

Bespoke Survey Research

April 2024

Coffee and Donuts

Volume 27 | Quarterly Survey

1,500 US Consumers Balanced To Census

Tickers Covered: SBUX, DNKN, MCD, DNUT, BROS.

KPIs and Key questions

KRISPY KREME AT MCDONALD'S

This quarter, we added some questions around Krispy Kreme. Consumers appear to be fairly excited about the prospect of getting Krispy Kreme Donuts at McDonald's. This is especially true of McDonald's customers who get coffee from McDonald's frequently or very frequently.

COFFEE DRINKING FREQUENCY

Coffee drinking frequency is tracking consistent quarter to quarter.

CHAINS VS LOCAL COFFEE SHOPS

Consumers continue to slightly favor chains vs. local coffee shops. Coffee out has softened a bit in recent waves while brewing at home has remained very consistent.

HOT VS COLD VS. ESPRESSO

There was a period of time in our trackers in which cold coffee (iced/cold brew) and espresso were gaining share on hot. That trend has regressed a bit in recent waves.

Noteworthy Stats:

60.7% Of McDonald's coffee drinkers would be very interested in getting Krispy Kreme donuts at McDonald's.

20.0% Of respondents who drink coffee at least infrequently prefer iced coffee.

54.2% Of respondents drink coffee frequently to very frequently.

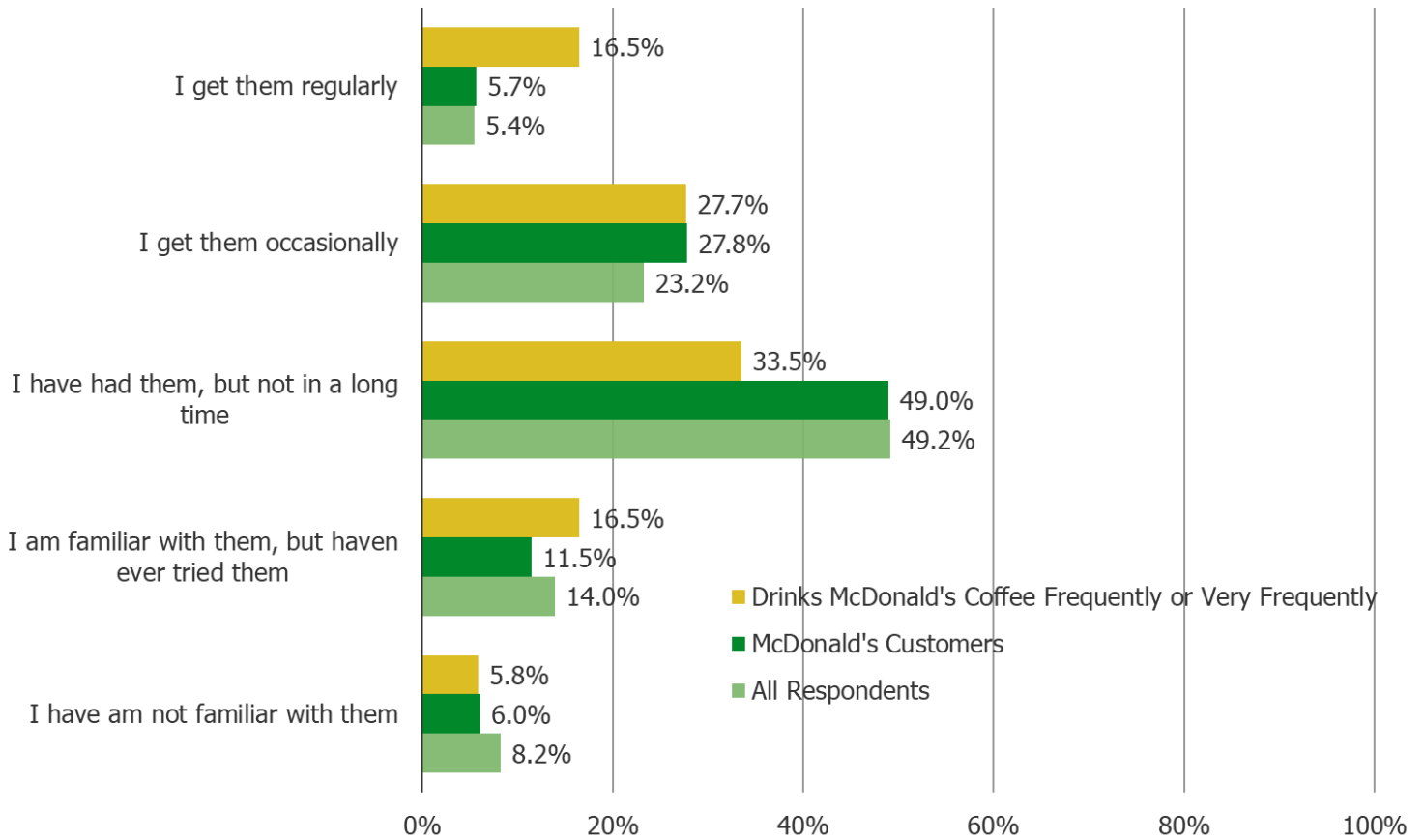
Coffee

NEW QUESTIONS

US DATA

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH KRISPY KREME DONUTS?

Posed to all respondents.

