

BESPOKE SURVEYS

Coffee, Vol 34

1,000 Consumers Per Wave, Balanced to Census

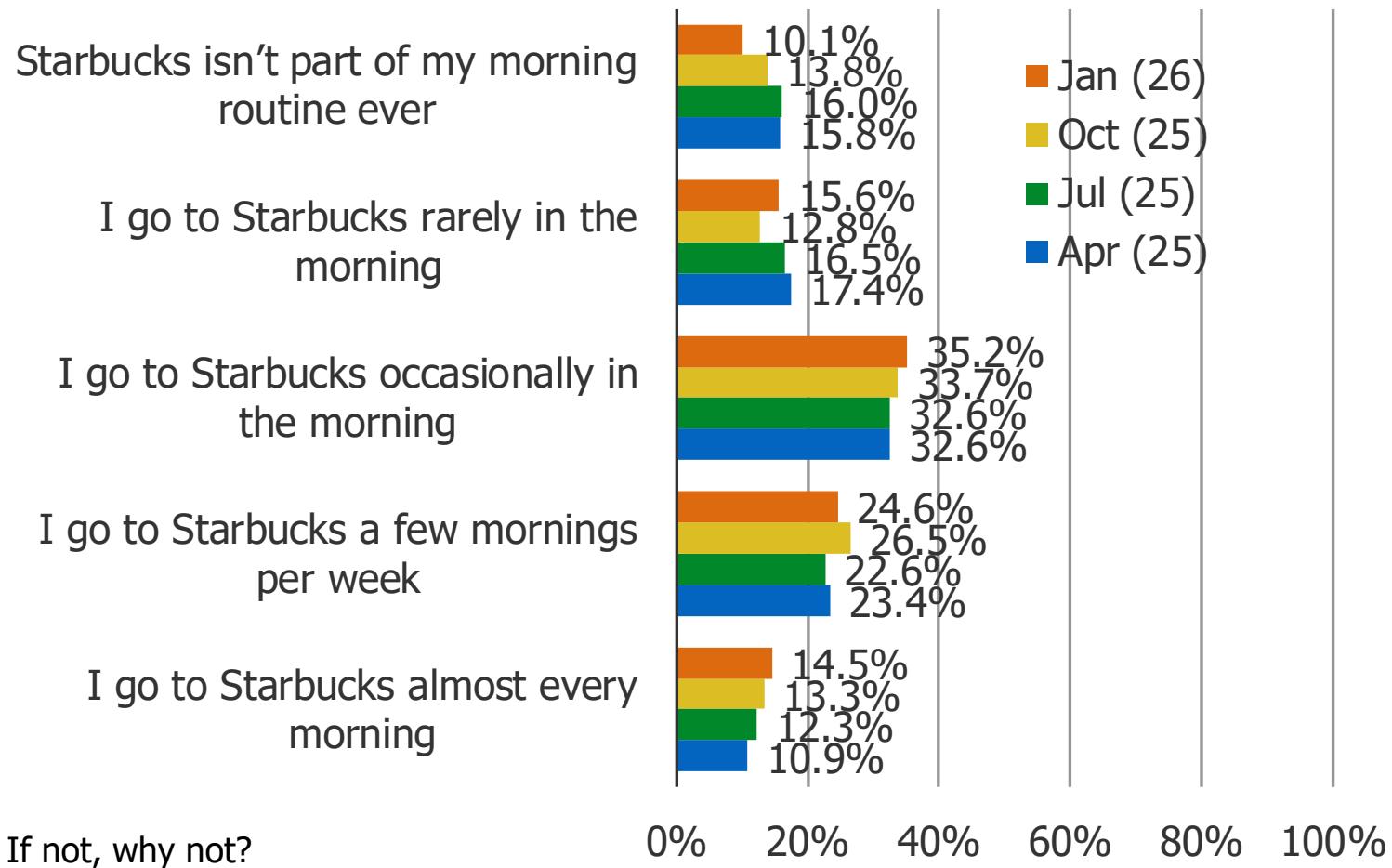
Coffee

NEW QUESTIONS

US DATA

HOW OFTEN IS STARBUCKS PART OF YOUR MORNING ROUTINE?

Posed to Starbucks customers.



Expensive

The cost is too high.

It's too far away

It's not in my direct area, and I also work 3rd shift.

I go to Starbucks when I leave the house which is usually in the afternoon

Starbucks is a treat

Too expensive

I don't live close enough to one to make it a reasonable habit.

Not located in commute

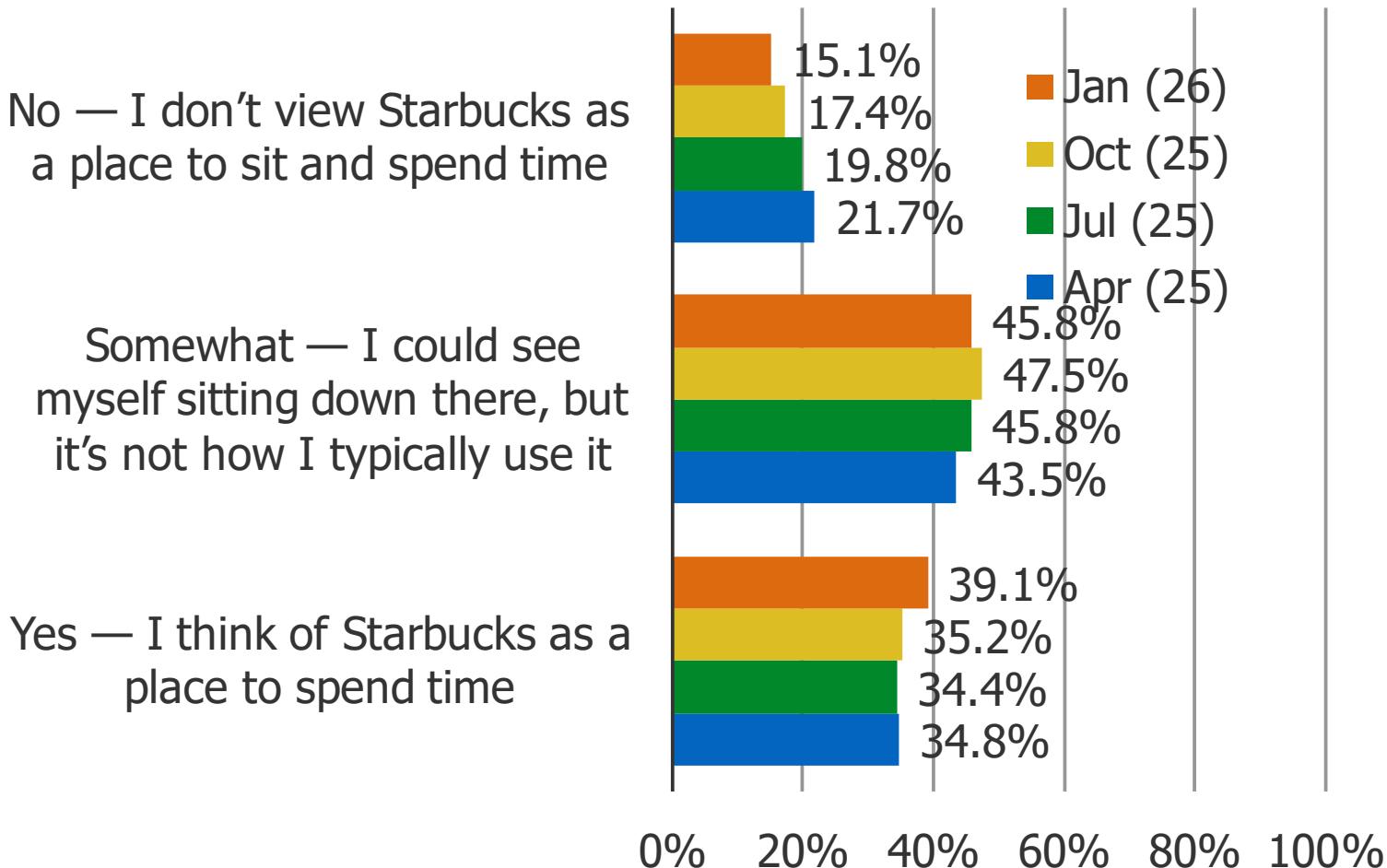
There is no Starbucks close to where I work-I usually go on the weekend

