
**Description:**

This food industry bundle consists of the following two reports:

Coffee and Ready-to-Drink Coffee in the U.S.: Retail and Foodservice

Make no mistake, coffee is big business: Packaged Facts forecasts that retail and foodservice sales of coffee will top $48 billion in 2014. Of this amount, we expect $11.2 billion (or 23%) to come from retail sales and $37 billion (or 77%) to come from sales at foodservice establishments.

For coffeehouse and quick-service restaurant operators, attaching food to the purchase of coffee is more important than ever. Brands are aggressively innovating on both the beverage and food side of the menu to provide customers the ammunition needed for more pairing firepower. But more and more of these players are also branching into other beverages, which has the potential to dampen coffee sales growth. Any yet despite all the variety, hot coffee is still the go-to beverage, with 75% of coffee/coffee drink users saying that among 10 choices “hot coffee” is the coffee/coffee drink they drink most often. As restaurant operators race to launch loyalty programs, coffeehouse chains are fertile ground for programs that blend and harness social media, mobile technology and rewards. Our research suggests that coffeehouse users are receptive to social media and brand interplay, and when it comes to adapting to technology, these consumers are also ahead of curve.

On the retail side, the rise of single-serve is changing the retail coffee landscape—and if Green Mountain Coffee Roasters has its way—single serve will also change away-from-home coffee consumption. But coffee co-branding is also moving beyond coffee shop brands to align with other indulgent brands. Building off coffeehouse expectations for a wide variety of options, retail coffee manufacturers are also embracing variety, and sourcing has become a key element in coffee premiumization. And innovation abounds: To combat attrition, instant coffee marketers are trying to breathe life into the category focusing on quality products underscored by variety, functional, and value positioning.

And this only scratches the surface.

Coffee and Ready-to-Drink Coffee in the U.S.: Retail and Foodservice provides industry participants with valuable insight on trends shaping this the highly competitive U.S. coffee market. Sales content includes 1) a market size and forecast for coffee sales at retail and foodservice, along with retail sales analysis by coffee segment and by distribution channel; and 2) detailed company analysis of the retail coffee market, by market segment (ground/whole bean, instant, instant flavored, espresso/cappuccino, and ready-to-drink coffee) and by brand; and 3) detailed company analysis of leading foodservice participants, including Dunkin’ Donuts, Green Mountain Coffee Roasters, McDonald’s, Starbucks, Caribou Coffee and Tim Hortons, with a focus on how coffee fits into each companies’ competitive and growth strategies. The report also:

Identifies key marketing opportunities for coffee, supported by consumer survey data, product examples and other metrics. In particular, we focus on food and beverage pairing, organic growth opportunities, growing sales of iconic retail brands, and harnessing loyalty programs.

Using proprietary survey results, assesses the degree which consumers get different coffee types for home use from different retail distribution channels; similarly, we assess the degree they get coffee for “immediate consumption” from a variety of foodservice channels. Comparative analysis is included.

Explores coffee retail product trends centered on bringing the coffee shop experience into the consumers’ home (with an emphasis on co-branding); sourcing; convenience; and instant coffee, liquid concentrate and single-serve pod innovation.

Assesses coffee menu trends, focusing on menu item penetration by restaurant segment, including beverage varieties, coffee flavors/types and coffee brands.
Assesses household and personal coffee usage and usage frequency trends, including ground, whole bean, single-serve/pod, instant and RTD coffee; and household and personal coffee brand usage and trends, ground, whole bean, single-serve/pod, instant and RTD coffee. To help gauge brand loyalty, we also trend brands' "usage preference ratios," the ratio that consumers drink that brand "most" over drinking that brand "also."

Using proprietary survey results, provides comparative analysis on the degree to which consumers drink different flavors and types of coffee at home and at restaurants, as well as identifying which coffee types/flavors consumers drink most often.

Drawing from consumer survey “ranking” responses, identifies the relative importance consumers place on factors such as taste, getting a specific brand, low price, and time of day when deciding to order coffee at a restaurant.

Tea and Ready-to-Drink Tea in the U.S.: Retail and Foodservice, 5th Edition

Packaged Facts forecasts that sales of tea will reach $25 billion in 2014. Of this amount, we expect $6.2 billion (or 25%) to come from retail sales and $18.8 billion to come from foodservice sales.