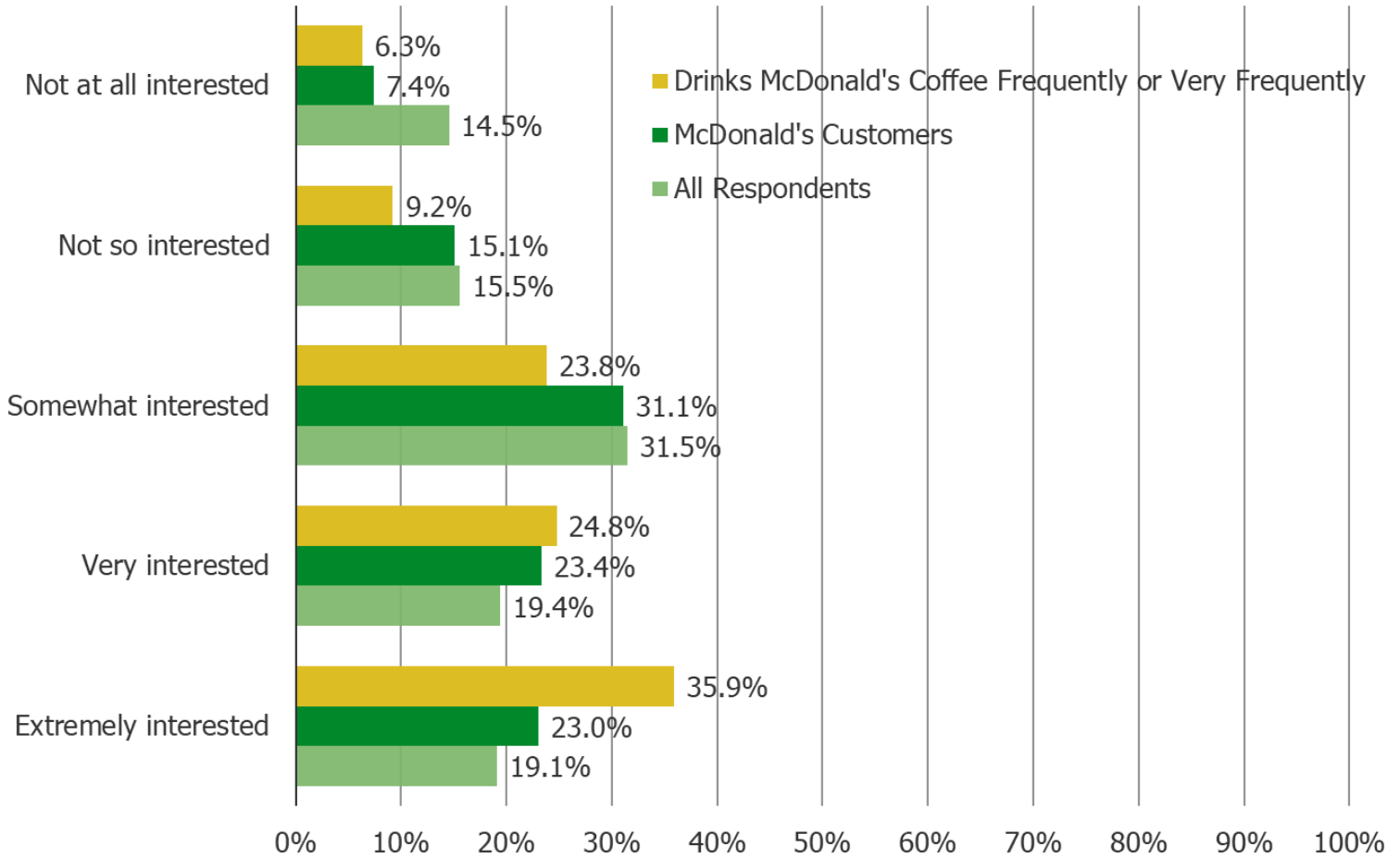


	N =
All Respondents	1011
McDonald's Customers	582
Drink's McDonald's Coffee Frequently or Very Frequently	206

US DATA

HOW MUCH INTEREST WOULD YOU HAVE IN BEING ABLE TO BUY KRISPY KREME DONUTS AT MCDONALD'S?

Posed to all respondents.

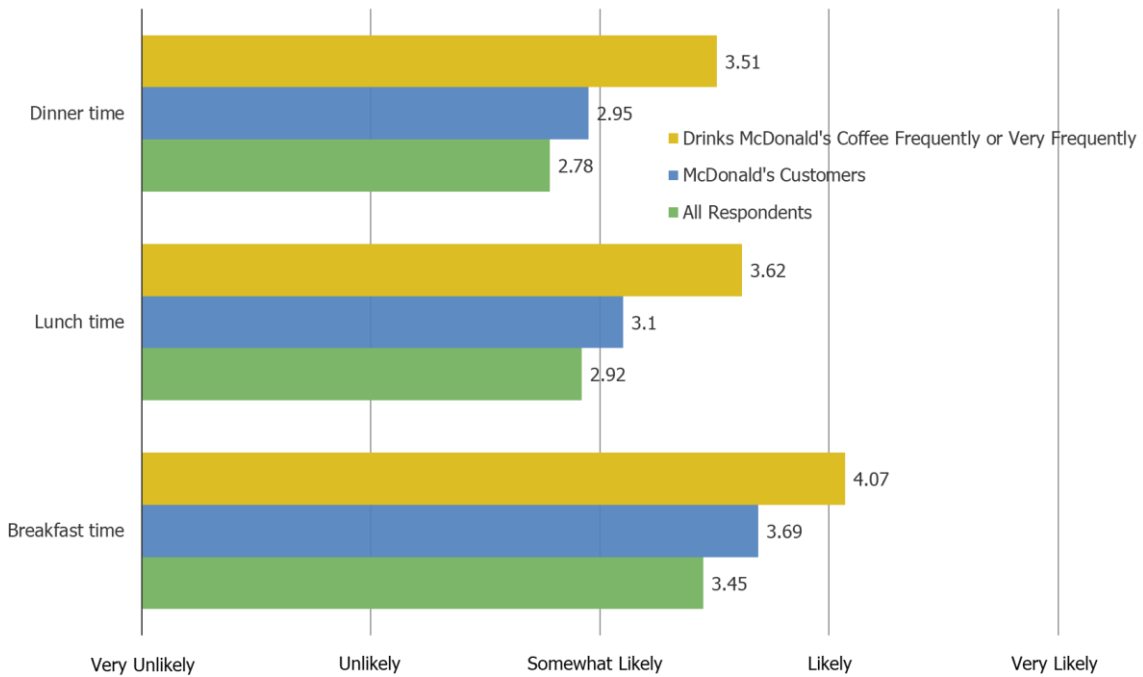
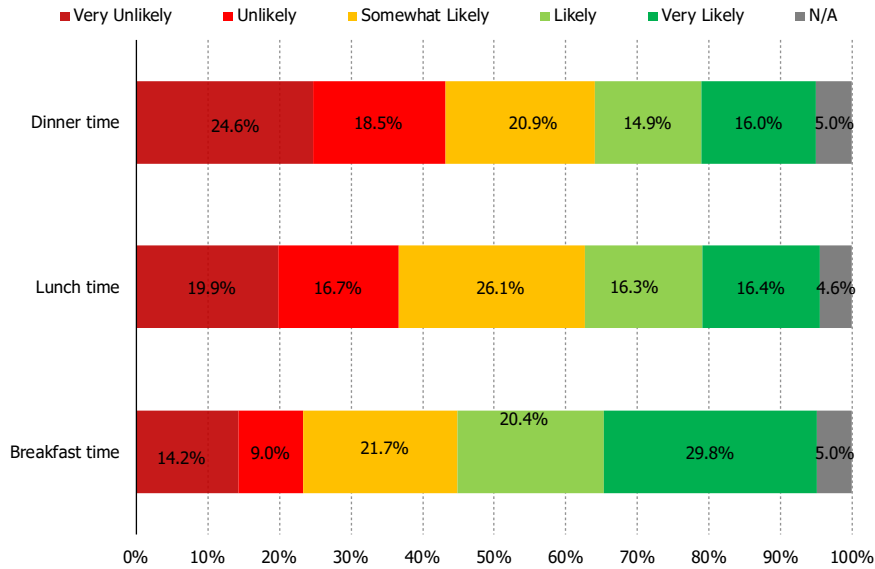


	N =
All Respondents	1011
McDonald's Customers	582
Drink's McDonald's Coffee Frequently or Very Frequently	206

US DATA

IF YOU WERE GETTING MCDONALD'S FOR THE FOLLOWING TYPES OF MEALS AND THEY WERE SELLING KRISPY KREME DONUTS, HOW LIKELY WOULD YOU BE TO GET ONE?

Posed to all respondents.