I have my own coffee. It's a treat to go there

US DATA

DO YOU PERSONALLY VIEW STARBUCKS AS A PLACE TO GO SIT DOWN AND SPEND TIME (E.G., TO RELAX, WORK, OR MEET SOMEONE)?

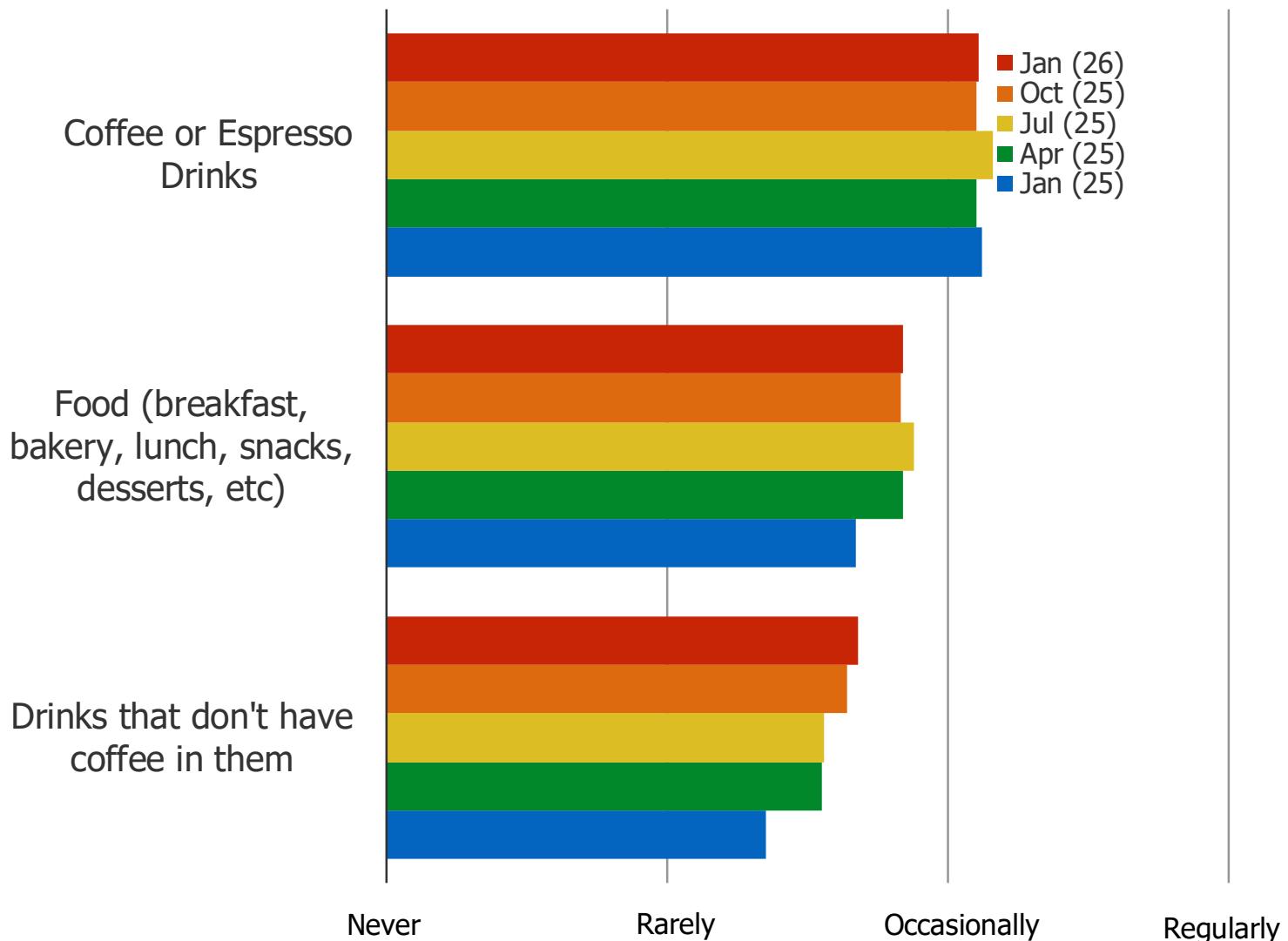
Posed to Starbucks customers.



US DATA

HOW OFTEN DO YOU GET THE FOLLOWING FROM STARBUCKS?

