Specialty Coffee Association

2016 Specialty Coffee Consumer Study

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A detailed analysis based on the results of a consumer survey that was conducted by Marketing General Incorporated (MGI).

Executive Summary

Introduction and Background

At the Specialty Coffee Association, we have been on a five-year journey to better understand the specialty coffee consumer. The goal has been to gather information that will bring us closer to the consumer, helping us improve communication and better meet their needs. Relationships with individual consumers have developed throughout the community, but specialty coffee as an industry constantly asks itself, "What do we know about specialty coffee consumers as a group?"

The journey began in 2011 when a camera crew went out to the streets of San Francisco to ask people with coffee cups in hand questions about what they drink and why. A key question was, "What does specialty coffee mean to you?"

These questions formed the basis of a 2012 qualitative focus-group study in Portland, Oregon and Los Angeles, California. We wanted to select some coffee drinkers and have a conversation with them, learning more about who they were, their perspectives on specialty coffee, and what they drank. The results showed specialty coffee drinkers crossed gender, age, education, and socioeconomic lines. They were generally not price-sensitive, but had difficulty describing what makes specialty coffee better. The focus group participants were asked to create a collage depicting what specialty coffee meant to them: These collages showed the deep emotional attachment and love people have for their coffee.

In 2013, a follow-up qualitative study further explored specialty coffee consumers' stories, asking participants to write a series of blogs that described their coffee journey. The results showed the specialty coffee drinker is still evolving, revealing generational differences in which younger consumers are beginning to drink coffee much earlier in life.

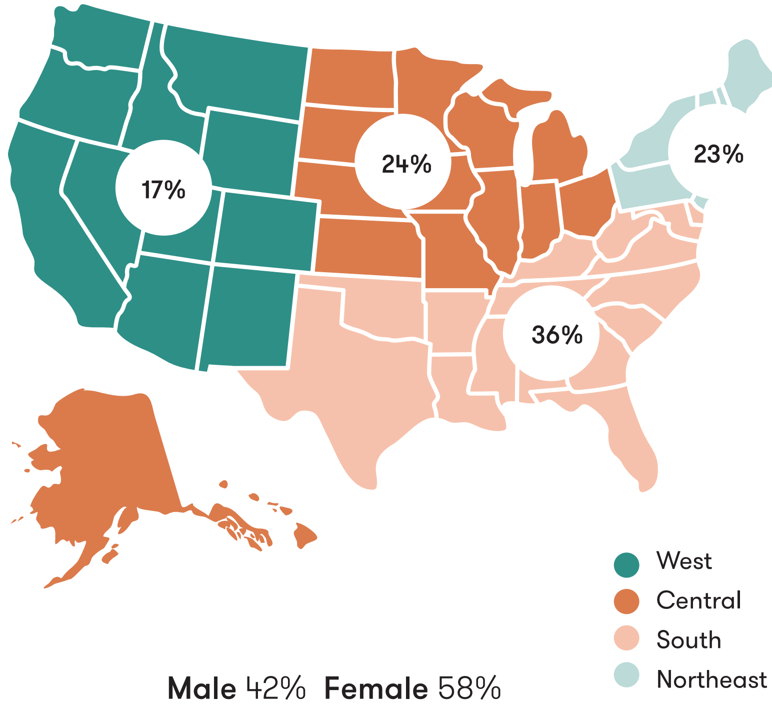
In 2016, the next step in our research journey was to develop a quantitative study awd survey a larger number of consumers to validate what the preliminary research was telling us. We hired a third-party research firm, Marketing General Inc. (MGI) to conduct a specialty coffee consumer survey. This 2016 survey is the first quantitative research on specialty coffee consumers in SCA history. The findings of this survey showed similar results to the qualitative study, but with deeper insight.

As our journey continues, we strive to help you get closer to the specialty coffee consumer. We invite you to consider these findings a vehicle that will take you deeper into the minds of specialty coffee drinkers.

2016 Research Objectives

- Determine specialty coffee consumers' characteristics, habits, and preferences related to specialty coffee.
- Determine specialty coffee consumers' purchase behaviors and motivators related to specialty coffee.
- Explore what the term "specialty" means to the specialty coffee consumer.
- Identify generational preferences and patterns of specialty coffee consumers ages 18 and up. Generations were defined as follows:
    - Millennials: *Ages 18–35*
    - Younger Millennials: *Ages 18–25*
    - Older Millennials: *Ages 26–35*
    - Generation X: *Ages 36–50*
    - Boomers: *Ages 51 and above*
- Gain a deeper understanding of two pre-identified segments for The Super Specialty consumer and the Specialty Adopter consumer, and delineate the differences between the two groups.
- Identify opportunities for growth for each of the defined segments.

Methodology



Male 42% **Female** 58%

Internet panel collection

March 15-March 19, 2016

n=250 respondents

In addition to other screeners noted throughout the detailed findings, all respondents were screened to meet the following criteria:

- Drink coffee 5-7 days per week
- Not employed in the coffee industry

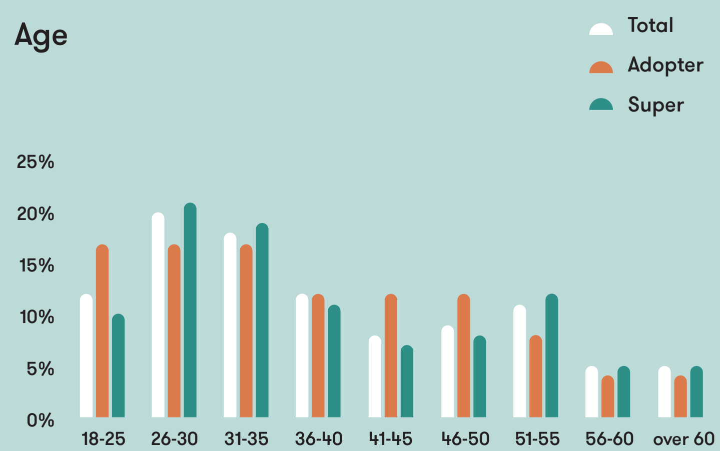
Margin of Error and Confidence Level:

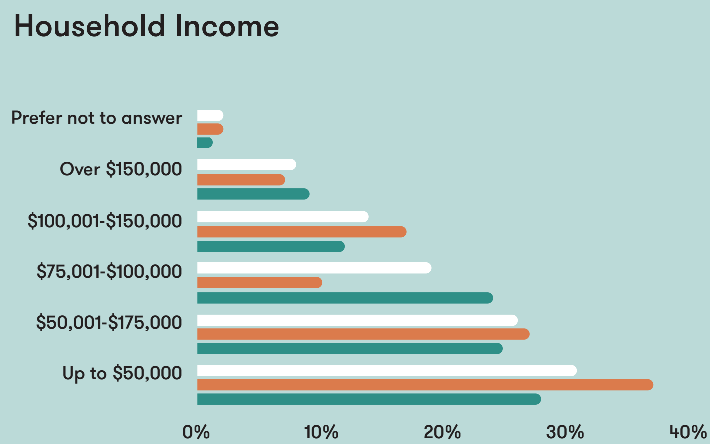
The margin of error for this sample is 6.2%. The margin of error, or standard error, is a statistical term used to measure the random fluctuations inherent in samples; the smaller the standard of error, the more accurate the measurement of the population or universe.

This study's significance level of .05 carries with it a 95% confidence interval. The confidence interval is established as the likelihood that the same results would be achieved in a similar study, meaning that if we were to conduct this study 100 times, the same results, plus or minus the margin of error (6.2%), would occur 95 out of 100 times.

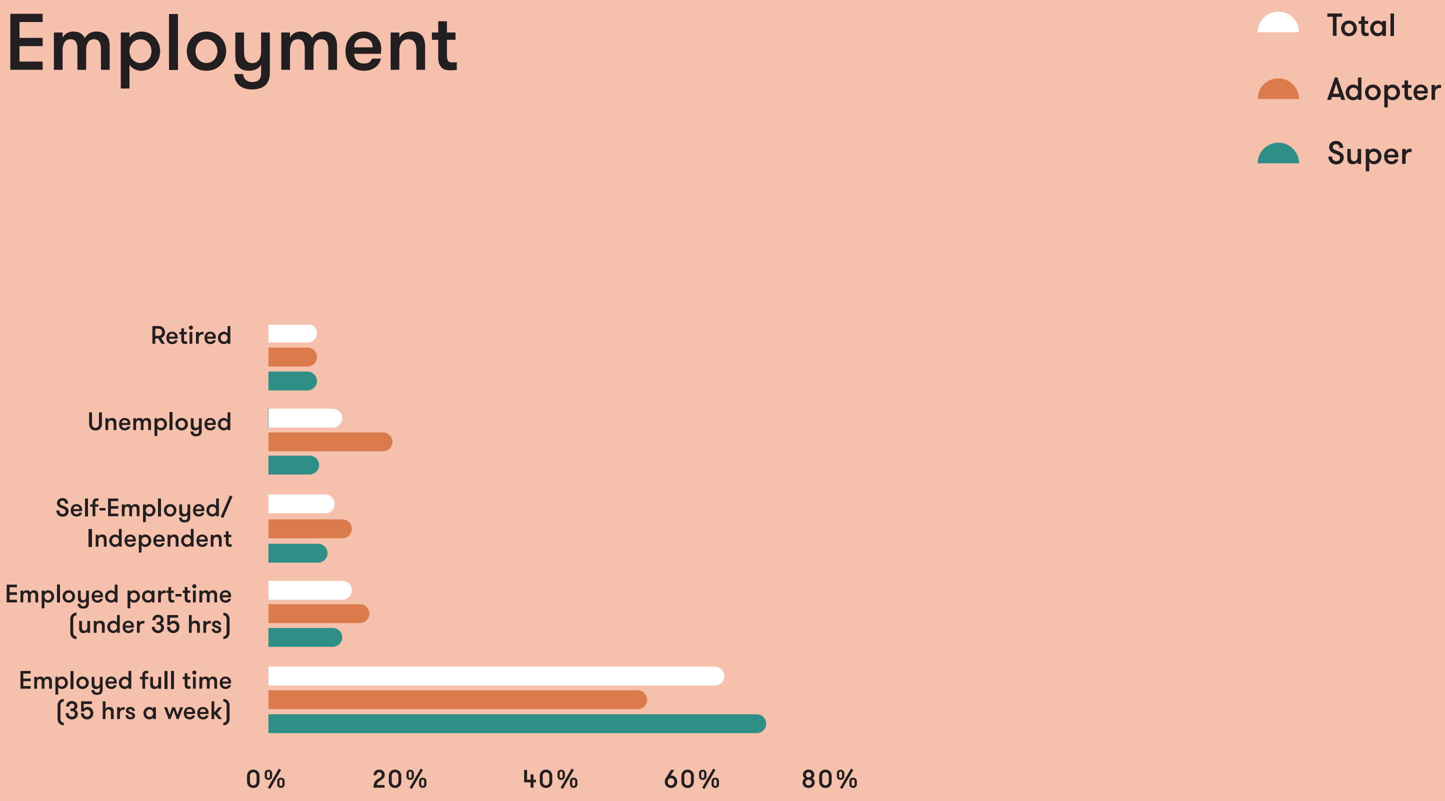
Data Interpretation:

Percentages within the report are rounded, so percentages may not add up to 100%. Additionally, for questions that allow multiple responses, as in "check all that apply," totals may not add to 100%.





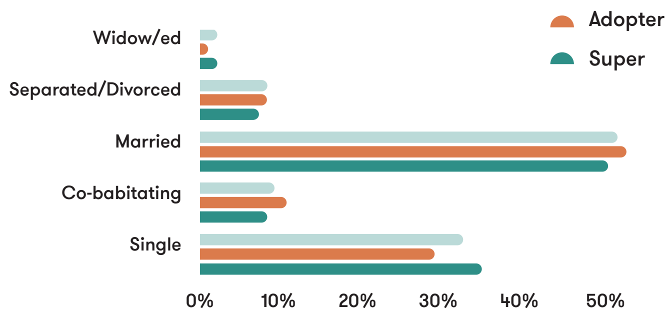
Employment



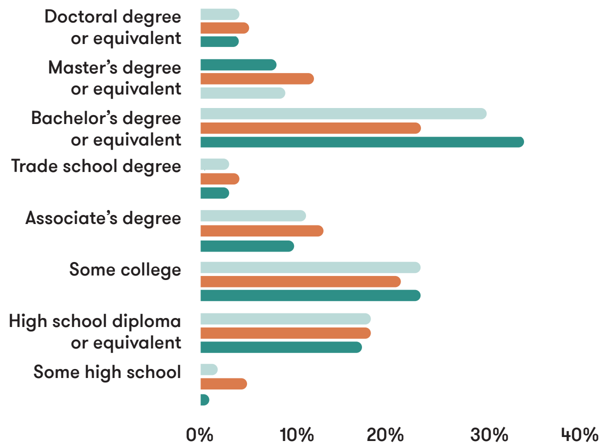
For the current study, respondents were required to answer every question, but not every question was asked of each respondent. As a result, there are some questions that not all respondents answered. The number of respondents that answered a particular question is reported on the corresponding table or chart.

Respondents answered attitudinal survey questions with an eye toward personal self-perception; that is, they answered questions in the manner most closely aligned with how they view themselves.

Marital Status



Education



Segmentation

The 2012 focus group study resulted in the further segmentation of specialty coffee drinkers into what came to be known as Specialty Adopter ("Adopter") and Super Specialty ("Super") consumers. The criteria and classification were based upon responses provided to a series of questions. All respondents were screened to ensure that they drink coffee 5-7 days per week, and respondents could not be employed in the coffee industry.

Behavioral attributes included how often they drink coffee, how much they pay for coffee, the type of coffee they purchase, and the type of coffee shops they frequent. Each segment was further refined to include attitudinal measures such as how much they love coffee, and how they describe their coffee experience. Since characteristics were not always clearly defined, decisions on who was classified into each category were based on which group a respondent most closely related to in terms of attitude and behavior. Those who were equal on both were classified as Adopters because they didn't show any characteristics which tipped them into the higher group.

Segmented Respondents

Specialty Coffee Consumers (n=250)

Segment	n	%
Adopter	84	33%
Super	166	67%

Specialty Adopter Profile

Adopters identify as coffee lovers, but not necessarily connoisseurs. They like good coffee, and are willing to pay higher prices for it. Adopters feel somewhat knowledgeable about specialty coffee, but will not seek out the most unique coffees available. The majority of Adopters are Millennials, earn up to $50,000 per year, and have attended some college or earned a bachelor's degree.

At home, Adopters drink three cups of hot brewed specialty coffee a day on average, five days a week, and generally add cream and sugar. They tend to purchase 16-ounce ground, bagged specialty coffee for about $12-$15 at a retail coffee shop or the grocery store. They are also likely to purchase single-cup coffee at the grocery store and more inclined to use a drip or single-cup maker to brew it.

Away from home, Adopters visit large national coffee shops four days a week. At the shops, they purchase one cup of hot brewed coffee for $2-$5 and generally add cream and sugar. Furthermore, Adopters have a notable interest in drinking cold, ice-blended beverages when visiting a coffee shop.

Most Adopters feel their coffee is equally as good at home as in a coffee shop, but 33% of Adopters think coffee from a shop is better-tasting. To Adopters, the coffee is better because of the brew method and type of coffee brewed at the shop.

Adopters prefer medium-roasted coffee and they feel their tastes have evolved over the years to include a smoother, bolder taste. They are less interested in the secondary attributes of coffee such as coffee origin and fair trade.

Super Specialty Consumer Profile

Supers identify as coffee aficionados, and are confident in their knowledge of specialty coffee. They likely developed a taste for coffee between ages 15 and 18, and almost certainly by the time they were 21. The majority of Supers are older Millennials, ages 26-35, and have a bachelor's degree or higher. They are more likely to be employed full-time, and generally have a higher income than Adopters.

At home, Supers drink on average three cups of hot, brewed specialty coffee every day and add cream and sugar. They tend to purchase a 12-16-ounce bag of whole beans for $14-$17 at a retail coffee shop. Supers take an interest in the method used in making coffee, and are more likely to use a French press or full immersion to brew their own coffee at home.

Supers typically visit large national coffee shops four days a week, but are also likely to visit local high end shops that are focused on quality. They typically spend $4-$7 for a hot brewed coffee or espresso beverage at the shop.

Like Adopters, Supers largely feel their coffee is equally as good at home as in the shop, but 26% of Supers did feel the coffee from a shop was better-tasting because of the equipment and brew method used.

Supers prefer medium-roasted coffee but are more likely than Adopters to drink a dark-roasted coffee. Supers believe their tastes have evolved to something more refined, now preferring a smoother and bolder taste. They show interest in the secondary attributes of coffee such as coffee origin and fair trade.

It must be stated, however, that the aforementioned differences in the two segments are not always so clear-cut. An individual respondent may exhibit several characteristics of each group, answering some questions as an "Adopter" and others as a "Super." There were very few respondents who fit cleanly into either group. As such, it becomes difficult to provide a definitive sketch of a typical Adopter or Super, and this overlap should always be borne in mind.

Strategic Insights

Specialty coffee consumer survey findings that aligned with previous qualitative findings:

- The term "specialty" continues not to resonate with consumers, and they tend to describe their coffee as gourmet or premium instead.
- Specialty coffee consumers continue to show a deep emotional attachment to their coffee.
- Flavor continues to be a top factor in choosing a coffee.
- Secondary attributes (e.g., origin, fair trade) remain less important to Specialty Adopters than Super Specialty drinkers.
- "Better coffee" continues to be an enhanced experience that includes psychological and emotional benefits.
- Brew method and strength continue to be the coffee-related terms both groups are familiar with.

Specialty coffee consumer survey findings that differed from the previous qualitative findings:

- The majority of participants in 2012 felt the cup of coffee they drank at home did not taste as good as the coffee that was brewed for them at a coffee shop. The 2016 survey results showed the majority of respondents felt the cup at home was equally as good as at the coffee shop.
- The 2012 results showed no one was actively investigating new coffees, but the 2016 results showed 69% of respondents were actively investigating new coffees. 69% were seeking new coffees on brand websites and 56% were seeking new coffees on blogs/websites.

There is opportunity to transition Adopters into the Super category. The factors to be taken into consideration when crafting a path are awareness, education, income, and segment similarities.

Awareness:

Many of the Adopters do not have as much knowledge of specialty coffees as the Supers. They love coffee, but do not consider themselves aficionados or connoisseurs. They may be less aware of the details around various specialty coffee selections, including the story of where the coffee came from, existing specialty coffee shops, or different methods of preparing home-brewed coffee. There is opportunity to increase the exposure of specialty coffee to Adopters that might cause them to become more enthusiastic about it, embrace new behaviors, and move into the Super category.

Education and Income:

The survey results show the majority of Supers have a bachelor's degree or higher, work full time and have high incomes. Adopters present two possible opportunities for future growth:

- Among Adopters, target those with higher incomes and higher education levels. These traits mark some of the most likely individuals to become Supers.
- Many of the younger respondents who fell into the Adopter category still have yet to either finish college or have a higher income. Some of the Adopters simply have not yet arrived at the Super level, but will eventually.

Similarities:

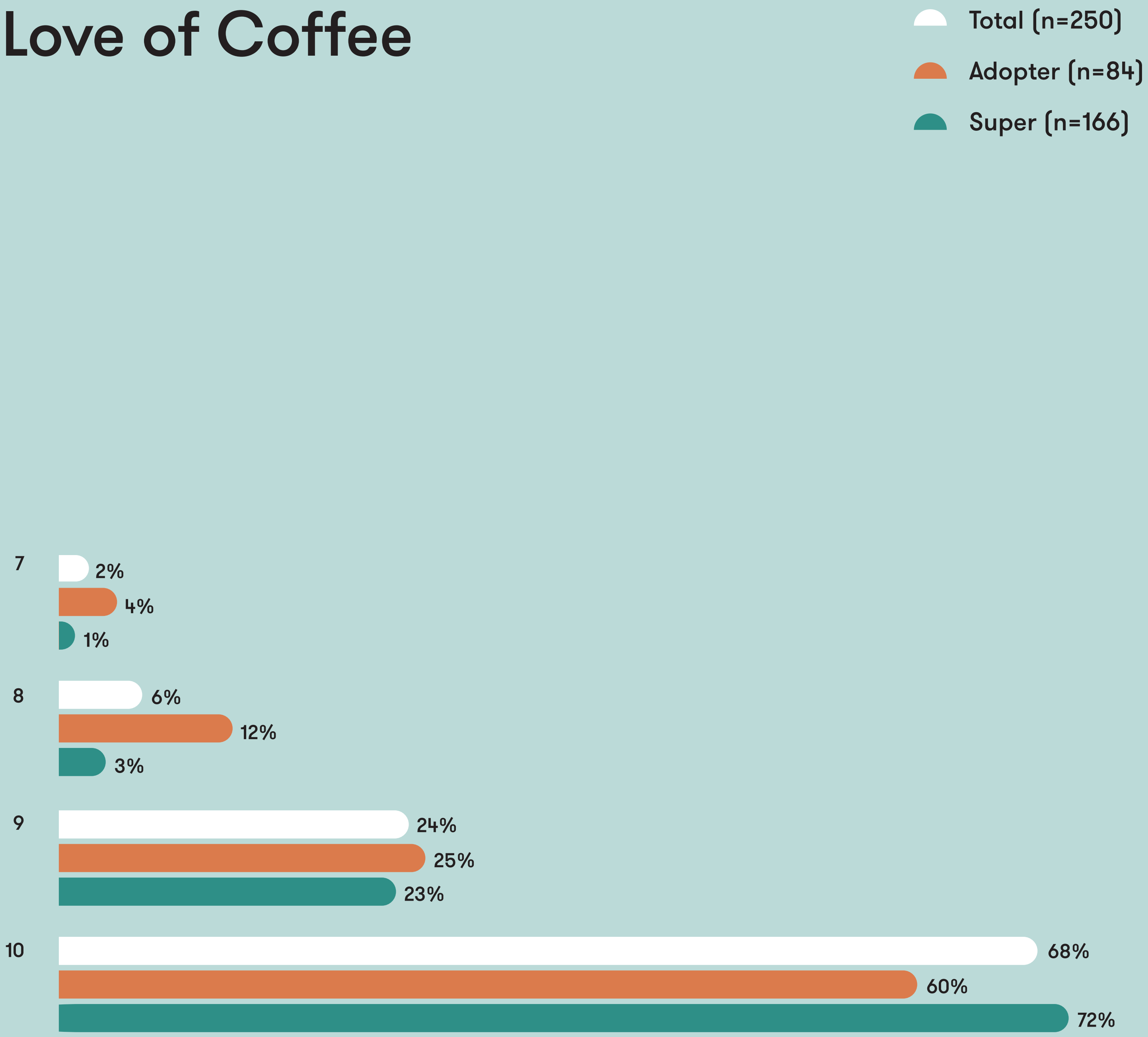
Despite the differences highlighted above, there are a couple of key similarities that give perspective. These key similarities may help bridge the gap between Adopters and Supers.

- Despite their differences on so many other questions, Adopters and Supers both tend to enjoy coffee at the same times of day.
- Both groups believe that flavor, roast level, and coffee origin are the three most important factors when choosing a coffee.
- Most Adopters already exhibit some characteristics of Supers, thus easing their transition to a Super.