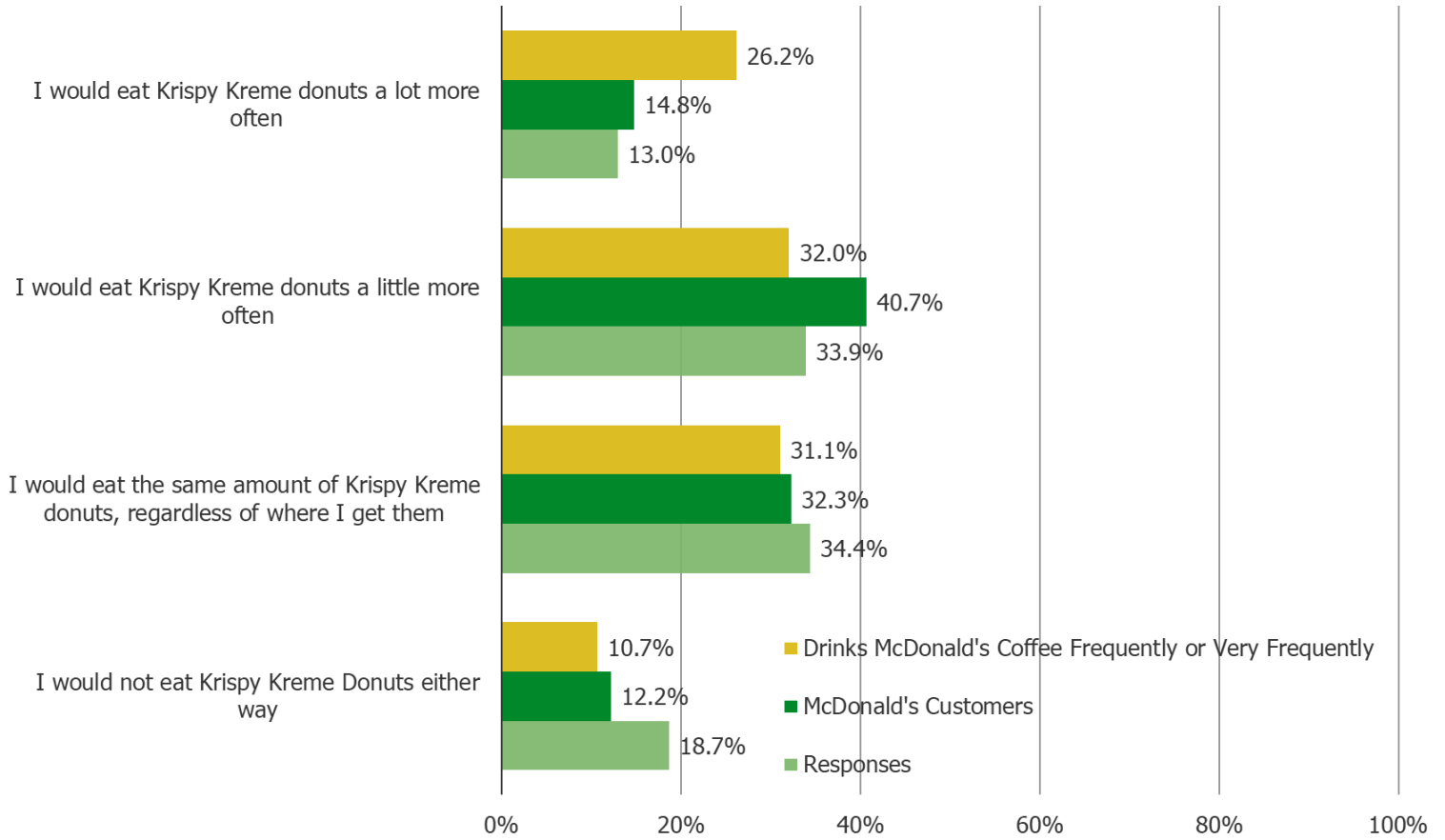


	N =
All Respondents	1011
McDonald's Customers	582
Drink's McDonald's Coffee Frequently or Very Frequently	206

US DATA

IF KRISPY KREME DONUTS WERE AVAILABLE AT A MCDONALD'S NEAR YOU, WOULD IT CHANGE HOW OFTEN YOU EAT KRISPY KREME DONUTS?

Posed to all respondents.



	N =
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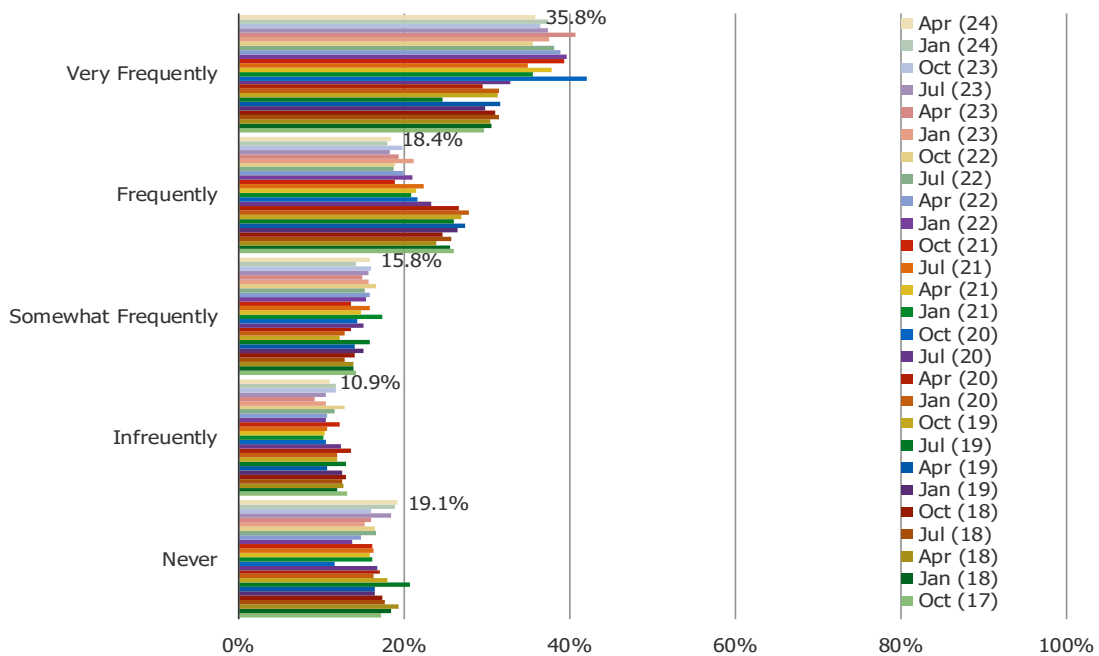
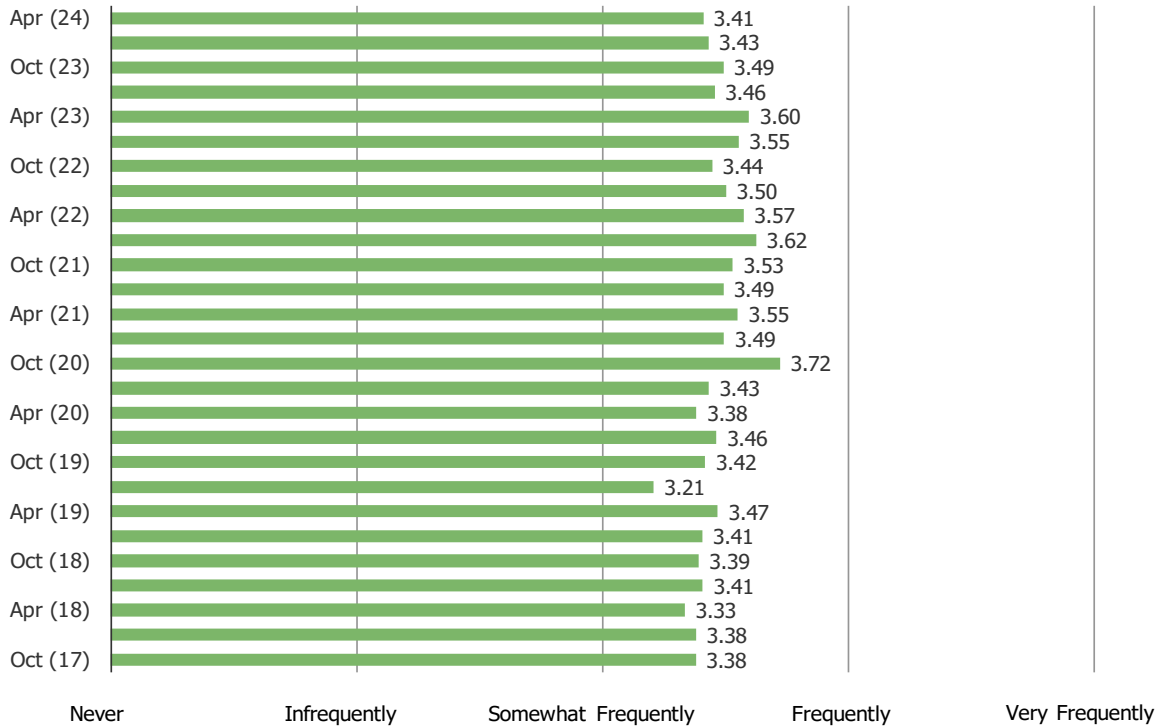
Coffee

