

European coffee Report 2021

Analysis of the coffee market and consumption in Europe

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Outline

1. Methodology
2. Coffee consumption in Europe
3. Coffee consumption inside and outside European households
4. How do European's drink coffee?
5. Favorite coffee brands in Europe

Methodology

Metodología



Sample

- The survey was conducted among 5,204 respondent's representative of the national population 18+ of each country, as follows:
 - France: 1,024
 - Germany: 2,049
 - Spain: 1,099
 - Italy: 1,032



Methodology

- The survey was conducted online, on YouGov's own dashboard.
- Country-level results have been weighted to be representative of the national population aged 18+
- Total-level results have been weighted according to the numerosity of each country's population aged 18+



Fieldwork

- France, Germany, Italy and Spain 25th November to 2nd December 2021

European coffee consumption

73% of Europeans over the age of 18 drink coffee regularly, while only 9% never drink coffee.

Spaniards and Italians are more likely to drink coffee than French and Germans.

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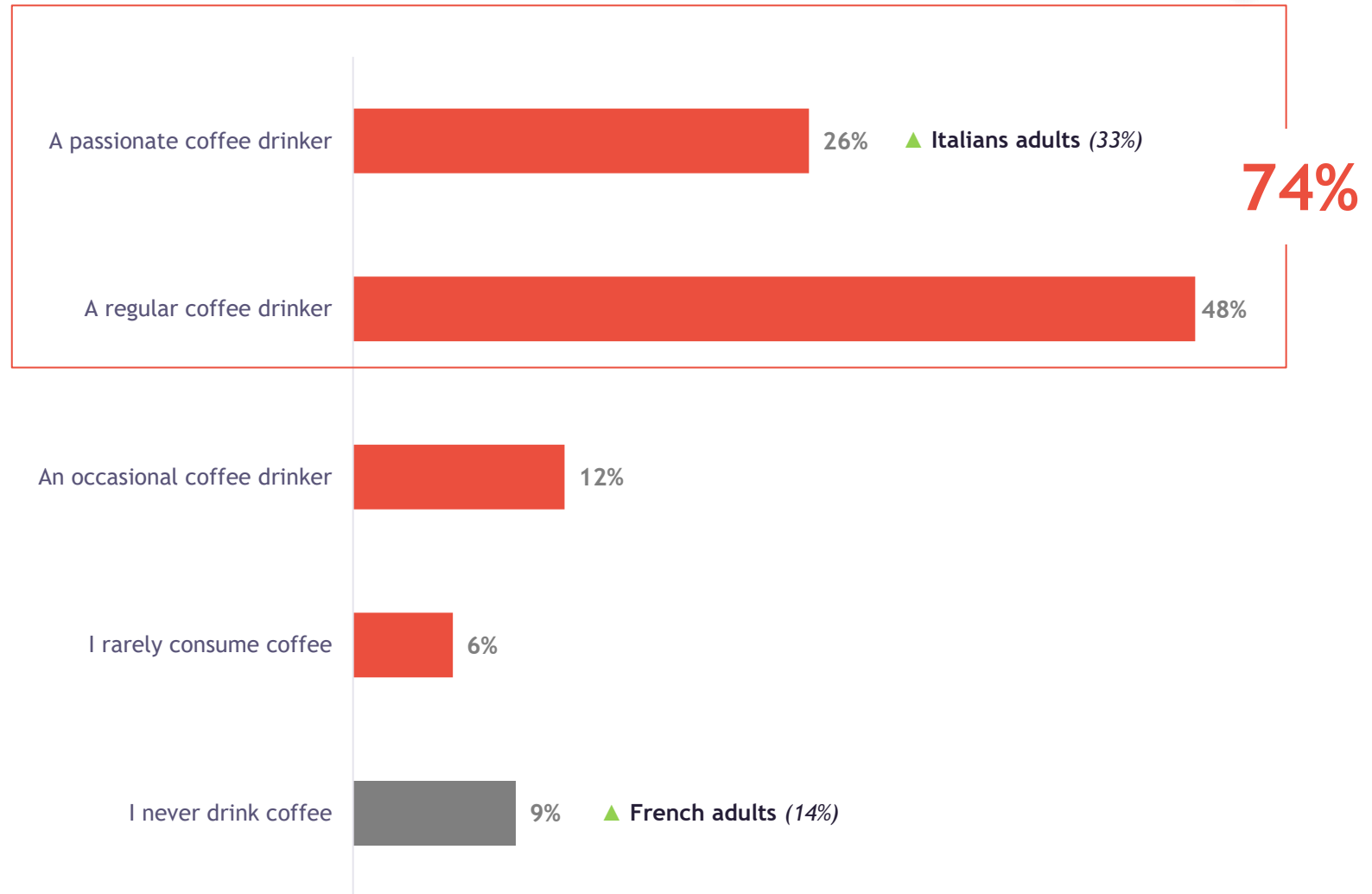
The average number of regular coffee drinkers is higher in Italy and Spain, where 80% and 78% respectively of the adult population report drinking coffee regularly.

However, Germans are likely to consider themselves 'passionate' coffee drinkers (27%), second only to Italians (33%).



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Which of the following best describes you in terms of your coffee consumption? Do you consider yourself...



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Base : adults from 4 countries (n=5204), of which France (1024), Germany (2049), Spain (1099), Italy (1032). Overall results weighted to reflect each country's population.

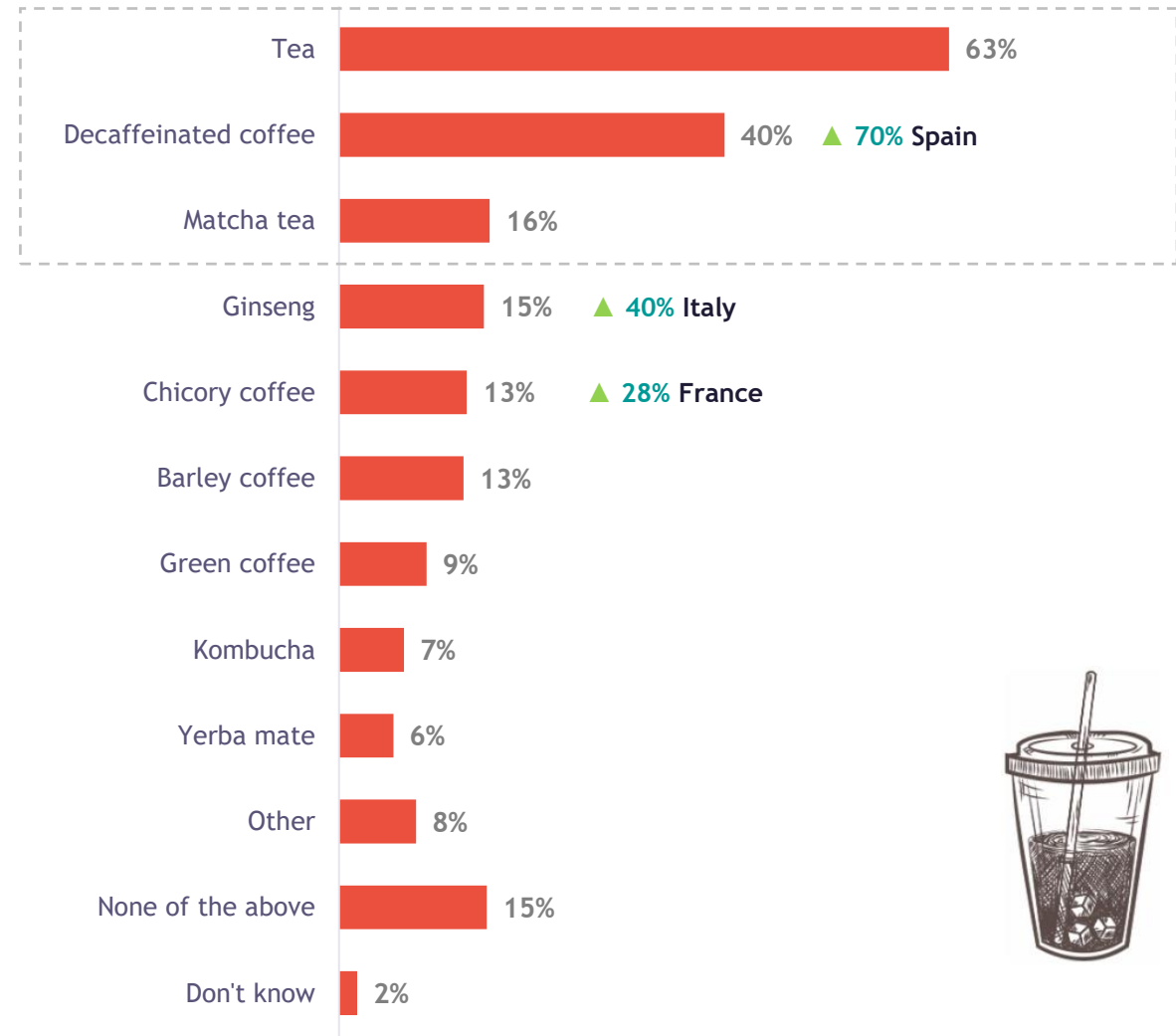
▲ ▼ Statistically higher/lower than global average

Tea and decaf are by far the most widespread alternatives to coffee in the 4 countries surveyed, drunk by 63% and 40% respectively.