In-Depth Findings

Specialty Coffee Drinking Habits

Love of Coffee



*respondents answering 1-6 were screened out

Q:

On a scale from 1 to 10, with 10 being the highest, how would you rate your love of coffee?

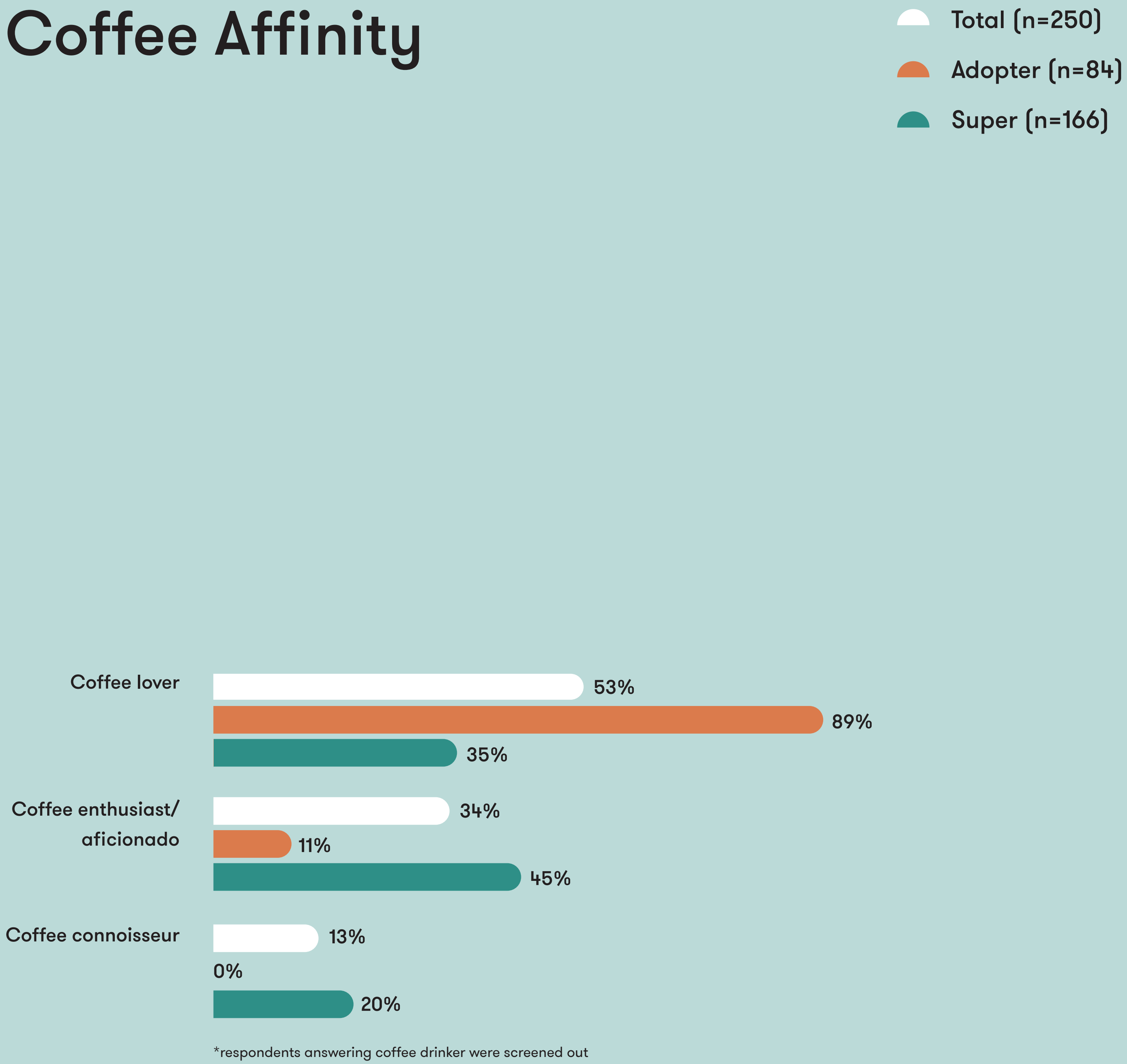
Base:

All respondents.

All respondents had to answer at least 7 on a scale of 1 to 10 in order to qualify for the survey.

- Most respondents answered either 9 or 10.

Coffee Affinity



Q:

Which of the following terms best describes you?

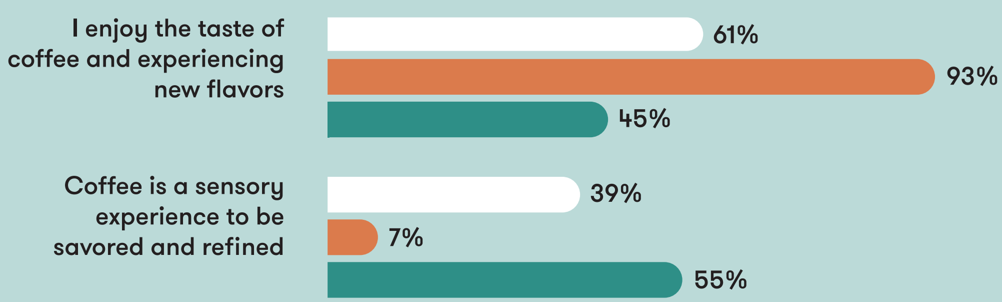
Base:

All respondents.

All respondents had to consider themselves at least a coffee lover.

- Most Adopters (89%) considered themselves coffee lovers, while Supers considered themselves enthusiasts/aficionados (45%).
- 20% of Supers rate themselves as connoisseurs, whereas no Adopters would consider themselves such.
- Among Supers, Generation X is more likely to consider themselves coffee connoisseurs (34% vs. 20% among all Supers).

The Coffee Experience



*respondents answering coffee is fuel were screened out

Q:

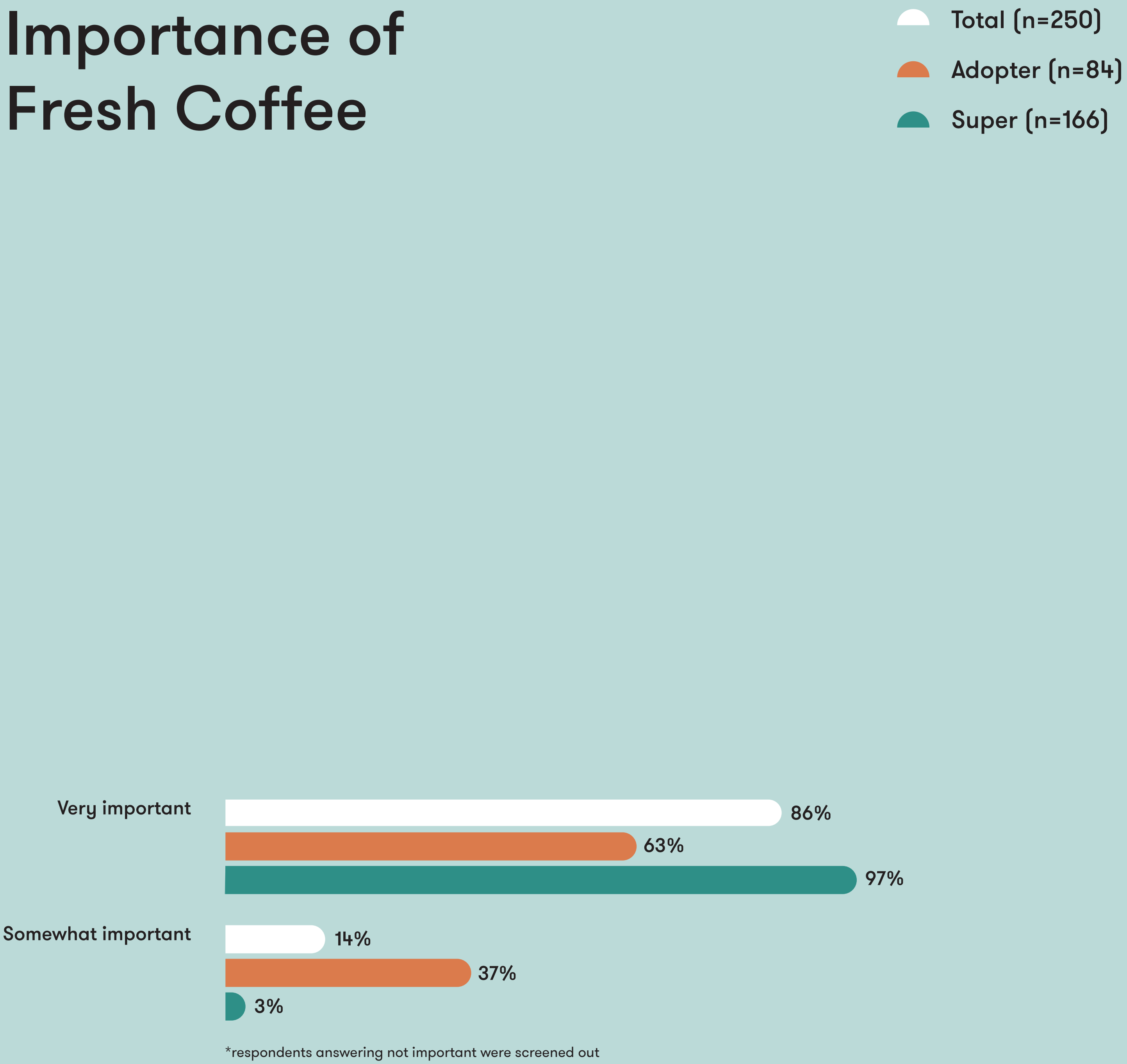
Which statement do you most agree with?

Base:

All respondents.

Adopters overwhelmingly say they enjoy the taste of coffee and experiencing new flavors, whereas Supers are more likely to view coffee as a sensory experience to be savored and refined.

Importance of Fresh Coffee



Q:

How important to you is the freshness of your coffee beans (e.g., date the coffee was roasted)?

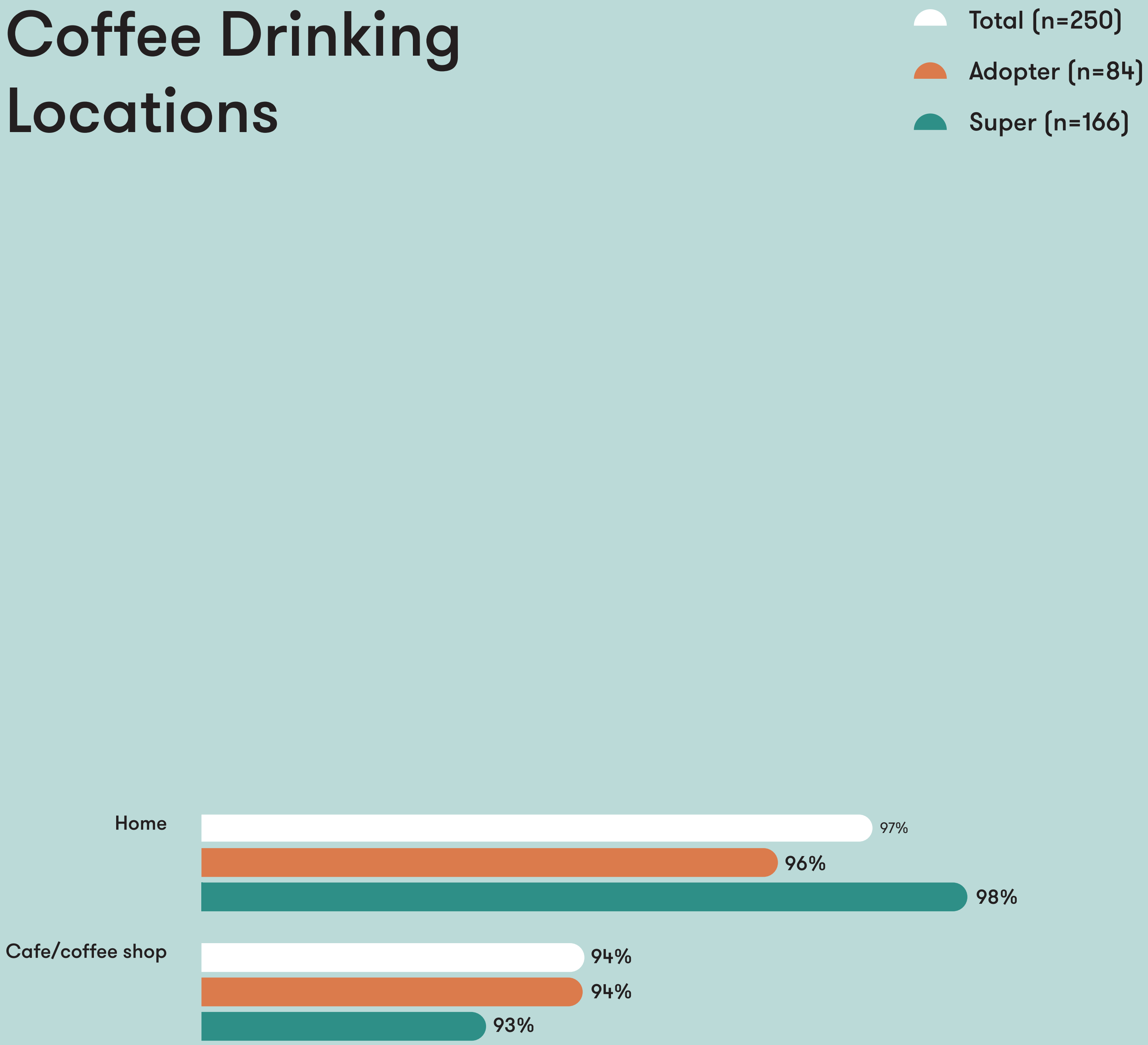
Base:

All respondents.

Most respondents find it very important to have fresh coffee.

- Supers are nearly unanimous (97%) that fresh coffee is very important, compared to 63% of Adopters who feel the same way.

Coffee Drinking Locations



*respondents answering none of these were screened out

Q:

Do you drink coffee in any of the following locations. Check all that apply.

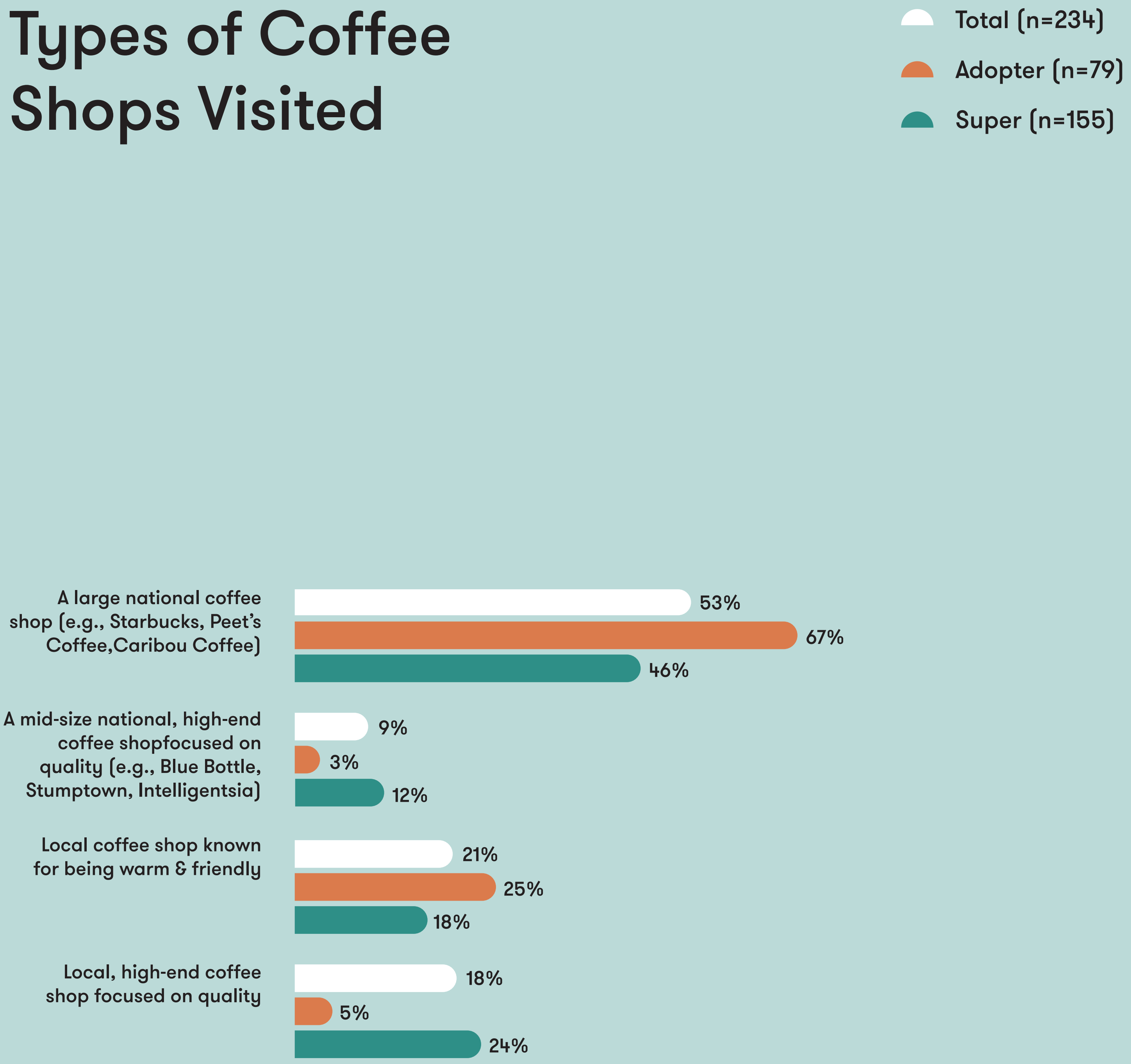
Base:

All respondents.

The majority of both groups drink coffee at home and in a cafe or coffee shop

- Both groups are slightly more likely to drink coffee at home.

Types of Coffee Shops Visited



Q:

When you visit a coffee shop, what type of shop do you frequent?

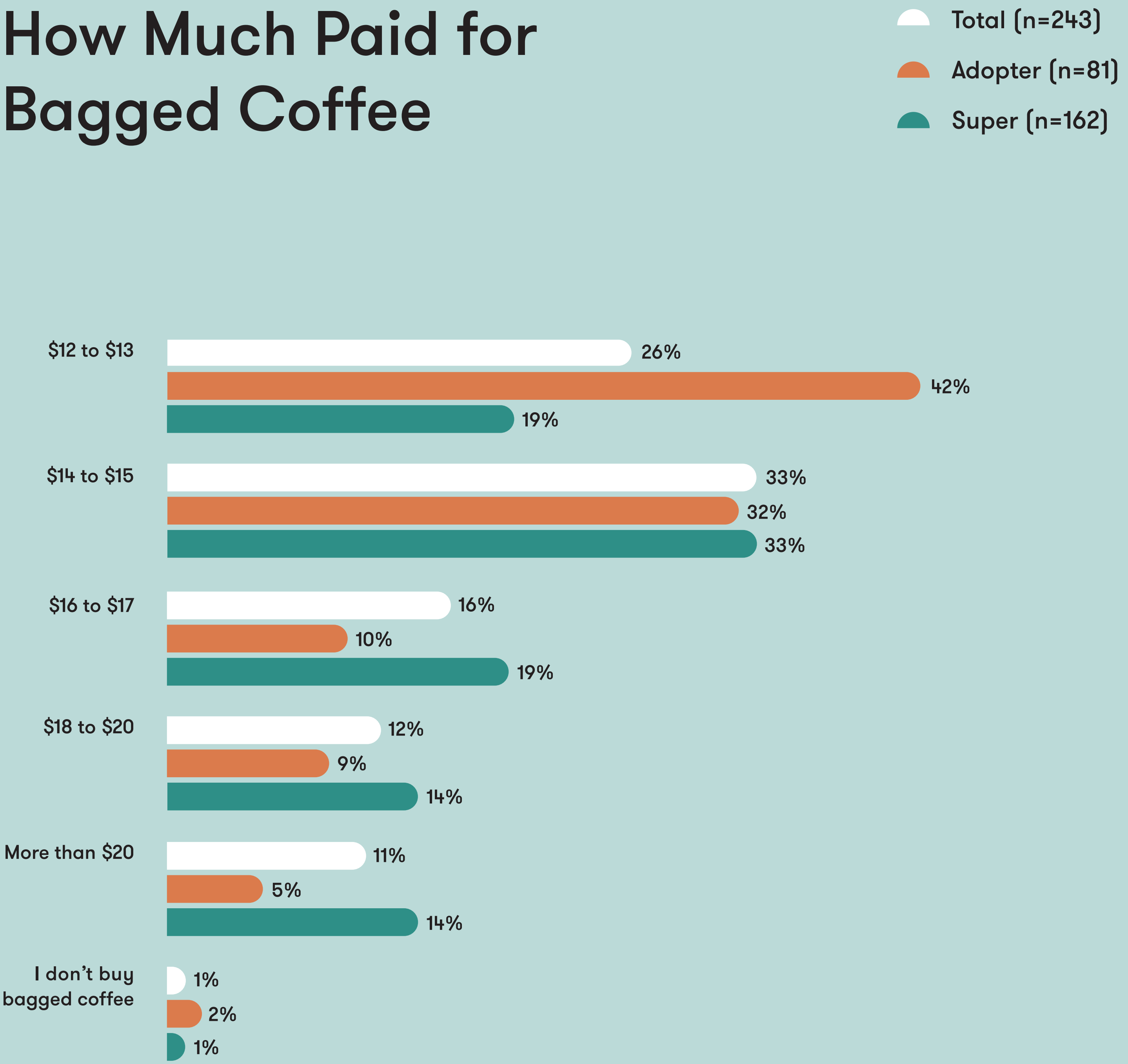
Base:

Those who drink coffee at cafes/coffee shops

Large national coffee shops are still very popular, with the majority of all respondents preferring them.

- While Supers prefer a large national coffee shop, their support falls just short of a majority (46%); Supers are significantly more likely to enjoy local high-end coffee shops that focus on quality (24% vs. 5%).

How Much Paid for Bagged Coffee



Q:

When you buy coffee for home use, how much do you typically pay for a bag of coffee?