Retail sales trends from 2012-2013 suggest both challenges and successes for the U.S. tea market. For instance, once a growth driver, RTD canned and bottled tea sales are flat, and instant tea mix declines present challenges. But the flipside is that plenty of opportunity exists to continue to grow the category, from making tea drinking a bit more "manly" to looking for avenues to personalize tea drinking. And marketers can continue to ratchet up category innovation by supporting the trend toward premiumization, incorporating unique ingredients, and pursuing innovations in form. But bagged/loose tea participants—already on notice—must prepare for continued Green Mountain single-cup tea share taking.

Our expectations are brighter for tea sales at foodservice establishments, which we expect to increase steadily during 2014-2016, driven by modest growth in foodservice establishment visits, tea menu item and tea room establishment expansion, and pricing power. Growth drivers include iced tea, as well as niche beverages such as chai tea, which has seen the most growth in usage on restaurant menus from 2009-2013. Our analysis also suggests that tea is still not being fully leveraged by quick-service restaurants to draw customers. And while fast food restaurants serve generally as Pied Pipers in luring younger customers, coffeehouses may be having greater success in drawing in younger tea drinkers.

Tea and Ready-to-Drink Tea in the U.S.: Retail and Foodservice, 5th Edition analyzes the industry and consumer trends shaping this highly competitive environment. The report does the following:

Addresses retail tea category innovation, including premium characteristics, ingredients, and new beverage formats.

Identifies key marketing opportunities for tea, supported by consumer survey data, product examples and other metrics. In particular, we focus on families, men, healthfulness and customization, single-cup brewing, and all-in-one brewing.

Assesses how foodservice operators are capitalizing on “hot” trends; penetration and penetration growth of hot and iced tea types on quick-service, family-midscale, casual and fine dining menus; retail brand penetration in foodservice menus; and trend spotting.

Assesses household and personal tea usage and usage frequency trends, including bagged, loose, RTD and instant tea; household and personal tea brand usage and trends, including bagged, loose, RTD and instant tea. To help gauge brand loyalty, we trend brands’ “usage preference ratios,” the ratio that consumers drink that brand “most” over drinking that brand “also.”

Assesses the degree to which consumers get different tea types for home use from different retail distribution channels; similarly, we assess the degree they get tea for “immediate consumption” from a variety of foodservice channels. Comparative analysis is included.

Provides comparative analysis regarding the degree to which consumers drink different flavors and types of tea at home and at restaurants, as well as identifying which tea types/flavors consumers drink most often.

Assesses the relative importance consumers place on factors such as taste, getting a specific brand, low price, and time of day when deciding to order tea at a restaurant.

Contents:

Chapter 1: Executive Summary
Report Scope
Report Summary
Market size, segmentation and forecast
Marketing opportunities
Retail product trends
Foodservice menu trends
Beverage variety trends
Restaurant segment trends
Coffee flavor & variety trends
Coffee usage & brand trends
Personal coffee usage and usage frequency
Household coffee usage and usage frequency
Household coffee usage trending
Trended coffee brand usage
Coffee retail & foodservice channel usage trends
Coffee types drunk at home & restaurants
Factors influencing restaurant coffee ordering decision
On the retail side: company and brand analysis
The retail market for coffee
Top marketers
Top brands
Top marketers and brands: segment analysis
On the foodservice side: company and brand analysis
Caribou Coffee
Dunkin' Donuts
Green Mountain Coffee Roasters, Inc.
McDonald's
Starbucks Corporation
Tim Hortons
Chapter 2: Market Size, Segmentation and Forecast
Summary analysis
Market size and forecast
Graph 2-1: Coffee Market Size and Forecast: Foodservice and Retail, 2009-2016
Coffee sales at retail
Graph 2-2: Retail Coffee Market Size, by Distribution Channel, 2013
Retail market segmentation
Graph 2-3: Retail Coffee Segment Share, 2013
Table 2-1: Retail Coffee Sales and Share, by Segment, 2012-2013
Coffee sales at foodservice
Table 2-2: Foodservice Coffee Sales, 2009-2016
Analysis: coffee price outlook
Summary pricing analysis
Table 2-3: Coffee Commodity PPI & CPI Index and Percent Change, 2010-2014
At the commodity level: coffee price declines drive margin gains
Graph 2-4: Producer Price Index, Commodities: Coffee, Tea, Soft Drinks and Juices, 2007-2014
On restaurant menus
Table 2-4: Coffee/Coffee Drink Menu Prices and Price Trends, 2007-2013
Table 2-5: Average Coffee/Coffee Drink Menu Price, by Drink Type, 2011-2013
By restaurant segment
Table 2-6: Coffee/Coffee Drink Menu Price Trends, by Restaurant Segment, 2009-2013
Table 2-7: Average Coffee/Coffee Drink Menu Price, by Drink Type & Restaurant Segment, 2013
At retail: coffee commodity declines passed on to consumer
Graph 2-5: Consumer Price Index: Coffee, Tea, Carbonated & Noncarbonated Drinks and Juices, 2007-2014
Coffee imports: volume and value
Coffee import volume growth tapers; value dives
Table 2-8: Total Coffee Imports, by Value, Volume and Price per Ton Trends, 2009-2013
Table 2-9: Coffee Imports, by Coffee Type: Value, Volume and Price per Ton Trends, 2009-2013
Table 2-10: Coffee Imports, by Coffee Type: Value & Volume Share Trends, 2009-2013
Chapter 3: Coffee Market Opportunities
Summary analysis
Finding the right pairing
Table 3-1: Caribou Coffee New, Returning & Limited-Time Restaurant Beverage Item Introductions, 2013-2014
Table 3-2: Caribou Coffee New, Returning & Limited-Time Restaurant Food Item Introductions, 2013-2014
Mixing and matching coffee variety and beverage menu breadth
Graph 3-1: Coffee/Coffee Drink, Tea and Other Beverage Menu Item Share & Breadth, by Coffeehouse Chain, 2014
Graph 3-2: Presence of Non-Coffee Beverages on the Menu, by Coffeehouse Chain and Beverage Type, 2014
You know what? I'll just get a hot coffee