Spaniards are the only ones who drink **Decaffeinated** coffee (70%) more than Tea (66%), while the **French** are the most passionate about **Chicory Coffee** (28%) and **Italians** about **Ginseng**.



Top 3 Europe



Do you ever consume any of the following coffee alternatives? Please select all the answers that apply.

Base : adults from 4 countries (n=5204), of which France (1024), Germany (2049), Spain (1099), Italy (1032). Overall results weighted to reflect each country's population.

▲ ▼ Statistically higher/lower than global average

Do you...?



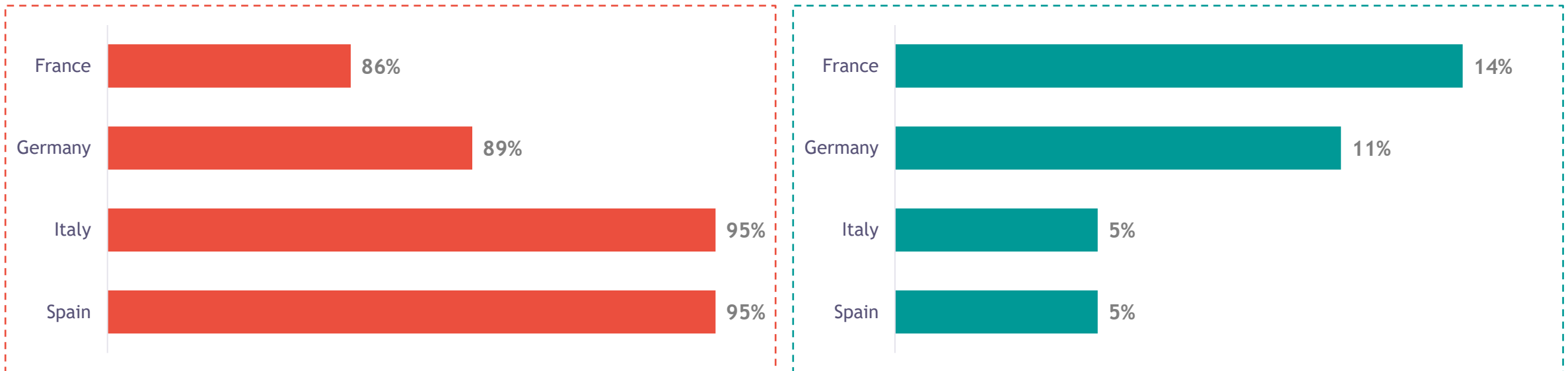
Drink Coffee



Never Drink Coffee



Differences between countries



Why do you...?

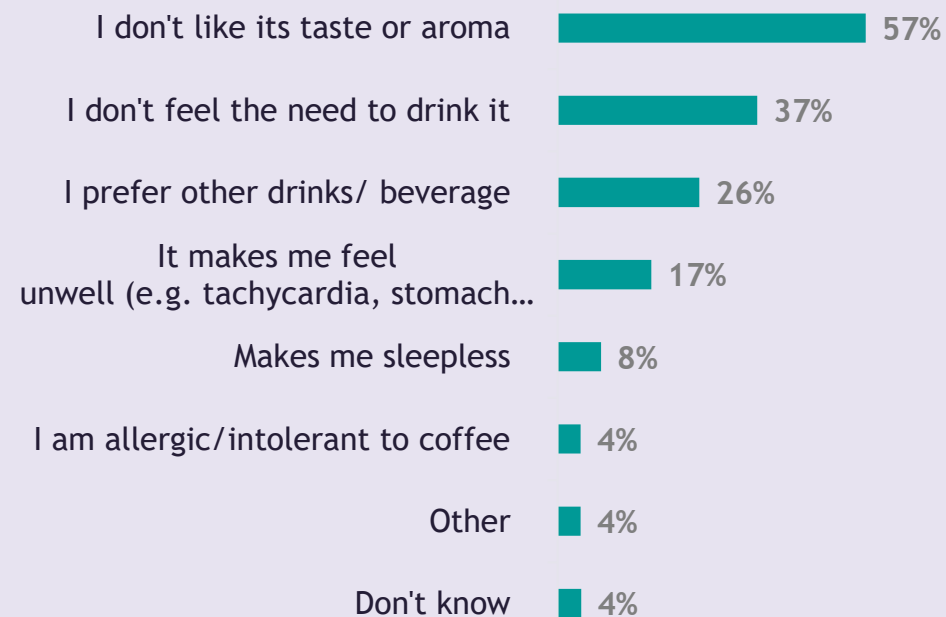


Drink Coffee?



You've said you drink coffee, at least occasionally. For what reasons do you consume coffee? Please select all that apply Base : adults from 4 countries who drink coffee (n=4730)

Never drink coffee?



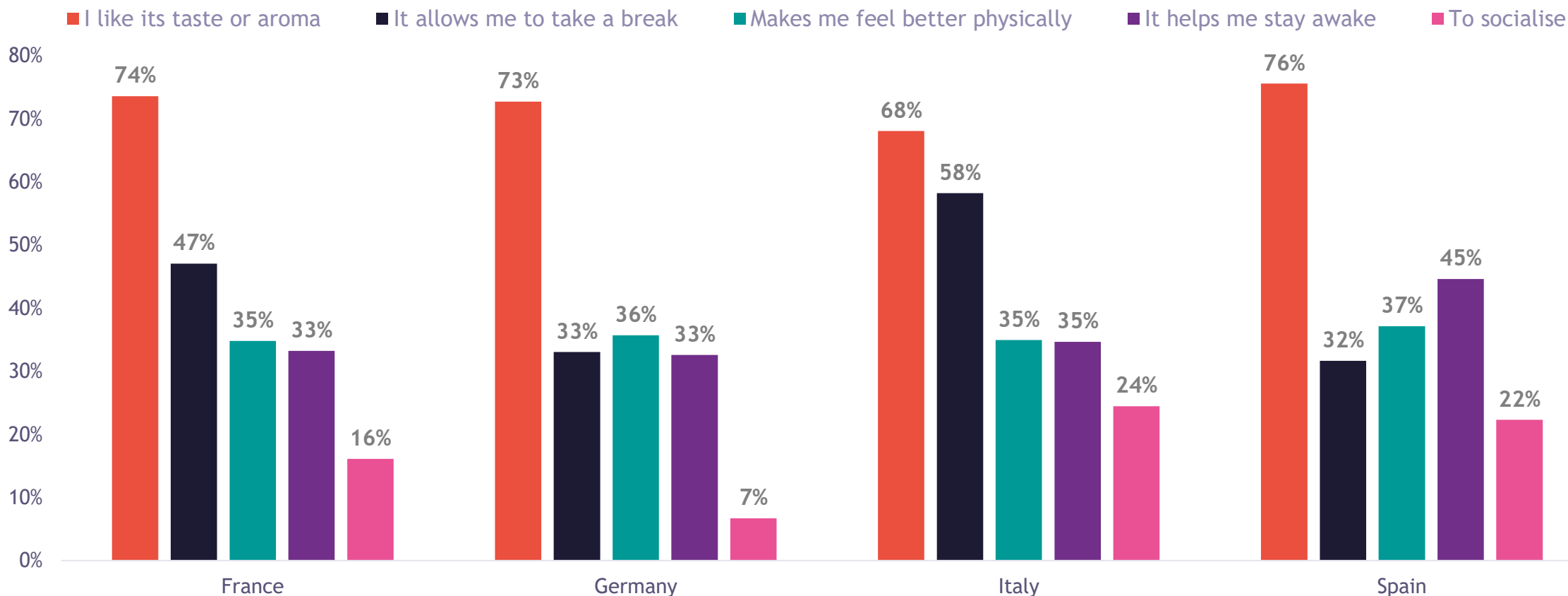
You have said you do not drink coffee. What are the reasons? Please select all that apply. Base : adults from 4 countries who do not drink coffee (n=487)

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Reasons why people drink coffee in Europe



Coffee's aroma is the most cited reason across all countries, but other reasons differ. French and Italians often mention that coffee allows them to take a break (47% and 58% respectively), while Spaniards say it helps them stay awake (45%) and makes them feel better (37%), a reason shared with Germans (36%).

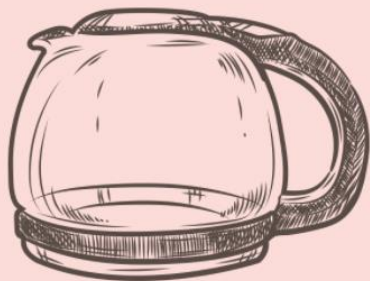


Coffee consumption inside and outside European households

Coffee is mostly drunk at home, where 78% of coffee drinkers consume it more at least once a day.