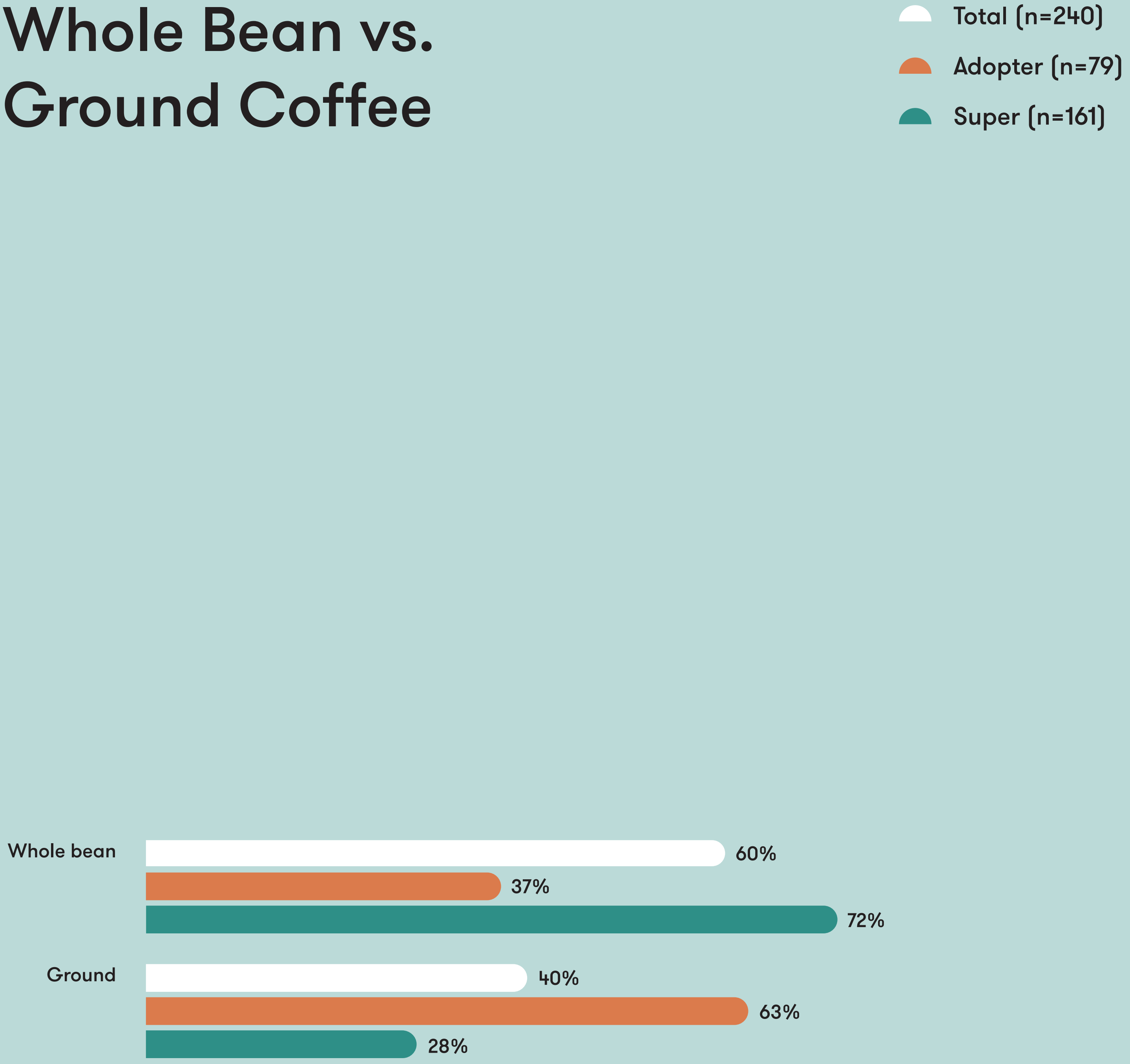
Base:

Those who drink coffee at home.

Supers spend more on bagged coffee than do Adopters.

- 47% of Supers spend at least $16 on a bag of coffee compared to 24% of Adopters who do.

Whole Bean vs. Ground Coffee



Q:

When you purchase bagged coffee to drink at home, do you typically buy whole bean or ground coffee?

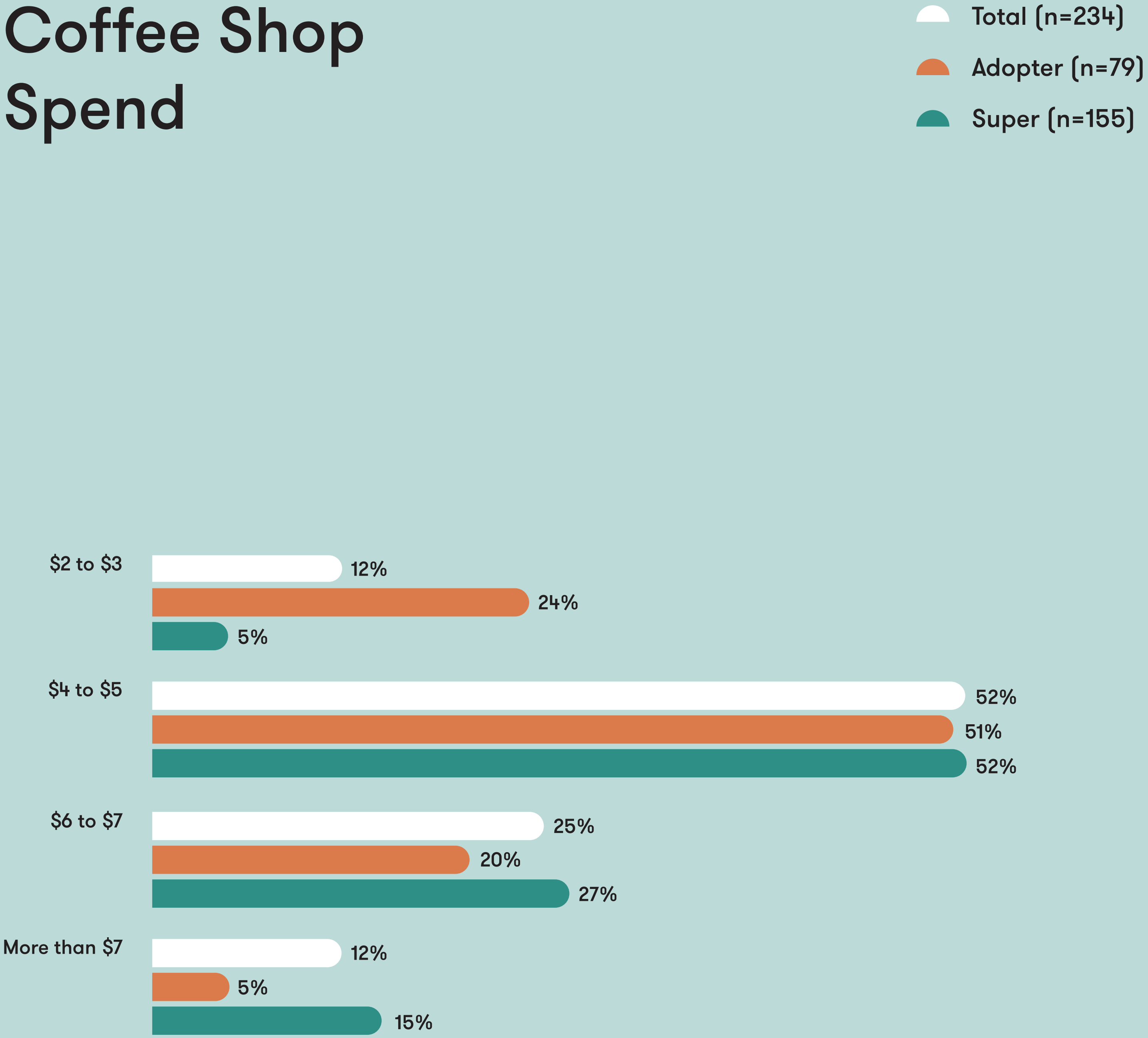
Base:

Those who purchase bagged coffee to drink at home.

Adopters and Supers have different preferences when it comes to whole bean vs. ground coffee.

- 63% of Adopters prefer ground coffee, while 72% of Supers prefer to purchase whole bean coffee for home consumption.
- Among Supers, older Millennials (ages 26-35) showed a greater preference for ground coffee over whole beans (36% vs. 28% among all Supers).

Coffee Shop Spend



*respondents answering up to $2 were screened out

Q:

How much do you typically pay for a coffee beverage when you visit a coffee shop?

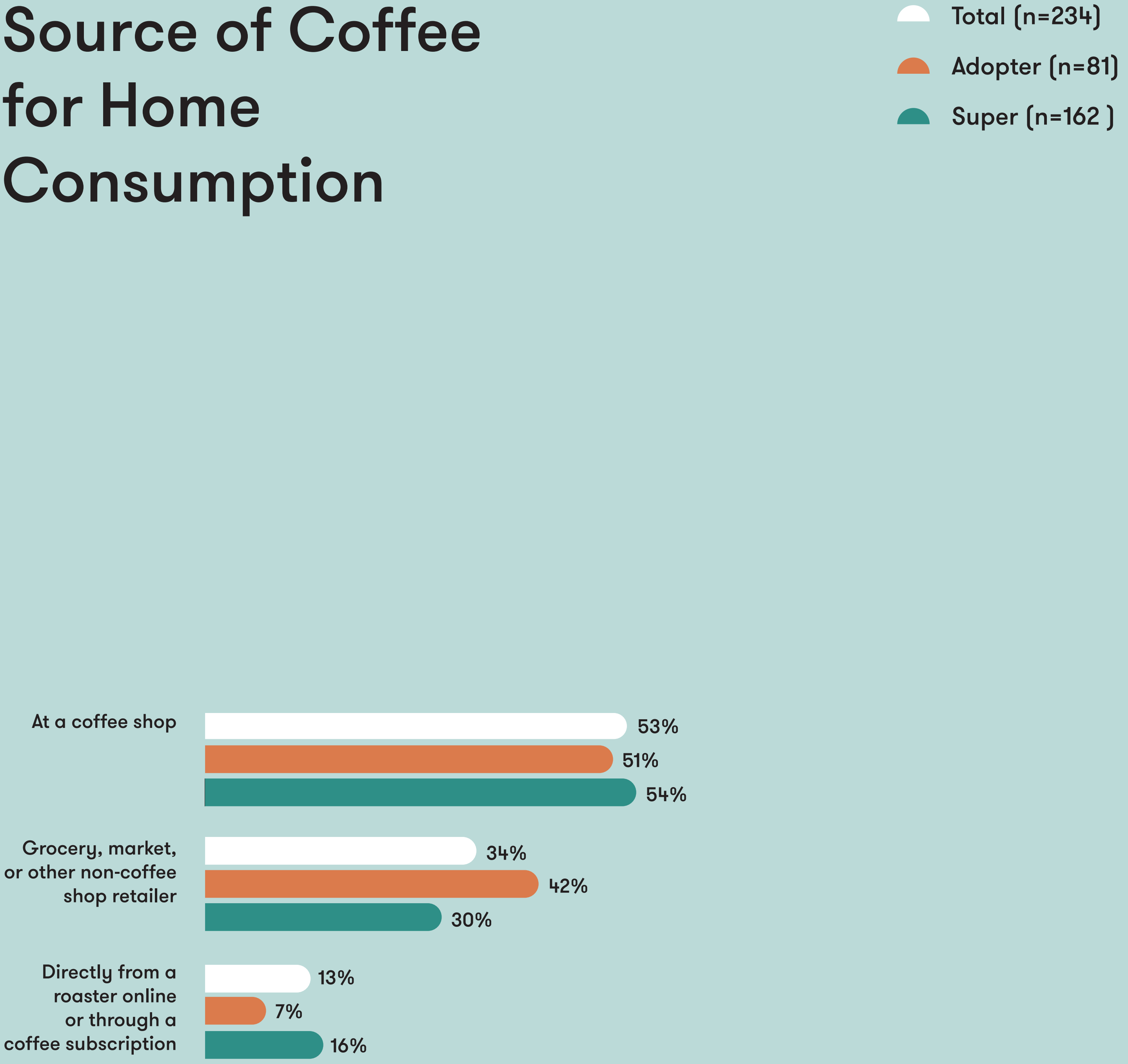
Base:

Those who drink coffee at cafes/coffee shops.

Most respondents spend $4 to $5 on a coffee beverage when visiting a coffee shop.

- 42% of Supers spend $6 or more for coffee, while only 25% of Adopters spend that much.
- Adopters are much more likely to spend only $2 or $3 on a cup of coffee (24% vs. 5%).

Source of Coffee for Home Consumption



Q:

Where do you most often purchase coffee to drink at home?

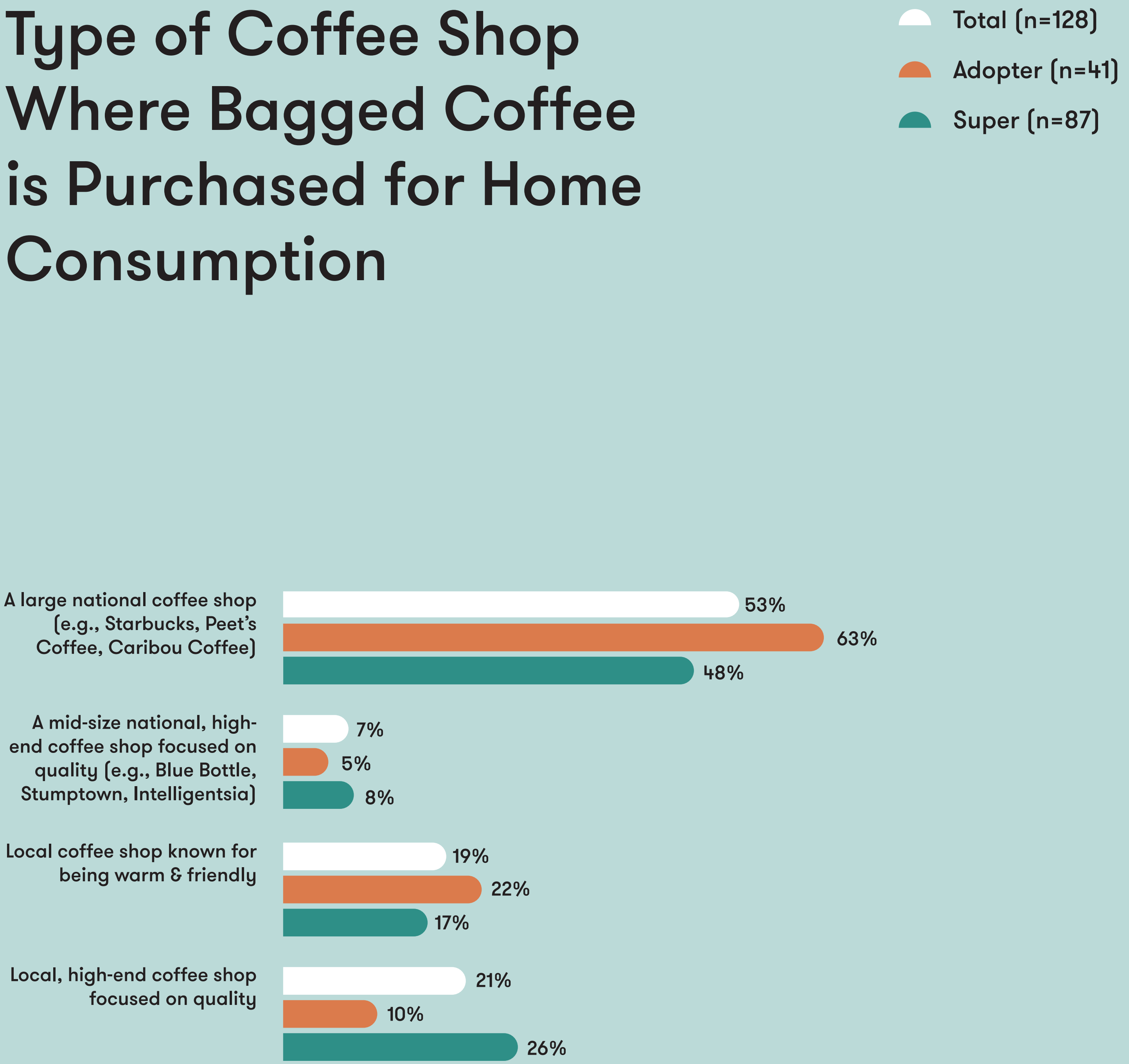
Base:

Those who drink coffee at home.

Both groups typically buy their coffee at a coffee shop for home consumption.

- Adopters are more likely to purchase coffee at a non-coffee shop retailer (42% vs. 30%), while Supers are more likely to buy directly from a roaster online or through a subscription (16% vs. 7%).

Type of Coffee Shop Where Bagged Coffee is Purchased for Home Consumption



Q:

From what type of coffee shop do you most often buy your coffee?

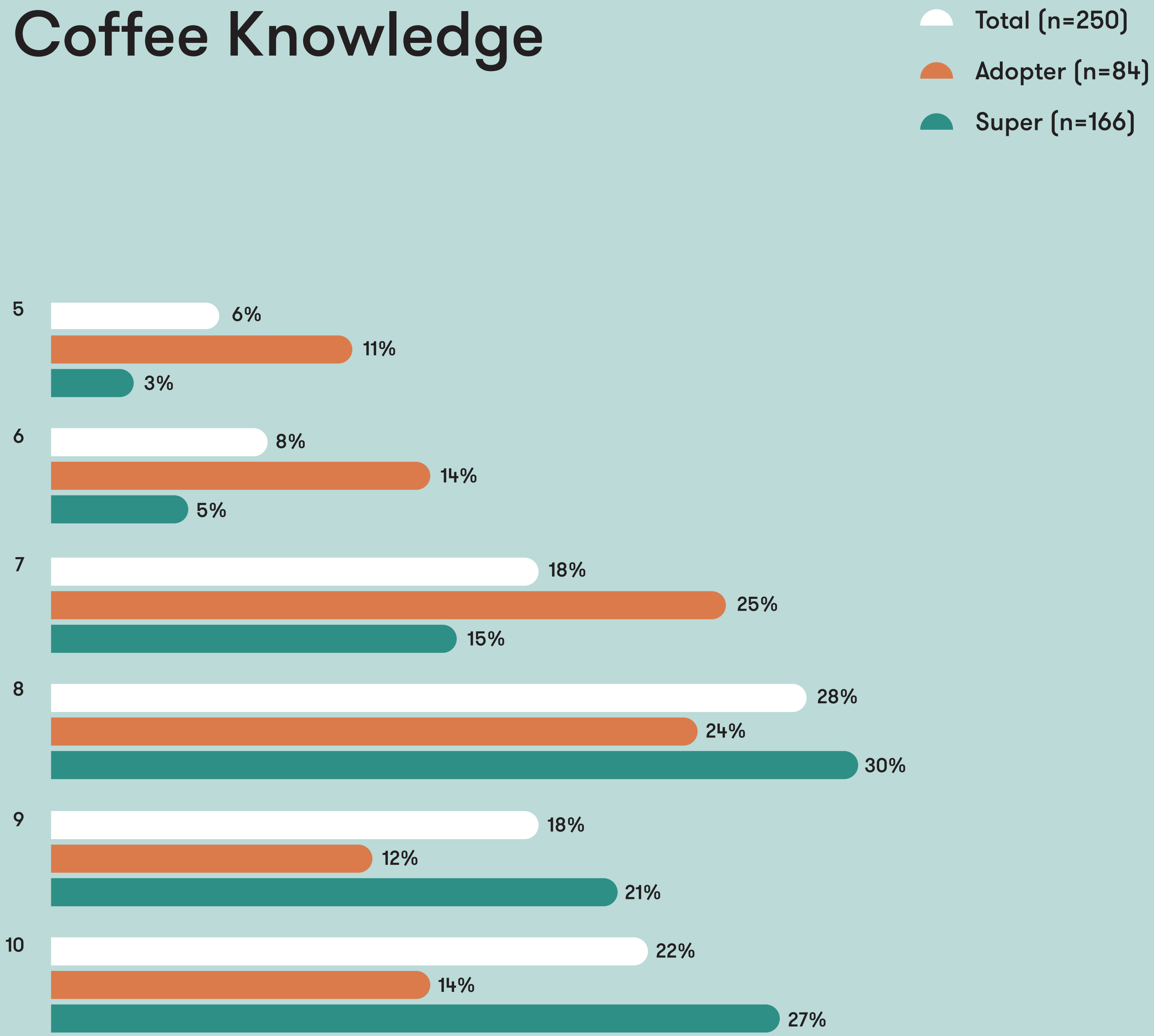
Base:

Those who purchase bagged coffee at a coffee shop to drink at home.

When purchasing coffee from a coffee shop for home consumption, respondents prefer a large national coffee shop as their source.

- Adopters are more likely to favor a large national coffee shop (63% vs. 48%).
- Supers are significantly more likely to purchase coffee from a local, high-end coffee shop that focuses on quality (26% vs. 10%).

Coffee Knowledge



*respondents answering 1-4 were screened out

Q:

On a scale from 1 to 10, with 10 being highest, how would you rate your coffee knowledge? For example, your knowledge of coffee trends, origins, quality, brew methods, coffee ratios, roasting times, etc.

Base:

All respondents.

48% of Supers rate their coffee knowledge at either a nine or a ten (vs. 26% for Adopters). 49% of Adopters rate their knowledge at either a seven or an eight.

- All respondents had to rate their coffee knowledge as 5 or greater on a scale of 1 to 10.

Familiarity with Coffee Terminology

	Total (n=250)	Adopter (n=84)	Super (n=166)
Strength	86%	81%	88%
Coffee variety	76%	74%	77%
Brew method	73%	67%	77%
Coffee origin	70%	62%	75%
Grind size	67%	58%	72%
Coffee region	62%	50%	68%
Brew ratio	43%	33%	48%
Coffee extraction	43%	31%	49%
Coffee cherry process	18%	10%	22%
Peaberry	11%	8%	13%
Coffee TDS	8%	5%	10%
None of these	--	--	--

Q:

Based on your coffee knowledge, select the terms that you are familiar and/or comfortable with. Check all that apply.

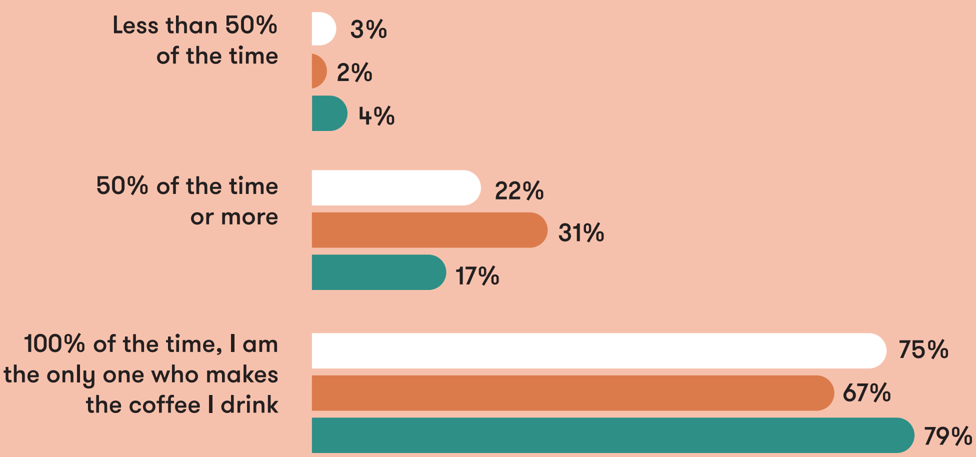
Base:

All respondents.

Strength, coffee variety, and brew method are three coffee-related terms with which all groups are most familiar. Supers, however, are more familiar with all coffee terminology compared to Adopters.

Consumption at Home

Home Coffee Preparation



Q:

When you drink coffee at home, how often are you the person who prepares it?