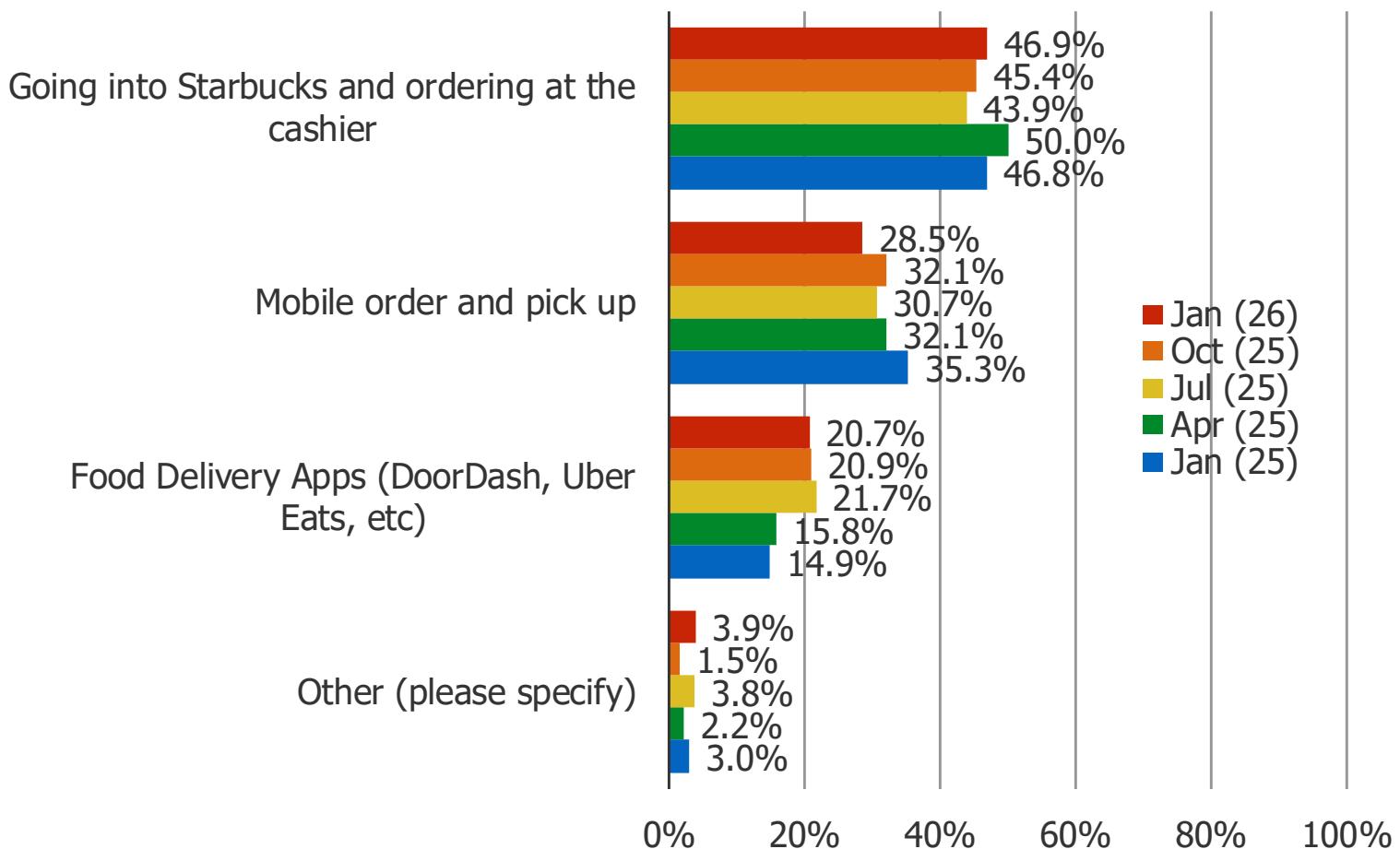
Posed to Starbucks customers.



US DATA

WHICH IS YOUR PREFERRED METHOD FOR GETTING STARBUCKS?

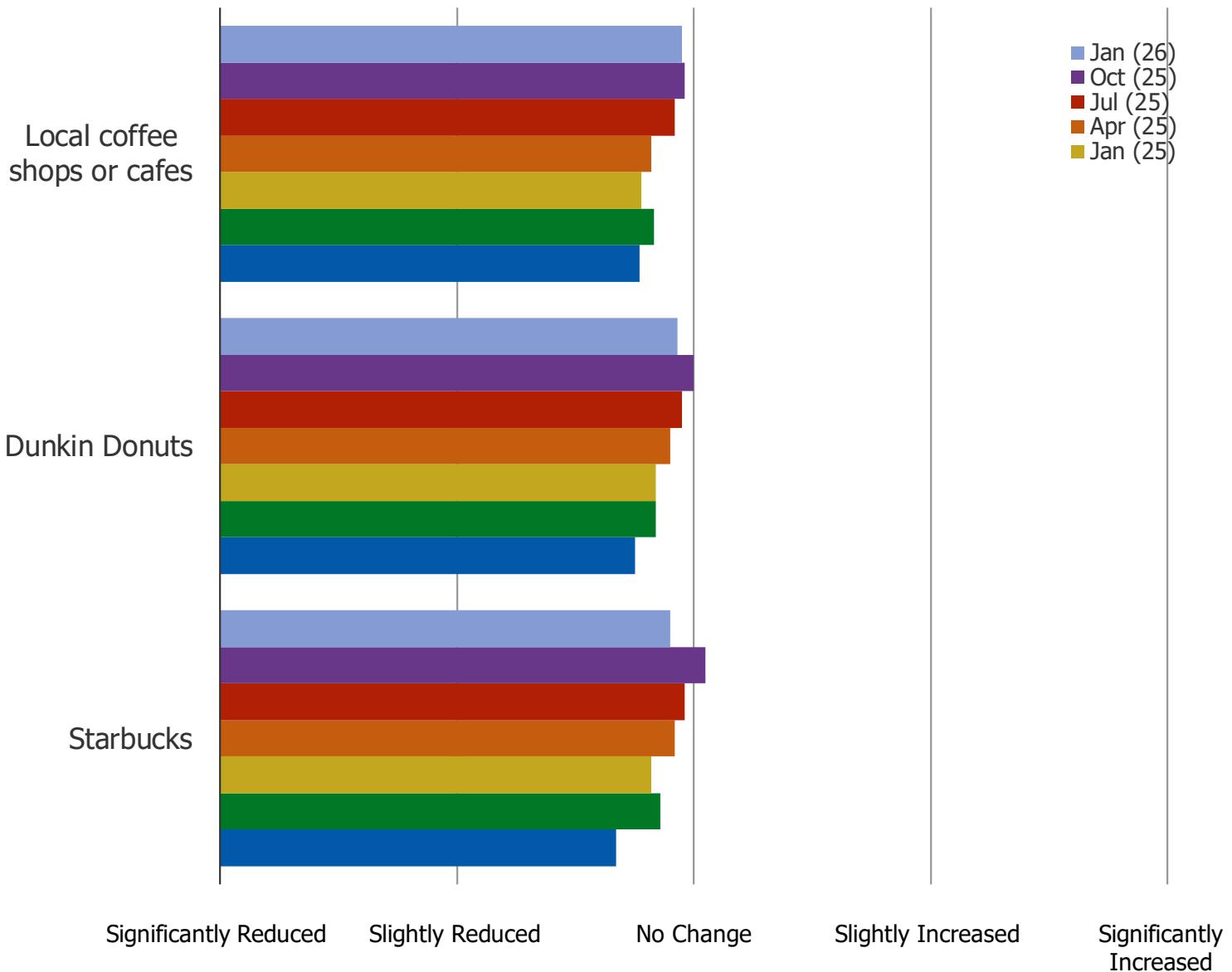
Posed to Starbucks customers.



US DATA

HAVE YOU CHANGED YOUR USAGE OF THE FOLLOWING IN THE PAST MONTH OR SO?

Posed to customers of each of the following.



YOU MENTIONED THAT YOU HAVE REDUCED YOUR USAGE OF THE FOLLOWING IN THE PAST MONTH OR SO. WHY HAVE YOU REDUCED YOUR USAGE OF THE FOLLOWING?

Posed to all respondents who have reduce their usage of the below in the past month or so.