Coffee is mostly drunk at home, with 78% of coffee drinkers consuming it more than once a day

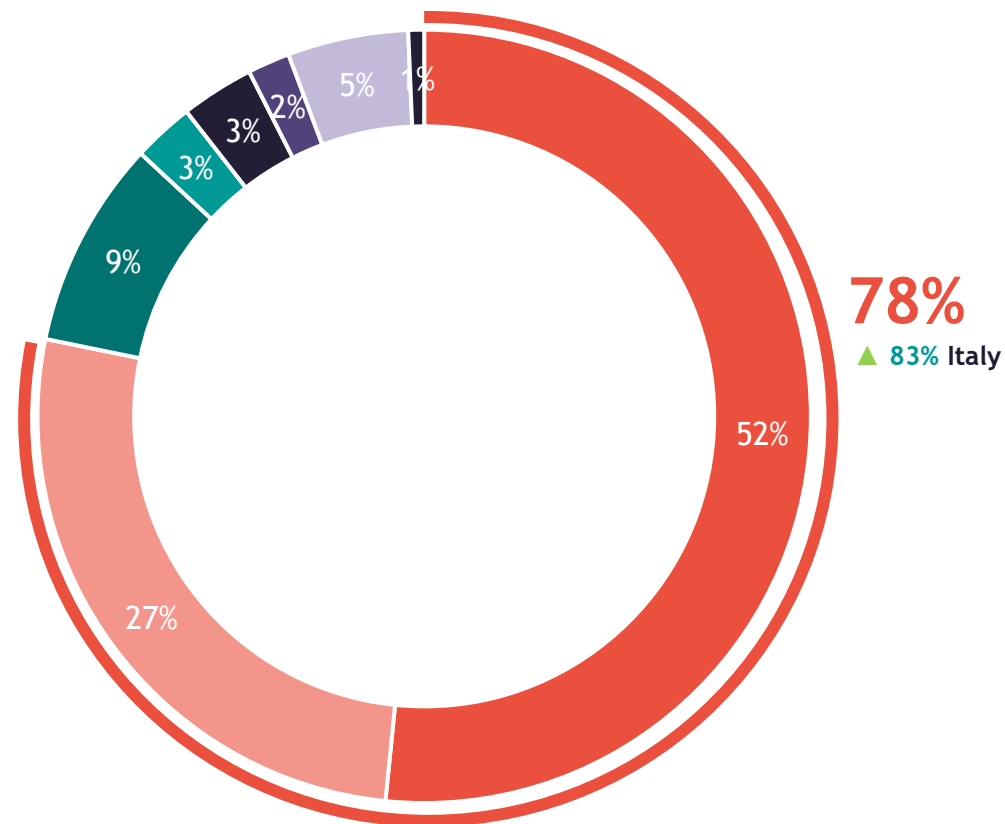
Italians are the top at-home consumers of at least one coffee a day (83%).



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How often do you consume coffee at home?

- Several times a day
- Once a day
- Several times a week
- Once a week
- Several times a month
- Once a month
- Less often or never
- Don't know



For each of the following situations, how often do you consume coffee? Think of both espresso and mixed with milk (e.g. cappuccino). Please select only one answer for each situation.

Base : adults from 4 countries who drink coffee n: 4717)

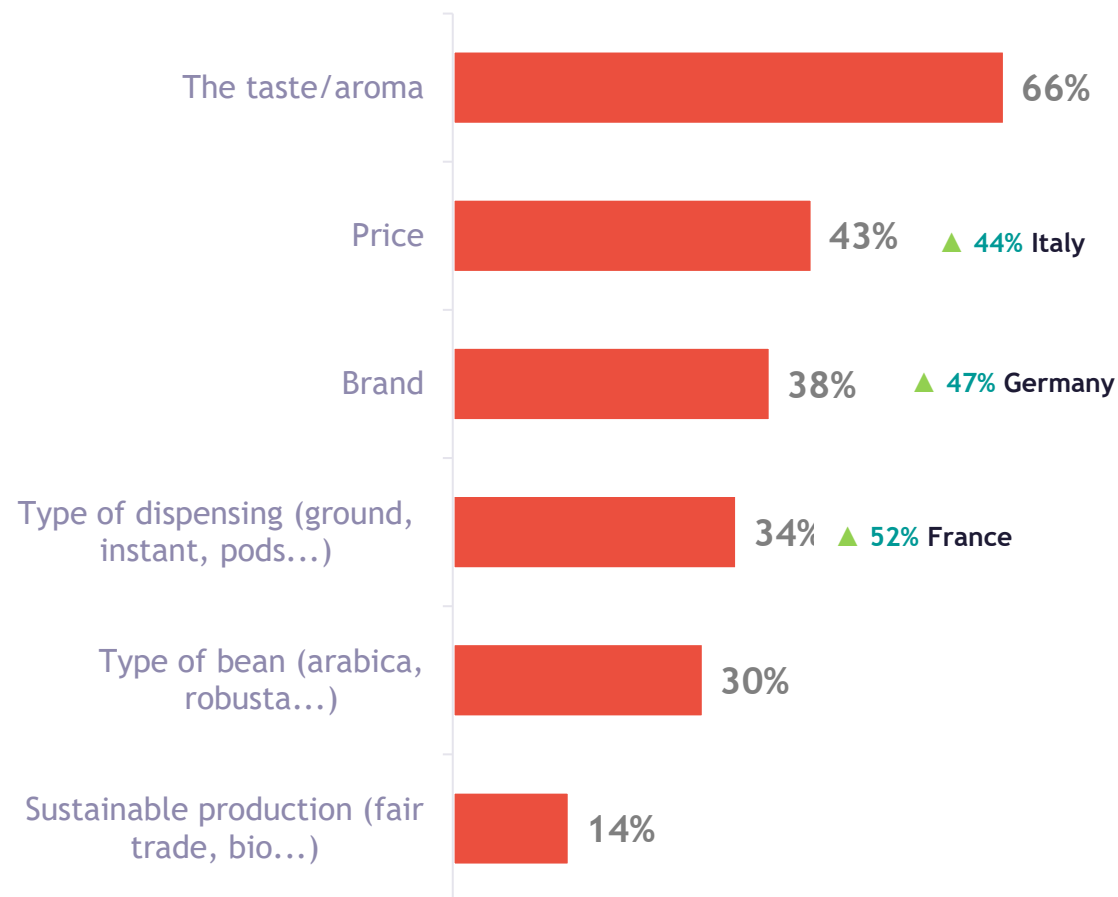
▲ ▼ Statistically higher/lower than global average

When buying coffee for home consumption, taste/aroma is the main driver (66%), followed by price (43%) and brand (38%)

French respondents are more likely to make the choice based on type of dispensing, Germans are more subject to price, Italians to the brand.

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Main selection criteria



What are the main criteria when choosing to purchase coffee for your home consumption? Please select up to 3 answers.

Base : adults from 4 countries who drink coffee at home n: 4456)

▲ ▼ Statistically higher/lower than global average





For domestic consumption in Europe, coffee is mainly bought in brick-and-mortar supermarkets, while in Italy Online and Branded stores are also quite common

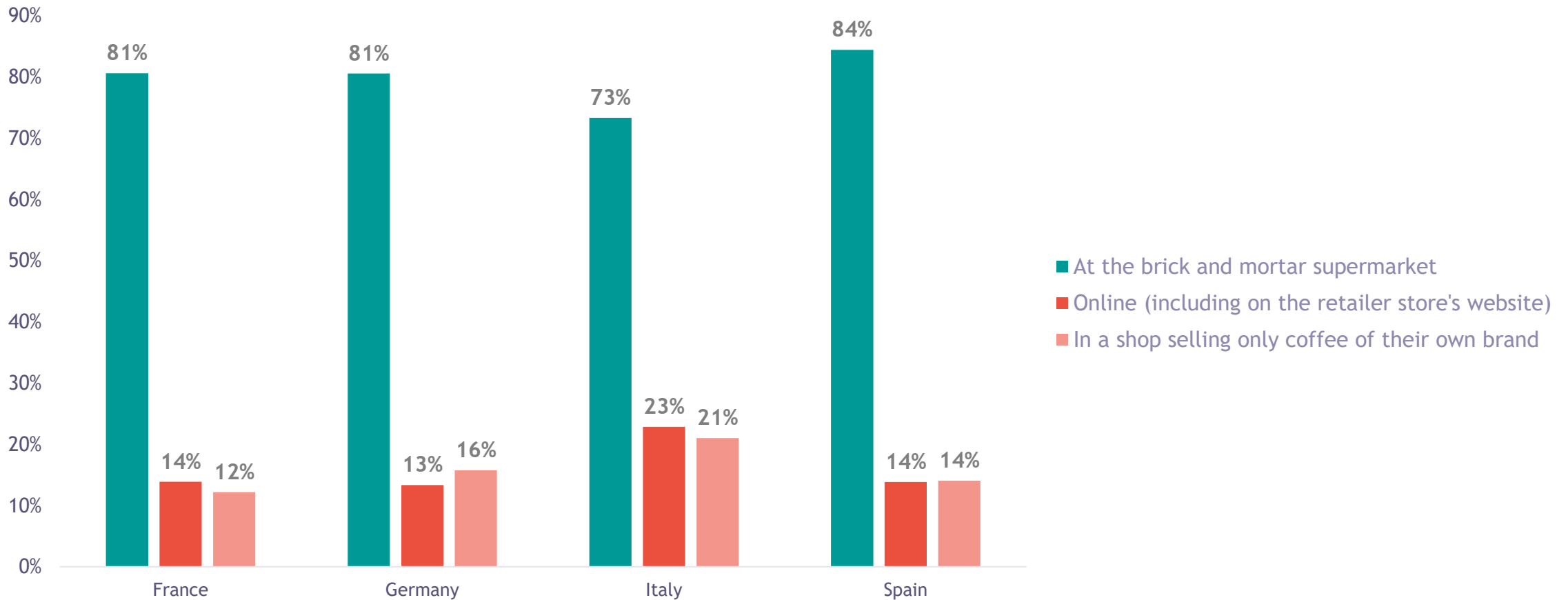


You said you sometimes consume coffee at home. Where do you usually buy the coffee meant for your home consumption? Please select all that apply.
Base : adults from 4 countries who drink coffee at home n: 4456)

▲ ▼ Statistically higher/lower than global average

Top 3 places in Europe to buy coffee

The supermarket is the favorite place to buy coffee in the countries analyzed, with the percentage being 4 p.p. higher of the average in Spain. Germany is the only country that chooses to buy coffee in specialized shops (16%) as the second option after the supermarket, while Italy is the country that chooses to buy coffee online to a greater extent (23%). Finally, France equals both online and in specialized shops.