COFFEE US

US DATA

HOW OFTEN DO YOU DRINK COFFEE?

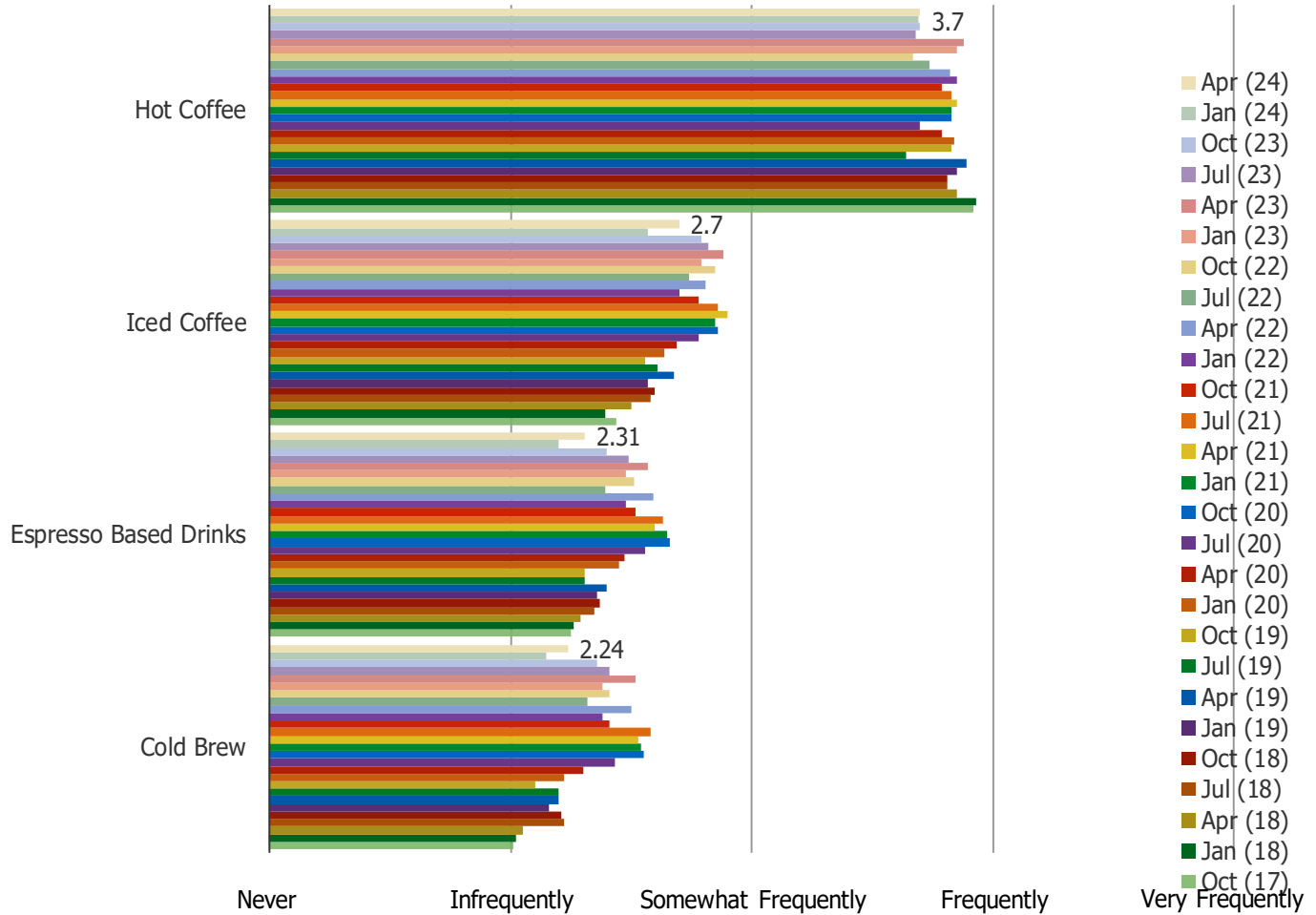
Posed to all respondents.



US DATA

HOW OFTEN DO YOU DRINK THE FOLLOWING?