Graph 3-3: Coffee Drunk Most, by Coffee Type/Flavor

Organic market growth requires more than just new product innovation

Driving the association between coffee and usage

Healthy at home, taste at restaurants?

Graph 3-4: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance

Breathing life into iconic coffee brands

Turning mobile lifestyles, technology and social media into loyalty

Coffeehouse users receptive to social media and brand interplay

Table 3-3: Coffeehouse Users’ Social Sharing/Networking Website Attitudes, by Coffeehouse Visited in Last 30 Days, 2013

. . . are more technology-forward

Table 3-4: Technology Adoption Segmentation, by Coffeehouse Visited, 2013

. . . and connected to their mobile phones

Table 3-5: Mobile Segmentation, by Coffeehouse Visited, 2013

Making them prime targets for technology-forward, mobile-driven loyalty platforms

My Starbucks Rewards

DD Perks Rewards Program

Table 3-6: Dunkin' Donuts’ DD Perks Rewards Program Features, 2014

Location-based promotions a growing reality

Chapter 4: Coffee Retail Product Trends

Bringing the coffee shop home

Coffeehouse branding lends expertise position

Panera Bread: upscale brand, meet upscale retail coffee platform

Dunkin’ Donuts: building loyal drinkers—at the coffeehouse and at home

Caribou Coffee: bring home a little social responsibility

Co-branding creates brand recognition

Godiva: upscale chocolate builds expectation

Entenmann’s: baked goods & coffee a natural cross-merchandising pair

Cold Stone Creamery: decadence in a bottle

Variety plays to coffeehouse expectations

Eight O’Clock

Wegmans

Target

Quality of coffee is denoted by sourcing

Kauai Coffee Company: leveraging Hawaiian sourcing—replete with peaberry line

Trader Joe’s: private label peaberry!

Fresh & Easy taps Rogers Family Coffee Company for direct trade

Convenience

Ready-to-drink requires no preparation

Hain Celestial

Bolthouse Farms

International Delight

Starbucks Discoveries

Instant coffee innovation to debunk poor quality and taste associations

Starbucks VIA

BarnDad’s Rise

Seattle’s Best Coffee

Liquid concentrates

Single-serve pods

Green Mountain

Starbucks

Maxwell House

Chapter 5: Coffee Foodservice Menu Trends

Summary analysis

Beverage variety trends

Nearly two-thirds of restaurants feature coffee

Table 5-1: Top Beverage Varieties: Percent of Restaurants Featuring: by Restaurant Segment, 2013

Fine dining showing growth in coffee offerings; Chai tea creates competition

Table 5-2: Top Beverage Varieties: Change in Percent of Restaurants Featuring: By Restaurant Segment, 2009-2013

