS DRINKING OUT-OF-HOME?

Percent of past day coffee drinkers 18+



Top Line

- Coffee consumption is down significantly from 65 years ago...but holding steady.
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BREWING METHOD YESTERDAY

Percent of past day coffee drinkers 18+



Drip coffee maker



Single-cup brewer



Espresso machine



Instant coffee - Can or jar



Instant coffee - Stick Pack



Purchased ready-to-drink in a bottle or can



Cold brewing (NET)*



Moka stove top (octagonal Italian style brewer)



French press/plunger



Percolator



Pour Over (e.g. Chemex)



Coffee Strainer



Coffee concentrate



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



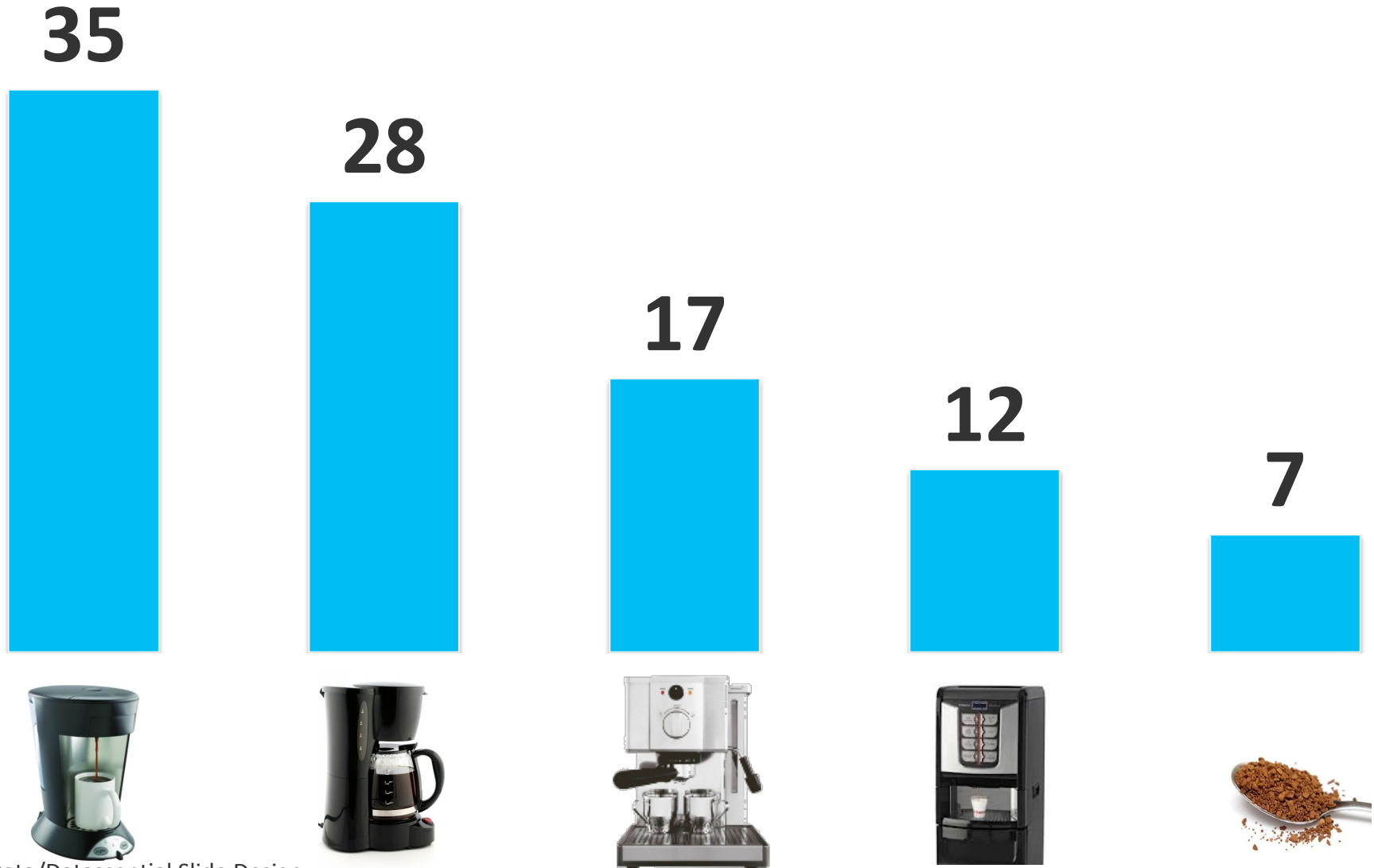
Live in a major city



Have kids in HH