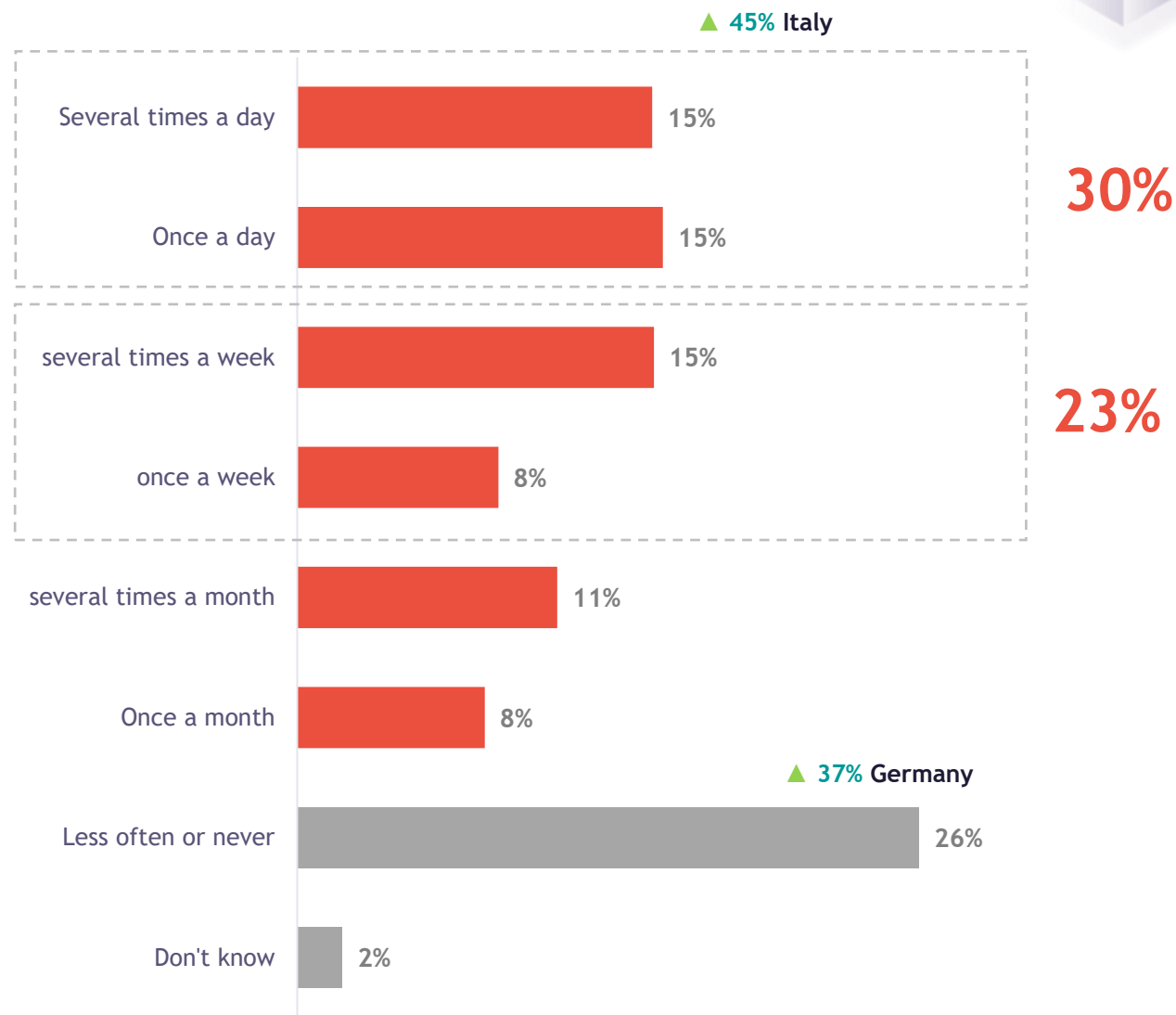
Outside home, 30% consume it at least once a day

Italians are again the most frequent consumers, with 45% drinking at least once a day away from home, followed by Spaniards, 40%, French, 25% and Germans, 19%.

Outside the home, the number of people who never or hardly ever use it increases (26%), with Germans at the top of the ranking (37%).



Frequency of consumption outside the home



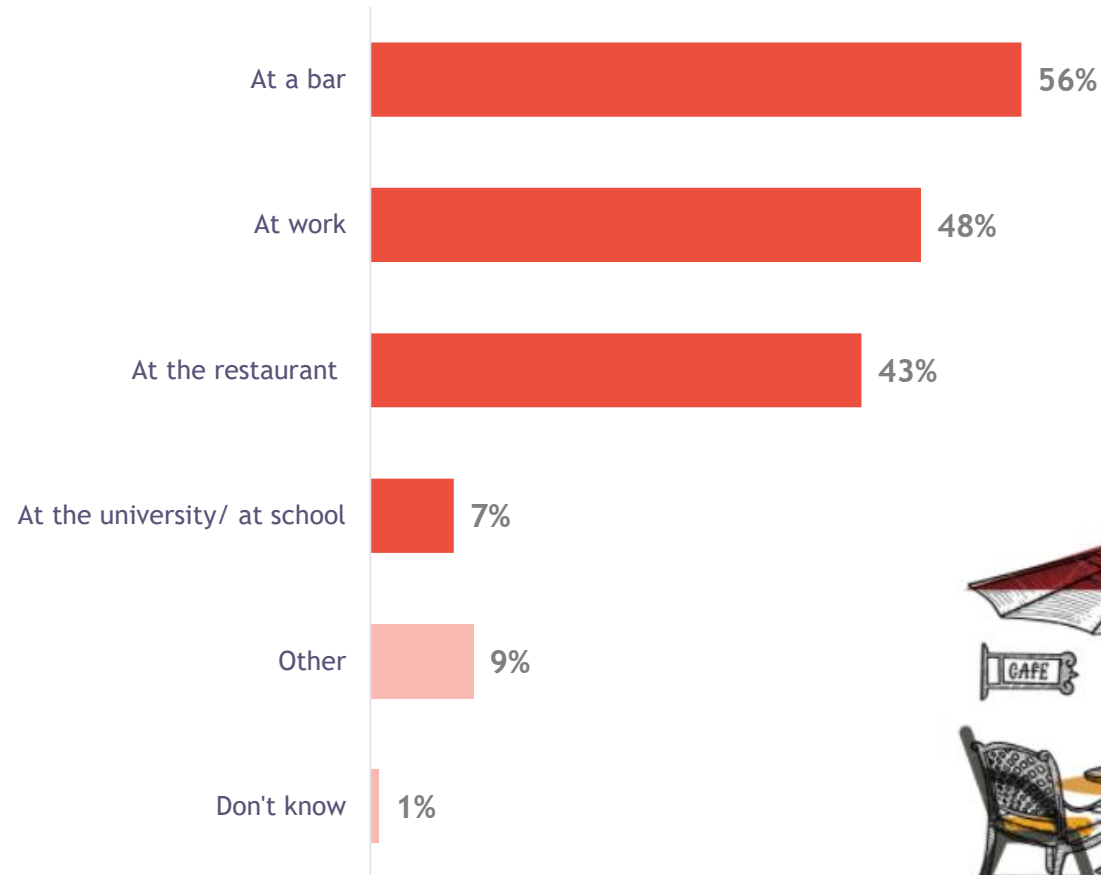
For each of the following situations, how often do you consume coffee? Think of both espresso and mixed with milk (e.g. cappuccino). Please select only one answer for each situation.
Base : adults from 4 countries (n: 4717)

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Consumption outside home takes place mainly at the bar (56%), followed by the office (48%), followed by the restaurant (43%)

Lastly, the university or school, where 7% of respondents say they drink coffee.