Soda commands largest share of beverage menu

Table 5-3: Top Beverage Varieties: Beverage Menu Share: By Restaurant Segment, 2013
Growth in “healthy” beverages creates more choice on the beverage menu
Table 5-4: Top Beverage Varieties: Change in Beverage Menu Share: By Restaurant Segment, 2013

Coffee flavor & variety trends
Specialty coffees most prevalent at fine dining restaurants
Table 5-5: Top Coffee Varieties: Percent of Restaurants Featuring: By Restaurant Segment, 2013
Americano coffee showing significant growth
Table 5-6: Top Coffee Varieties: Change in Percent of Restaurants Featuring: By Restaurant Segment, 2009-2013

Classic flavors have strongest penetration on restaurant menus
Table 5-7: Top Coffee Flavors/Types: Percent of Beverage Items Featuring: By Restaurant Segment, 2013

The premiumization trend is alive and well in restaurant coffee
Table 5-8: Top Coffee Flavors/Types: Change in Percent of Restaurants Featuring: By Restaurant Segment, 2009-2013

Chapter 6: Coffee Usage & Brand Trends
Summary analysis
Personal coffee usage and usage frequency
Household coffee usage and usage frequency
And household coffee usage trending
Trended coffee brand usage
Household & personal coffee use and usage frequency trends
The majority of adults drink coffee
Graph 6-1: Times per Month Consumers Drink Coffee, by Usage Frequency
Most coffee drinkers consume several cups per day
Graph 6-2: Daily Coffee Drinkers: Cups of Coffee Drunk per Day

Coffee usage, by demographic
Men are more frequent coffee drinkers
Table 6-1: Monthly and Daily Coffee Drinkers: Cups of Coffee Drunk, by Gender, 2014
Young coffee drinkers are less engaged
Table 6-2: Monthly and Daily Coffee Drinkers: Cups of Coffee Drunk, by Age, 2014
Table 6-3: Monthly and Daily Coffee Drinkers: Cups of Coffee Drunk, by Employment Status, 2014
Less affluent drink the most coffee per day
Table 6-4: Monthly and Daily Coffee Drinkers: Cups of Coffee Drunk, by HH Income, 2014
Hispanics are Asians more likely to be coffee drinkers
Table 6-5: Monthly and Daily Coffee Drinkers: Cups of Coffee Drunk, by Race/Ethnicity, 2014

Trended coffee usage, by coffee type
Table 6-6: Household Ground/Whole Bean, Instant, Instant Flavored Mix & Espresso/ Cappuccino Usage, Personal RTD Iced Coffee Usage, 2008-2013

Trended HH coffee usage frequency, by coffee type
Household usage of regular ground coffee is twice that of decaf ground
Table 6-7: Household Coffee Usage Frequency: Ground (Regular vs. Decaffeinated, 2008-2013
Household penetration of instant coffee is on the rise
Table 6-8: Household Instant Coffee Usage Frequency, 2008-2013
Flavored instant coffee mix household use is flat
Table 6-9: Household Instant Flavored Coffee Mix Usage Frequency, 2008-2013

Coffee use, by type: demographic analysis
Table 6-10: Household Ground/Whole Bean, Instant, Instant Flavored Mix & Espresso/ Cappuccino Usage, Personal RTD Iced Coffee Usage: By Race/Ethnicity, HH Income, Number/ Age of Children in HH & Nielsen Region, 2013

Household and personal coffee use and preference, by type
Ground/whole bean coffee
Table 6-11: Household Coffee Use: Caffeinated & Decaffeinated Ground/Whole Bean, Loose Grinds, Single-Serve/Pod & Whole Bean: With Usage Preference Ratios, 2008-2013
Instant coffee
Table 6-12: Household Instant Coffee Usage: Regular, Decaffeinated, Flavored, & Unflavored: With Usage Preference Ratios, 2008-2013
Instant flavored coffee mix
Table 6-13: Instant Flavored Coffee Mix HH Usage: Regular and Sugar-Free, 2008-2013