Table 1. Reasons for Reducing Usage (% of respondents)

October 2025 vs. January 2026

Category	Starbucks Oct	Starbucks Jan	Dunkin Oct	Dunkin Jan	Local Coffee Oct	Local Coffee Jan
Price	52.5%	55.0%	30.4%	33.6%	38.8%	33.1%
Other (unclear / idiosyncratic)	41.0%	39.1%	59.4%	53.1%	54.6%	56.8%
At-home consumption	2.9%	2.0%	2.9%	4.9%	5.9%	7.9%
Location / relocation	2.9%	2.6%	5.1%	2.8%	0.0%	1.4%
Quality	0.0%	1.3%	1.4%	2.8%	0.0%	0.7%
Reduced frequency / habit change	0.7%	0.0%	0.0%	0.7%	0.7%	0.0%
Switching to other options	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
No reason given	0.7%	0.0%	0.7%	1.4%	0.0%	0.0%

Table 2. Largest Q/Q Changes (October → January)

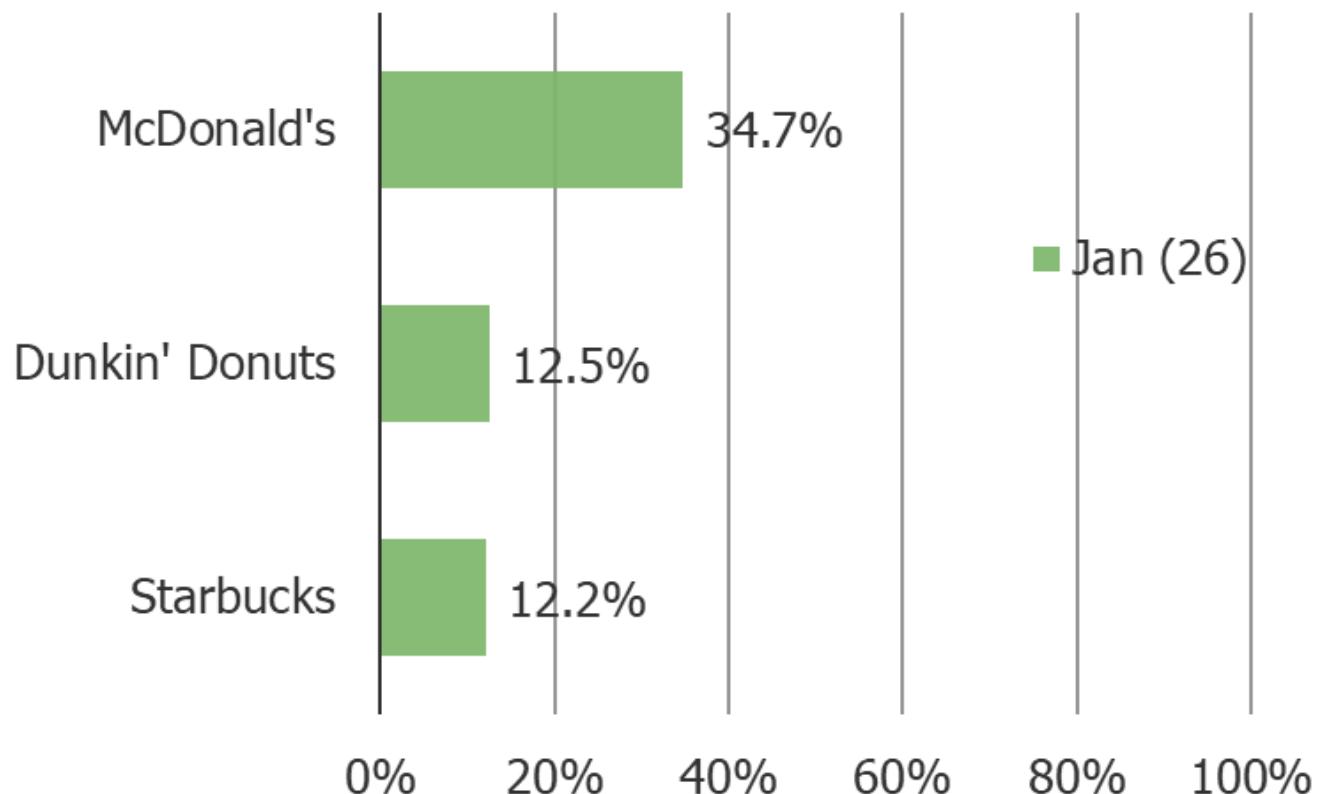
Brand	Category	Direction	Q/Q Change
Local Coffee Shops	Price	▼ Decrease	-5.7 pts
Dunkin'	Other (unclear / idiosyncratic)	▼ Decrease	-6.3 pts
Dunkin'	Price	▲ Increase	+3.2 pts
Starbucks	Price	▲ Increase	+2.5 pts
Local Coffee Shops	At-home consumption	▲ Increase	+2.0 pts
Dunkin'	At-home consumption	▲ Increase	+2.0 pts

- **Starbucks:** Reduction behavior continues to consolidate around price, with cost now clearly dominating the narrative.
- **Dunkin':** Respondents become more explicit about why they are cutting back — fewer vague answers, more price and at-home substitution.
- **Local coffee shops:** Price pressure eases materially, with reductions shifting toward at-home and mixed, non-economic reasons.

US DATA

DO YOU HAVE THE MOBILE APP OF ANY OF THE FOLLOWING
DOWNLOADED ON YOUR PHONE? SELECT ALL THAT APPLY

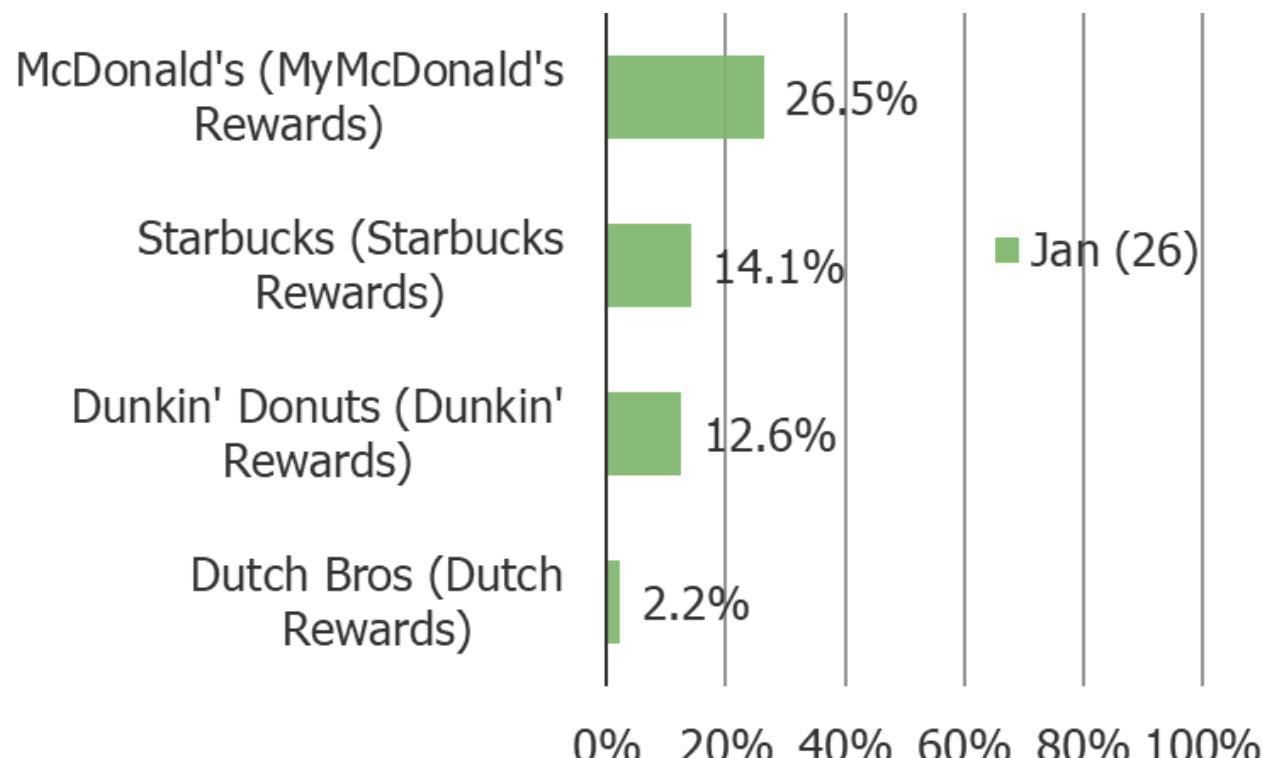
Posed to all respondents.