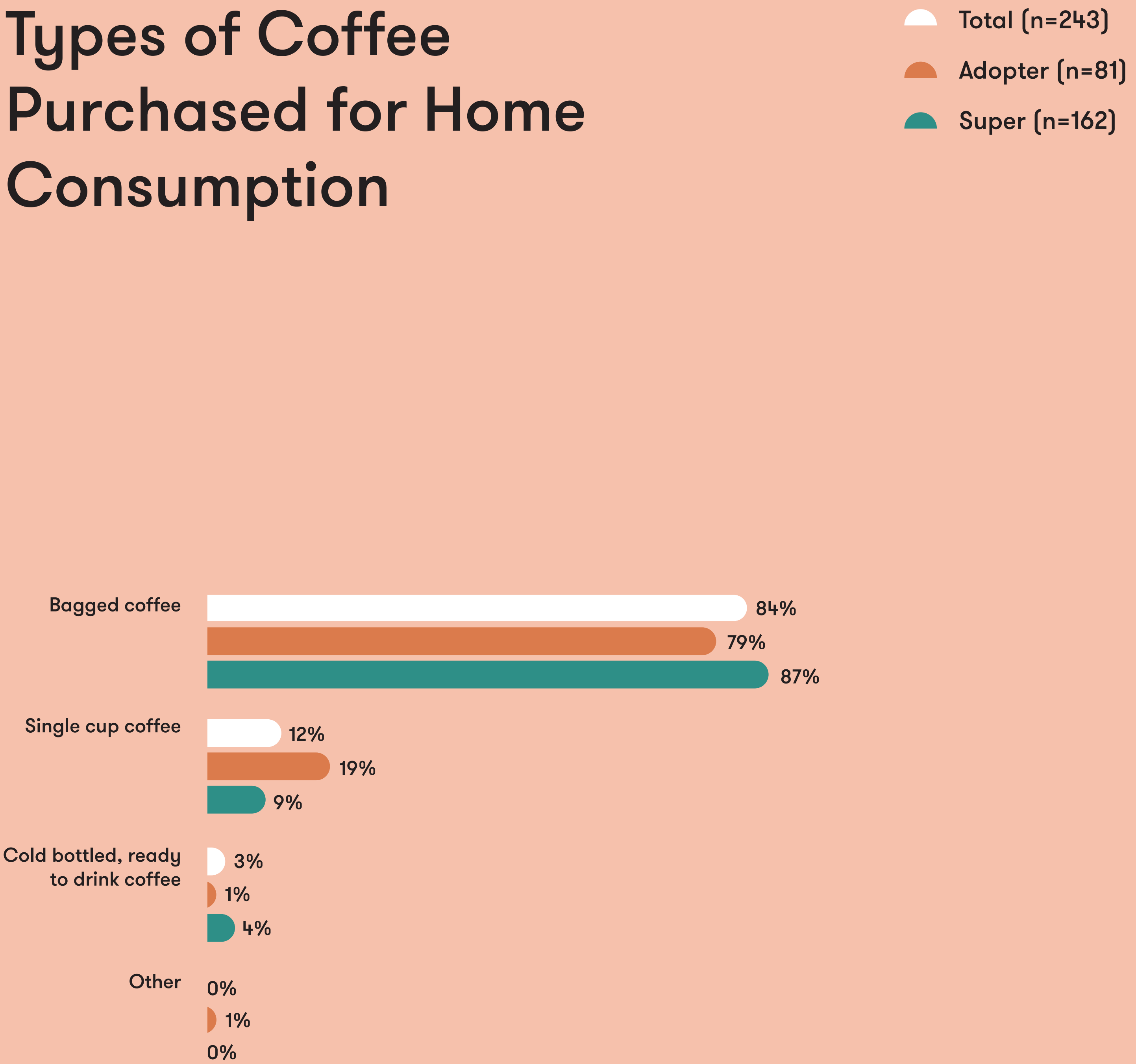
Base:

Those who drink coffee at home.

Most respondents make the coffee they drink at least 50% of the time.

- Supers are significantly more likely to make it 100% of the time (79% vs. 67% for Adopters).
- Adopters are significantly more likely to make it 50% of time or more (but not 100%) (31% vs. 17% for Supers).

Types of Coffee Purchased for Home Consumption



Q:

What type of coffee do you buy most often to drink at home?

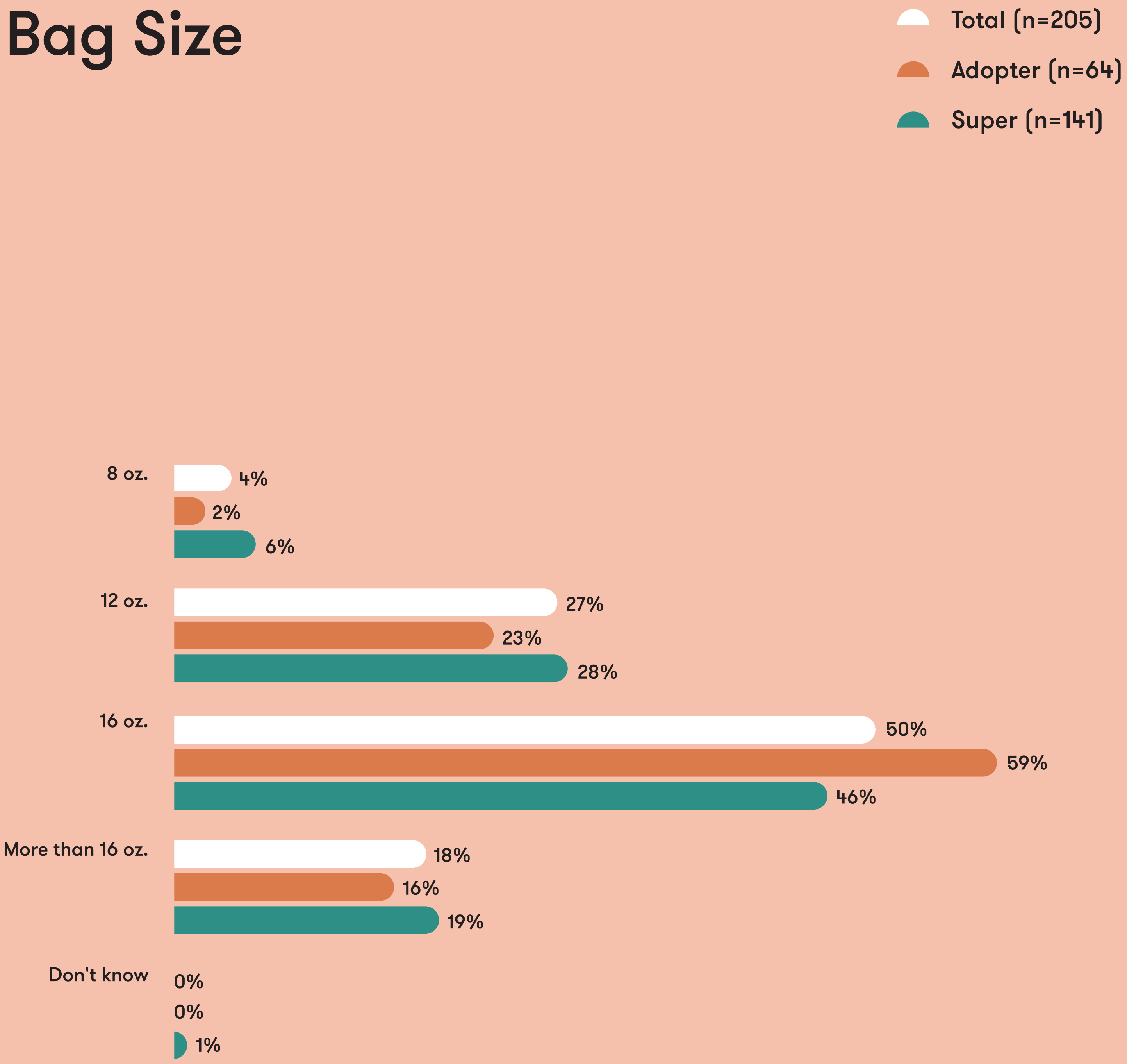
Base:

Those who drink coffee at home.

Most respondents buy bagged coffee to drink at home (87% of Supers; 79% Adopters).

- Adopters are significantly more likely to purchase single-cup coffee to drink at home (19% vs. 9% for Supers).

Bag Size



Q:

What size bag do you typically purchase?

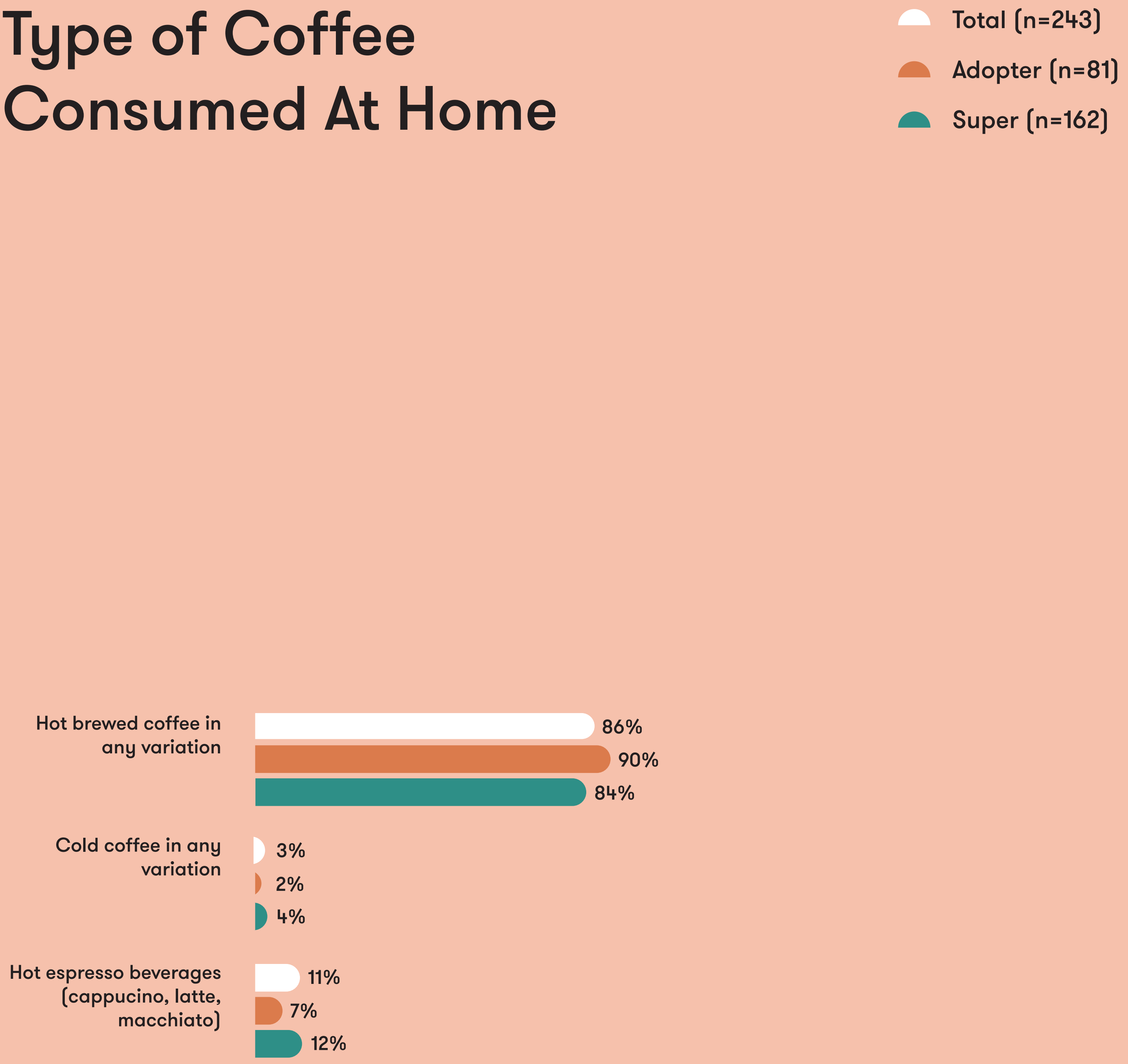
Base:

Those who purchase bagged coffee to drink at home.

A 16 oz. bag of coffee is the most popular size purchased for home consumption.

- Adopters are more likely to purchase a 16 oz. bag (59% vs. 46%), while Supers are more likely to try out smaller sizes.

Type of Coffee Consumed At Home



Q:

The type of coffee I most often drink at home is:

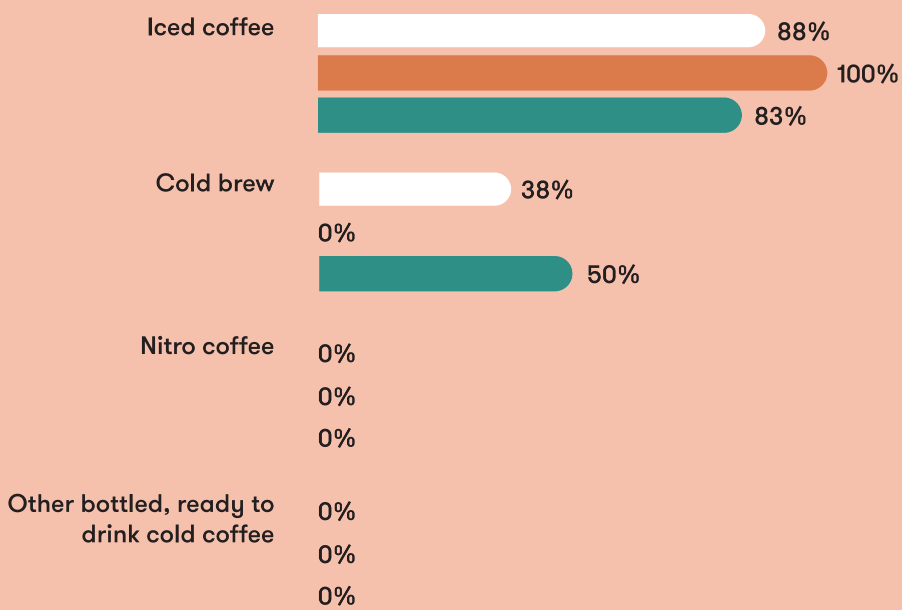
Base:

Those who drink coffee at home.

Hot brewed coffee is preferred by both groups for home consumption.

- Supers are more likely than Adopters to drink hot espresso beverages at home.

Cold Coffee Beverages Consumed at Home



Q:

What type of cold coffee beverages do you drink at home? Check all that apply.

Base:

Those who most often drink cold coffee beverages at home

Most respondents who drink cold coffee beverages at home drink iced coffee.

Brew Method at Home

	Total (n=243)	Adopter (n=81)	Super (n=162)
Drip Machine	36%	40%	35%
Single Cup Machine	24%	36%	19%
French Press/Full Immersion	12%	5%	16%
Espresso Machine	9%	6%	10%
Percolator	9%	4%	12%
Manual Pour-Over (Chemex, V60, Cone, Beehouse, Kalita, Woodneck)	5%	6%	4%
Aeropress	2%	--	3%
Cold Brew	1%	1%	1%
Vacumm Pot	1%	2%	1%
Stovetop Espresso Maker	--	--	1%
Other	--	--	--

Q:

When you prepare coffee at home, in what way do you most often prepare it?

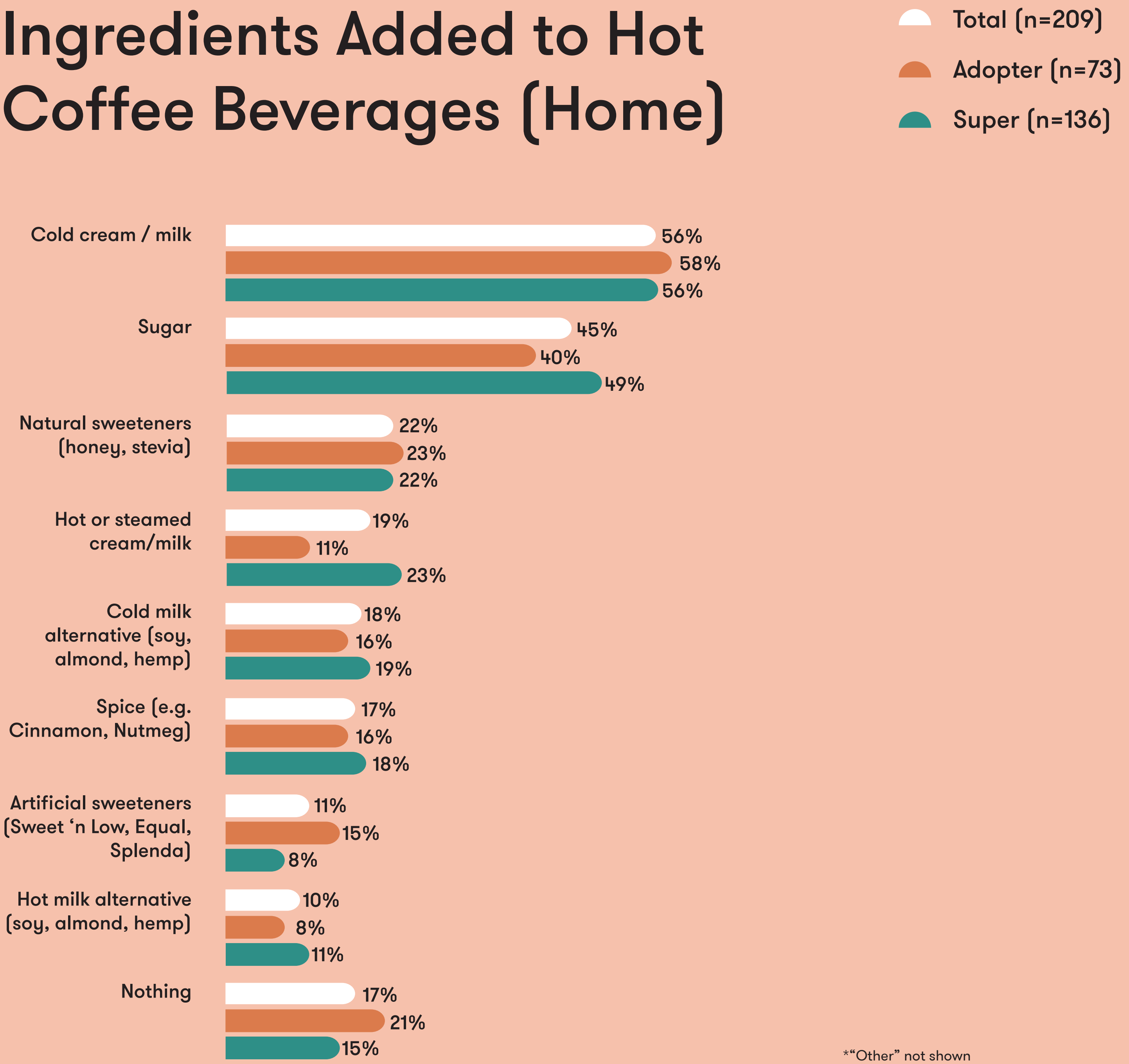
Base:

Those who drink coffee at home

Drip machines and single-cup machines are the most popular methods for making coffee at home.

- Supers are significantly more likely to use a French press or full immersion to prepare coffee (16% vs. 5%).
- Among Supers, older Millennials (ages 26- 35) prefer single-cup machines (29% vs. 19% among all Supers).

Ingredients Added to Hot Coffee Beverages (Home)



*"Other" not shown

Q:

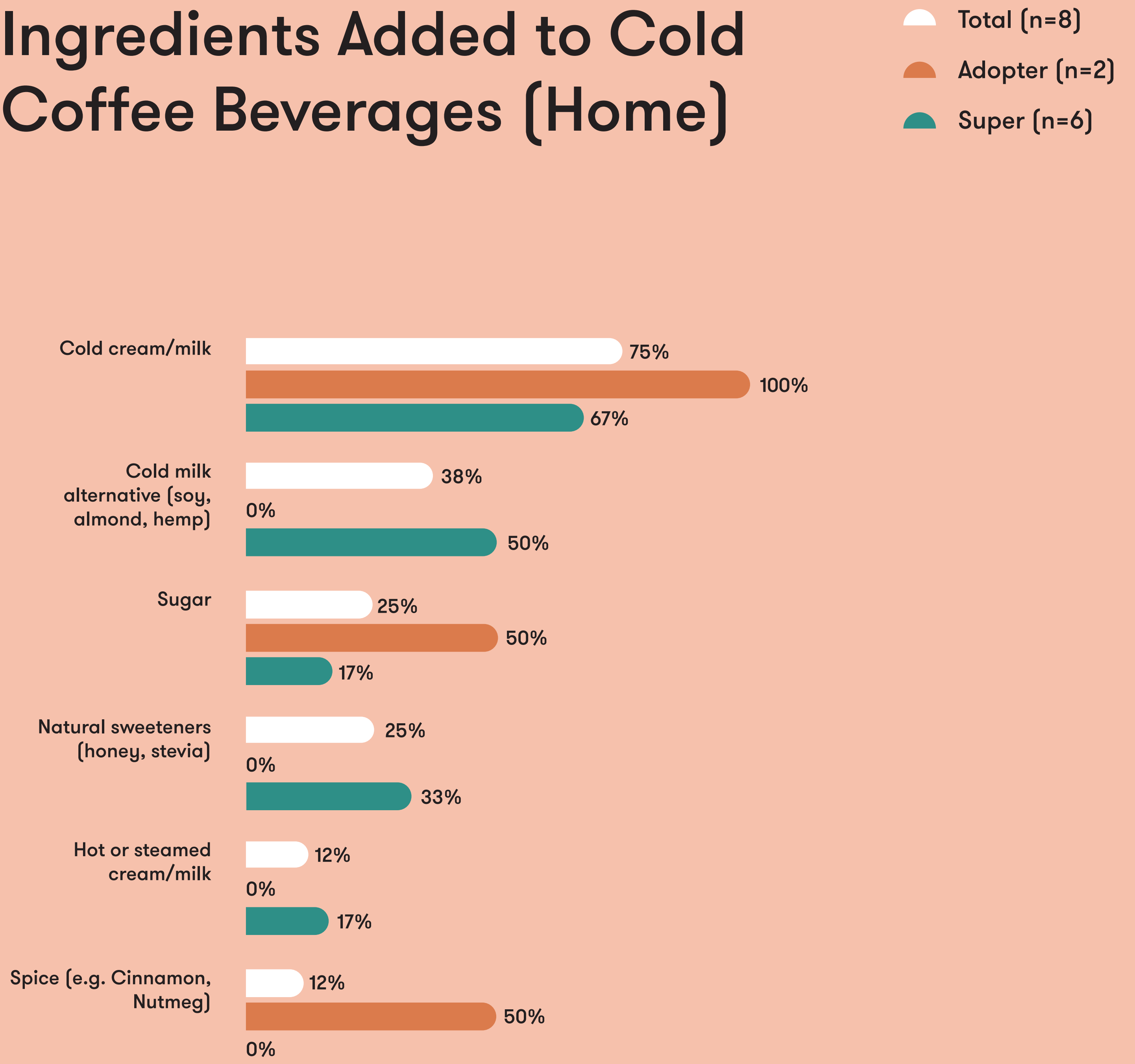
What do you typically add to your hot coffee beverage at home? Check all that apply.

Base:

Those who most often drink hot brewed coffee at home

Cold cream/milk and sugar are the two most popular ingredients added to coffee consumed at home.