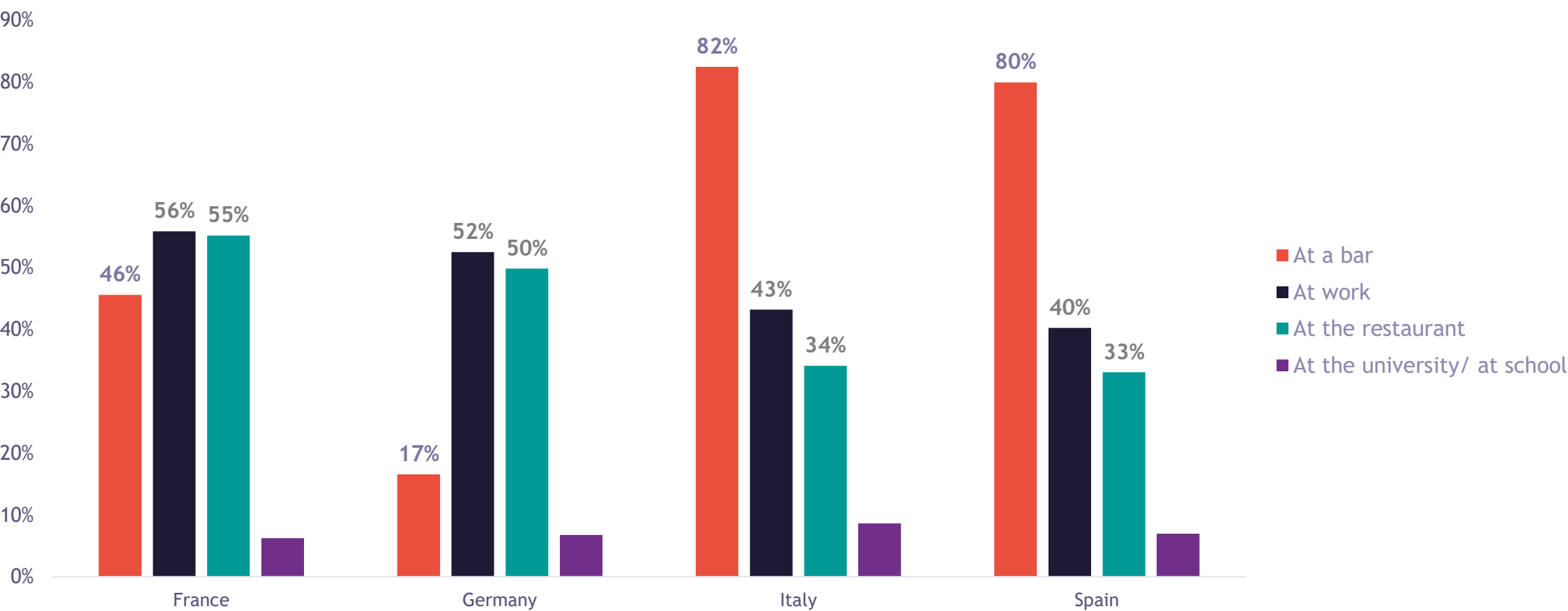
Out-of-home consumption places





Top places in Europe to drink coffee out of home

For Italians and Spaniards, the bar is the favorite place to drink coffee out of home (82% and 80% respectively) while the French and Germans drink it more often at work (56% and 52%) or at the restaurant.



You said you sometimes consume coffee out of home. Where? Please select all that apply.
Base : adults from 4 countries who drink coffee out of home (n=3410)

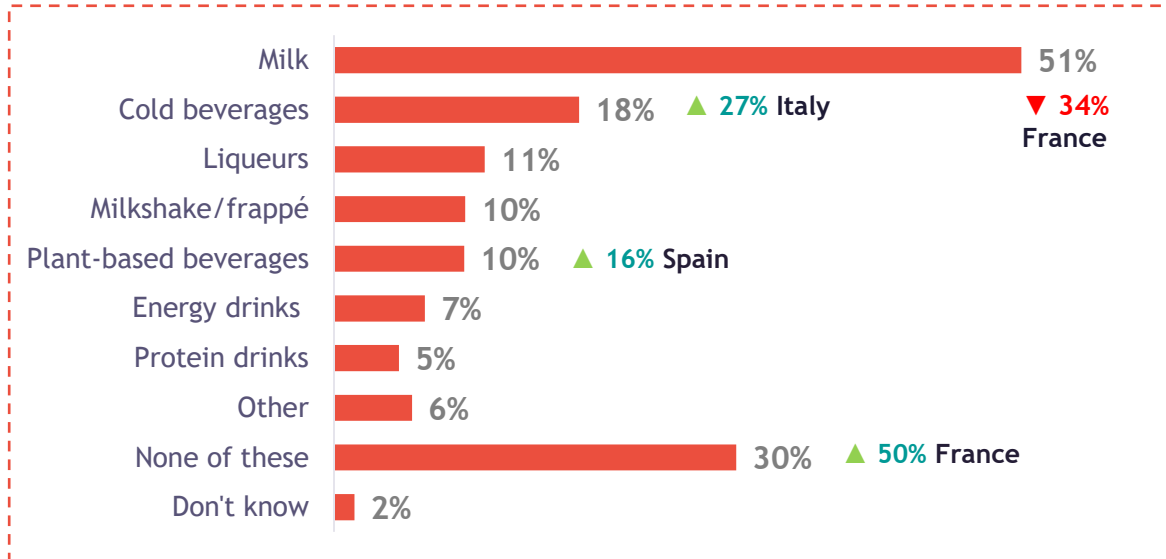
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Ways to drink coffee in Europe, at home and out of home

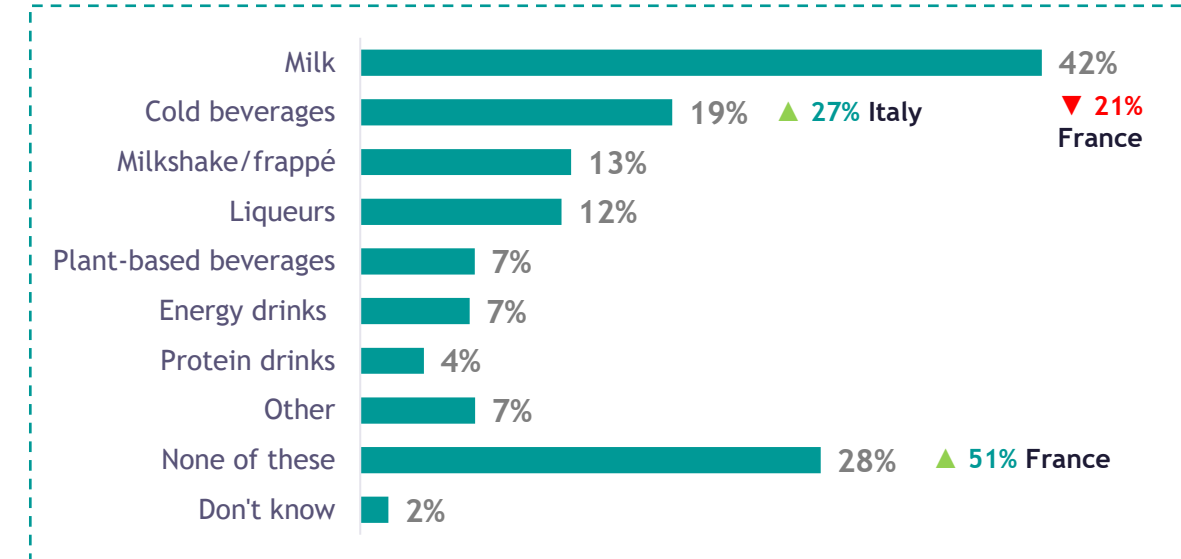
Milk is the most commonly drunk beverage with coffee, especially at home (53%), but cold beverages (18%) and drinks are also quite common, especially in Italy.

At home



Which of the following beverages do you happen to drink coffee with? Please select all that apply for each situation
Base : "At home" adults from 4 countries (n=4717)

Out of home



Which of the following beverages do you happen to drink coffee with? Please select all that apply for each situation
Base : "Out of home" adults from 4 countries (n=3410)

For Spaniards, **plant-based drinks** are in third place at home (16%).

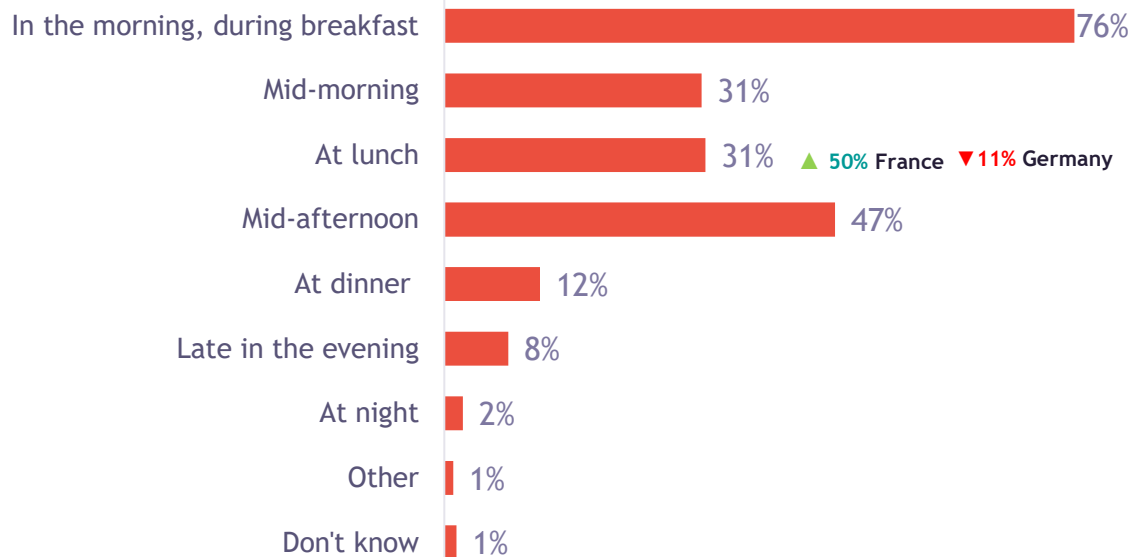
France is the least likely to ever drink **coffee mixed** with other beverages, **especially milk**.