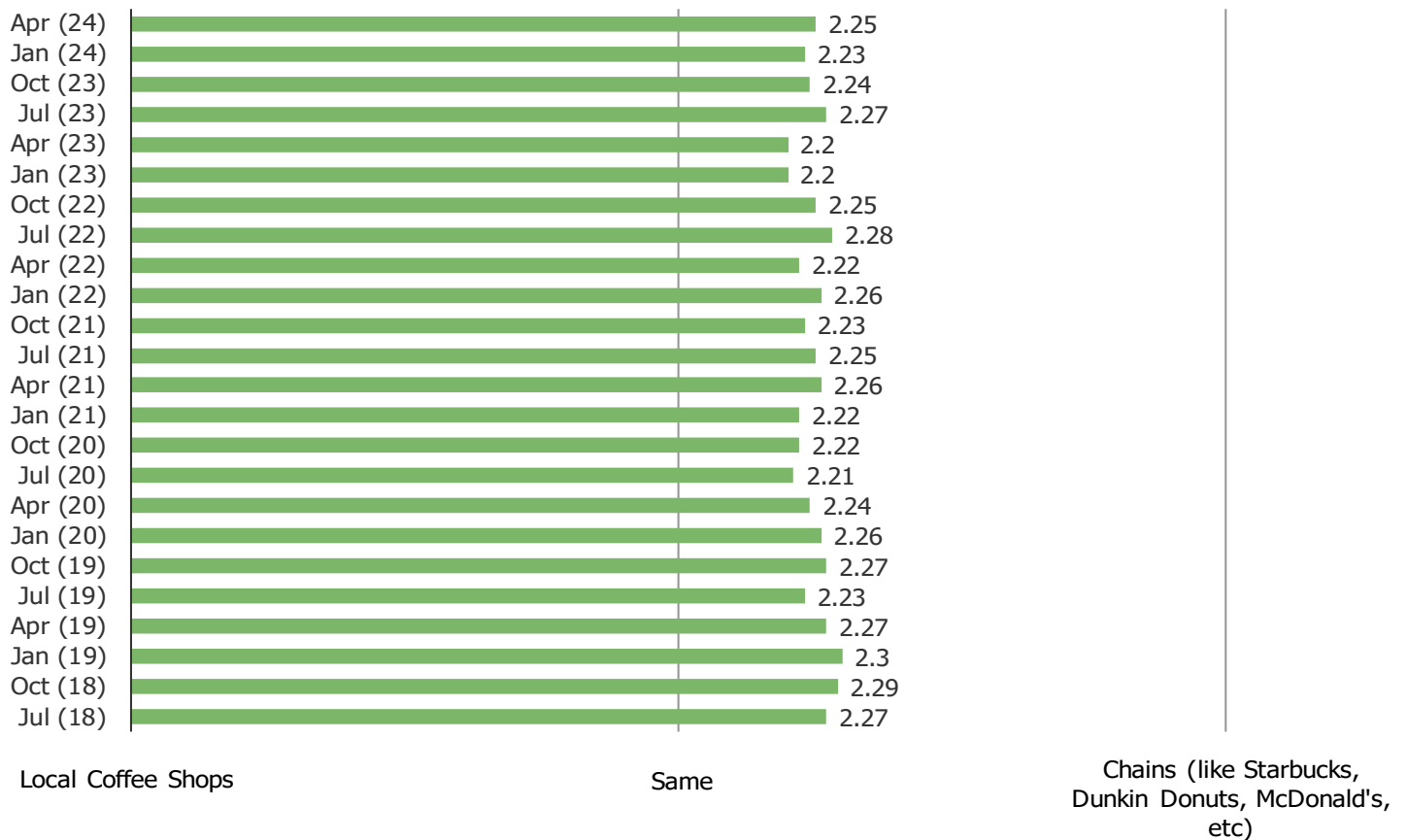
Posed to respondents who drink coffee at least infrequently.



US DATA

WHERE DO YOU PREFER TO GET COFFEE?

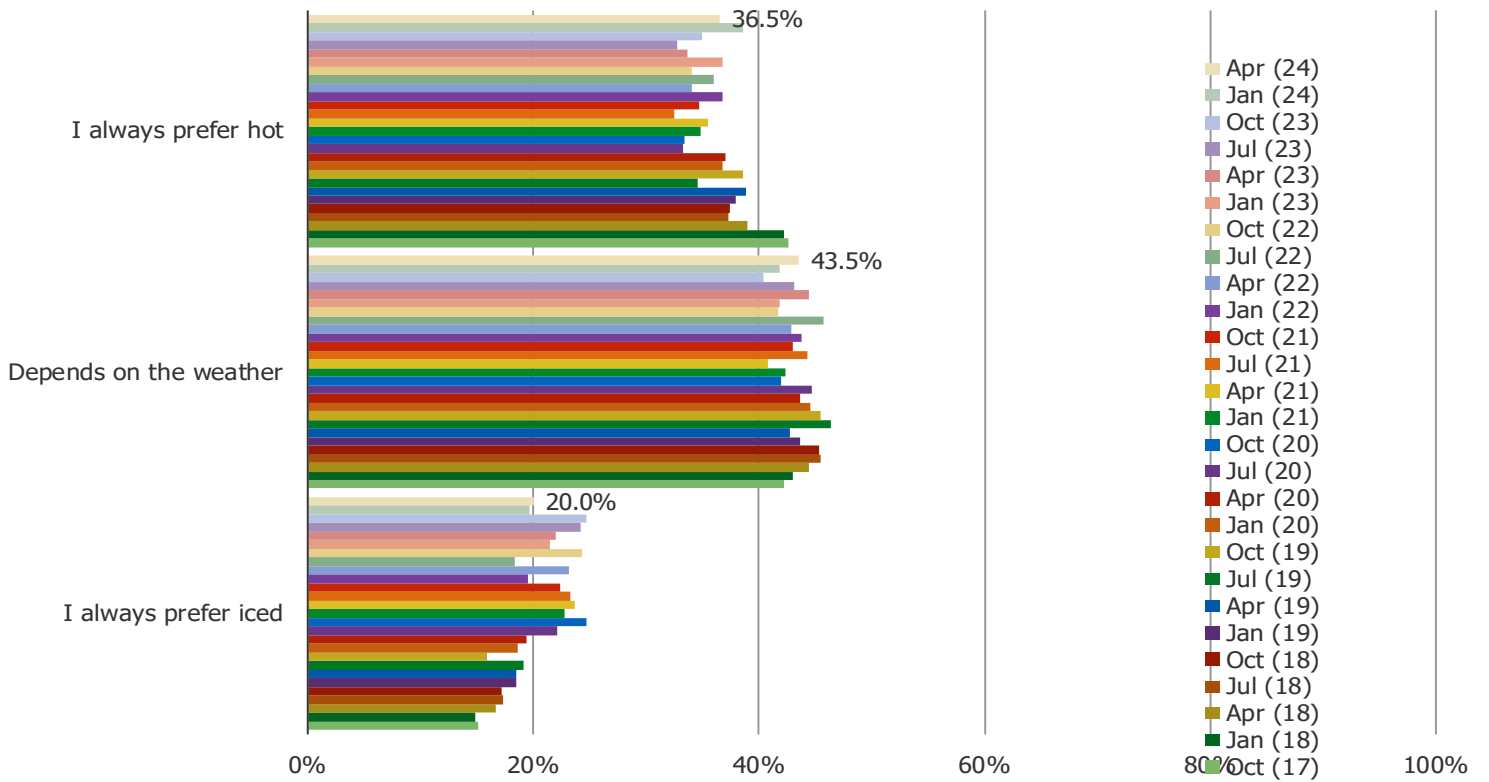
Posed to respondents who drink coffee at least infrequently.