SINGLE-CUP BREWERS ARE THE MOST DESIRED WORKPLACE COFFEE PREPARATION METHOD

Percent of those 18+ who have a workplace coffee area



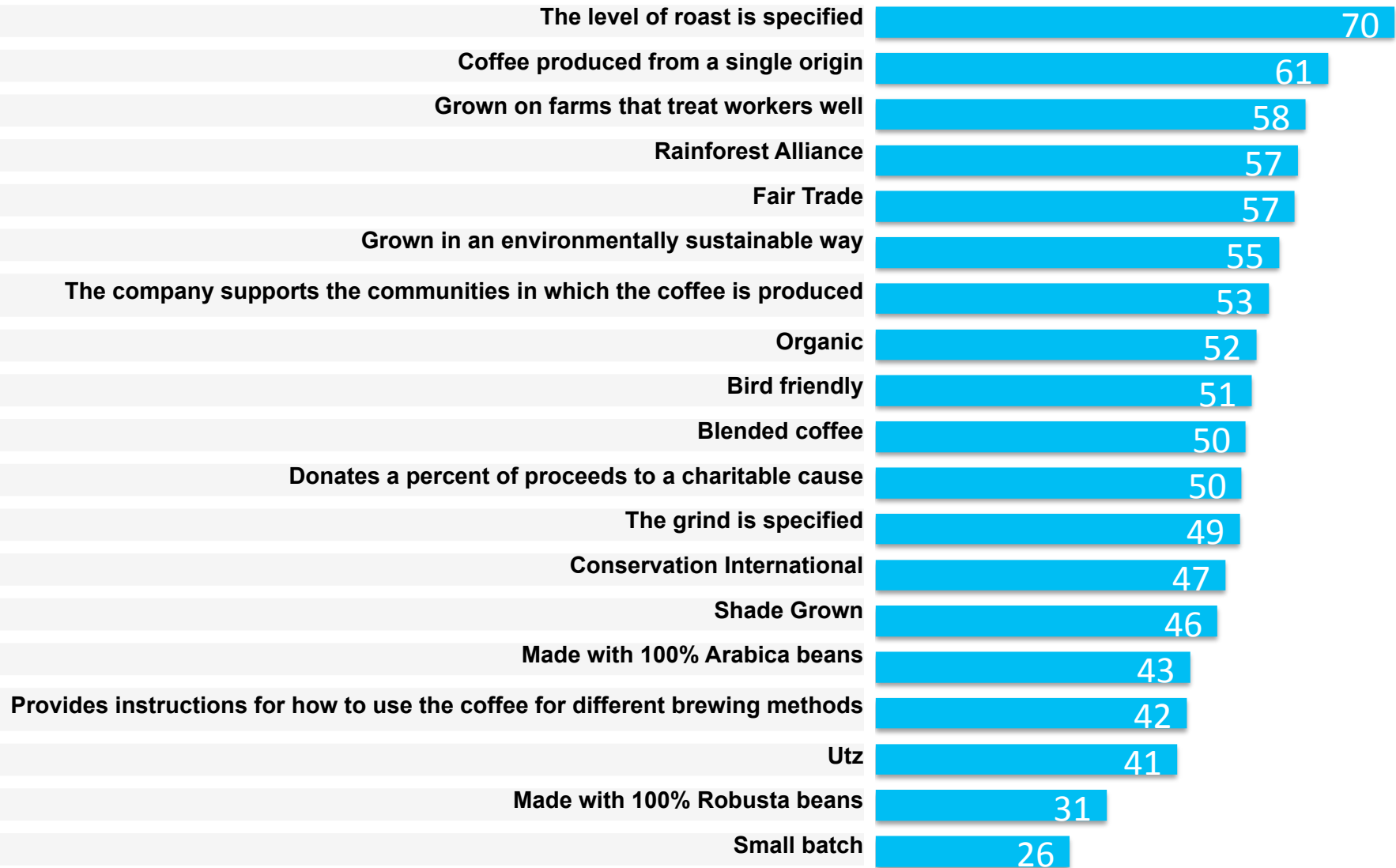
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PURCHASE INTENT INFLUENCED BY MESSAGING

Those who have drank coffee in the past-year or those aware of the certification
Percent much / somewhat more likely to buy





[Home](#) / [Industry Resources](#) / [Market Research](#) / [National Coffee Drinking Trends Report](#)

BUSINESS DIRECTORY

MARKET RESEARCH

GOVERNMENT AFFAIRS

COFFEE GIVES BACK

EVENTS, EDUCATION & NETWORKING

ADDITIONAL RESOURCES

NCA CONNECTS

ECONOMIC IMPACT



ncausa.org



National Coffee Drinking Trends

America's love affair with coffee is more complicated than ever before.



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.