Europe's favorite time for coffee: for breakfast at home, mid-morning and mid-afternoon when out

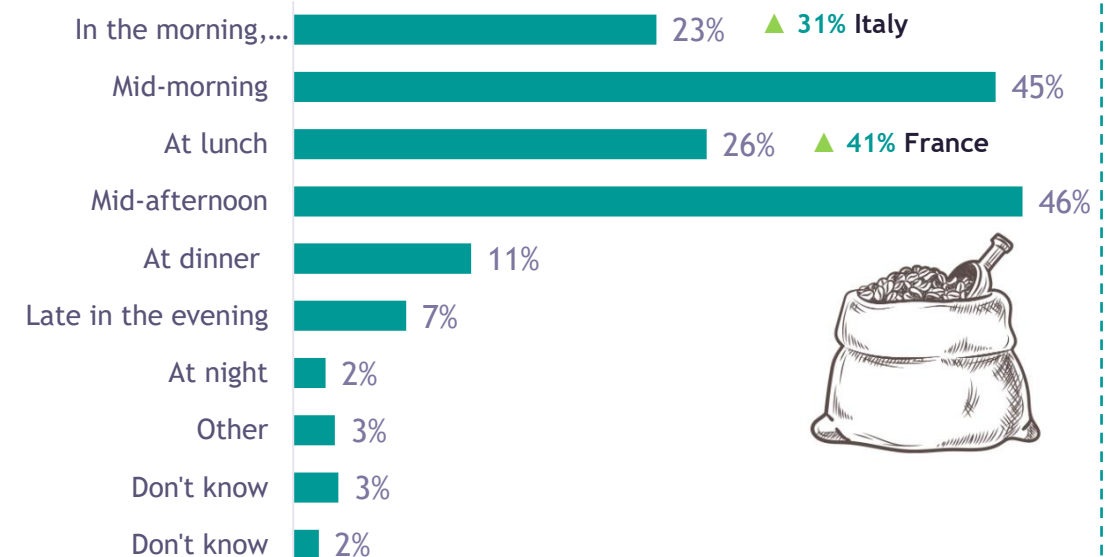


At home



In the following questions, we will talk about coffee consumption. Think about when you consume it espresso, or long, as well as mixed with milk or plant-based beverages (e.g. cappuccino). What time during the day do you consume coffee in each of these two situations? Please select all that apply.
Base : "At home" adults from 4 countries (n=4717)

Out of home



In the following questions, we will talk about coffee consumption. Think about when you consume it espresso, or long, as well as mixed with milk or plant-based beverages (e.g. cappuccino). What time during the day do you consume coffee in each of these two situations? Please select all that apply.
Base : "Out of home" adults from 4 countries (n=3410)



For French, **lunchtime** is the second favorite time to drink coffee both indoors and outdoors, while Germans are the least likely to drink coffee at this time of the day.

Italians are the most likely to have breakfast out of home and drink coffee.

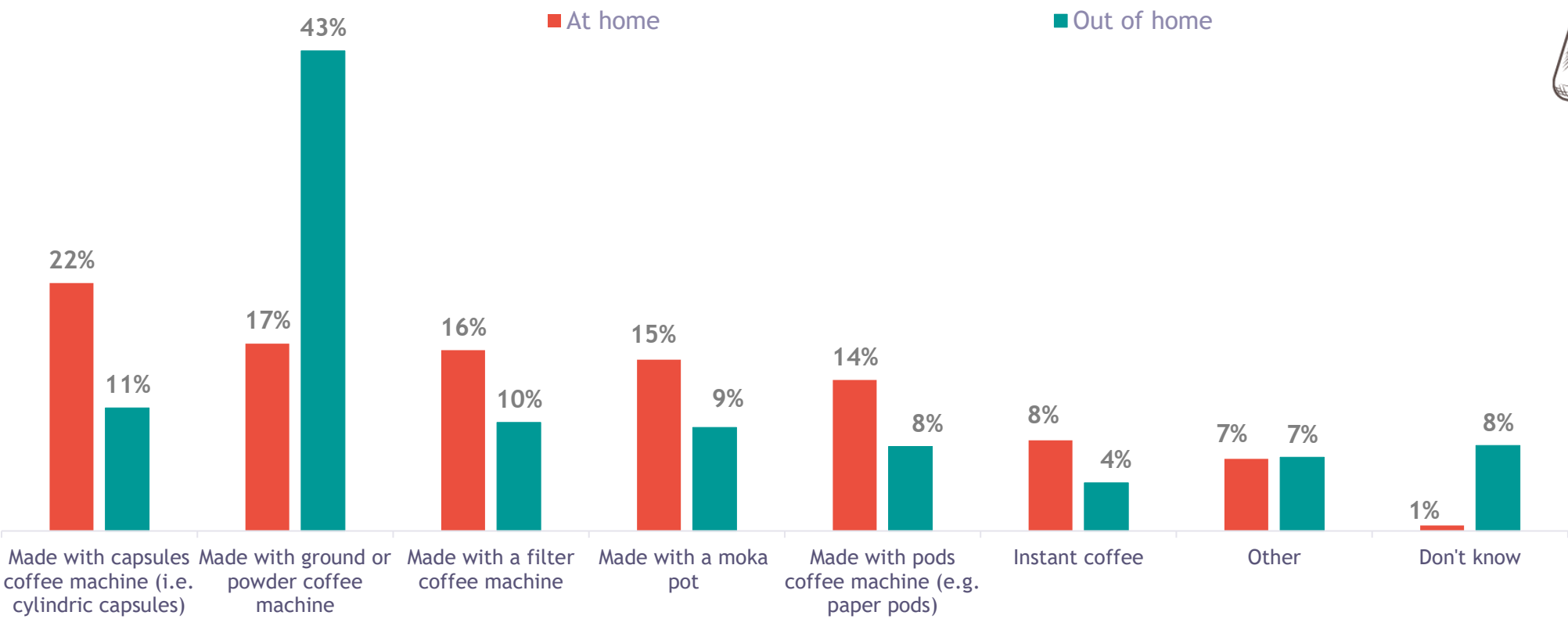
How do European's drink coffee?

The capsule coffee machine takes first place at home (21%), while ground coffee machines (44%) take first place outside the home



Preferred type of dispensing coffee at home and out of home

Capsule coffee machines are the first choice at home (22%), while ground coffee machines (43%) represent the relative majority of out-of-home consumption.



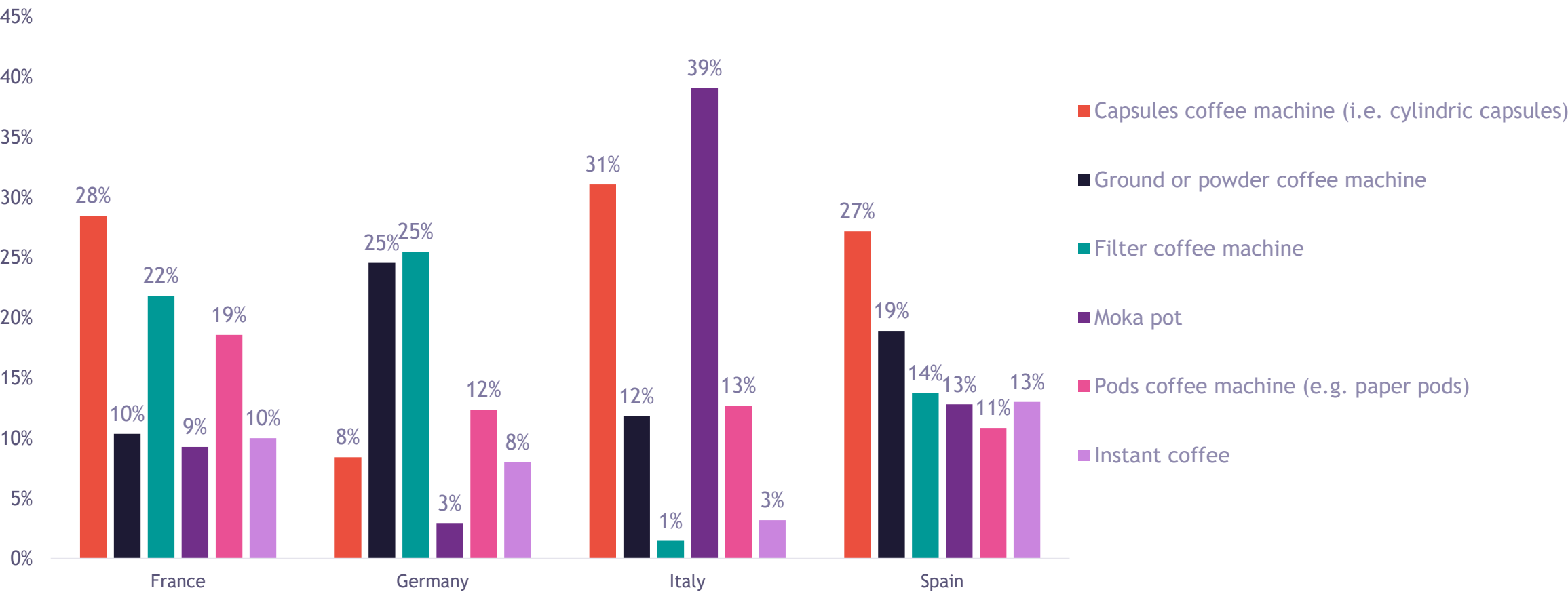
How do you usually drink coffee...?
Base: adults from 4 countries (At home n=4438) (Out of home n: 3410)

▲ ▼ Statistically higher/lower to global average

Coffee preparation at home divides Europe



Italians choose the moka pot (39%) and reject instant coffee (3%), while Germans often use filter coffee machines but are not into capsules, which instead are the top pic for French and Spanish respondents.