Household and personal coffee use by brand
Whole bean & ground coffee brand usage trending
Table 6-14: Household Ground/Whole Bean Usage, by Brand, 2008-2013
Whole bean & ground coffee brand usage, by demographics
Table 6-15: Household Ground/Whole Bean Usage, by Top 15 Brands: Generation, 2013
Table 6-16: Household Ground/Whole Bean Usage, by Top 15 Brands: HH Income, 2013
Table 8-3: Tea Type/Flavor Drunk at Home & Restaurant in Past 12 Months, HH Income, 2014
Regional differences
Table 8-4: Tea Type/Flavor Drunk at Home & Restaurant in Past 12 Months, by Region, 2014
Race/ethnicity differences
Table 8-5: Tea Type/Flavor Drunk at Home & Restaurant in Past 12 Months, by Race/Ethnicity, 2014
Chapter 9: Factors Influencing Restaurant Coffee Ordering
Factors influencing decision to order type of coffee at restaurant
Taste and timing
Health at the bottom of the list—should it matter?
Graph 9-1: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance
Age
Table 9-1: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance, by Age, 2014
Yes to lower price
Table 9-2: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance, by HH Income, 2014
Race/ethnicity
Table 9-3: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance, by Race/Ethnicity, 2014
Table 9-4: Factors Influencing Decision to Order Type of Coffee at Restaurant, Ranked by Importance, by Employment Status, 2014
Chapter 10: Retail Company and Brand Analysis
Segment summary
Table 10-1: Retail Coffee Sales and Share, by Segment, 2012-2013
J.M. Smucker takes the lead among coffee marketers
Graph 10-1: Top 10 Retail Coffee Marketers, 2013
Hip coffee house Starbucks brand coexists with iconic Folgers and Maxwell House brands
Graph 10-2: Top 10 Retail Coffee Brands, 2013
Coffee marketers and brands by category
Folgers is the undisputed top ground coffee marketer
Table 10-2: Top Retail Ground Coffee Marketers, by Marketer and Brand, 2012-2013
Folgers at the helm of the ground decaffeinated coffee brands
Table 10-3: Top Retail Ground Decaffeinated Coffee Marketers, by Marketer and Brand, 2012-2013
Starbucks captures largest share of whole bean coffee
Table 10-4: Top Retail Whole Bean Coffee Marketers, by Marketer and Brand, 2012-2013
Green Mountain maintains its first mover advantage in single-cup coffee
Table 10-5: Top Retail Single-Cup Coffee Marketers, by Marketer and Brand, 2012-2013
Nestle Nescafe has a stronghold on instant caffeinated coffee
Table 10-6: Top Retail Instant Caffeinated Coffee Marketers, by Marketer and Brand, 2012-2013
Folgers leads instant decaffeinated coffee sales, but all marketers in decline
Table 10-7: Top Retail Instant Decaffeinated Coffee Marketers, by Marketer and Brand, 2012-2013
All marketers of refrigerated RTD coffee category share impressive success
Table 10-8: Top Retail Refrigerated Ready-To-Drink Coffee Marketers, by Marketer and Brand, 2012-2013
Starbucks' Frappuccino dominates cappuccino/iced coffee category
Table 10-9: Top Retail Cappuccino/Iced Coffee Marketers, by Marketer and Brand, 2012-2013
Marketers of “other” coffee additive/flavorings/substitutes is fragmented
Table 10-10: Top Retail Coffee Additive/Flavoring, Refrigerated Coffee Concentrate & Coffee Substitutes Marketers, by Marketer and Brand, 2012-2013
J.M. Smucker
Folgers is the anchor in Smucker's coffee platform
Graph 10-3: J.M. Smucker Retail Sales, by Coffee Category and Brand, 2013
Table 10-11: J.M. Smucker Retail Sales, by Coffee Category and Brand, 2013
Innovation is necessary to meet the evolving needs of coffee consumers
Green Mountain Coffee Roasters
GMCR dominates single-cup coffee category by leveraging brand partnerships
Expired patent opens up the playing field
GMCR demonstrating strong growth despite increased competition
Graph 10-4: Green Mountain Coffee Roasters Retail Sales, by Coffee Category and Brand, 2013
Table 10-12: Green Mountain Coffee Roasters Retail Sales, by Coffee Category and Brand, 2013
Starbucks
Bringing coffee shop coffee to retail
Graph 10-5: Starbucks Retail Sales, by Coffee Category and Brand, 2013
Table 10-13: Starbucks Retail Sales, by Coffee Category and Brand, 2013
Starbucks continues to focus on innovation
Kraft Foods
Kraft rewarded with sales growth despite lower coffee prices
Graph 10-6: Kraft Retail Sales, by Coffee Category and Brand, 2013
Table 10-14: Kraft Retail Sales, by Coffee Category and Brand, 2013
Leveraging single-cup format
Going after the premium coffee consumer
Future plans to bring a powerhouse restaurant brand to retail
Nestlé USA
Nescafé finds success through its Latino consumer base
Table 10-15: Nestlé Retail Sales, by Coffee Category and Brand, 2013
New marketing strategy to bolster demand for Nescafé
Massimo Zanetti Beverage USA
Massimo Zanetti struggles with an underperforming coffee portfolio
Table 10-16: Massimo Zanetti Retail Sales, by Coffee Category and Brand, 2013
Eight O’Clock Coffee Company
Eight O’Clock brand sales down for whole bean and ground coffees
Table 10-17: Eight O’Clock Coffee Company Retail Sales, by Coffee Category and Brand, 2013
Brand refresh strategy to turnaround sales
Joh. A Benckiser
Finding success in the market through premium coffee shop brands
Table 10-18: Joh. A Benckiser Coffee Retail Sales, by Coffee Category and Brand, 2013
Chapter 11: Foodservice Companies and Brands
Dunkin’ Donuts
Brand positioning
Trends and initiatives
Need for speed
Redesign to woo all-day visits
Brand audience
Table 11-1: Dunkin’ Donuts Demographic Analysis, by Demographic & Visit Frequency, 2013
Trends over time
Table 11-2: Dunkin’ Donuts Visits in Past 30 Days 6+ Visits in Past 30 Days, by Age, HH Income & Race/Ethnicity, 2009 vs. 2013
Sales performance: coming up roses
Table 11-3: Dunkin’ Donuts U.S. Sales & Unit Growth, 2009-2013
Green Mountain Coffee Roasters, Inc.
Growth strategy
Brewers
Non-coffee beverage expansion, but coffee still rules
Table 11-4: Green Mountain Coffee & Tea K-Cup Retail Sales, 2012-2013
 Licensing/partner strategy
No license: no Keurig 2.0
Make mine carafe sized
Platform expansion
Cold brewing with Coca-Cola
Channel expansion
At home versus away from home
Table 11-5: Keurig Brewer Placements & Attachment Rate, by Location Type, 2013
At home
Table 11-6: Keurig Brewer Penetration, by Region, 2013
Away from home
Sales performance
Table 11-7: Green Mountain Coffee Roasters, Selected Metrics, 2009-13
McDonald’s
Competitive differentiation: First mover advantage
Growth strategy: Modernize the menu and consumer experience
Menu trends: Expanding the beverage menu
Coffee drinks
Graph 11-1: McDonald’s Entrée, Side, Dessert, Beverage & Appetizer Menu Share, 2013
Table 11-8: McDonald’s Food and Beverage Menu Share, by Menu Item Type, 2013
Beverage flavor expansion beyond coffee
And food pairings to meet a variety of purchase rationales