Ingredients Added to Cold Coffee Beverages (Home)



Q:

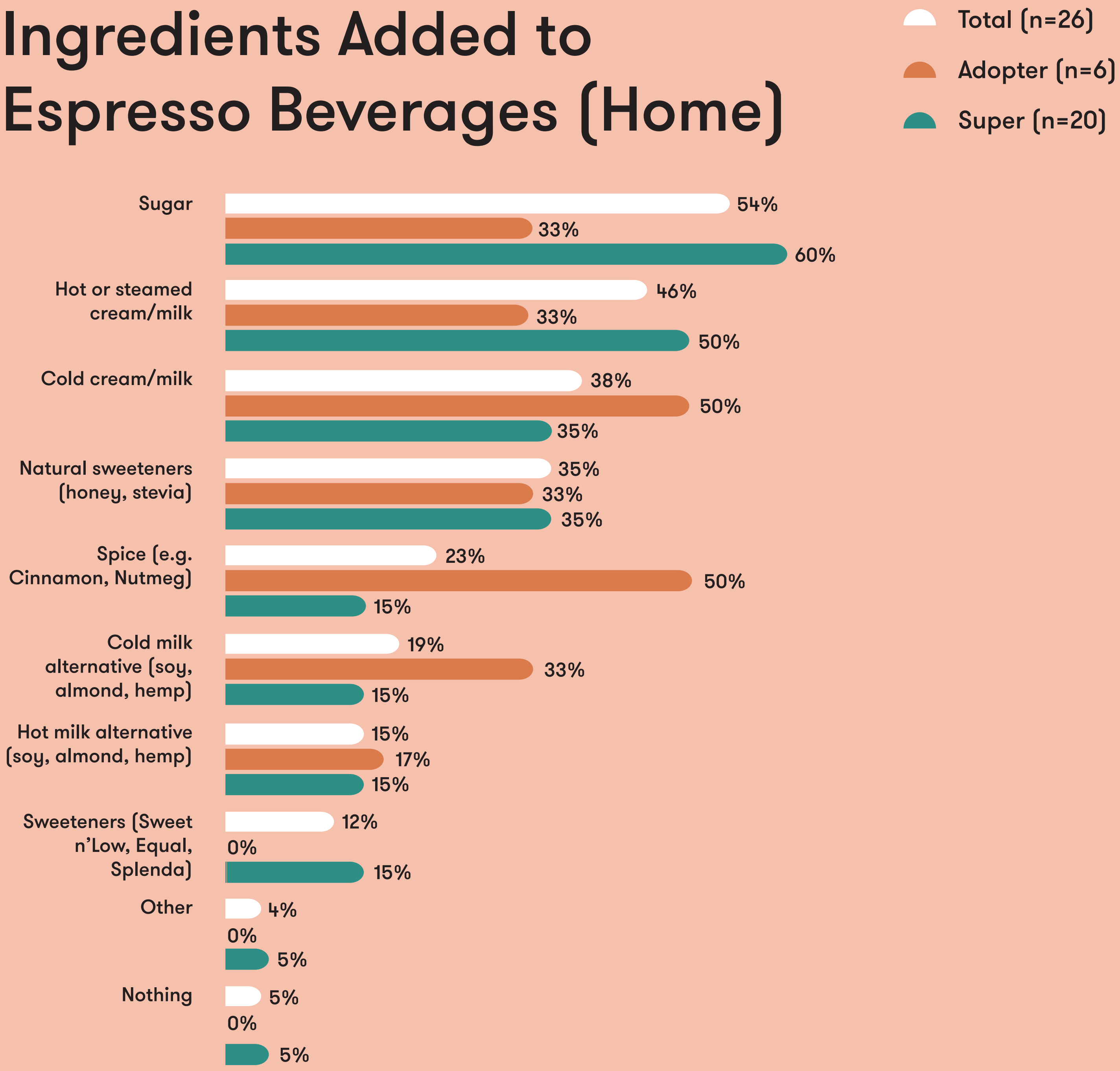
What do you typically add to your cold coffee beverage at home? Check all that apply.

Base:

Those who most often drink cold coffee at home

Cold cream/milk is the most popular ingredient added to cold coffee beverages consumed at home.

Ingredients Added to Espresso Beverages (Home)



Q:

What do you typically add to your hot espresso coffee beverage at home? Check all that apply.

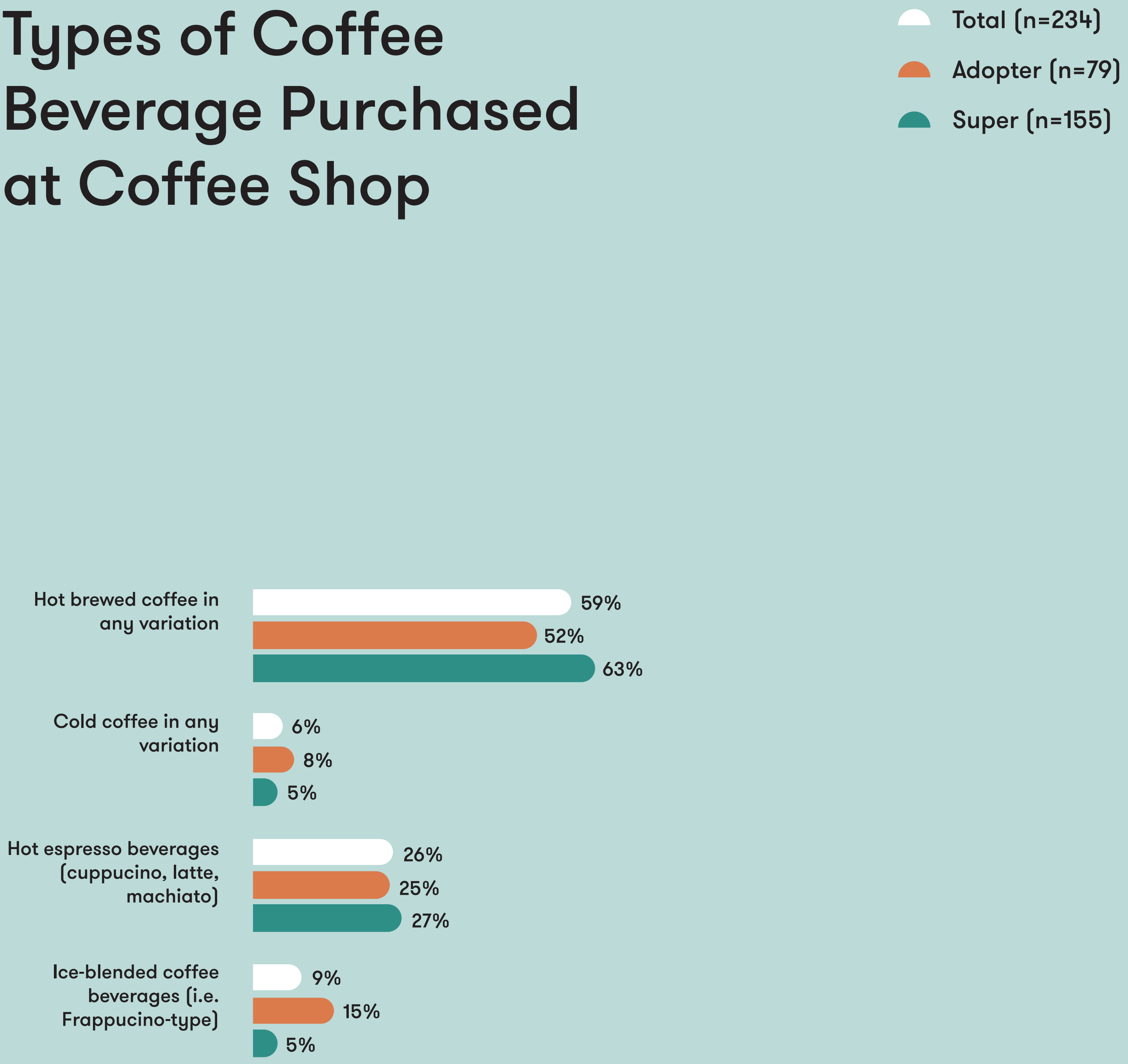
Base:

Those who most often drink hot espresso beverages at home

Supers are more likely to add sugar and hot or steamed cream/milk to their hot espresso beverages, while Adopters prefer cold cream/milk and spices.

Consumption at the Coffee Shop

Types of Coffee Beverage Purchased at Coffee Shop



Q:

The type of coffee beverage I most often purchase at a coffee shop

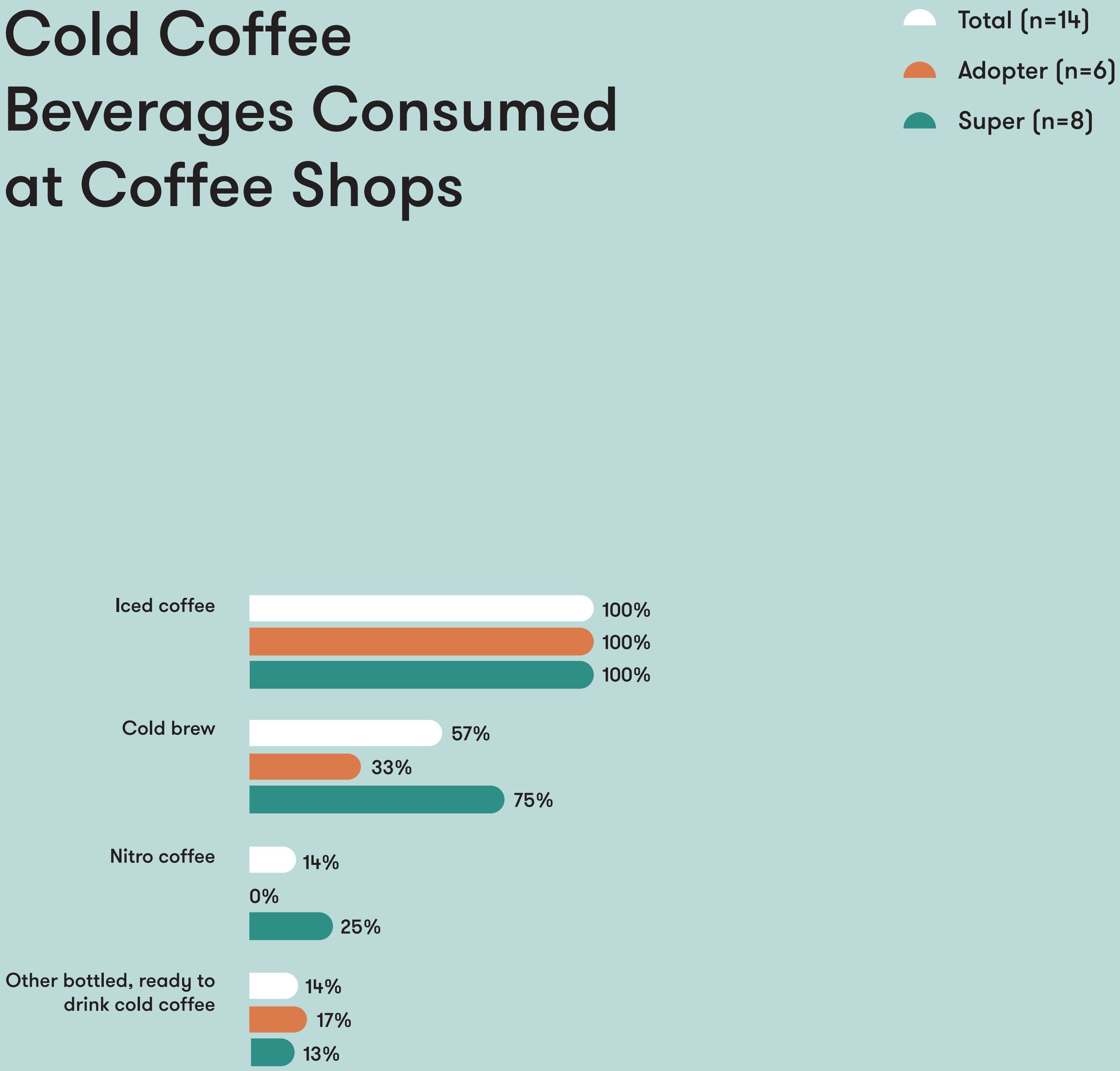
Base:

Those who drink coffee at cafes/coffee shops.

Hot brewed coffee is the most frequently purchased type of coffee at a coffee shop.

- Adopters express a notable interest in ice-blended coffee beverages (15% vs. 5%).

Cold Coffee Beverages Consumed at Coffee Shops



Q:

What type of cold coffee beverages do you drink at a coffee shop? Check all that apply.

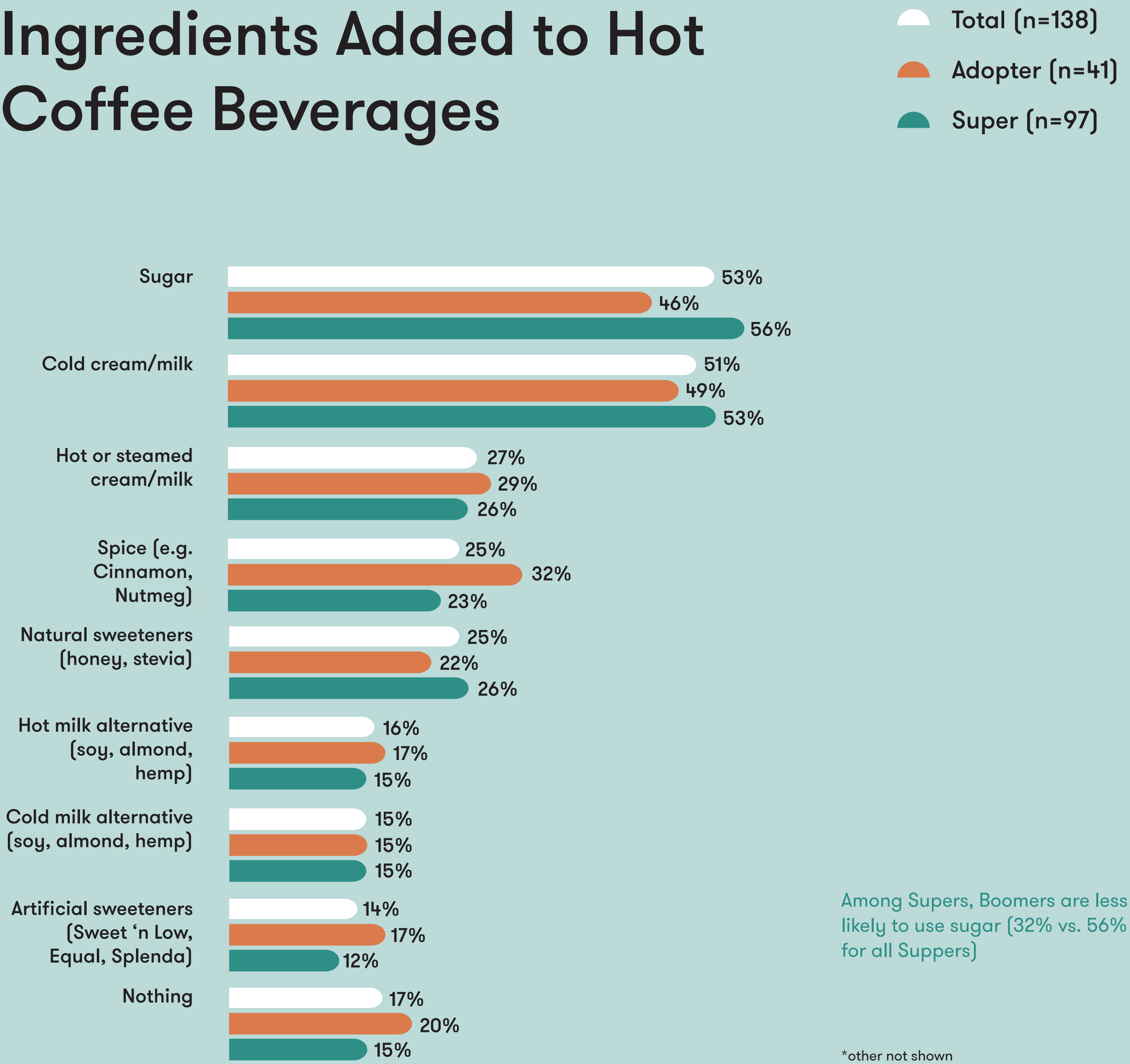
Base:

Those who most often drink cold coffee beverages at cafes/ coffee shops

Iced coffee is universally chosen by those who prefer cold coffee beverages.

- Cold brew (75%) and nitro coffee (25%) is also relatively popular among Supers.

Ingredients Added to Hot Coffee Beverages



Among Supers, Boomers are less likely to use sugar (32% vs. 56% for all Suppers)

*other not shown

Q:

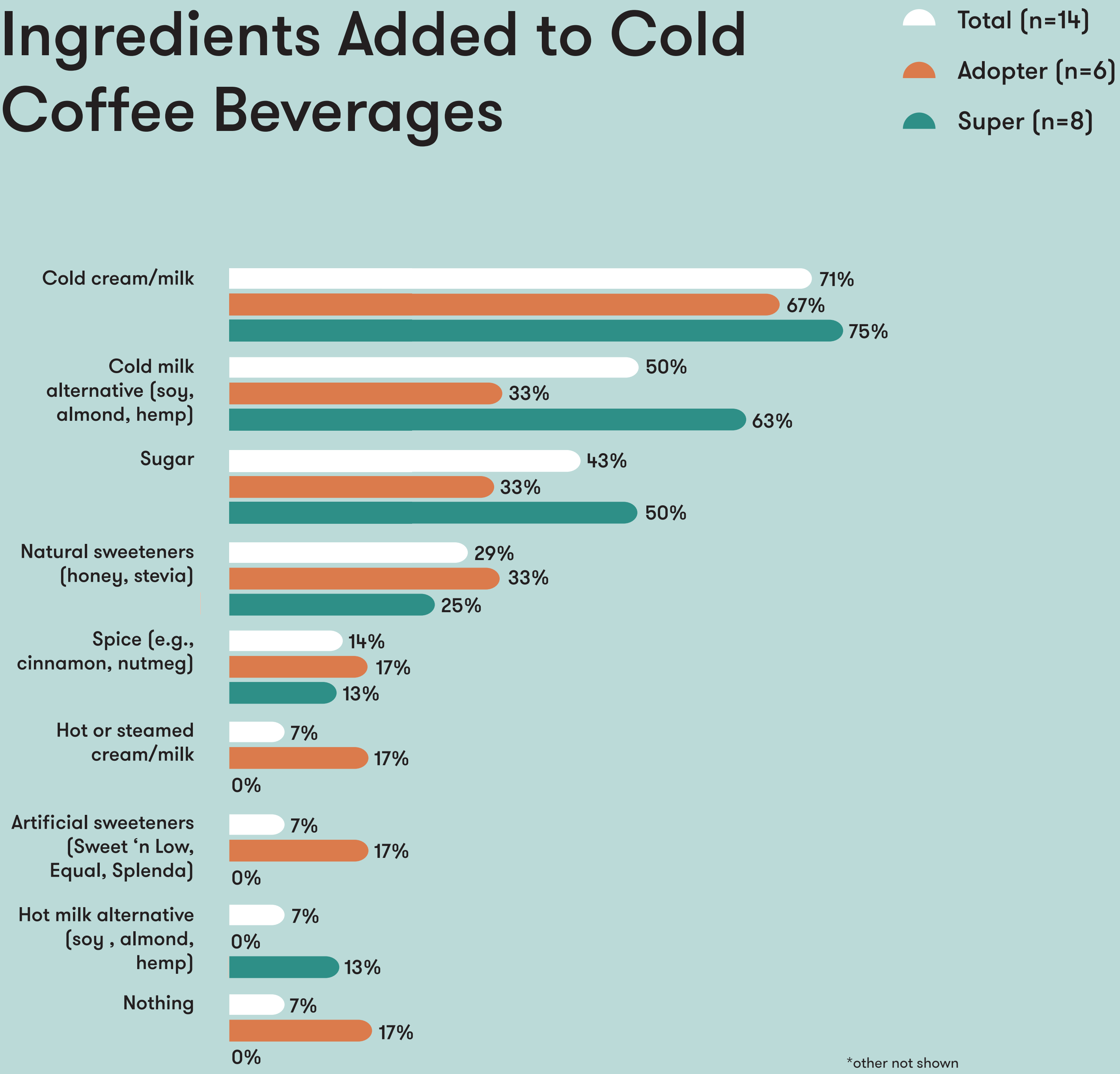
What do you typically add to your hot coffee beverage? Check all that apply.

Base:

Those who most often drink hot brewed coffee at cafes/ coffee shops.

Traditional ingredients such as sugar and cold cream/milk are the ingredients most frequently added to hot coffee beverages.

Ingredients Added to Cold Coffee Beverages



Q:

What do you typically add to your cold coffee beverage? Check all that apply.

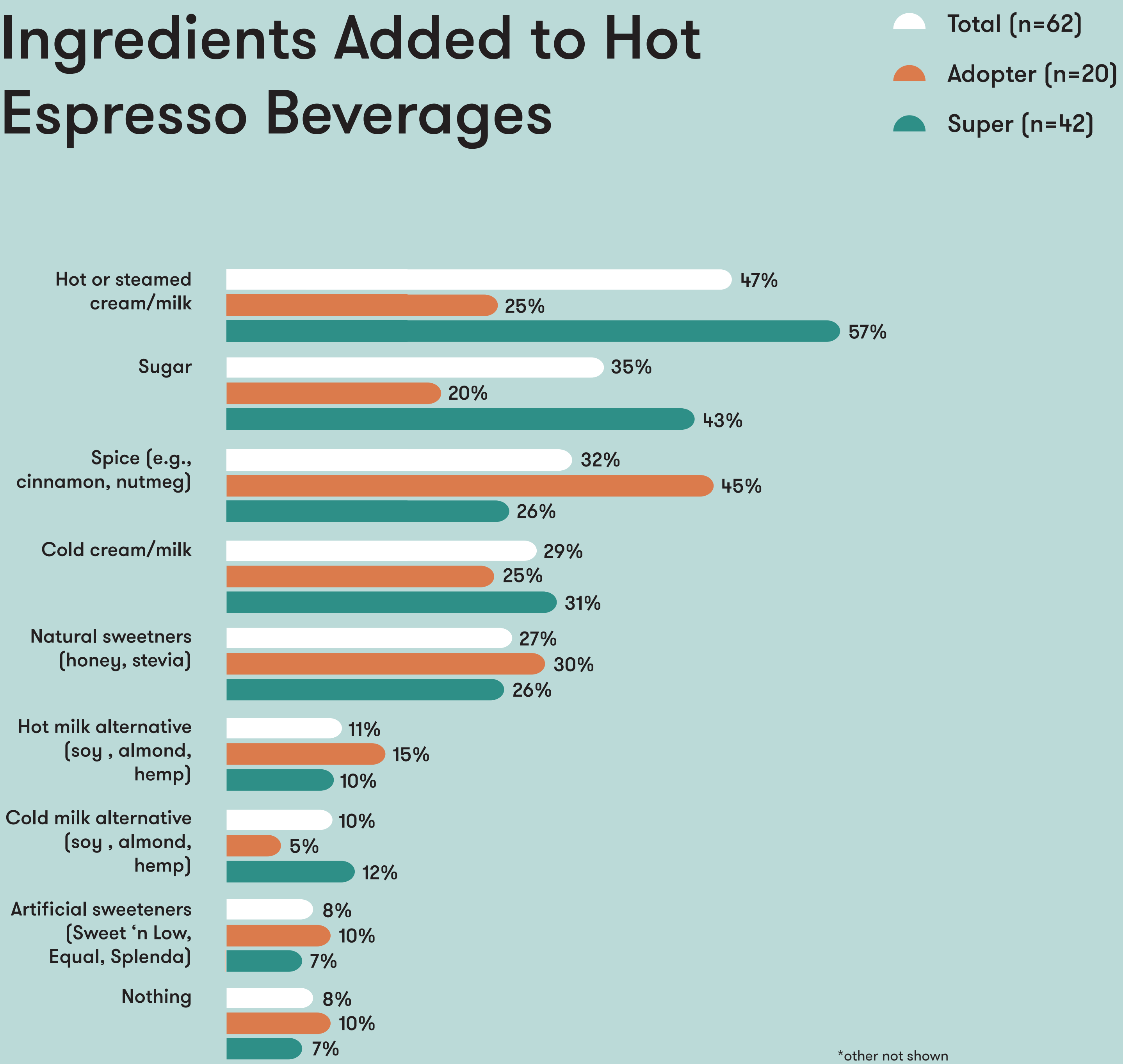
Base:

Those who most often drink cold coffee beverages at cafes/coffee shops.