How do you usually drink coffee...?



Bitter coffee (with no sugar) takes the top spot at home and abroad



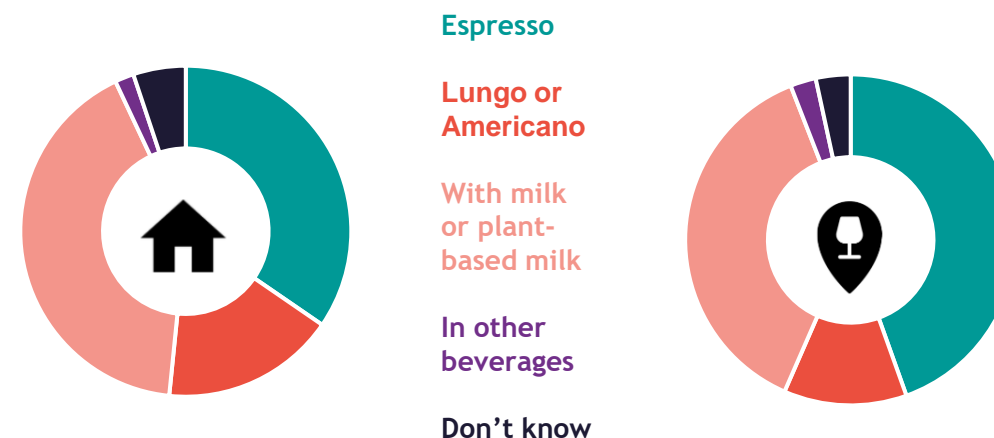
Caffeinated coffee, indoors and outdoors



Coffee with milk is the most consumed coffee at home



Coffee is blended according to more than 2/3 of respondents



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How do you usually drink coffee?
Base : "At home" adults from 4 countries (n=4438) "Out of home" adults from 4 countries (3410)

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At home

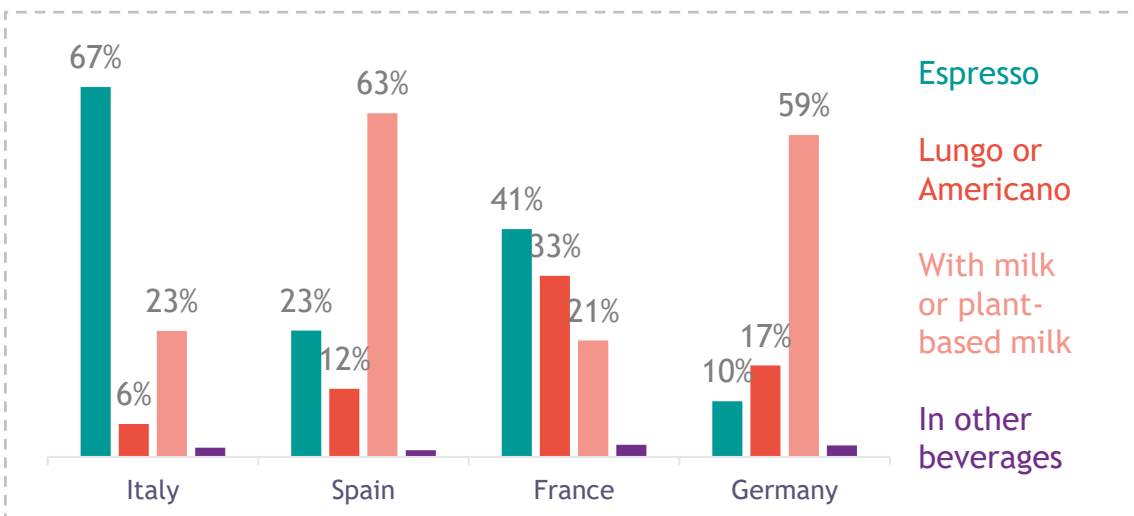
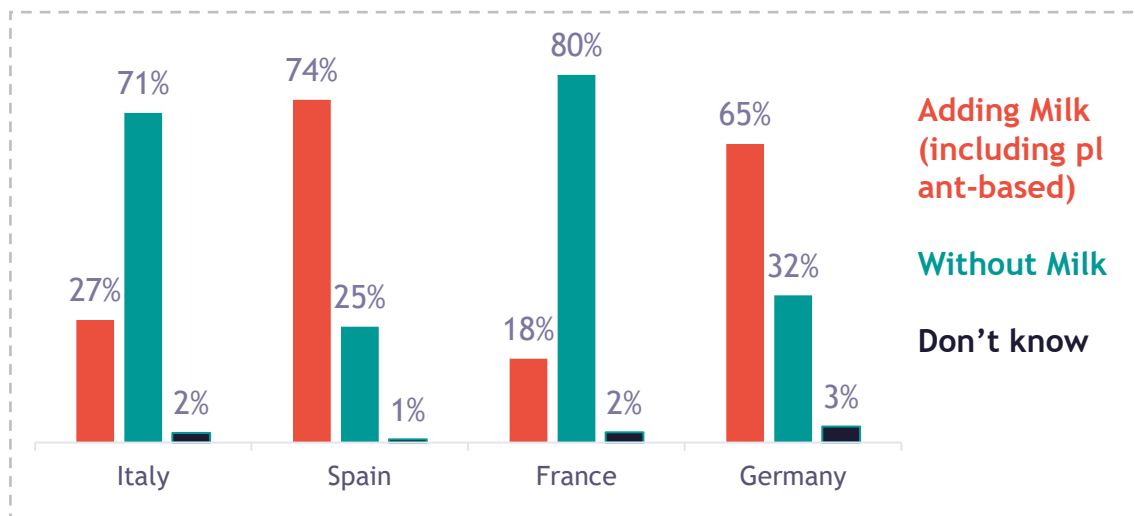
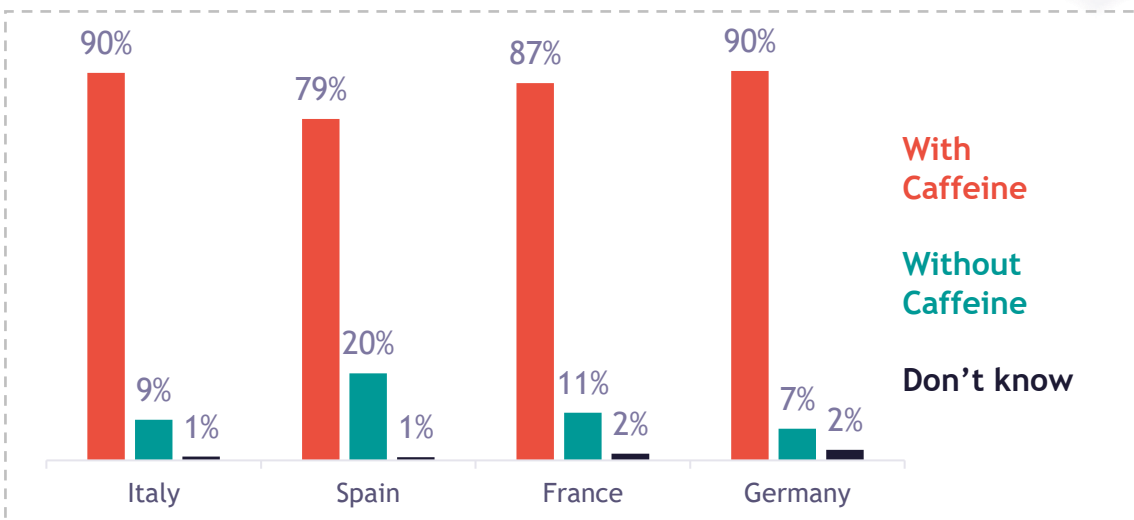
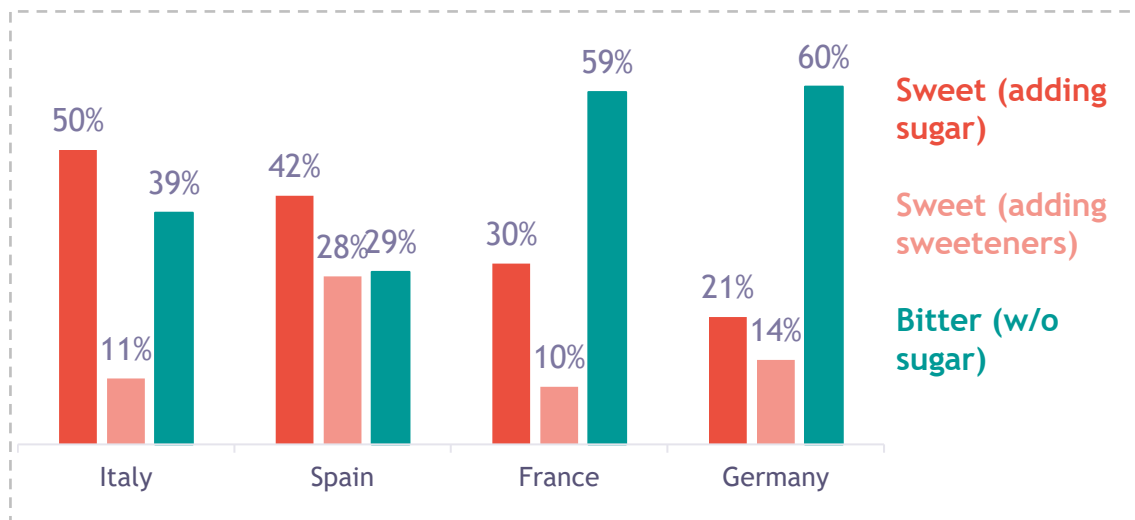


Out of home

How do you usually drink coffee at home...?