US DATA

ARE YOU CURRENTLY A MEMBER OF ANY OF THESE LOYALTY PROGRAMS?
SELECT ALL THAT APPLY

Posed to all respondents.



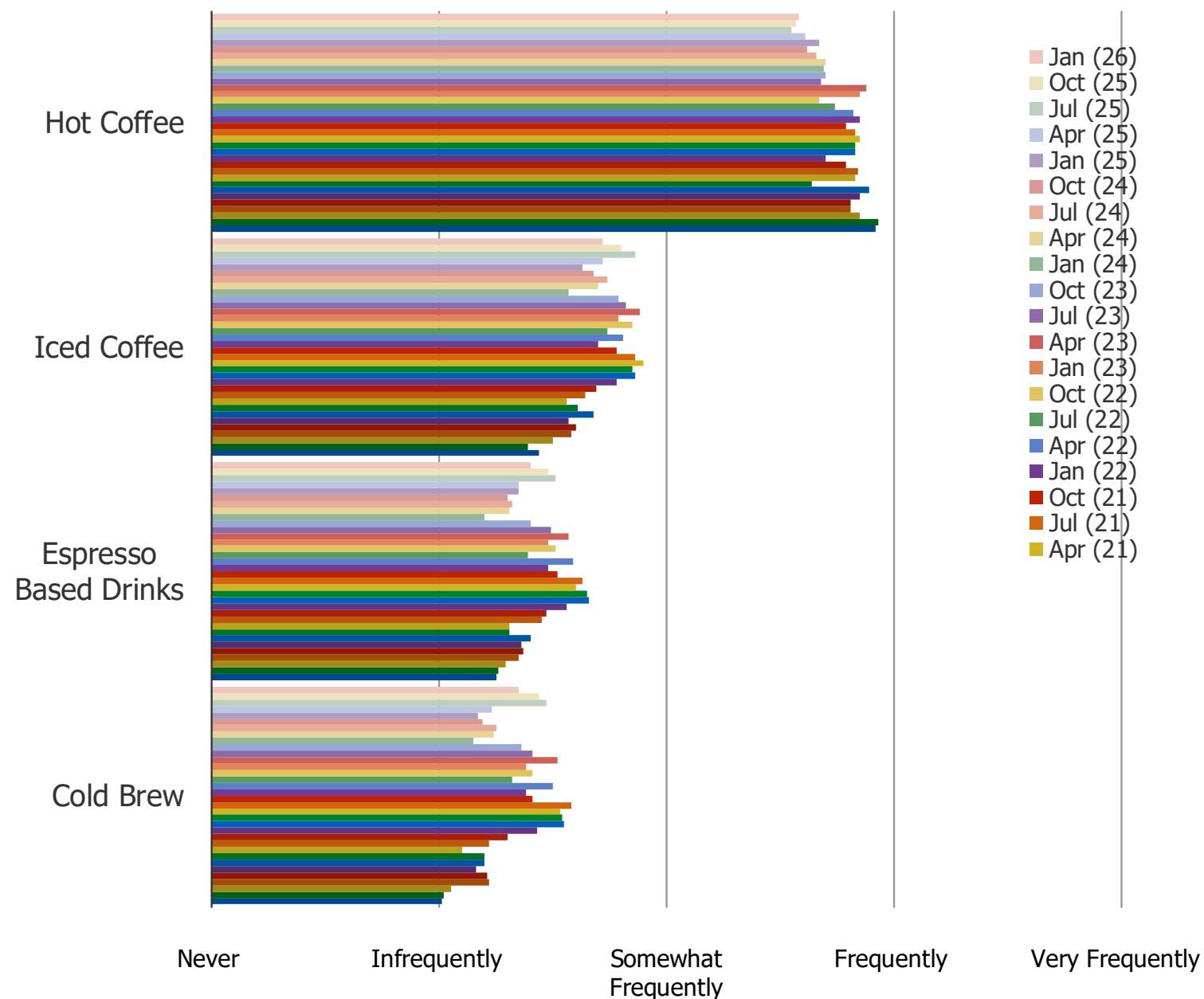
Coffee

COFFEE US

US DATA

HOW OFTEN DO YOU DRINK THE FOLLOWING?

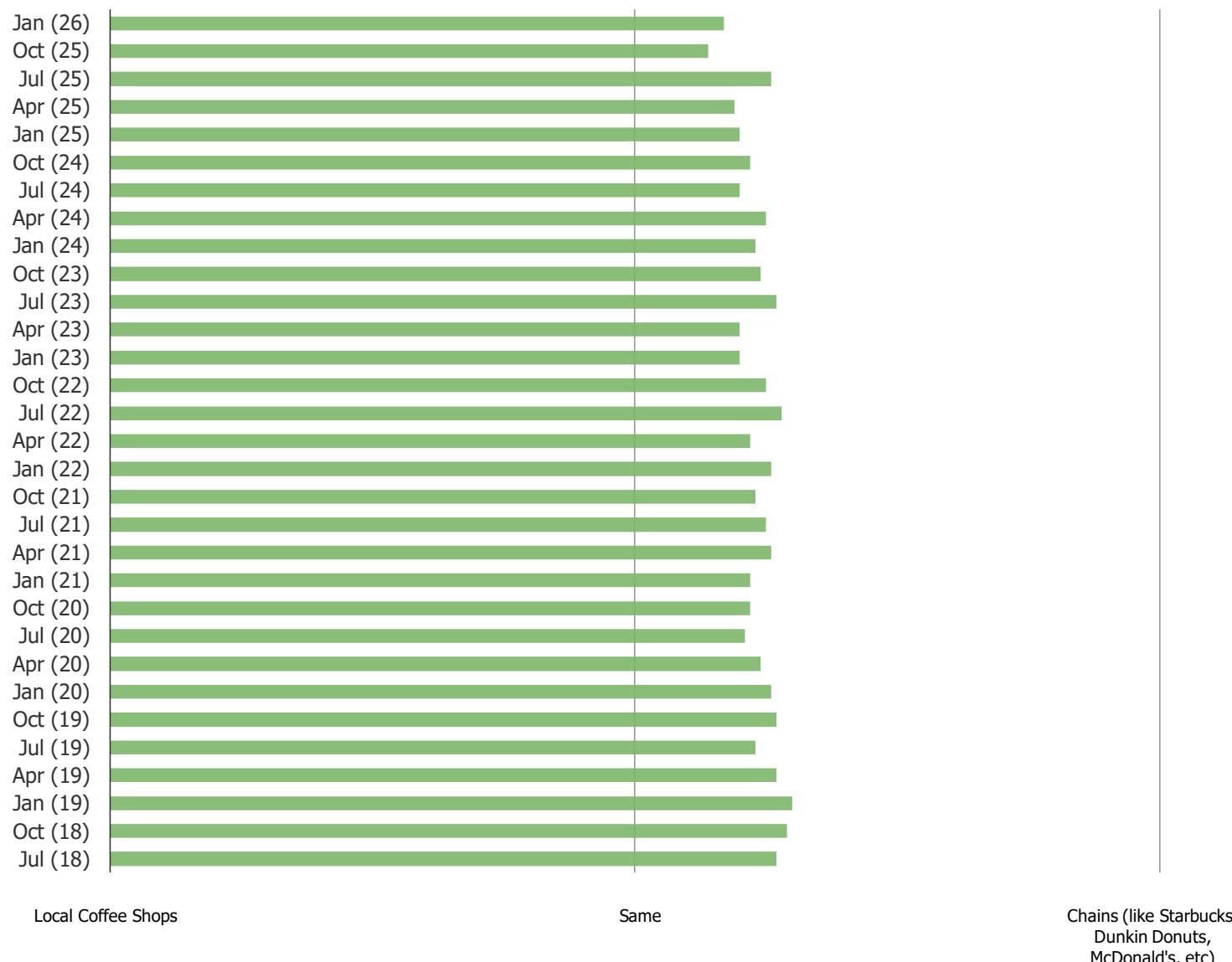
Posed to respondents who drink coffee at least infrequently.