US DATA

DO YOU PREFER ICED OR HOT COFFEE TYPE OF DRINKS?

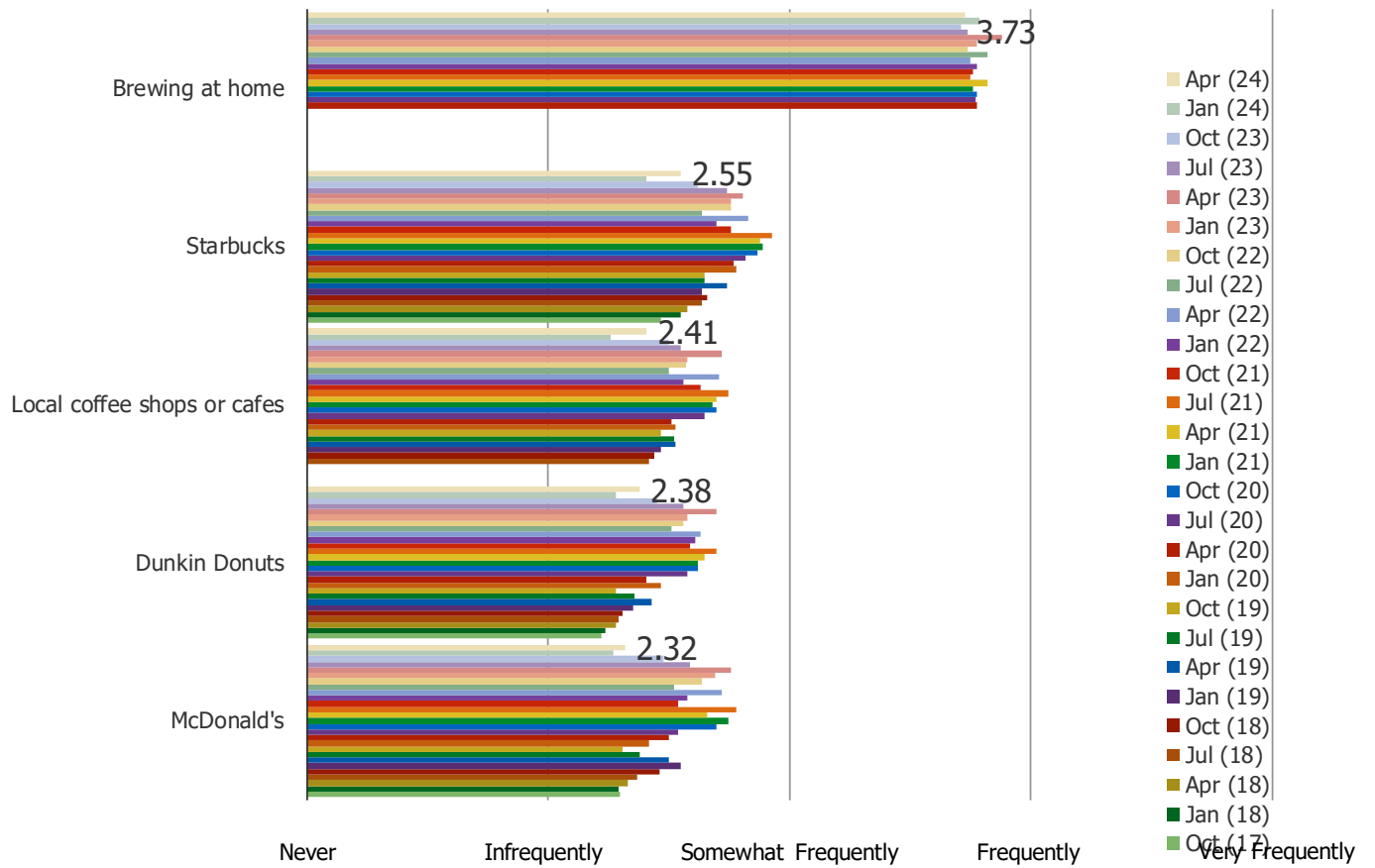
Posed to respondents who drink coffee at least infrequently.



US DATA

HOW OFTEN DO YOU DRINK COFFEE OR ESPRESSO DRINKS FROM...

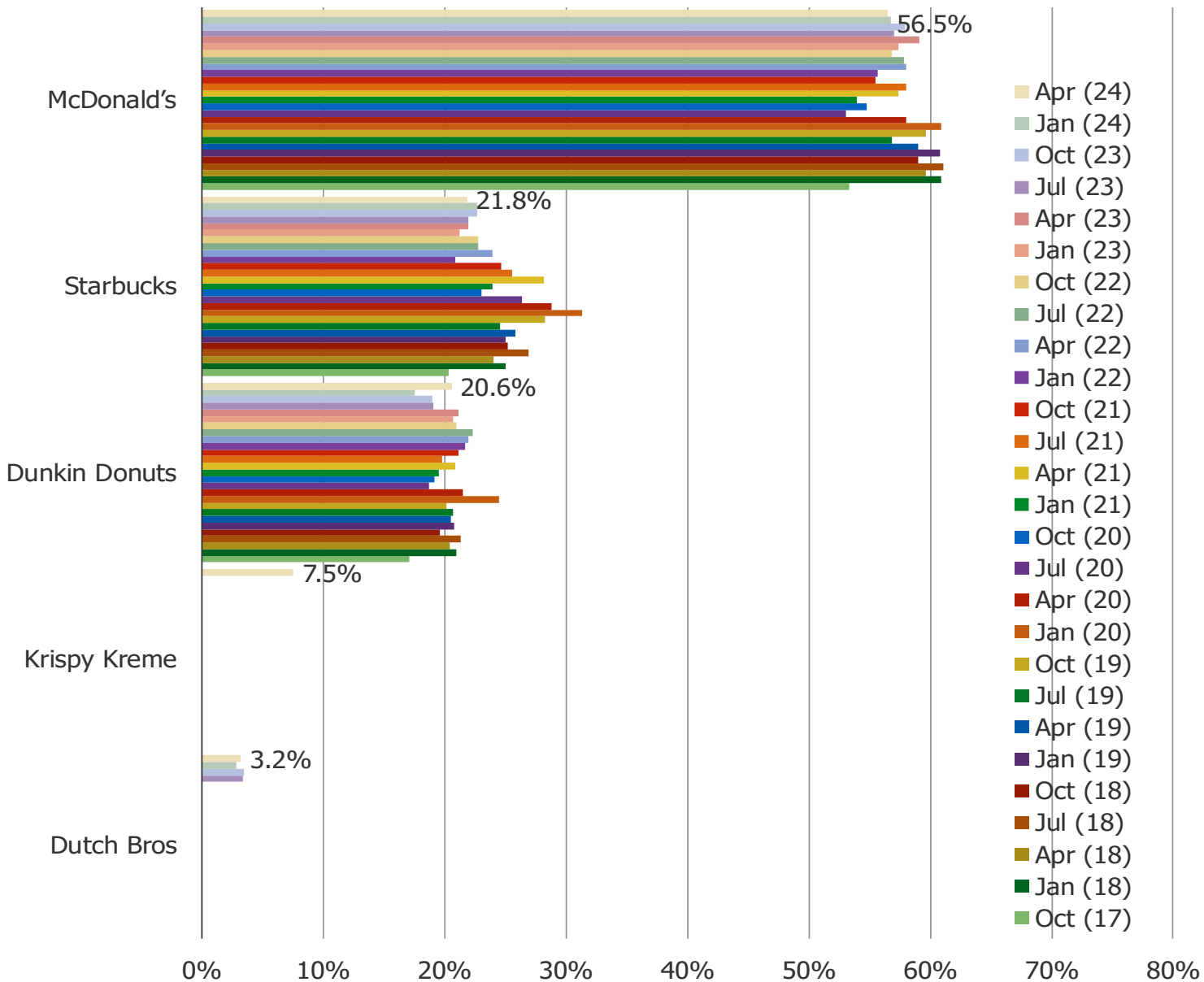
Posed to respondents who drink coffee at least infrequently.