Differences between countries



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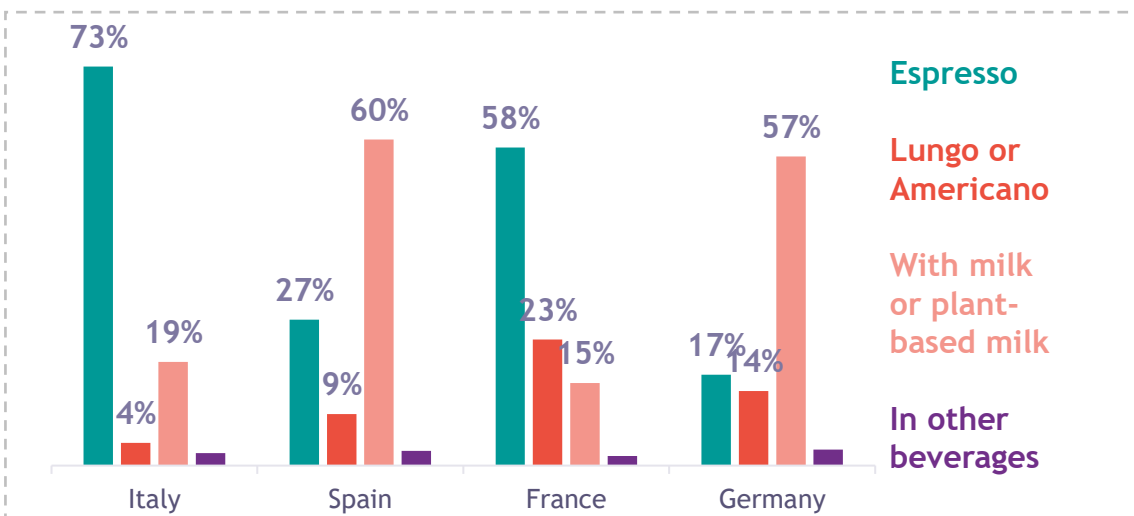
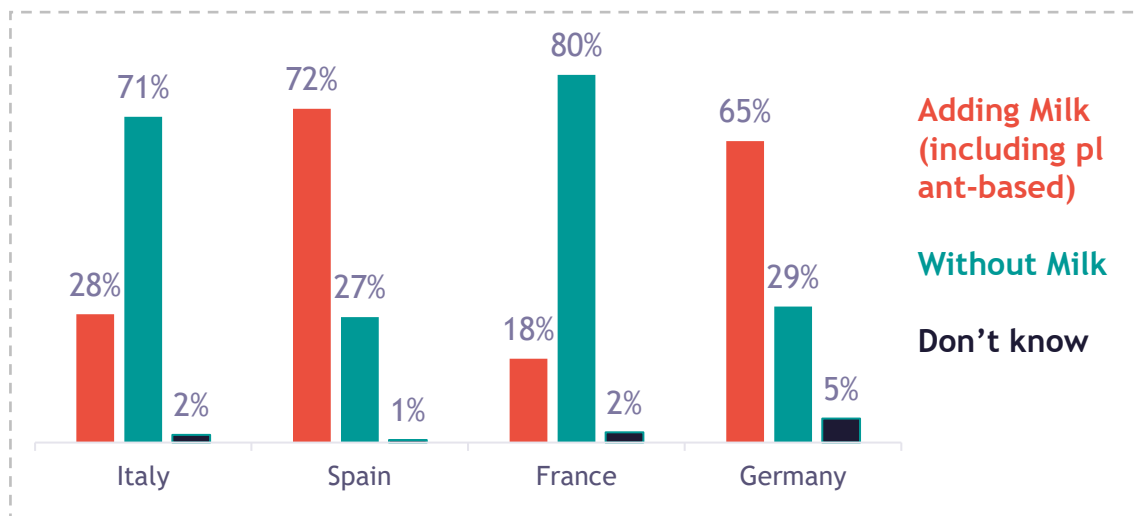
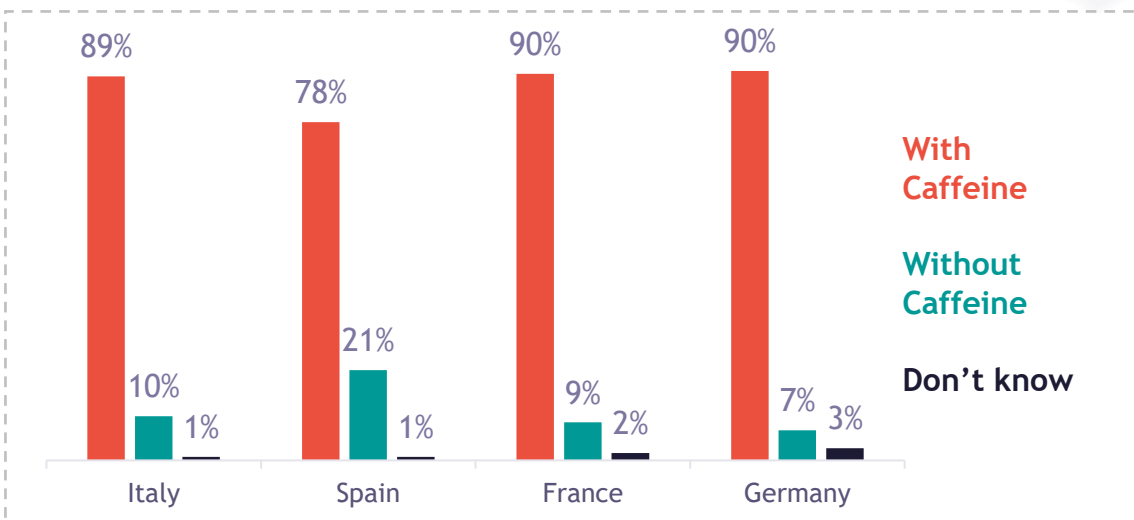
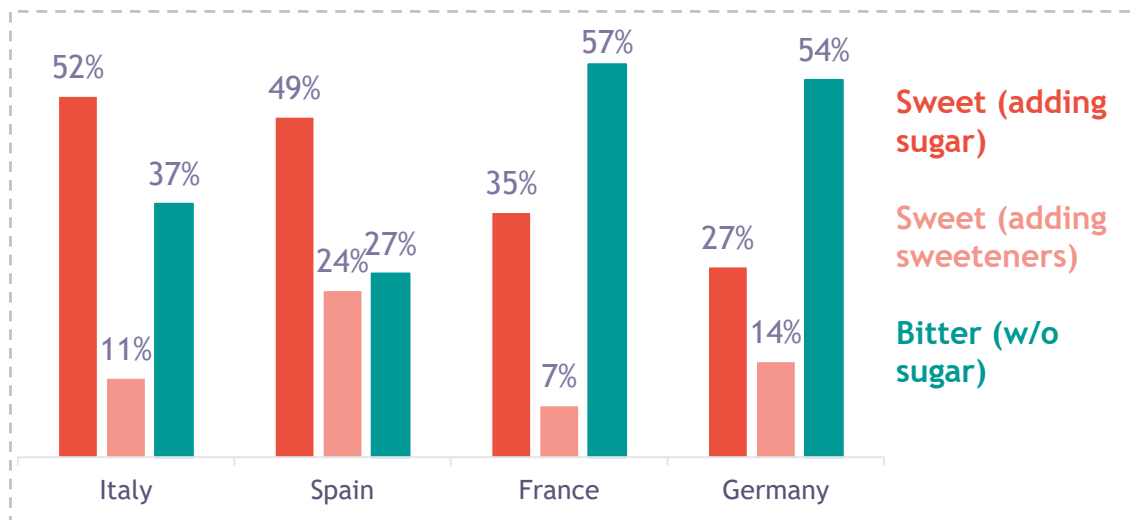
How do you usually drink coffee?
Base : "At home" adults from 4 countries (n=4438)

▲ ▼ Statistically higher/lower to global average

How do you usually drink coffee Out of home ...?



Differences between countries



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How do you usually drink coffee?
Base "Out of home" adults from 4 countries (3402)

▲ ▼ Statistically higher/lower to global average

Favorite coffee brands in Europe



TOP 5 EUROPE'S MOST KNOWN COFFEE BRANDS

Brand	TOTAL	France	Germany	Italy	Spain
Nescafé	78%	77%	78%	74%	83%
Nespresso	77%	78%	72%	78%	81%
Lavazza	69%	70%	70%	91%	37%
Senseo	42%	75%	71%	-	-
Illy	40%	22%	31%	80%	31%

TOP 5 EUROPE'S COFFEE BRANDS

Nescafé tops the Awareness score, followed by Nespresso and Lavazza. While Nescafé and Nespresso display similar awareness levels across countries, Lavazza has a clear point of strength in Italy (like Illy) and weakness in Spain. Senseo owes its position to France and Germany.



→ Thank you

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