US DATA

WHERE DO YOU PREFER TO GET COFFEE?

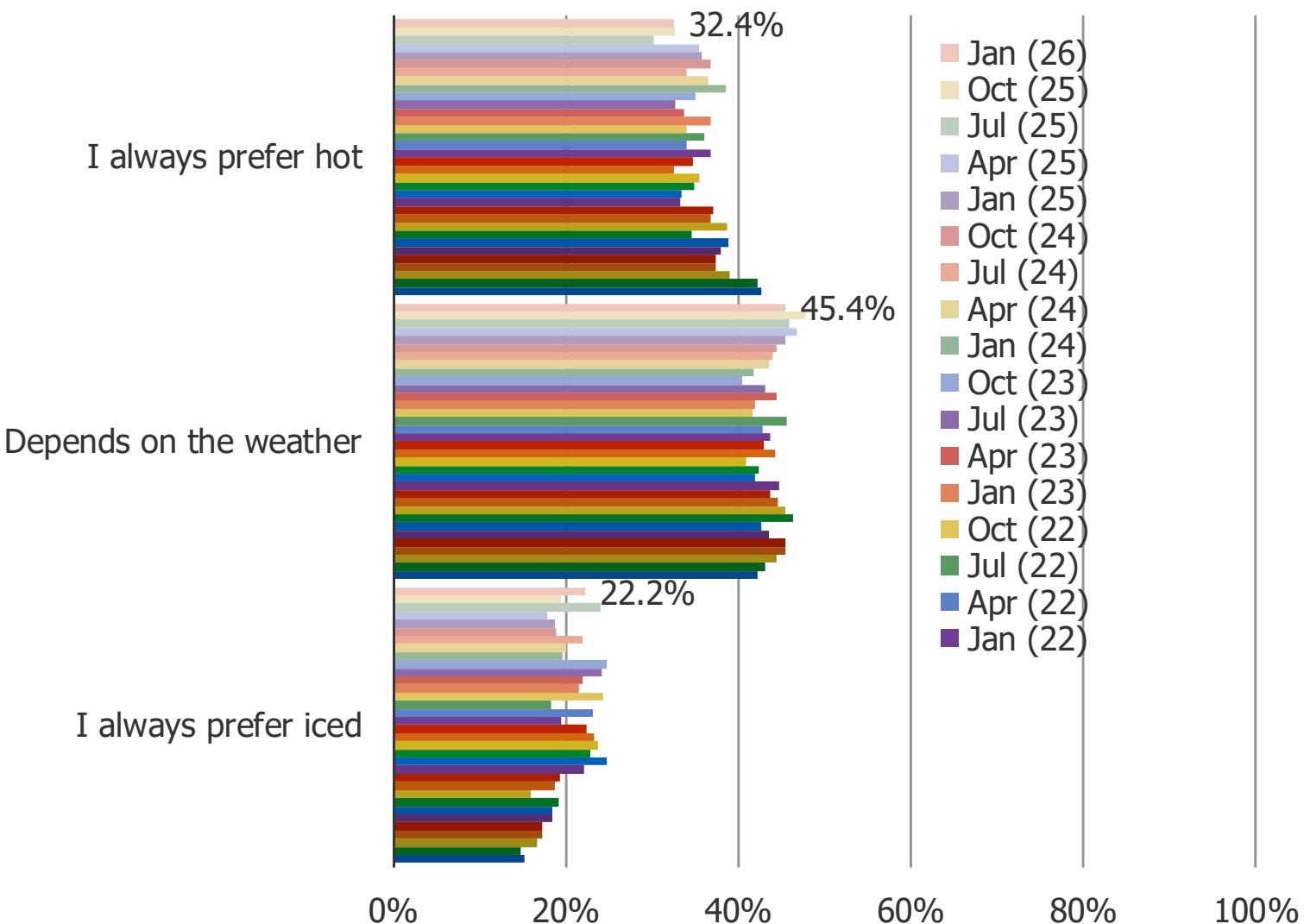
Posed to respondents who drink coffee at least infrequently.



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...