Cold cream/milk and sugar are also popular when added to cold coffee beverages.

- Cold milk alternatives, such as soy, almond, or hemp, are popular among Supers (63% vs. 33%).

Ingredients Added to Hot Espresso Beverages



Q:

What do you typically add to your hot espresso coffee beverage? Check all that apply.

Base:

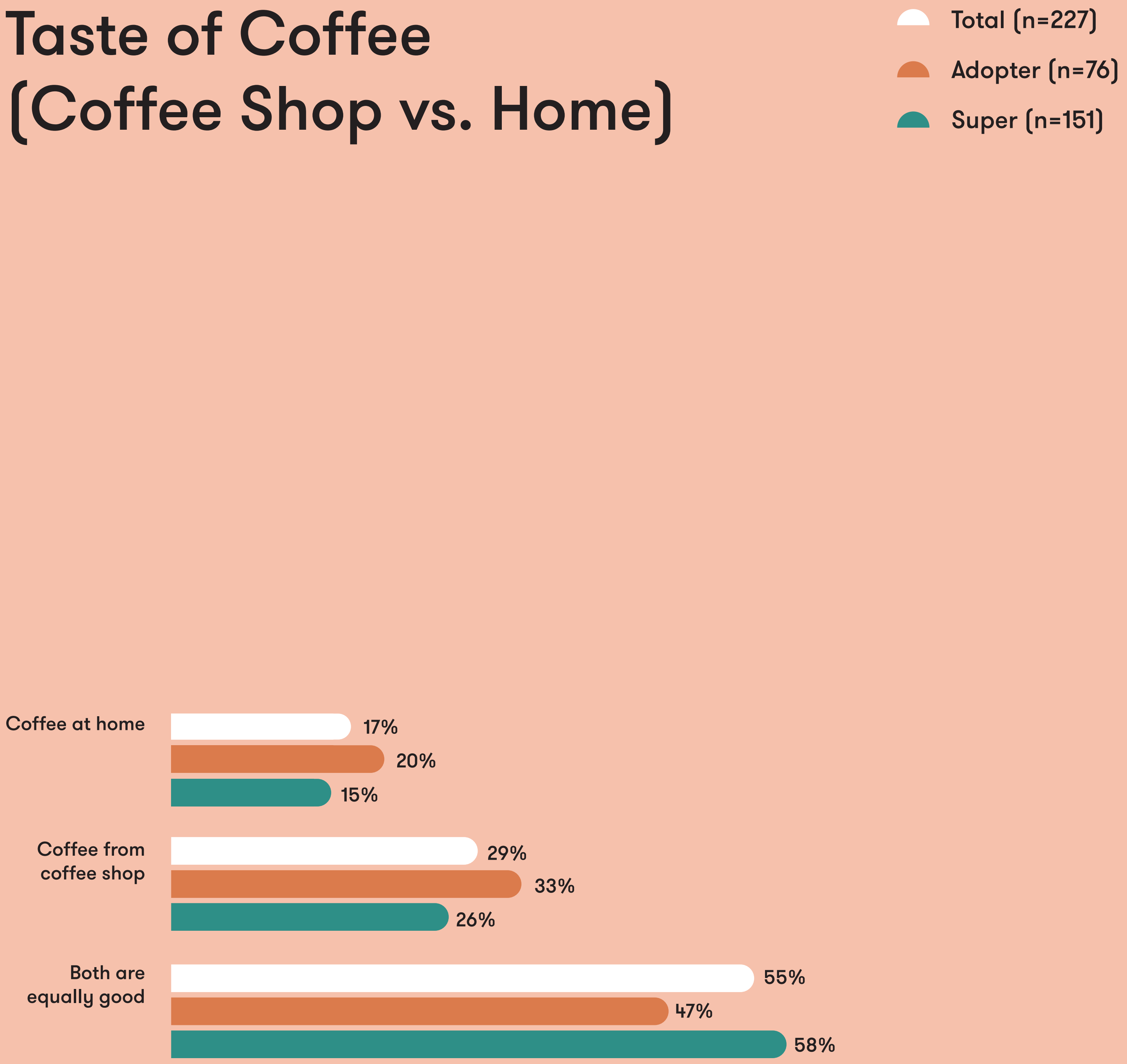
Those who most often drink hot espresso beverages at cafes/coffee shops.

Supers prefer the more traditional hot or steamed cream/milk (57% vs. 25% for Adopter) and sugar (43% vs. 20%) for their hot espresso beverages.

- Spices (45%) and natural sweeteners (30%) are popular among Adopters.

Coffee Shop vs. Home

Taste of Coffee (Coffee Shop vs. Home)



Q:

Which tastes better: the coffee that you drink at home or the coffee you drink from a coffee shop?

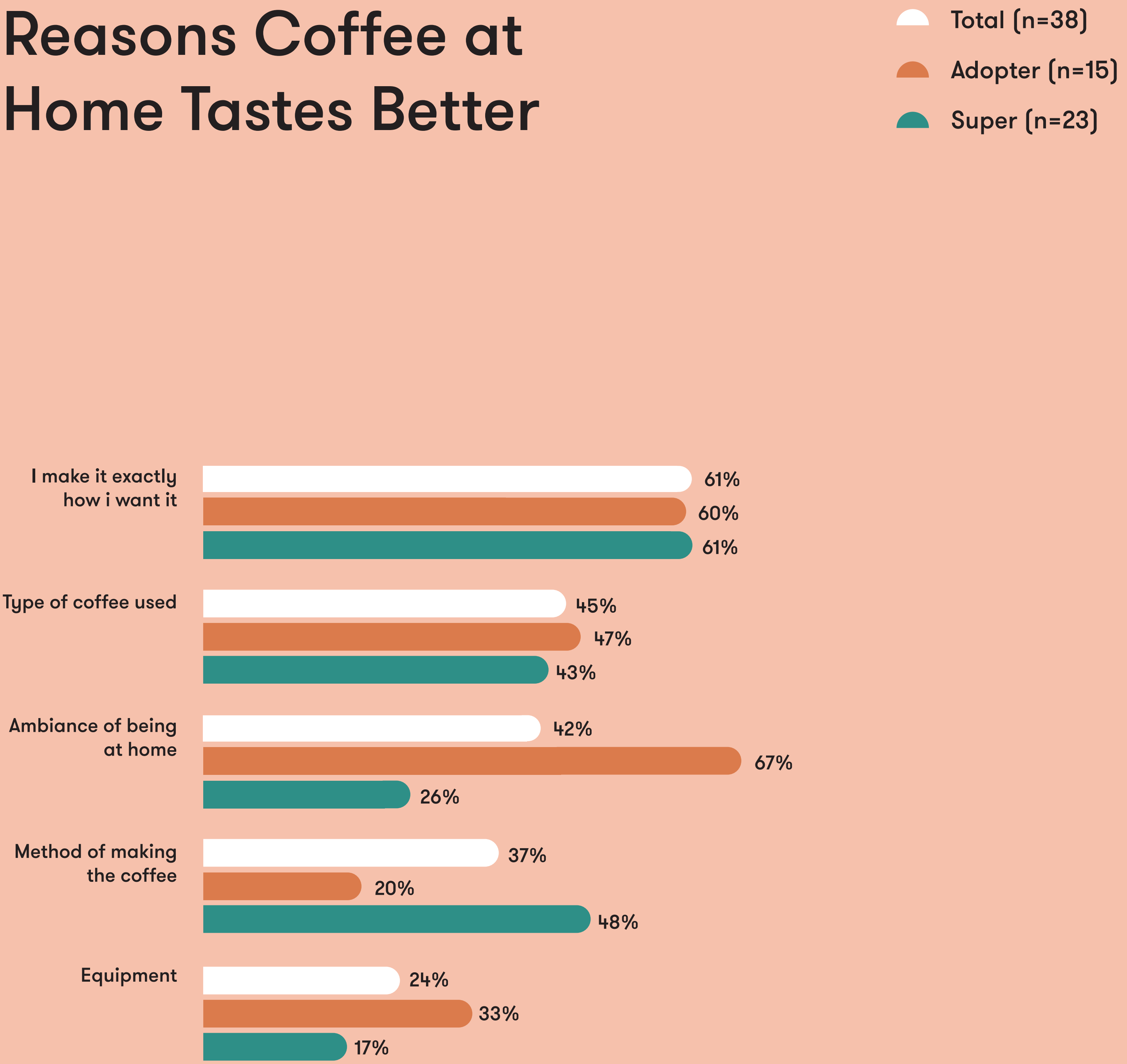
Base:

Those who drink coffee at home AND at cafes/coffee shops.

A majority of respondents (55%) believe that coffee at home and coffee from a coffee shop taste equally good.

- Adopters are more likely to express a preference for one or the other (53% vs. 41% among Supers).
- Millennials are more likely (among Supers) to think coffee at home tastes better (21% vs. 15 among all Supers).

Reasons Coffee at Home Tastes Better



Q:

Why do you think the coffee you drink at home is better? Check all that apply.

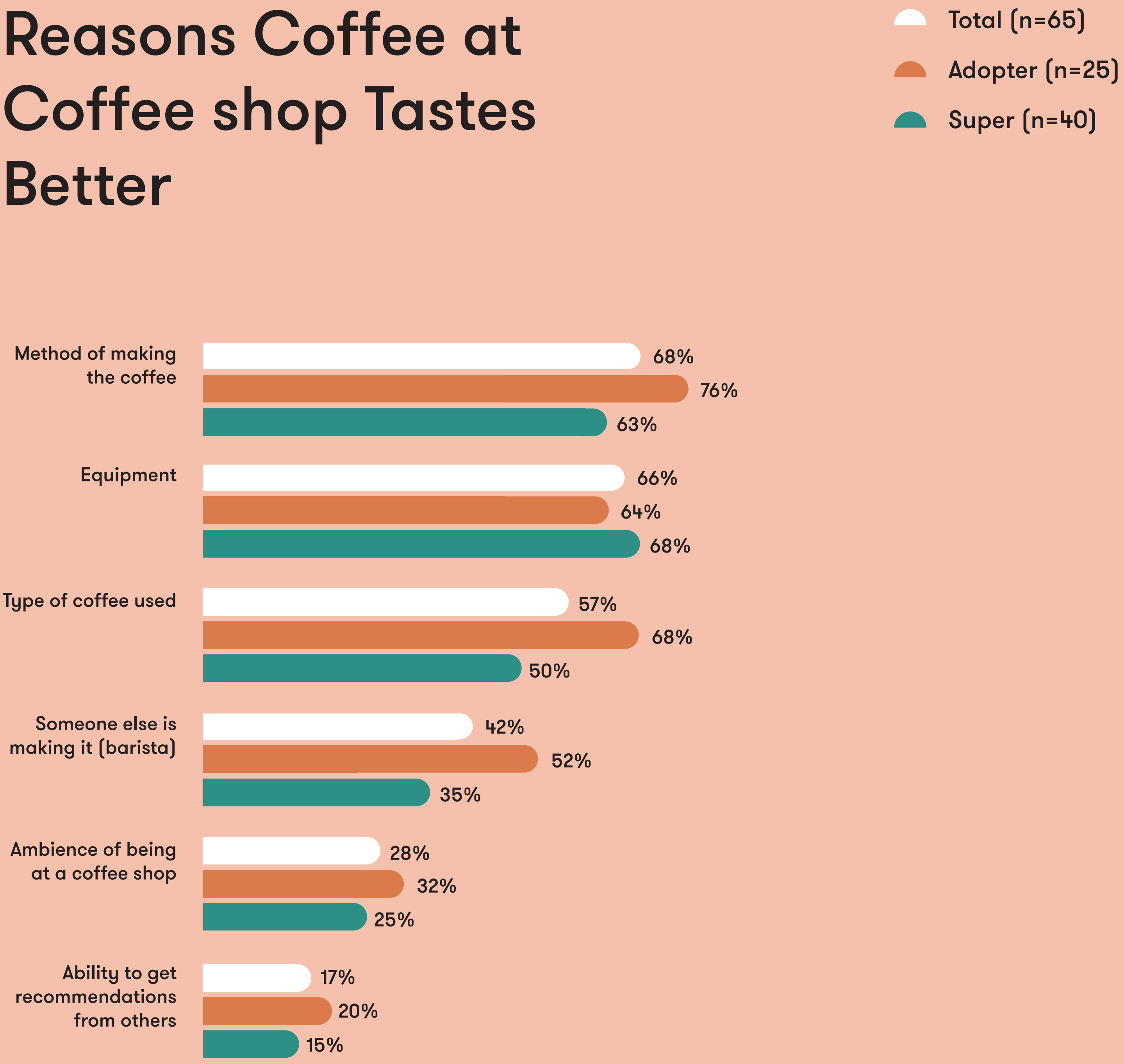
Base:

Those who think coffee at home tastes better.

Respondents cite being able to make coffee exactly how they want it as the main reason coffee at home tastes better.

- Adopters point to the ambiance of home (67% vs. 26%), while Supers note the method of making the coffee (48% vs. 20%) as influencing their opinion.

Reasons Coffee at Coffee shop Tastes Better



Q:

Why do you think the coffee you drink at a coffee shop is better? Check all that apply.

Base:

Those who think coffee at a coffee shop is better.

Respondents who prefer the taste of coffee from a coffee shop point to the method of making coffee (68% overall) and the equipment used (66% overall).

Specialty Coffee Throughout the day

Daily Consumption Habits (Median)

	Total	Adopter	Super
Home (Days/Week)	7	5	7
Home (Cups/Day)	3	3	3
Away from home (Days/Week)	4	4	4
Away from home (Cups/Week)	2	1	2

Q:

You indicated you drink coffee 5-7 days a week. How many days a week do you drink coffee at each of the following locations? Q39/Q40: When you drink coffee at each of the following locations, how many cups of coffee do you drink at (home/away from home)? Please do not provide a range.

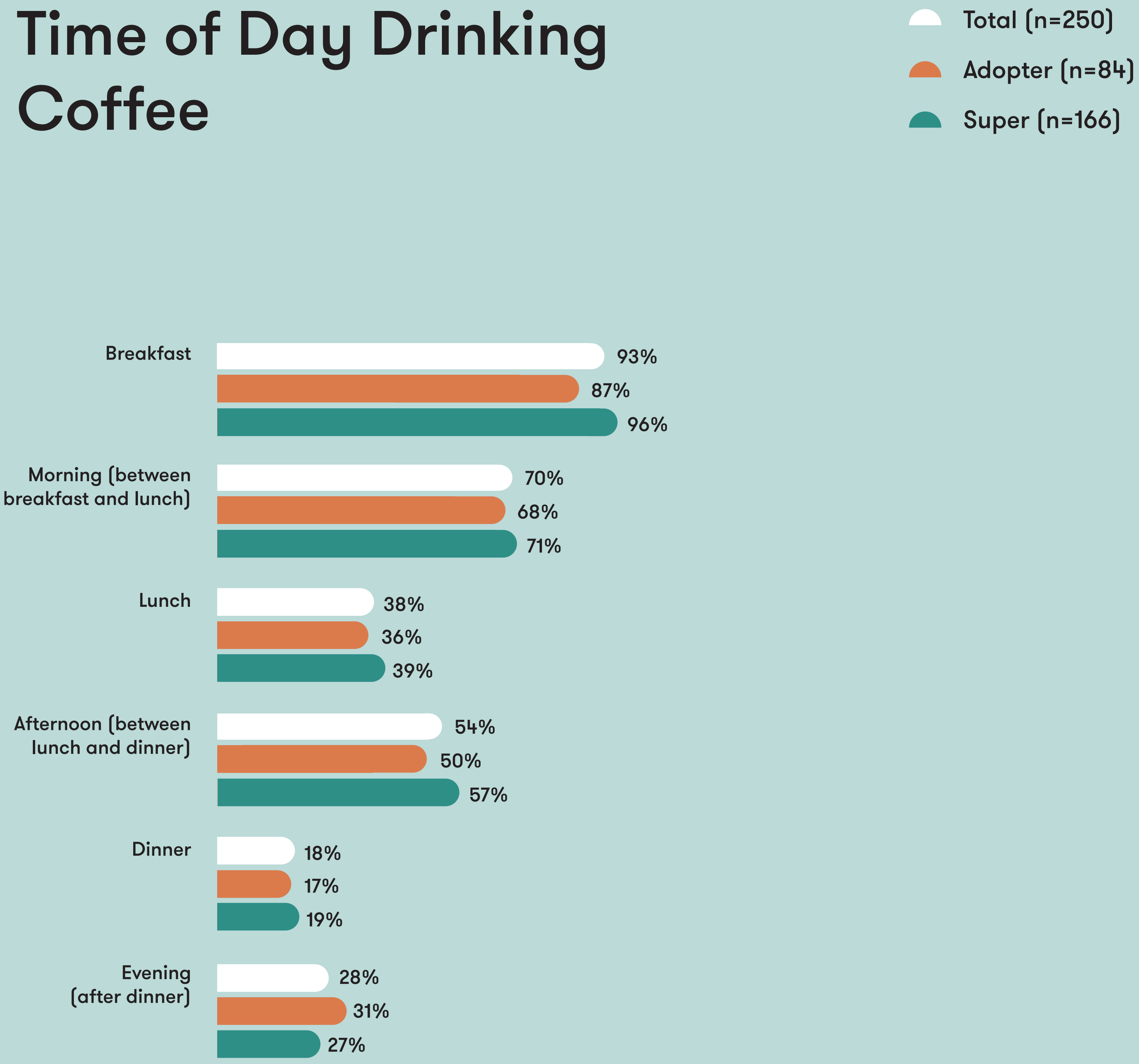
Base:

Among those who drink coffee in specified location.

Both Supers and Adopters drink three cups of coffee a day at home, though Supers drink coffee seven days a week; Adopters drink coffee only five days a week.

- Each group drinks coffee away from home four days a week, but Adopters only drink one cup as opposed to the two cups that Supers typically drink.

Time of Day Drinking Coffee



Q:

Please indicate when you typically drink coffee. Check all that apply.

Base:

All respondents.

Breakfast and the morning hours are the most common times for drinking coffee.

- Supers are significantly more likely to drink coffee at breakfast (96% vs. 87% for Adopters).
- Among Supers, Boomers are more likely to drink coffee at dinner (28% vs. 19% for all Supers).

Daily Consumption–By Type and Day Part (Median)

	Hot Coffee	Cold Coffee	Hot Espresso	Cold Espresso
Breakfast	1	1	1	1
Morning	1	1	1	1
Lunch	1	1	1	1
Afternoon	1	1	1	1
Dinner	1	1	1	2
Evening	1	1	1	1

Q:

Please indicate what type of coffee you drink during the times of day that you drink coffee. Indicate how many cups you will typically have.

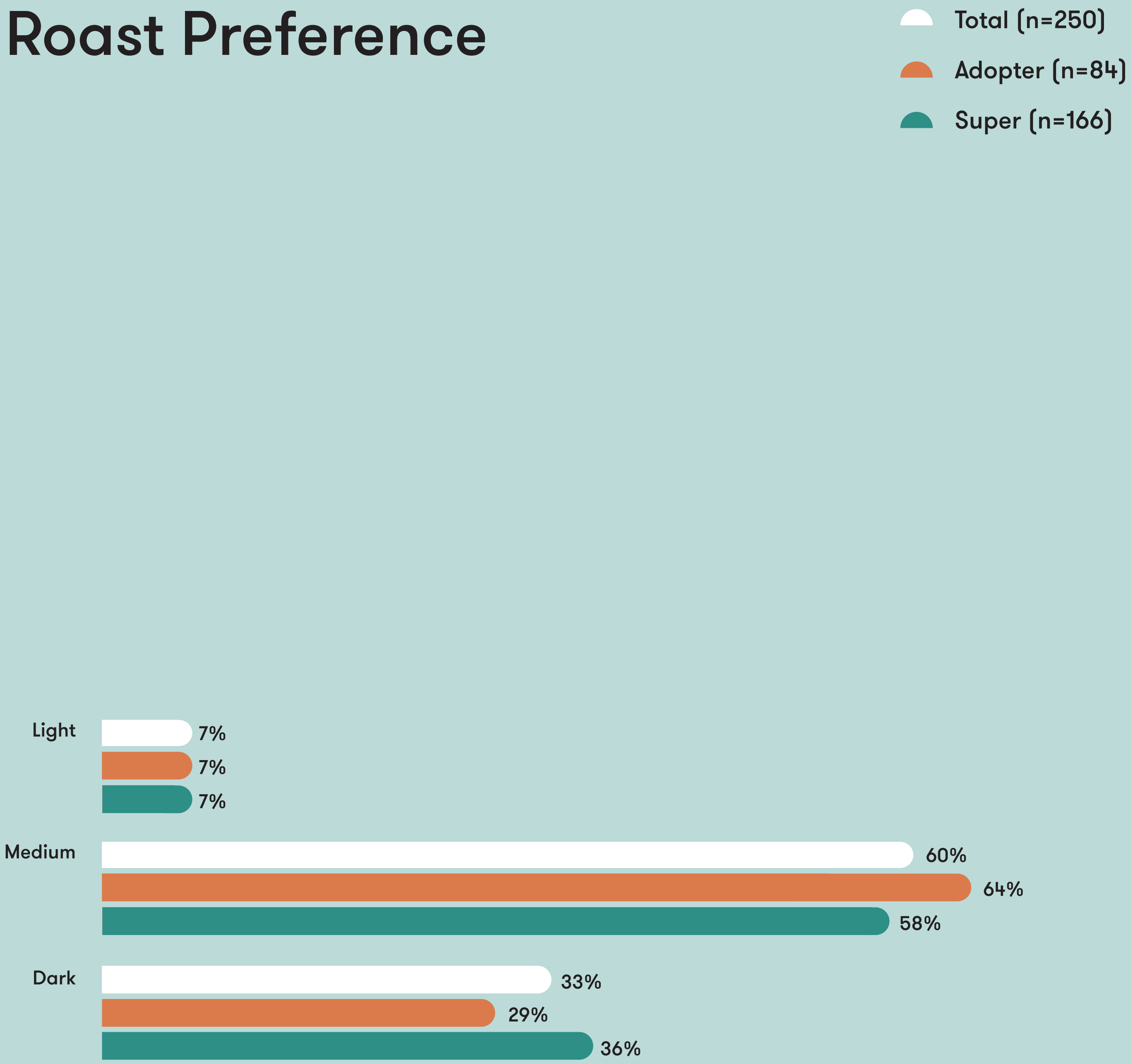
Base:

Respondents drinking beverage during day part.