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Click on the buttons below to go to that section:

Beverages consumed in
an average day

Coffee drinking in
the past year

Relationship between personal
financial situation and coffee

Coffee drinking in
an average day

Single-cup coffee

How coffee is consumed in an
average day

Coffee drinking in
an average week

There are fifty pre-loaded tables with data for 2013-2016. Each can be customized using five variable groups: Gender, Income, Region, Age, and Ethnicity.



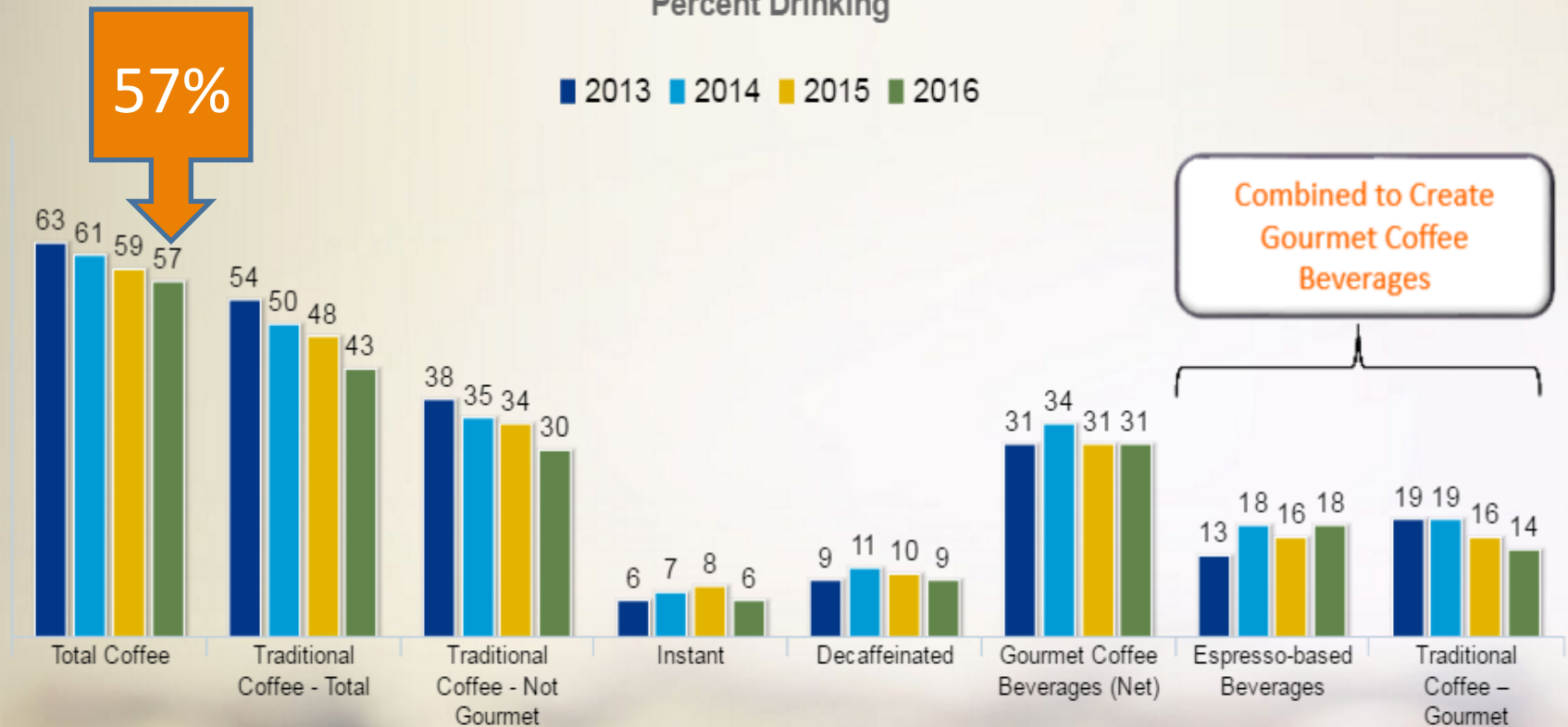
Gender: **MALE** | Region: **Northeast** | Age: **Under 60** | Income: **Over \$50K**
 Ethnicity: **White** | Exp: [Red box] | Update [Red button]

Update [Green button]