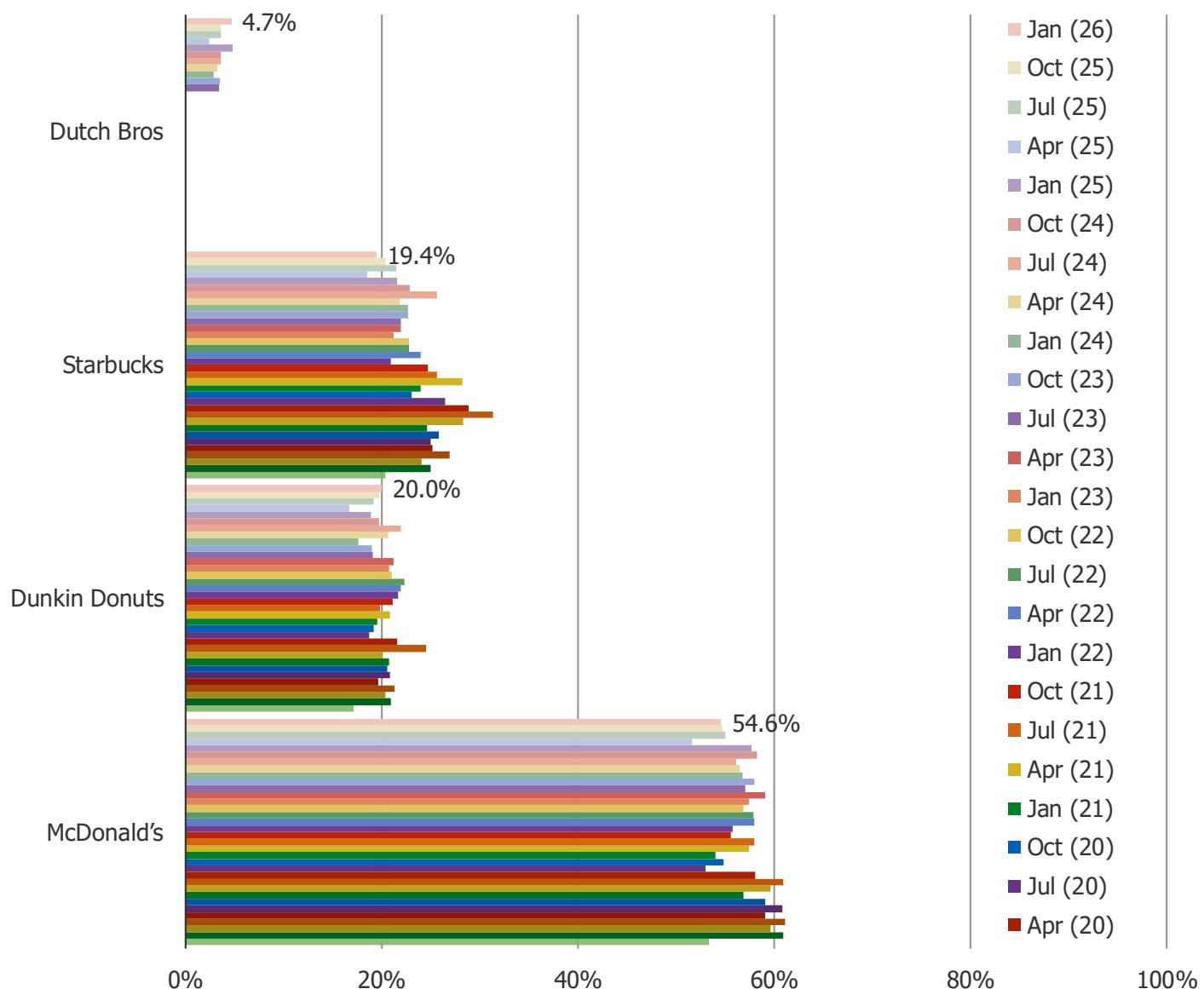
Posed to respondents who drink coffee at least infrequently.



US DATA

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

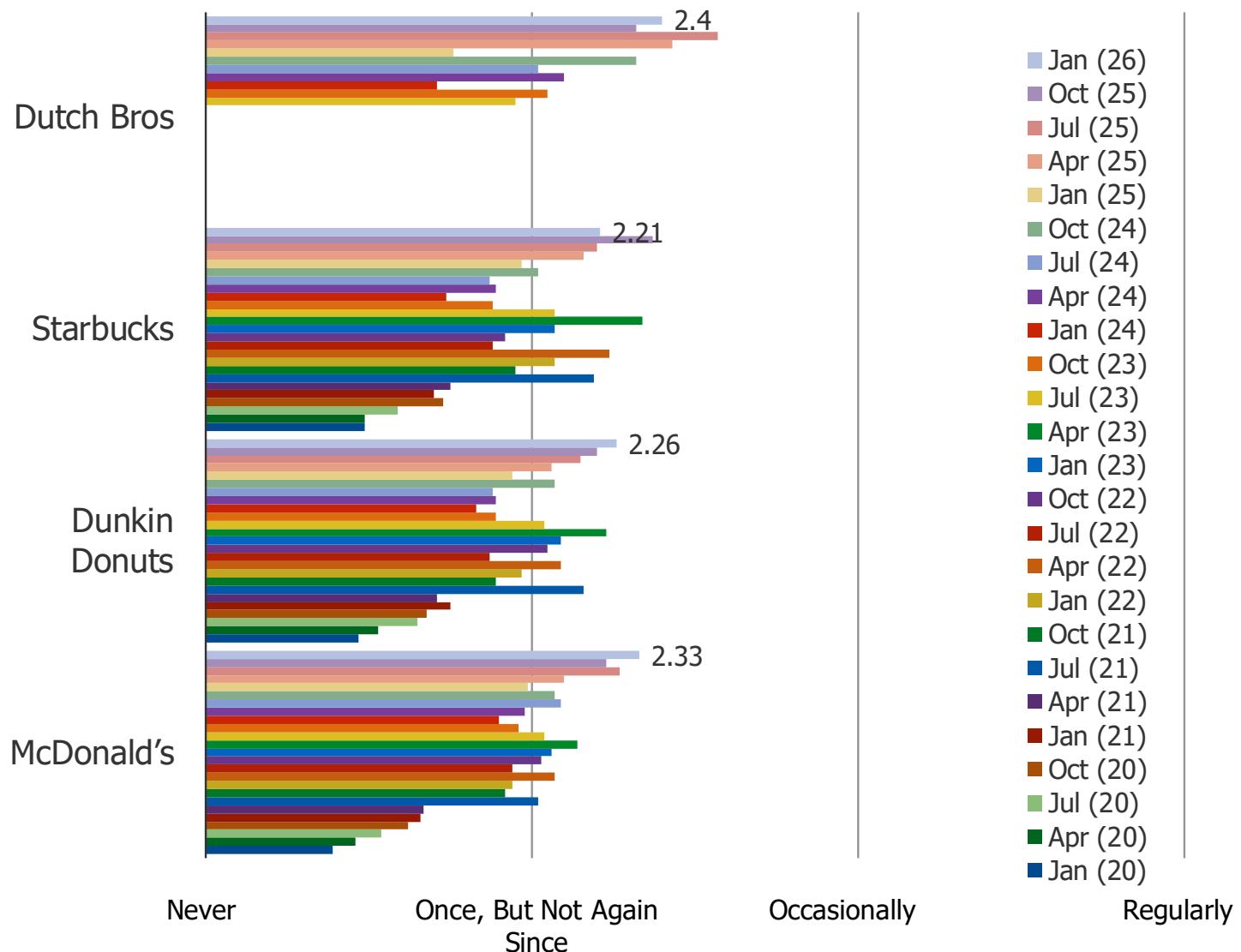
Posed to respondents who drink coffee at least infrequently.



