

PULSAR\*



## The State of Coffee Audiences 2023

Understanding how the world is talking about coffee

# From commodity to culture

Coffee. We wake up with it, rely on it to concentrate at work, and gather around it for moments of leisure. We also love talking about it.

In this report, we'll unpack the myriad of different perspectives, behaviors, decisions and brands that audiences bring to the coffee conversation – from sustainability concerns to the ever-shifting connotations around connoisseurship.

Audience interest in coffee continues to grow and grow, with both social and search interest on the rise – a clear sign that coffee will continue to be central in the culture, in business and in our individual self-image.

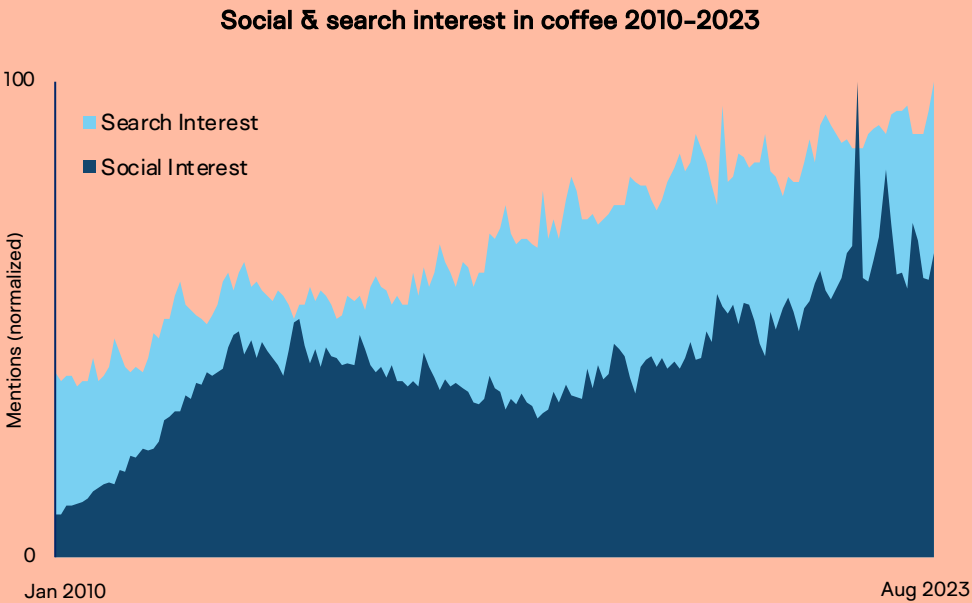
**Data Collection Period:** Mar 1<sup>st</sup> – Aug 31<sup>st</sup> 2023

**Channels:**

- |           |           |                |               |
|-----------|-----------|----------------|---------------|
| X         | TikTok    | Blogs          | Broadcast     |
| Reddit    | Pinterest | Forums         | Radio         |
| Facebook  | Tumblr    | Online News    | Expedia       |
| Instagram | YouTube   | Amazon Reviews | Google Search |