Respondents who drink a particular type of coffee during a particular time of day tend to drink only one cup at that time.

- A notable exception is dinner, when respondents who drink cold espresso tend to drink two servings.
- Adopters drink three cups of hot espresso at dinner.

Roast Preference



Q:

What roast type do you prefer?

Base:

All respondents.

Both groups prefer a medium roast.

- Supers are more likely than Adopters to prefer a dark roast (36% vs. 29%).

Decaffeinated Coffee Consumption

Q:

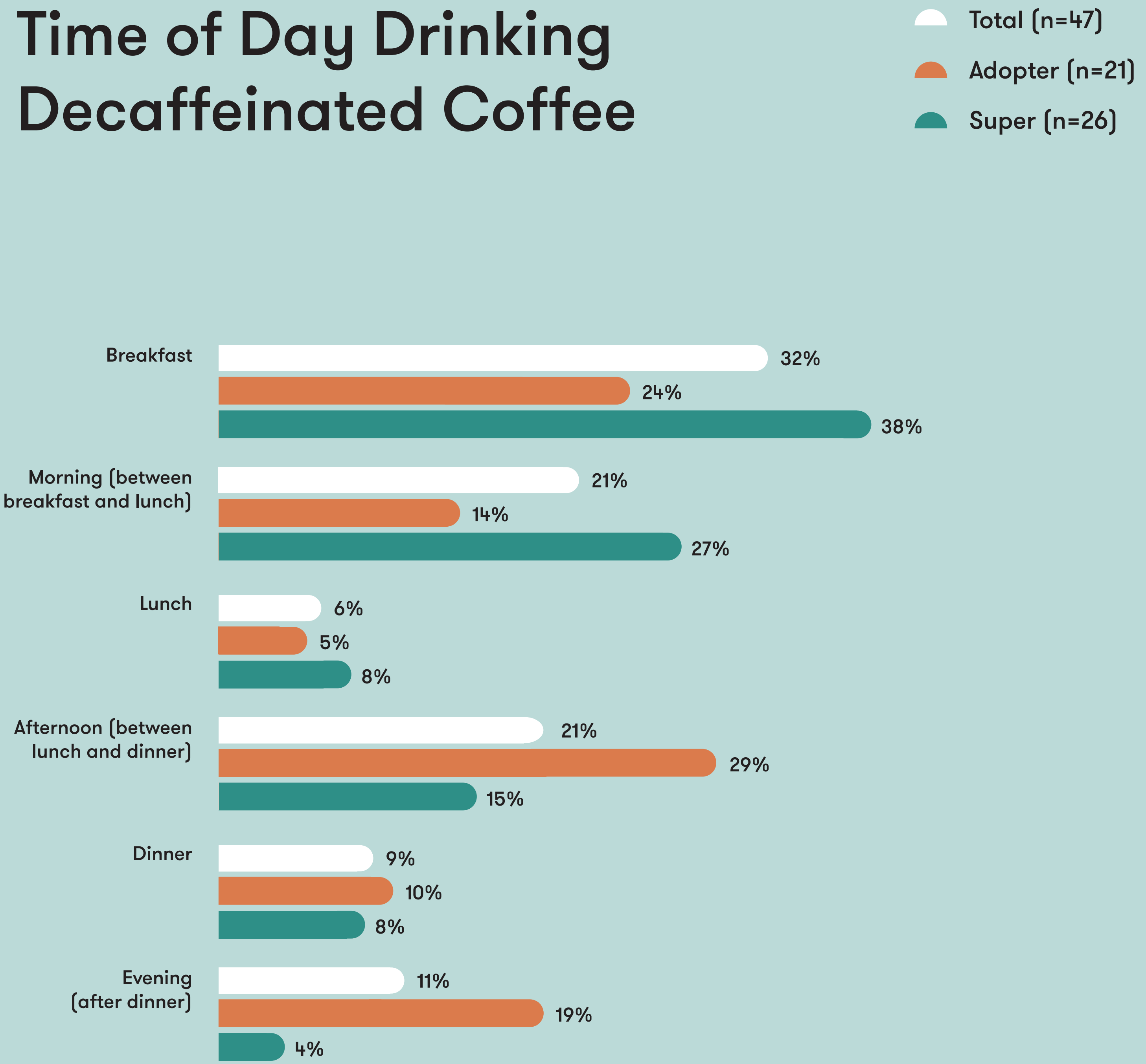
Do you drink decaffeinated coffee beverages?

Base:

All respondents.

Most respondents do not drink decaffeinated coffee, although Adopters are more likely than Supers to do so (25% vs. 16%).

Time of Day Drinking Decaffeinated Coffee



Q:

When you drink decaffeinated coffee beverages, at what point during the day do you start drinking decaffeinated coffee?

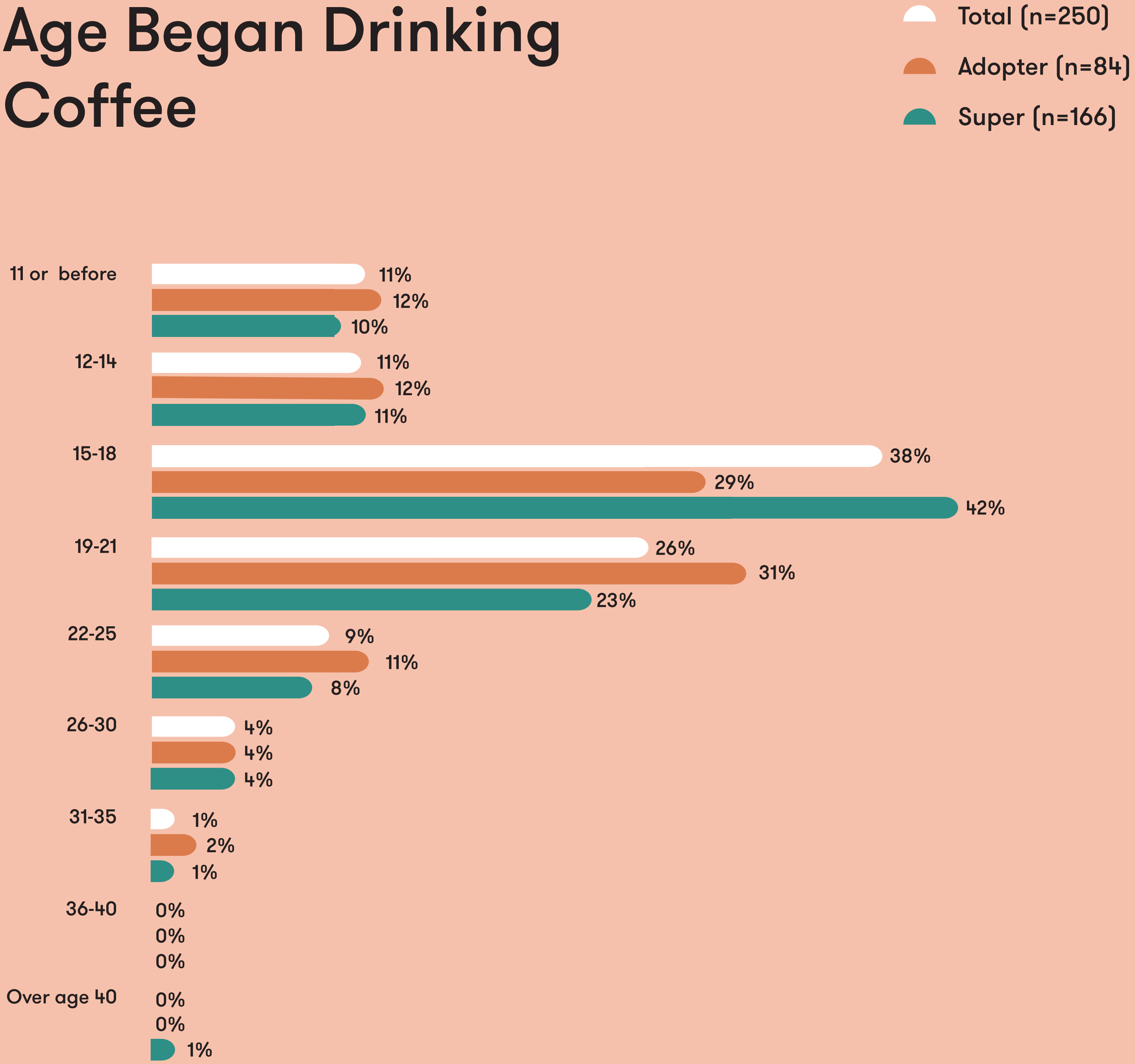
Base:

Those who drink decaffeinated beverages.

Supers prefer to drink decaffeinated coffee at breakfast (38%), while Adopters prefer decaffeinated coffee in the afternoon (29%).

Personal Coffee History

Age Began Drinking Coffee



Q:

At what age did you begin drinking coffee?

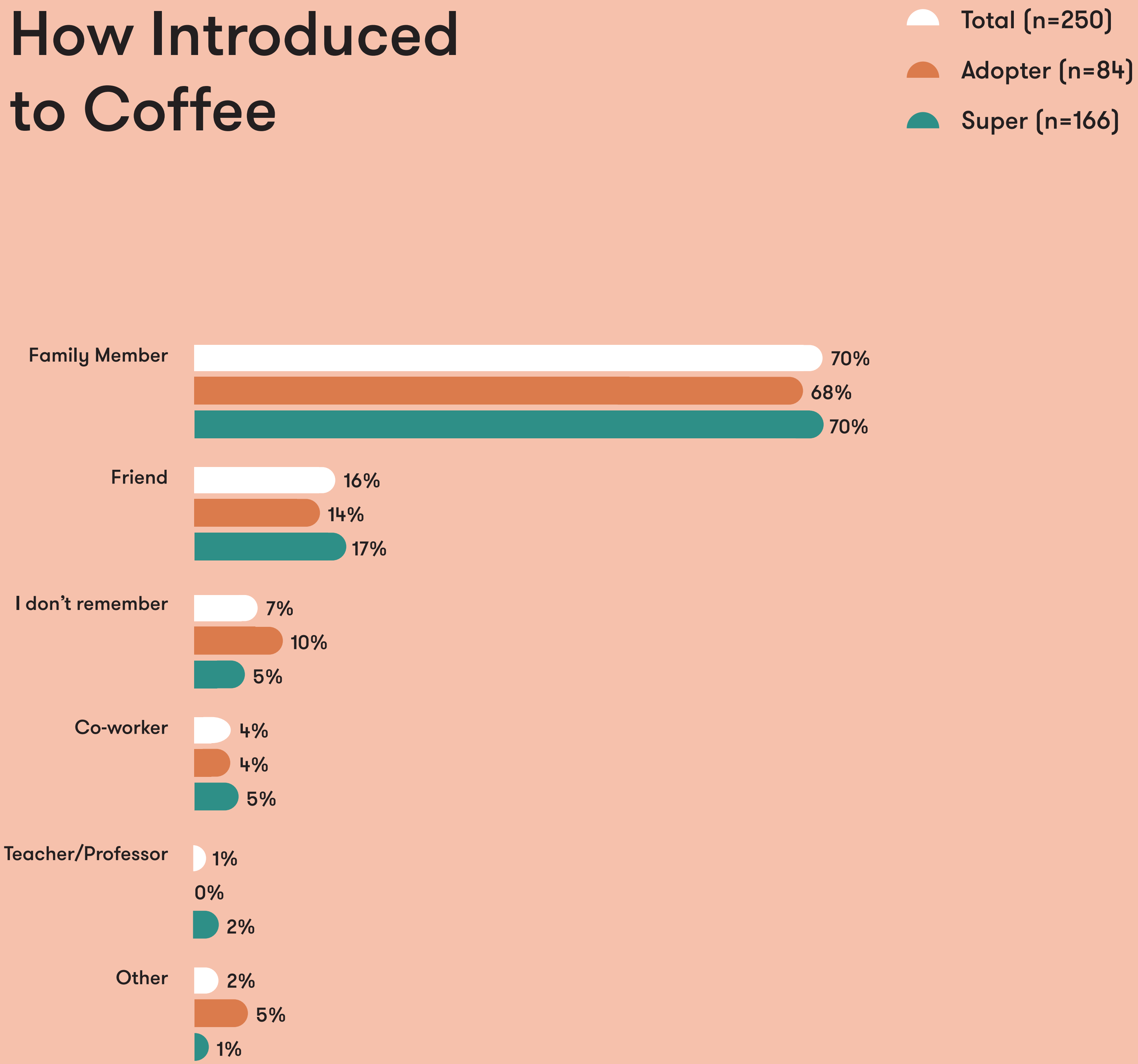
Base:

All respondents.

Most respondents began drinking coffee between ages 15- 21.

- Supers were significantly more likely to start drinking coffee between ages 15-18 (42% vs. 29% for Adopters).

How Introduced to Coffee



Q:

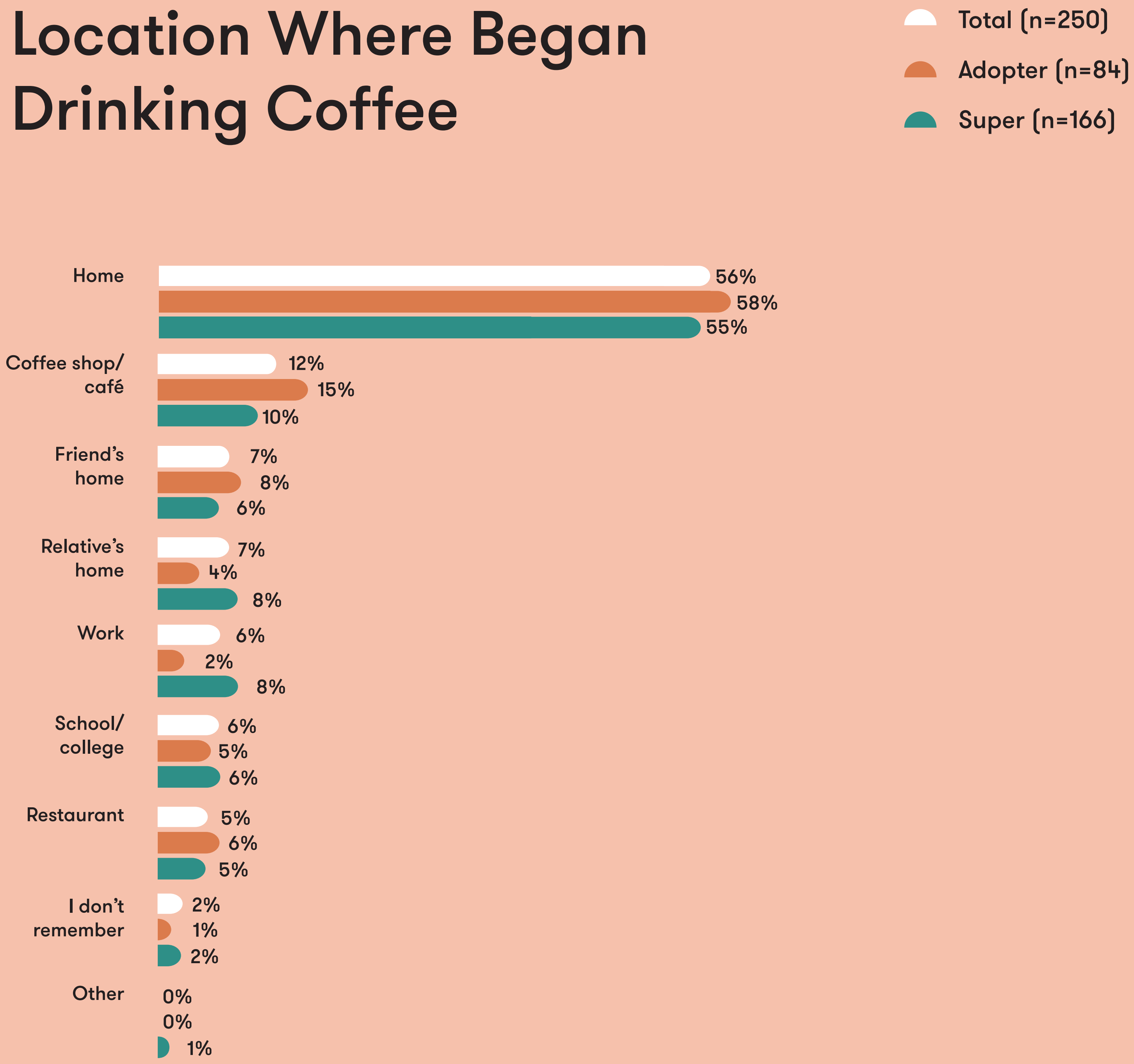
Who first introduced you to coffee?

Base:

All respondents.

Respondents were most often introduced to coffee by a family member (70% for Supers; 68% for Adopters).

Location Where Began Drinking Coffee



Q:

Where did you first drink coffee?

Base:

All respondents.

The majority of respondents began drinking coffee at home.

Original Taste Preferences

	Total (n=250)	Adopter (n=84)	Super (n=166)
Creamy	44%	43%	45%
Smooth	43%	38%	46%
Sweet	42%	45%	40%
Strong	34%	35%	34%
Bold	28%	26%	29%
Roasty	24%	18%	27%
Light	22%	26%	20%
Dark	21%	18%	23%
Black	18%	17%	18%
Chocolaty	18%	14%	19%
Blend	16%	13%	17%
Nutty	14%	6%	17%
Bitter	12%	12%	11%
Blonde	9%	8%	9%
Weak	8%	6%	8%
Fair trade	6%	6%	7%
Single-origin	5%	2%	7%
Sustainable	5%	5%	5%
Acidic	2%	4%	2%
Direct trade	2%	1%	3%
Estate	2%	0%	2%
Sour	1%	1%	1%
Other	1%	--	1%

Q:

When you first started drinking coffee regularly, what words would you use to describe your original preferences? Check all that apply.

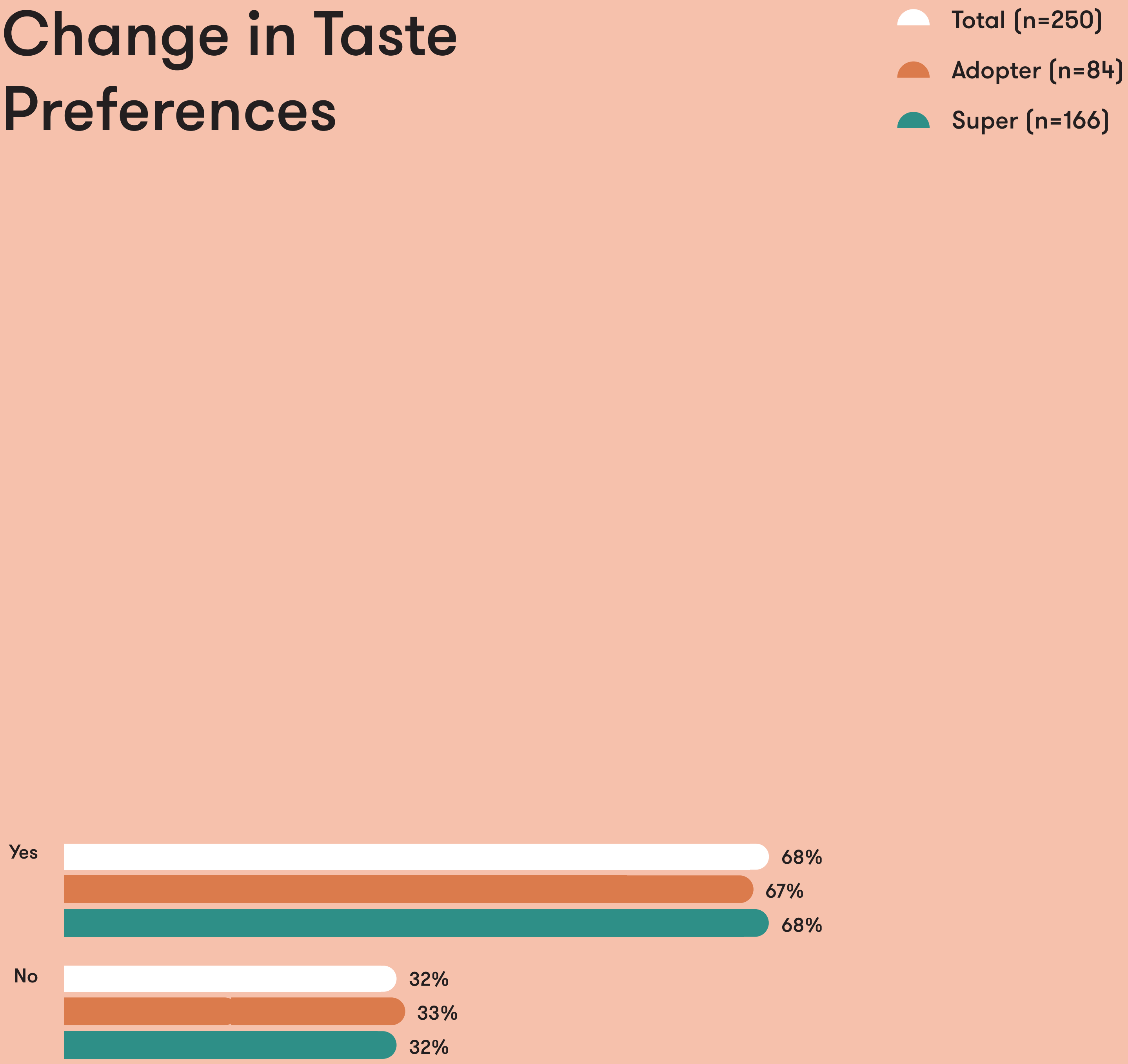
Base:

All respondents.

Both groups describe their original taste preferences as creamy, smooth, and sweet.

- Supers are significantly more likely to have originally preferred a nutty taste (17% vs. 6% for Adopters).

Change in Taste Preferences



Q:

Since you first started drinking coffee, do you feel that your taste preferences have changed?

Base:

All respondents.

Two-thirds of all respondents feel that their taste preferences have changed since they first started drinking coffee.

- Among Supers, Boomers are much more likely to have experienced a change in taste since they first began drinking coffee (82% vs. 68% among all Supers).