Past-Day Penetration of Coffee by Type – 2013 to 2016

Percent Drinking

■ 2013 ■ 2014 ■ 2015 ■ 2016



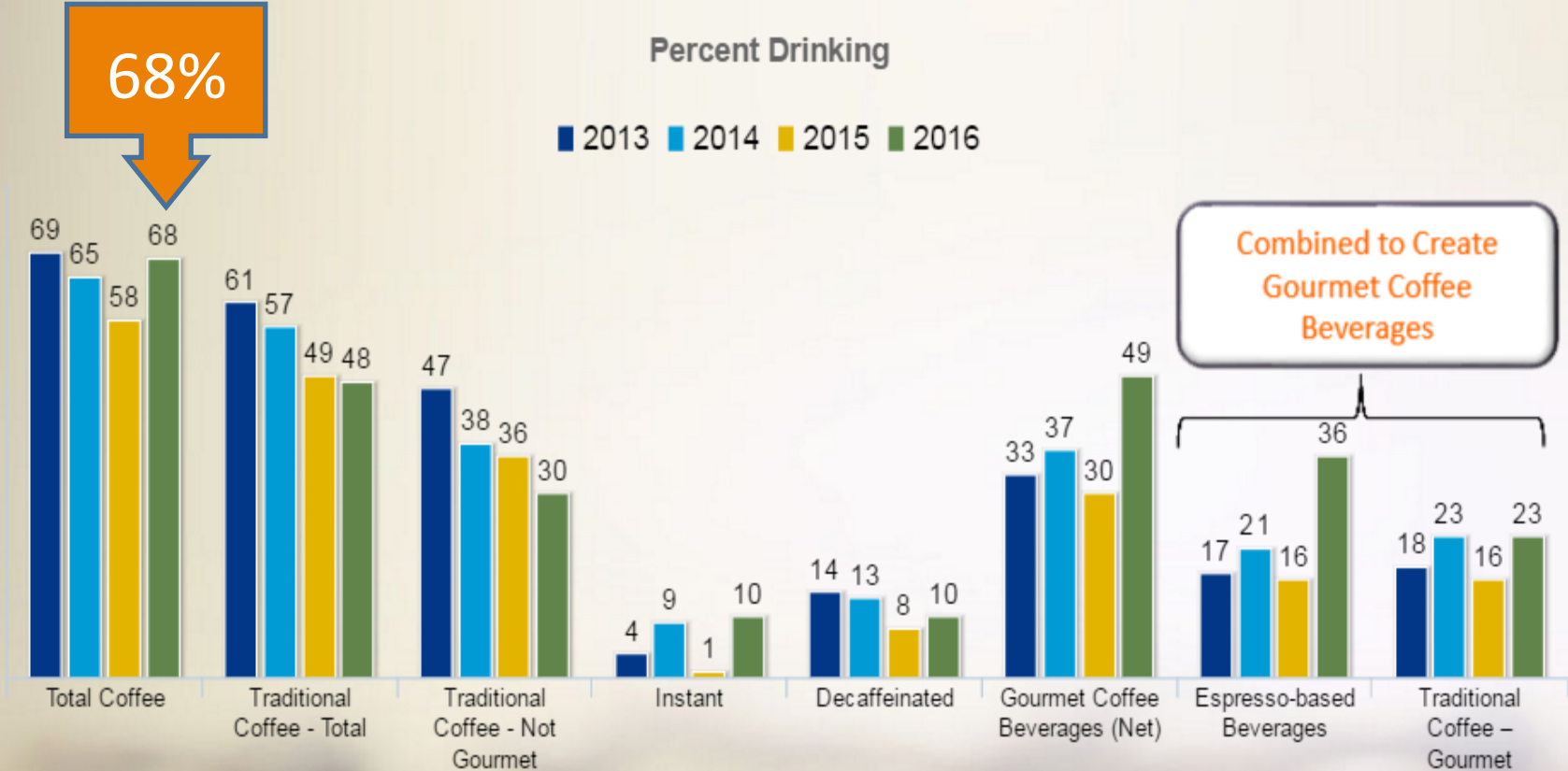
Filter: Baseage = all

* Gourmet Coffee Beverages (Net) also includes Iced/Frozen blended coffee and ready-to-drink coffee beverages, but is not shown in the graph.

Gender: Male
 Region: Northeast
 Age: 18-24, 25-39, 40-59
 Income: \$50,000 to \$74,999, \$75,000...
 Ethnicity: White/Caucasian
Update

Export Print

Past-Day Penetration of Coffee by Type – 2013 to 2016



Filter: Baseage = all - Gender = Male - Region = Northeast - Age = 18-24, 25-39, 40-59 - Income = \$50,000 to \$74,999, \$75,000 to \$99,999, \$100,000 or more - Ethnicity = White/Caucasian

* Gourmet Coffee Beverages (Net) also includes Iced/Frozen blended coffee and ready-to-drink coffee beverages, but is not shown in the graph.

With thanks to...

- Mark DiDomenico, Datassential (Chicago, IL)
 - Slides, analysis, insights
- Michael Edwards, DIG Insights (Toronto, ON)
 - Slides, original research for NCA's NCDT report





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Thank You
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