**Markets/Languages:**

Global data collection. Analysis in English-language



Coming to the boil: the growth of coffee as a topic

When gets people talking coffee

When coffee becomes attitudes

Coffee industry highlights

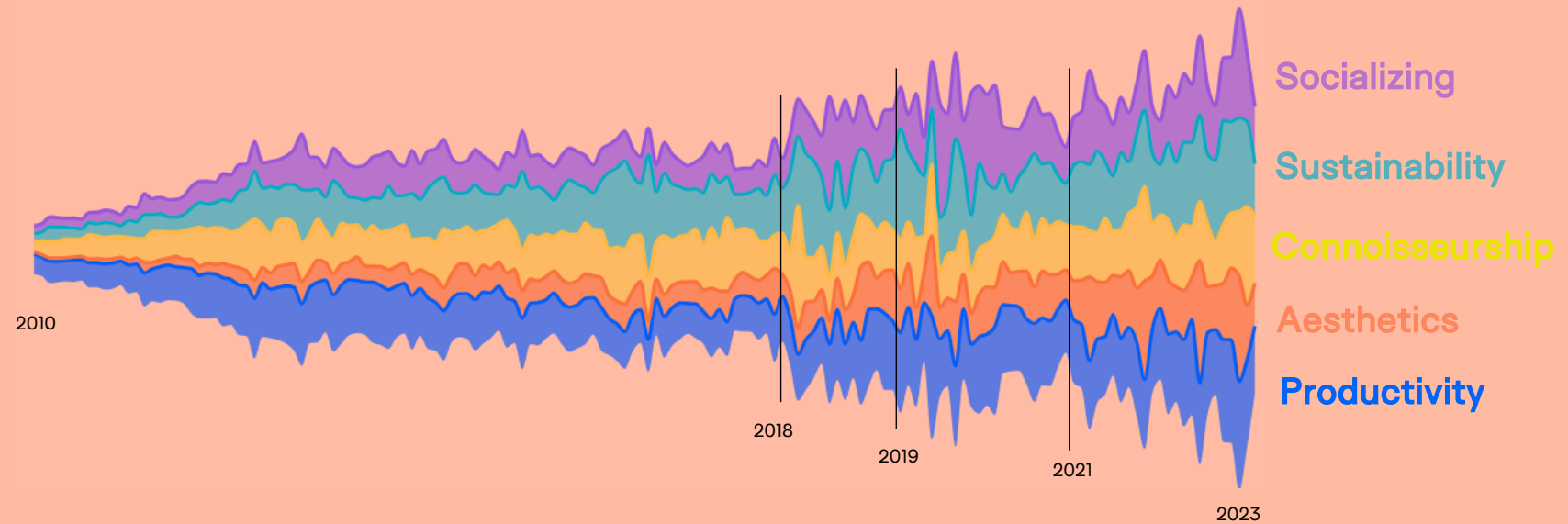
# The shifting associations around Coffee

## From Productivity to Socializing, to Sustainability

As with any topic as popular as coffee, distinct conversations emerge within the wider topic. When honing in on five of these, we can see how they contribute to how we understand and talk about coffee: Socializing, Sustainability, Connoisseurship, Aesthetics and Productivity.

What does this lens tell us? For one thing, that some of these trends (Socializing and Sustainability) are inherently “streaky,” with interest oscillating from month to month.

Productivity, meanwhile, appears have been mentioned less and less in relation to coffee, until the pandemic and WFH behaviors saw the combination become, once again, a part of the mainstream vernacular. And then there’s Aesthetics, a hitherto undeveloped conversation has also been turbocharged by pandemic behavioral change (in the case, sharing at-home, stylised creations and a rejuvenated appreciation of the cafe ‘vibe’).



# How coffee trends percolate through society

From the growth of decaf to DIY drinks, different trends condition what we want & expect from coffee

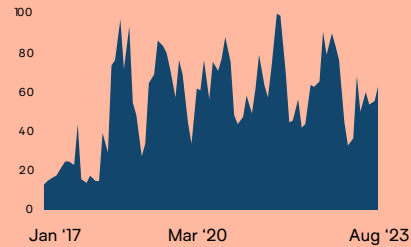
It's not only the associations we have towards coffee as a topic that evolve over time, but also our interest levels in specific types of drink and consumption.

For instance, the idea that one might be able to walk into a cafe or shop and choose “sustainable coffee” grew over successive years – before the cost of living crisis, and shifting priorities, contributed to a decline in online interest levels.

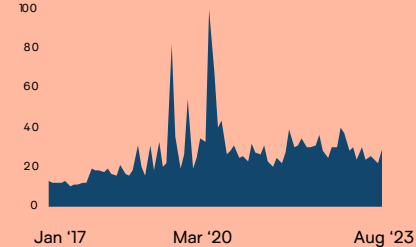
Similarly, at-home coffee has steadily grown as a topic, as drinkers look for more affordable alternatives. This elevated interest still stops some way short of the spike that global lockdowns caused in 2020, typified by the explosion in DIY coffee, but it appears likely that some behaviors, like brewing ice coffee at home, remain from that period. This latter trend is also likely accentuated by the increase in both global temperatures and WFH culture.