US DATA

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

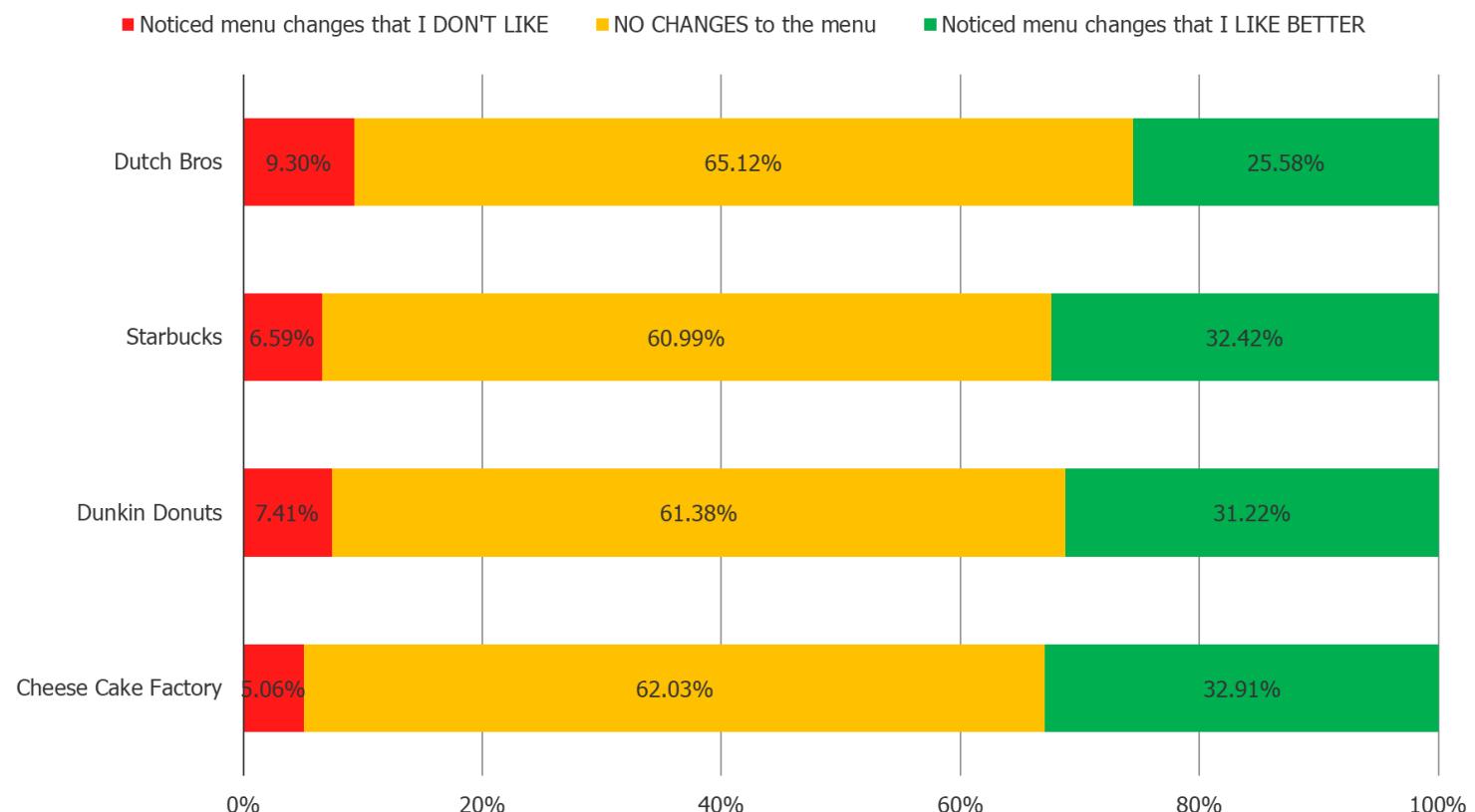
Posed to respondents who use the following regularly or occasionally.



US DATA

HAVE YOU NOTICED ANY MENU CHANGES RECENTLY?

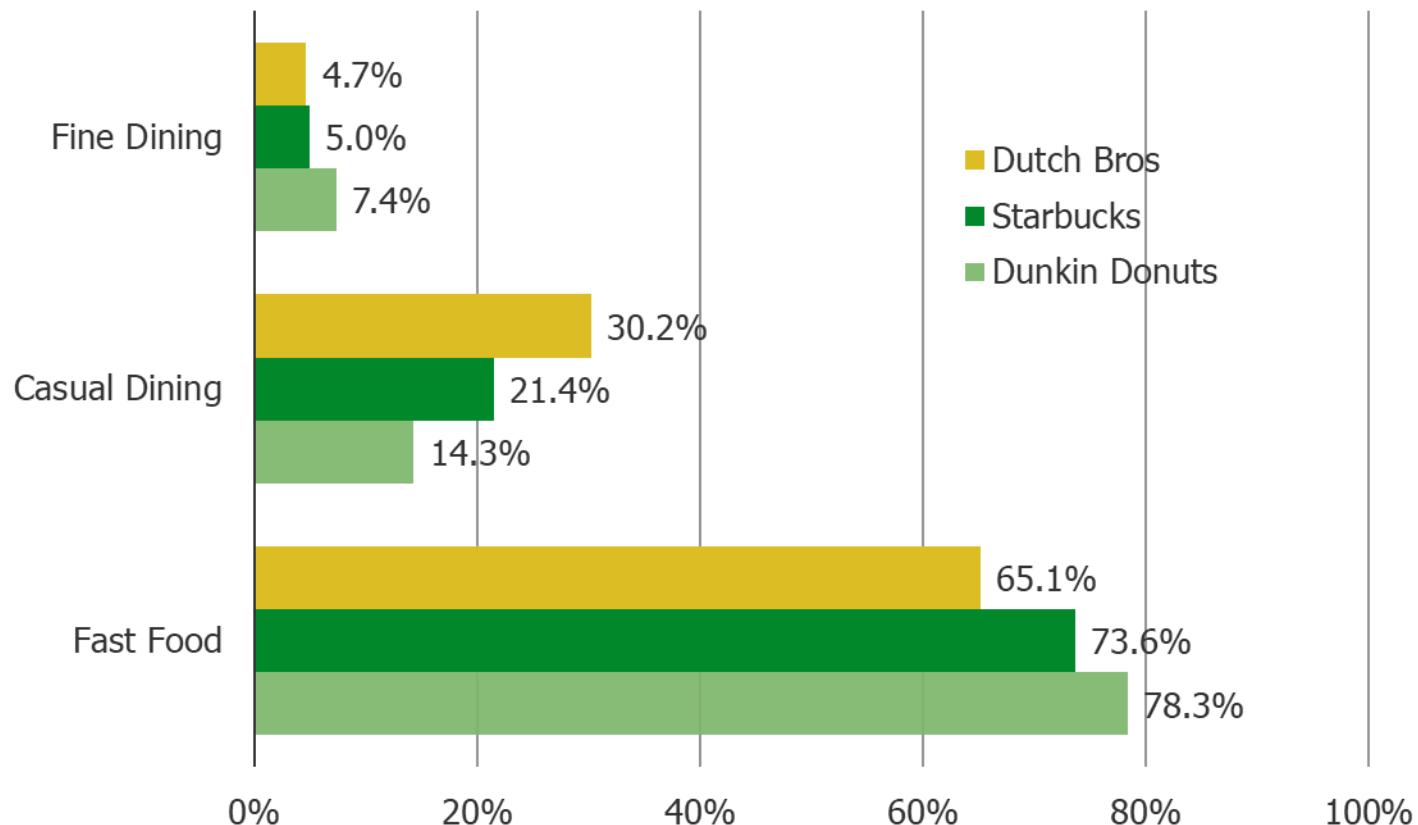
Posed to respondents who use the following regularly or occasionally.



US DATA

DO YOU VIEW THE FOLLOWING AS...

Posed to respondents who use the following regularly or occasionally.



US DATA

THINKING ABOUT WHAT YOU PAID FOR YOUR LAST MEAL FROM THE FOLLOWING, HOW WOULD YOU RATE THE 'WORTH'?

Posed to respondents who use the following regularly or occasionally.