US DATA

DO YOU REGULARLY OR OCCASIONALLY USE THE FOLLOWING FOR EITHER DINING OUT OR ORDERING TAKEOUT? % YES

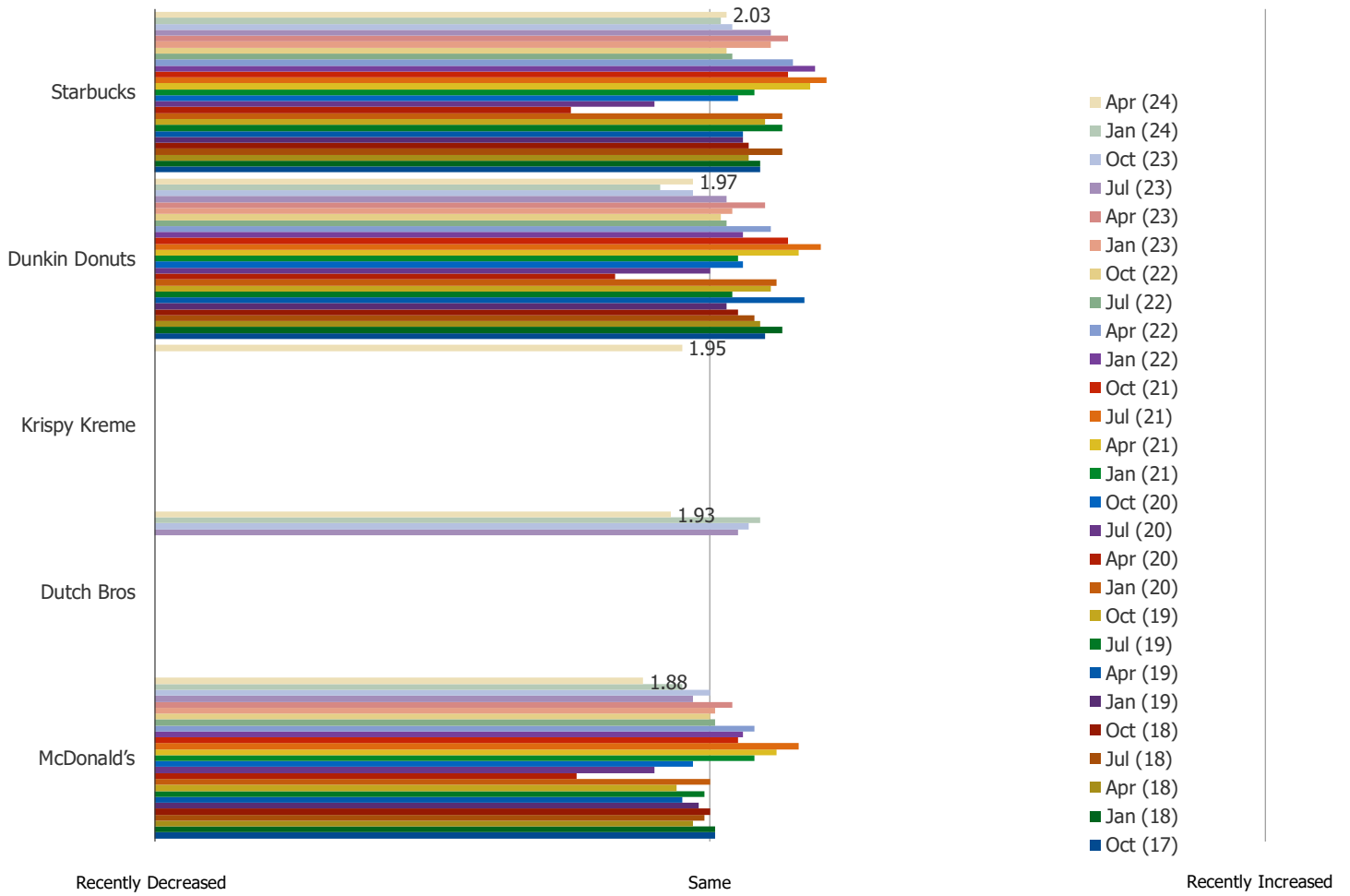
Posed to respondents who drink coffee at least infrequently.



US DATA

HAVE YOU CHANGED HOW OFTEN YOU TAKEOUT OR DINE HERE?