Original Taste vs. Current Taste Preferences

	Total (n=169)		Adopter (n=56)		Super (n=113)	
	Original preference	Current preference	Original preference	Current preference	Original preference	Current preference
Strong	33%	51%	34%	52%	33%	51%
Bold	25%	50%	29%	54%	23%	49%
Smooth	38%	44%	38%	48%	39%	42%
Roasty	21%	38%	12%	30%	25%	42%
Dark	18%	37%	16%	23%	19%	44%
Creamy	40%	32%	43%	41%	38%	27%
Sweet	39%	25%	45%	30%	36%	22%
Black	17%	24%	16%	23%	17%	25%
Nutty	14%	22%	4%	18%	19%	25%
Blend	17%	22%	16%	16%	17%	26%
Chocolaty	15%	18%	16%	21%	14%	16%
Fair trade	8%	16%	7%	14%	8%	17%
Sustainable	4%	15%	4%	11%	4%	18%
Light	27%	12%	30%	14%	25%	11%
Single-orgin	4%	8%	2%	5%	5%	9%
Estate	2%	6%	0%	2%	4%	8%
Bitter	13%	5%	16%	9%	12%	4%
Blonde	8%	5%	5%	5%	9%	4%
Direct trade	2%	3%	0%	--	4%	4%
Acidic	3%	2%	5%	2%	2%	3%
Sour	2%	2%	2%	2%	2%	2%
Weak	11%	1%	9%	--	12%	2%
Other	1%	1%	--	--	2%	1%

*among respondants whose tastes have changed

Q:

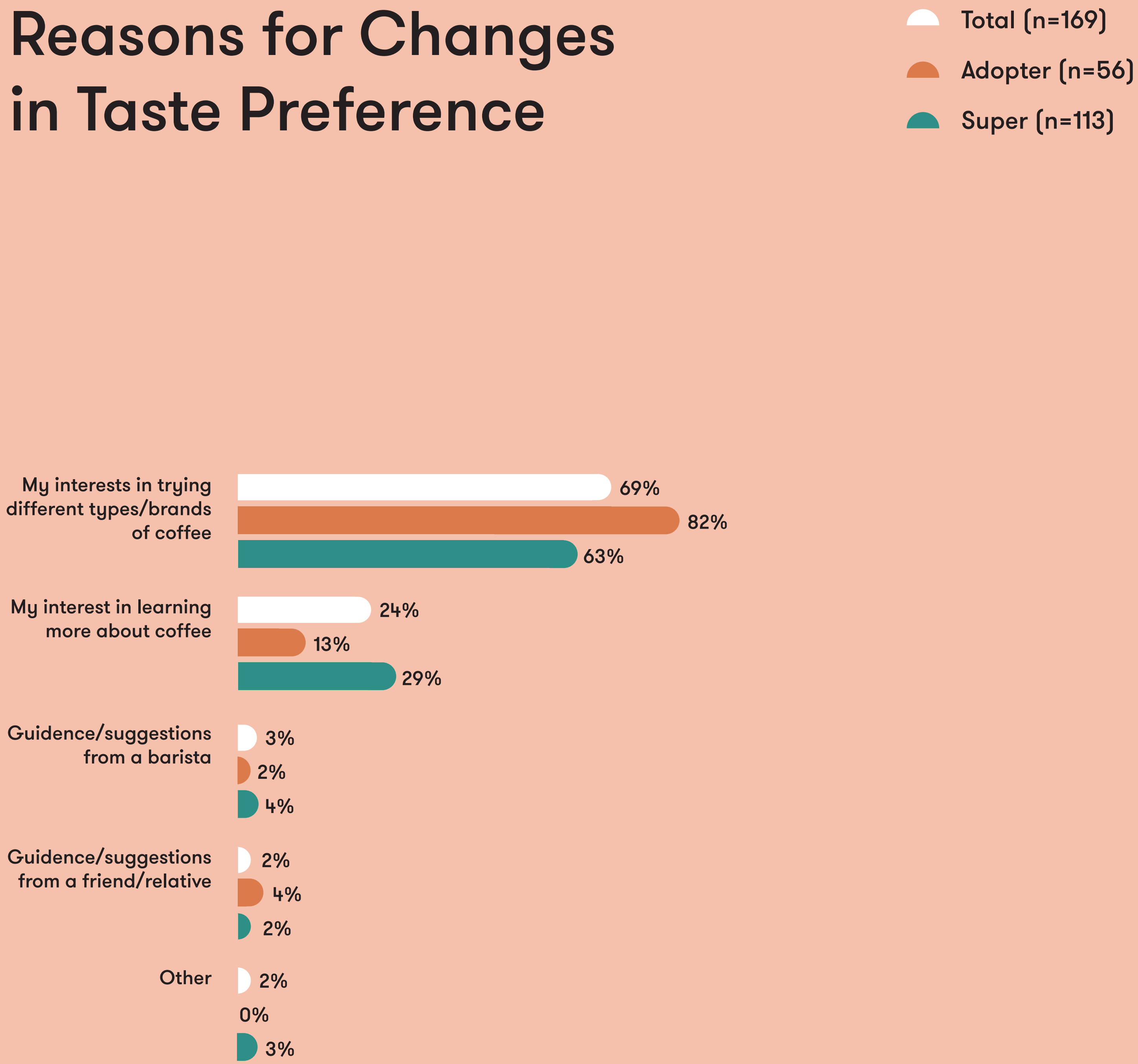
How would you describe your preferences now? Check all that apply

Base:

Those whose taste preferences have changed.

Respondents' preferences have changed from enjoying a creamy and sweet brew to one that is strong and bold.

Reasons for Changes in Taste Preference



Q:

What most motivated your change in preferences?

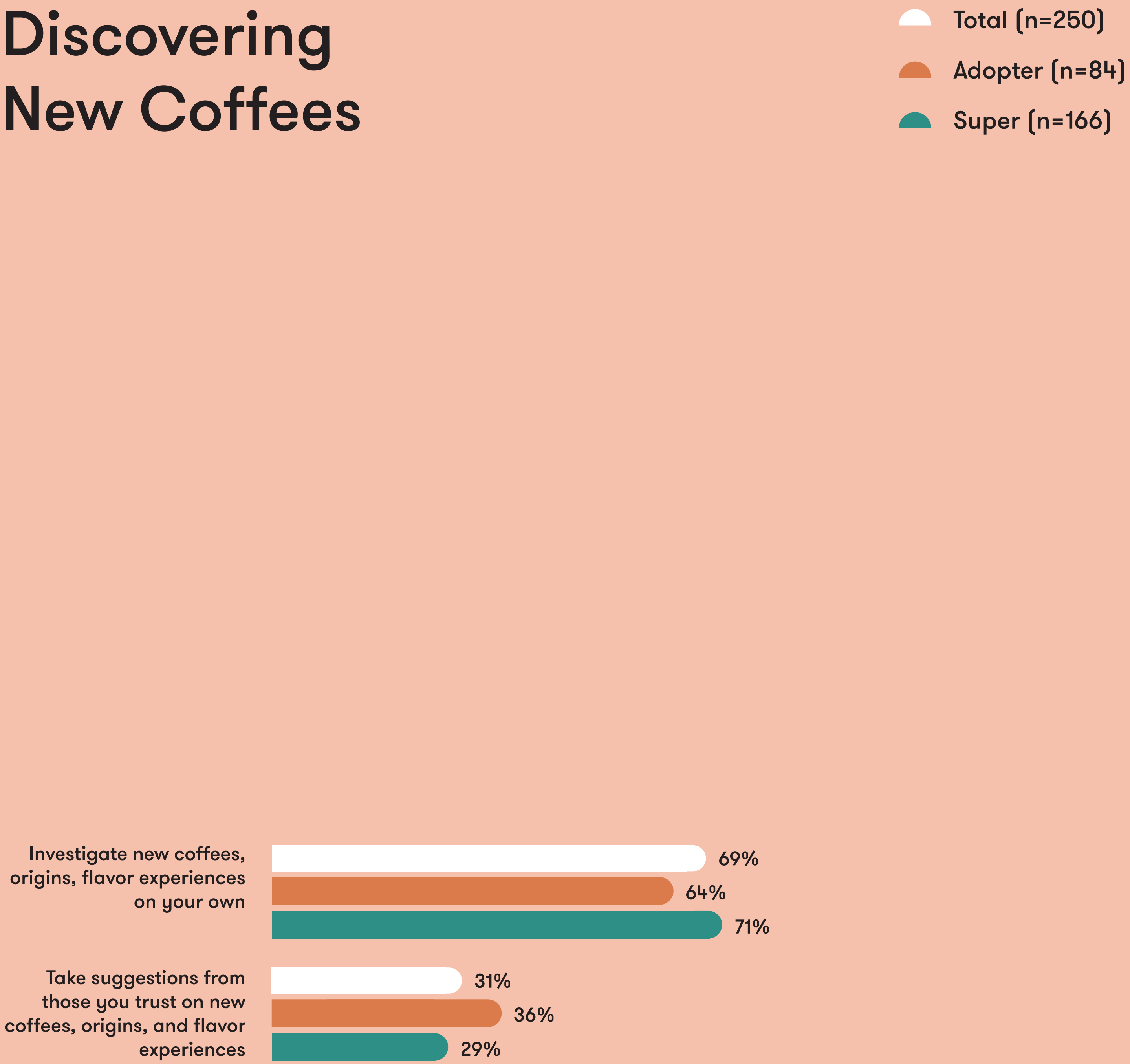
Base:

Those whose taste preferences have changed.

Change in taste preference is driven mainly by personal interest in trying different types and brands of coffee.

- Adopters are significantly more likely to have an interest in trying different types and brands of coffee (82% vs. 63% for Supers).
- Supers are significantly more interested in learning more about coffee (29% vs. 13%).

Discovering New Coffees



Q:

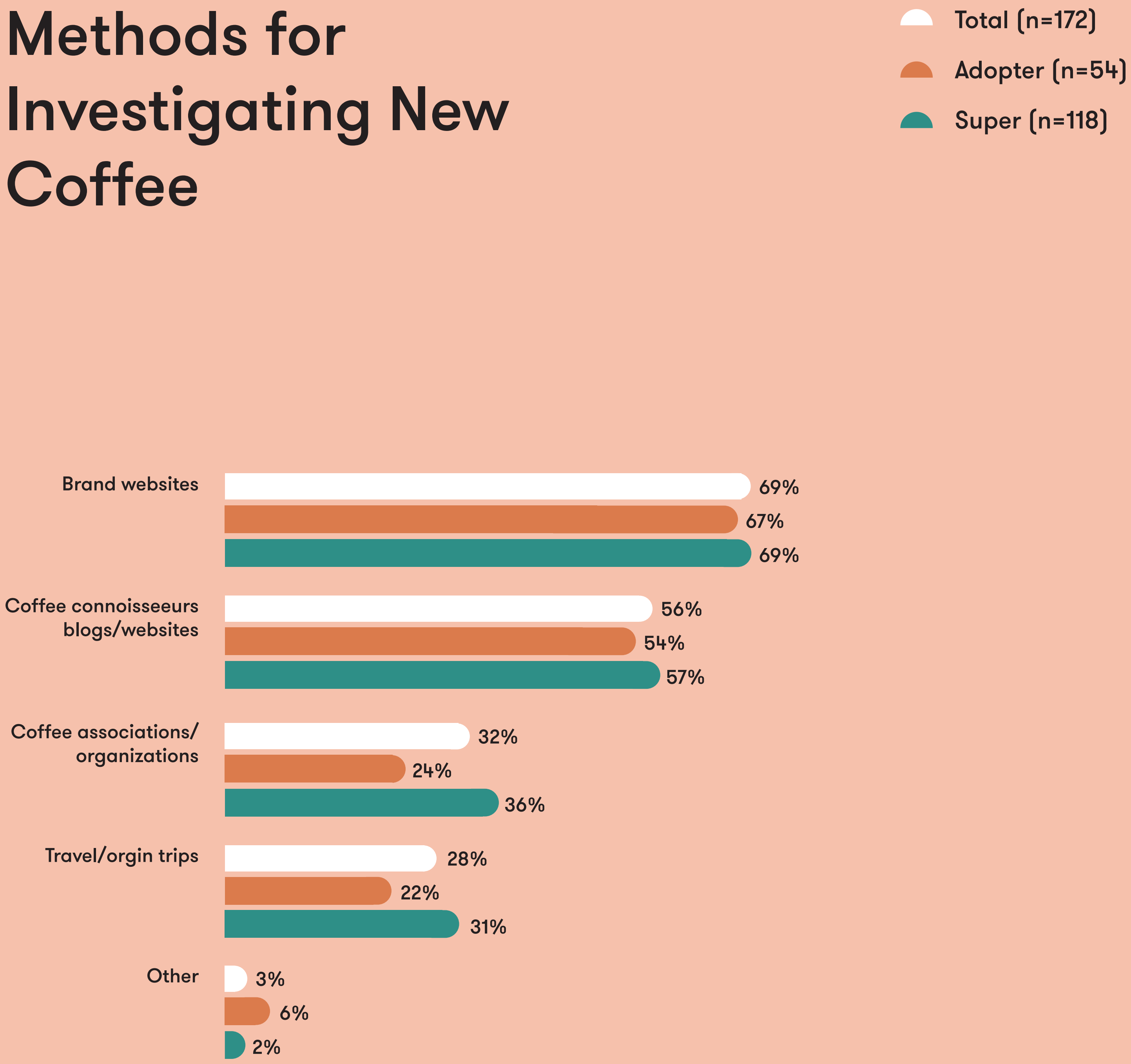
Are you more likely to...?

Base:

All respondents.

While Supers are slightly more inquisitive about new coffees (71% vs. 64%), both groups like to investigate new coffees, origins, and flavor experiences on their own.

Methods for Investigating New Coffee



Q:

In investigating new coffees, origins, and flavors, what sources do you turn to for information? Check all that apply.

Base:

Those who are more likely to investigate new coffees, origins, flavor experiences on own.

Brand websites and coffee connoisseur blogs/websites are the most frequently used methods for investigating new coffees.

Supers are notably more likely to consult coffee associations and organizations for more information.

Most Important Factors in Choosing a Coffee

	Total (n=250)	Adopter (n=84)	Super (n=166)
Most	Flavor	Flavor	Flavor
	Roast level	Roast level	Roast level
	Coffee origin	Coffee origin	Coffee origin
	Organic practices	Recommendation	Organic practices
	Sustainability	Sustainability	Fair trade
	Fair Trade	Certification	Sustainability
	Recommendation	Organic practices	Certification
	Certification	Fair Trade	Recommendation
Least	Shade practices	Shade practices	Shade practices

Q:

How would you rank the importance of the following factors when choosing a coffee? Please rank the most important factor first, and the second most important factor second, until all factors are ranked in importance.

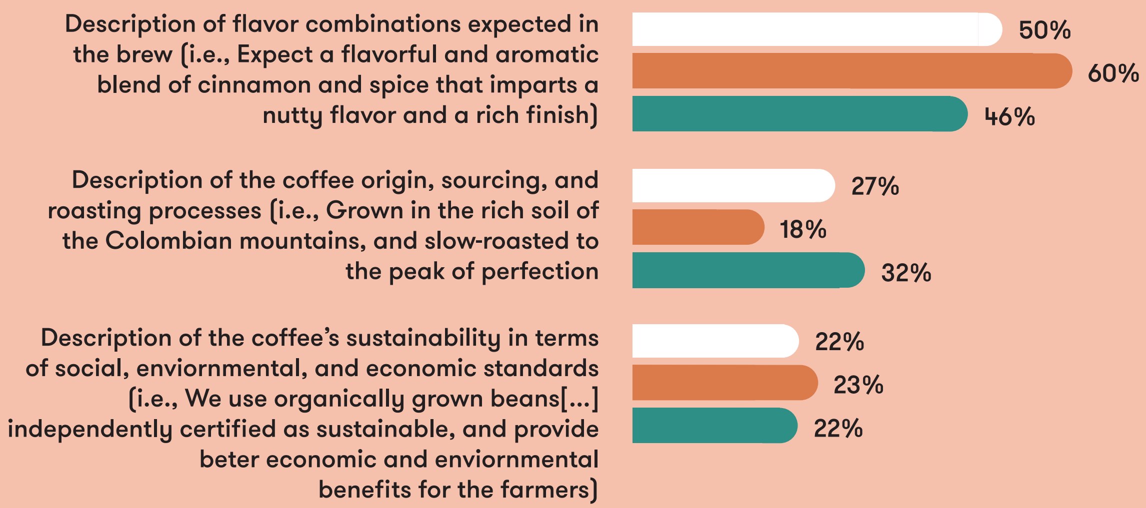
Base:

All respondents.

Flavor is overwhelmingly the most important factor for both groups in choosing a coffee.

- The three most important factors do not change for Adopters or Supers. However, organic practices and fair trade are more important to Supers than to Adopters. Recommendations from others are relatively important to Adopters.

Coffee Descriptions



Q:

When choosing a coffee, what type of description resonates most with you?

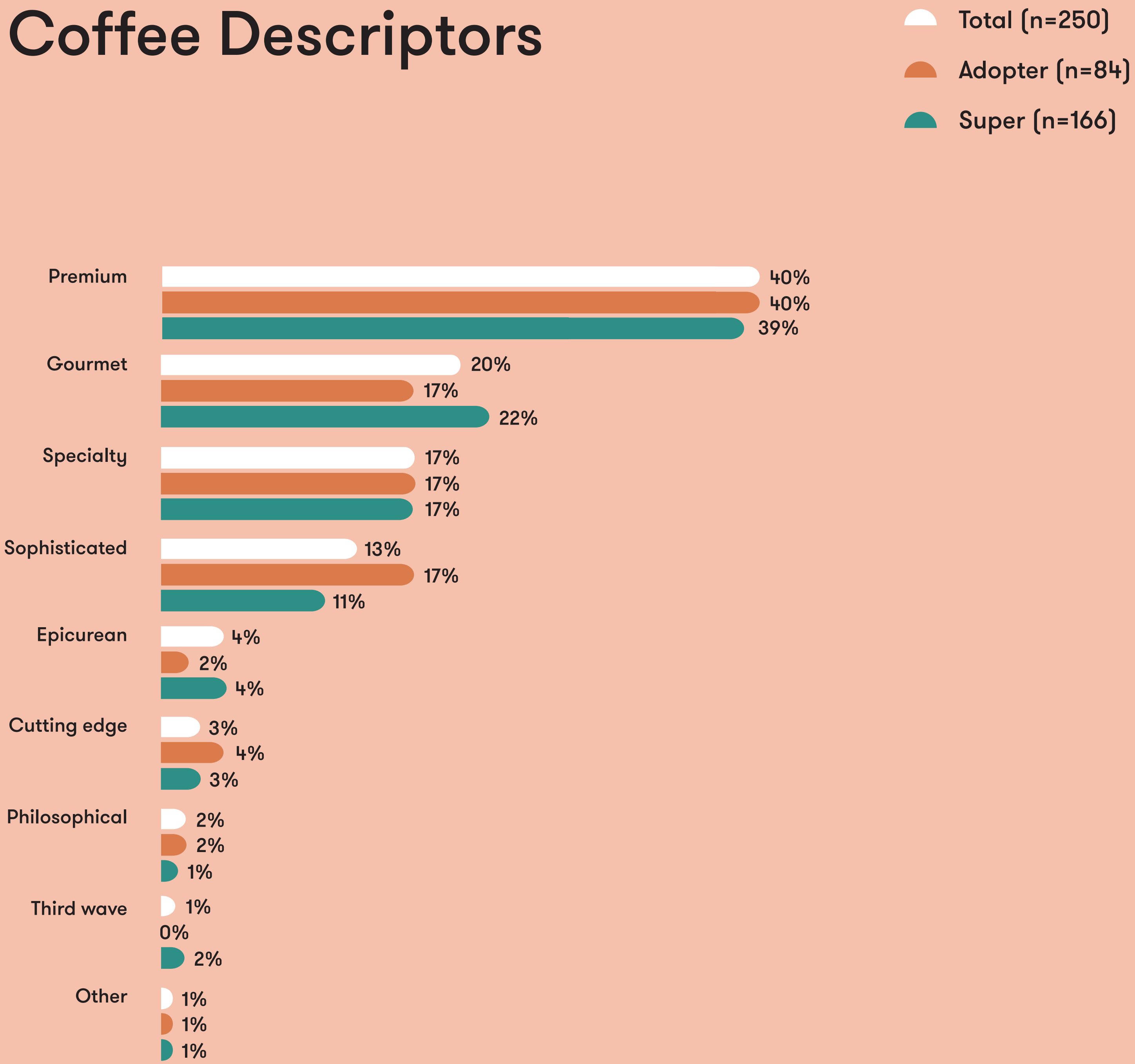
Base:

All respondents.

Both groups identify with a description of coffee that includes an explanation of flavor combinations expected in the brew, but this is especially true for Adopters (60% vs. 46% for Supers).

Supers are significantly more likely to respond to a description that includes mention of the coffee origin, sourcing, and roasting preferences (32% vs. 18% for Adopters).

Coffee Descriptors



Q:

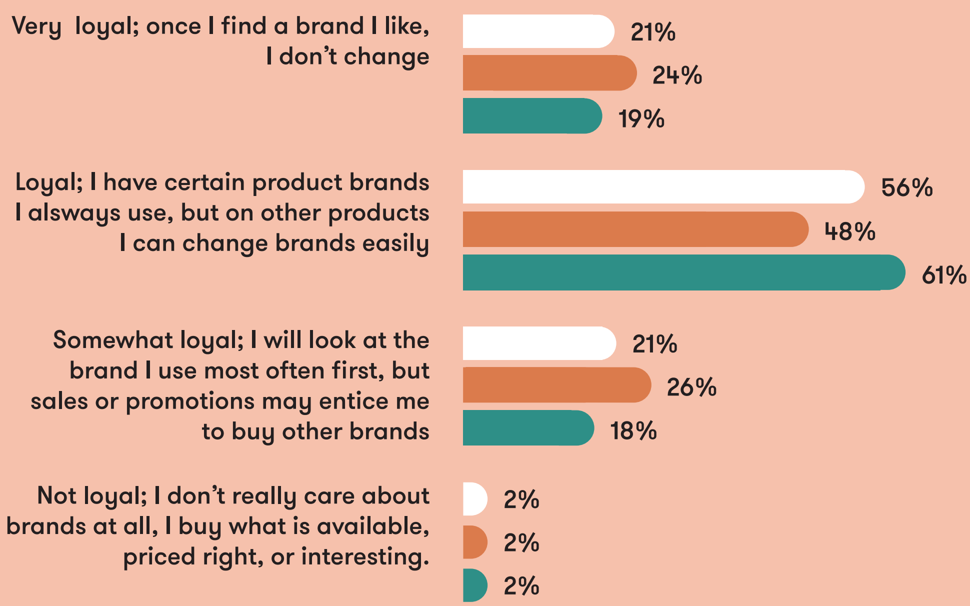
How would you best describe the coffee you drink?

Base:

All respondents.

Respondents most often think of their coffee as premium.

Brand Loyalty



Q:

How would you describe your loyalty to brands in general, not just coffee?

Base:

All respondents.

A majority of respondents believe they are loyal to a specific brand, with 21% claiming they are very loyal.

- Adopters are more likely than Supers to say they are very loyal (24% vs. 19%), but also more likely to say they are only somewhat loyal (26% vs. 18%).

SPECIALTY COFFEE CONSUMER SURVEY REPORT ·

Specialty
Coffee
Association