Table 11-10: McDonald's Breakfast Sandwiches & Pastries: New Items and Limited-Time Offers, 2013-2014

Table 11-11: Starbucks Food and Beverage Menu Share, by Menu Item Type

Table 11-12: Starbucks Company-Operated Stores: Revenue Mix by Product Type, 2009-2013

Starbucks Corporation

Competitive differentiation: Store experience

Menu trends: beverage category expansion around coffee core

Graph 11-2: Starbucks Entrée, Side, Dessert, Beverage & Appetizer Menu Share, 2013

Menu trends: coffee at the core

Table 11-13: Starbucks Demographic Analysis, 2013

Sales performance

Table 11-14: Starbucks U.S. and Global Company-Owned & Licensed Locations, 2012-13

Table 11-15: Starbucks Revenue: Restaurant & Retail/Foodservice, 2009-2013; Product Type & Geography, 2011-2013

Table 11-16: Starbucks Comparable Sales, Transaction & Ticket Growth, by Geography, 2009-2013

Mid-size players

Caribou Coffee

Brand audience

Table 11-17: Caribou Coffee Restaurant Brand Users, by Demographic, 2013

Tim Hortons

On the menu

Brand initiatives and strategies

Table 11-18: Tim Hortons Brand Users, by Demographic, 2013

Table 11-19: Tim Hortons Franchised Sales Systemwide Sales Growth & Sales per Restaurant: Canada and U.S., 2009-13

Table 11-20: Tim Hortons U.S. and Canada Locations, by Restaurant Type, 2009-13

Appendix

Methodology

Consumer survey methodology

Market size and forecast

Terms and definitions

Restaurant categories

Consumer segmentation groups

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