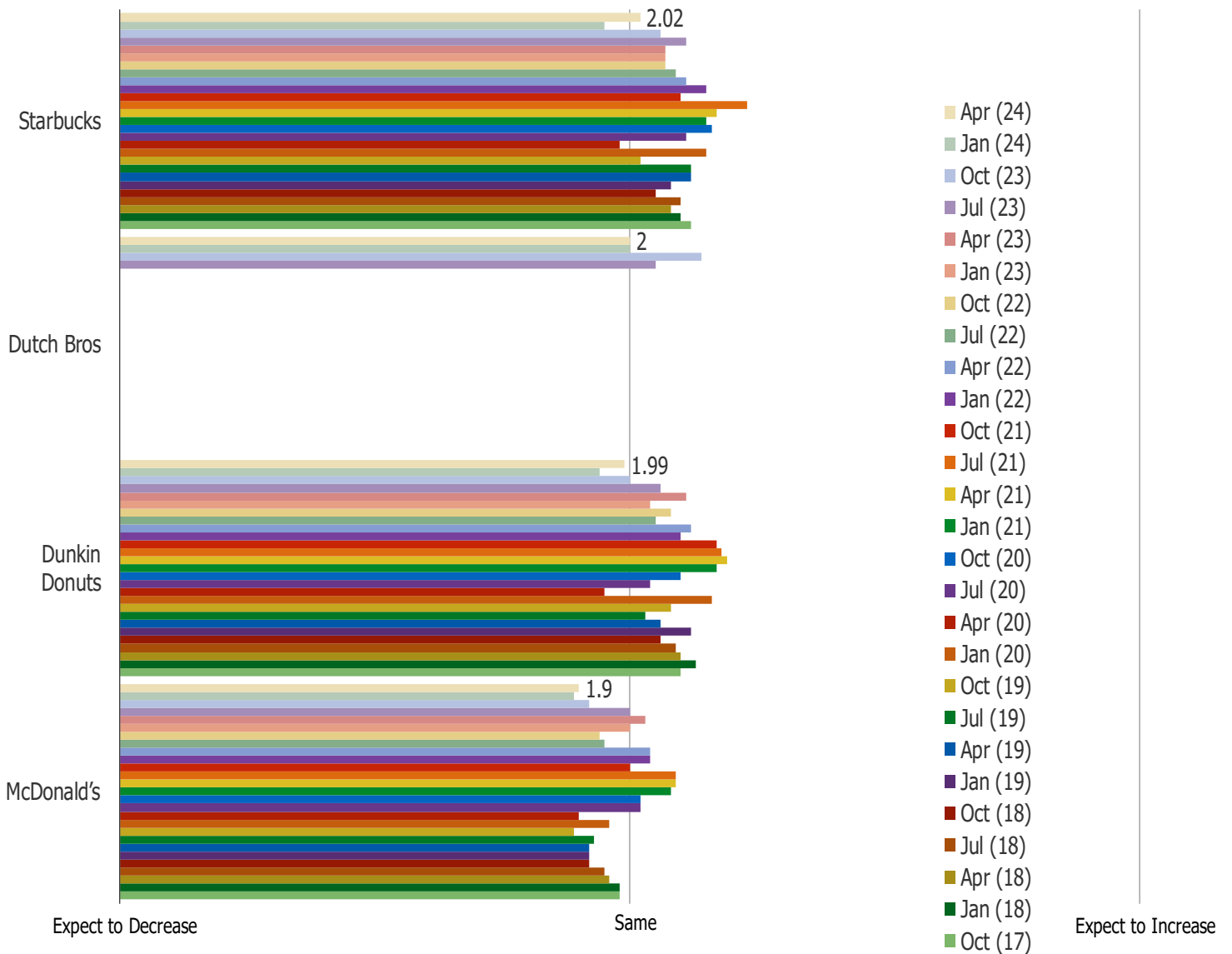
Posed to respondents who use the following regularly or occasionally.



US DATA

GOING FORWARD, DO YOU EXPECT TO CHANGE HOW OFTEN YOU TAKEOUT OR DINE HERE?

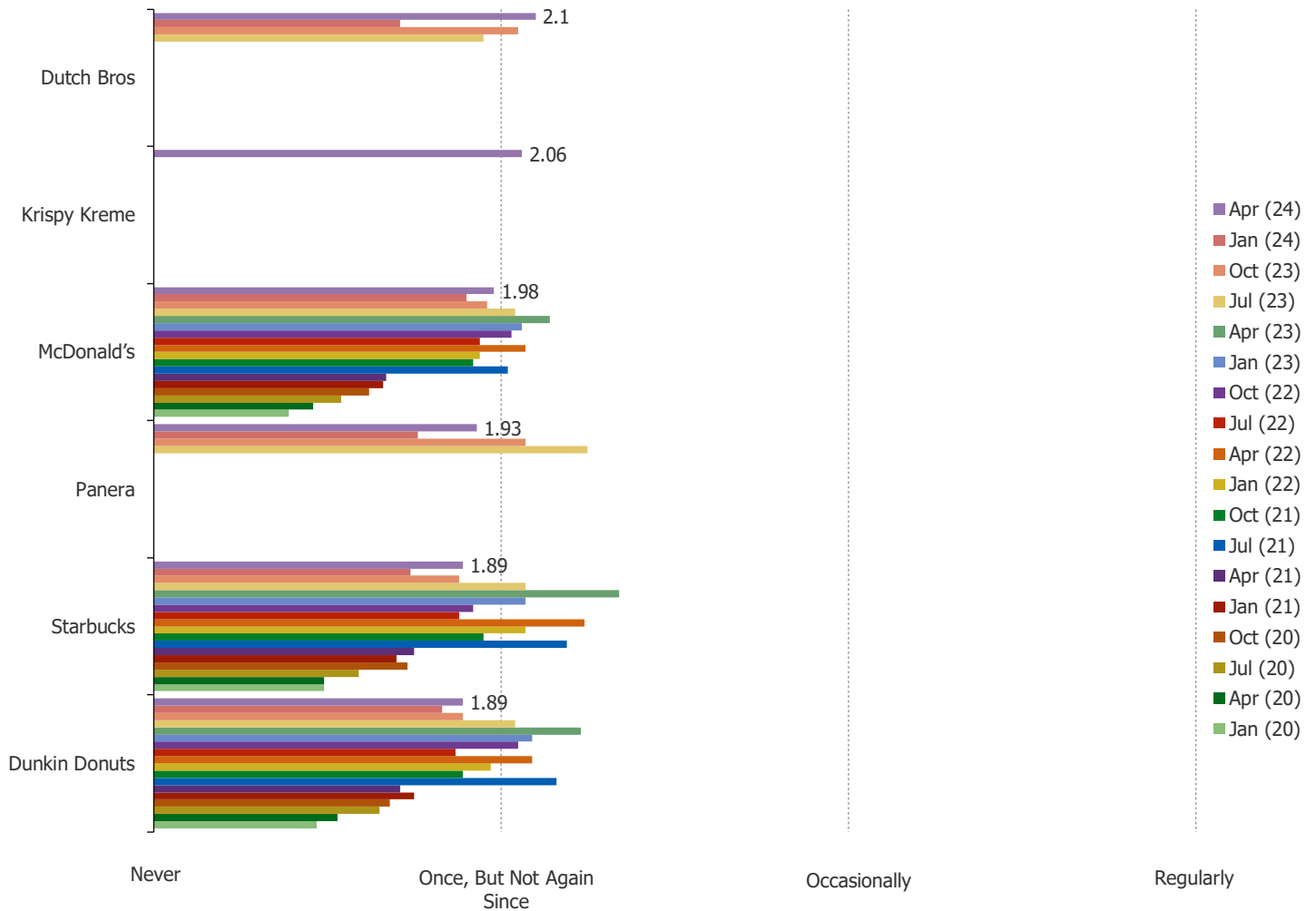
Posed to respondents who use the following regularly or occasionally.



US DATA

HOW OFTEN DO YOU ORDER FROM HERE FOR DELIVERY THROUGH THIRD PARTY FOOD DELIVERY APPS, LIKE UBER EATS, DOOR DASH, GRUBHUB, POSTMATES, ETC?

Posed to respondents who use the following regularly or occasionally.



US DATA

WHEN YOU ORDER FROM THIS RESTAURANT THROUGH THIRD PARTY FOOD DELIVERY APPS, ARE THEY ORDERS YOU WOULD HAVE GOTTEN ANYWAY OR ARE THEY ADDITIONAL?

Posed to customers of the following who order it from third party food delivery apps regularly or occasionally.