And then there's the steadily growing interest in decaf – itself a signifier of increased concern around health. The pandemic saw mentions hit an all-time high – likely a corollary of high-stress, a focus on health, and a breakdown in long-established commuting or social habits. It hasn't yet reached its pandemic height in the years since, but 'quitting coffee' completely has continued to grow as a topic.

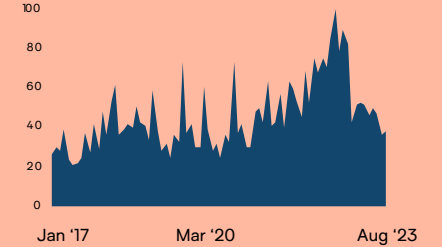
Iced Coffee



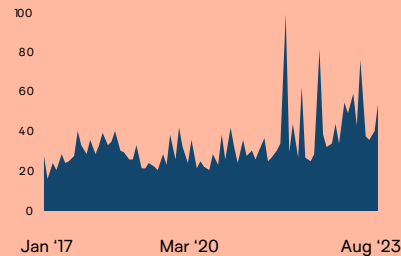
At-home Coffee



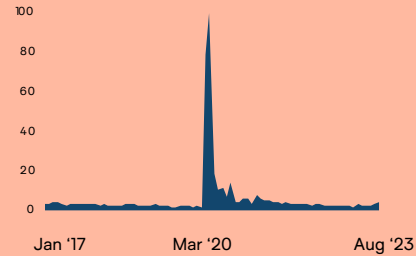
Sustainable Coffee



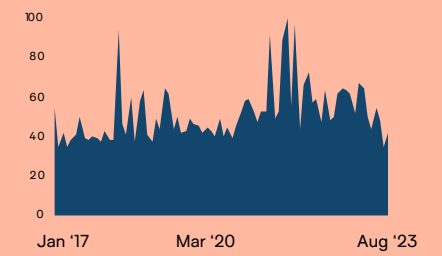
Luxury Coffee



DIY Coffee



Decaf Coffee





# Taking the temperature

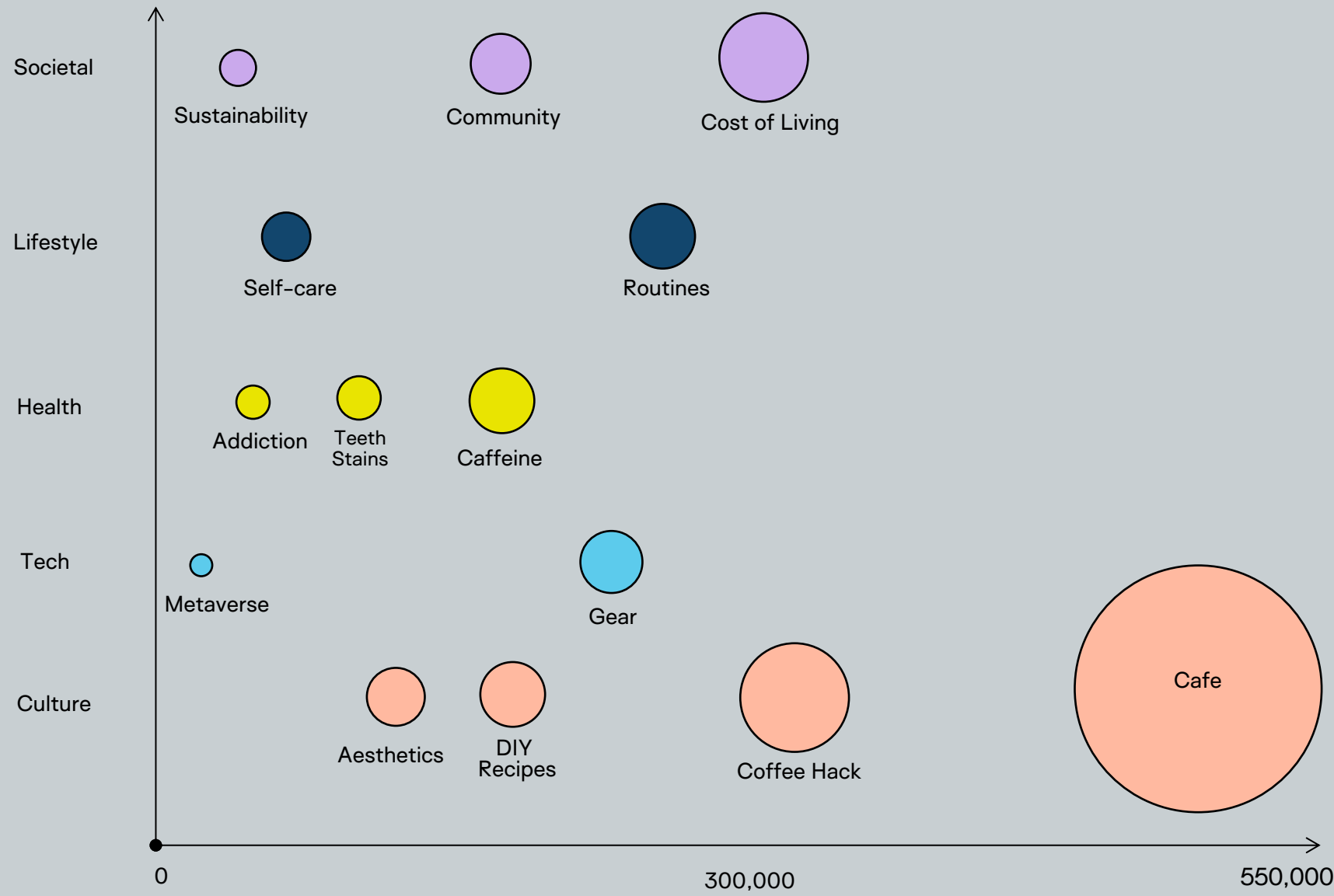
## What topics make up the coffee conversation?

Coffee is ubiquitous – meaning that the conversation around it has the potential to overlap with all kinds of different topics.

Some of these topics are too be expected – Cafes, for instance, emerge as a dominant topic of conversation. This tells us that their position in conditioning our expectations of quality coffee, and affirming the communal side of consumption, remains integral.

Community is also resnet as a topic of discussion in of itself, as too are Sustainability and the Cost of Living. The latter, in fact, far outweighs the former, due perhaps to the urgency and imminence of the lifestyle and consumption changes it evinces.

The Metaverse also makes a somewhat surprising appearance, thanks to Starbucks’ launch of a metaverse product. This move has met as much mockery online, as praise. But it has also engendered a brand advocacy amongst web3 communities somewhat more intense than Starbucks’ typical relationship with customers.



The most-mentioned topic split into lifestyle, health and culture in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC

Coming to the boil: the growth of coffee as a topic

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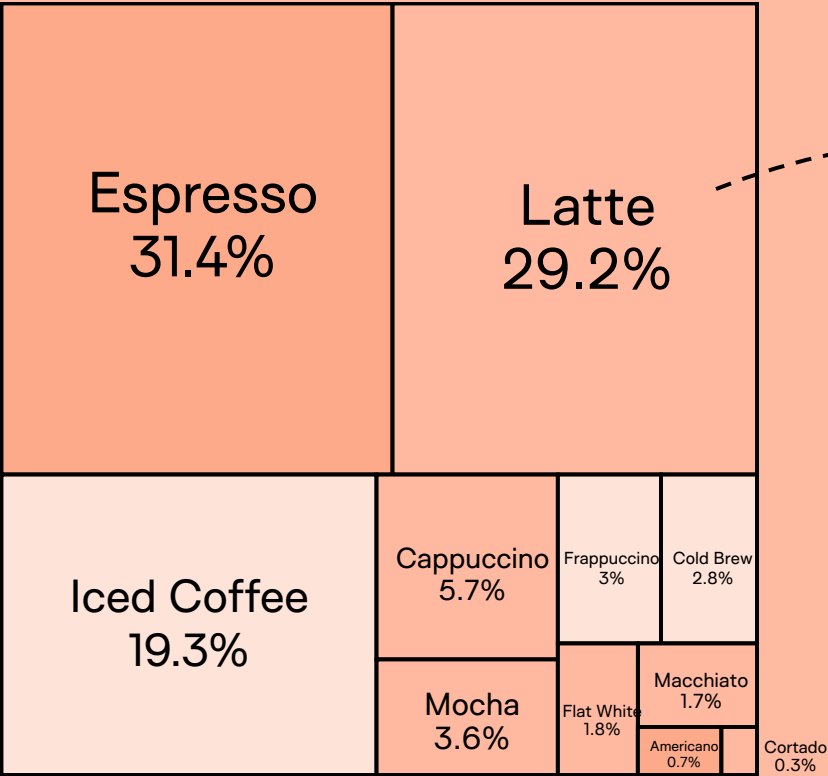
# What's your order?

Espresso & Latte account for over half the mentions of coffee drinks

Curtains for the cappuccino? False dawn of the flat white? Despite the various consumption trends that have prevailed over the years, it's espressos and lattes that dominate mentions of coffee online. Why is this?

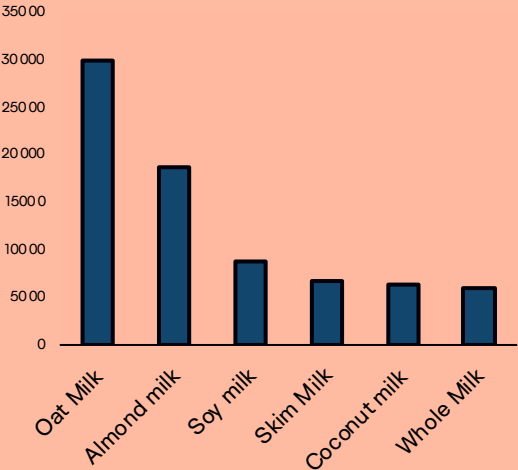
While espresso is mainly associated with the boom in interest in machines, the growth of the latte reflects the beverage's appeal among coffee aficionados.

The latter also feeds into the conversation around alternative milks, with the volume of mentions around "oat lattes" – and its linguistic components – confirming its newfound ubiquity.



- Espresso/black coffee
- Coffee with milk
- Iced/cold coffee

Plant-based milks have long de-throned skim & whole 'regular' milk



Mentions of coffee drink types (left) and mentions of milk types associated with latte (right) in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC



# Catering to cup – how we buy our coffee

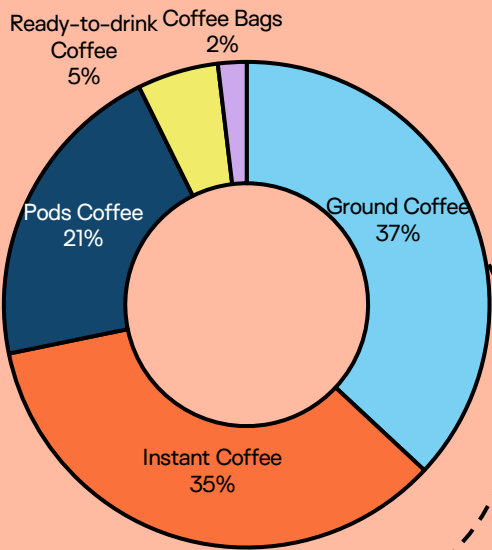
Convenience is important, but so too is indulging connoisseural preferences

Which of the options lining supermarket shelves and boutique stores do consumers most discuss?

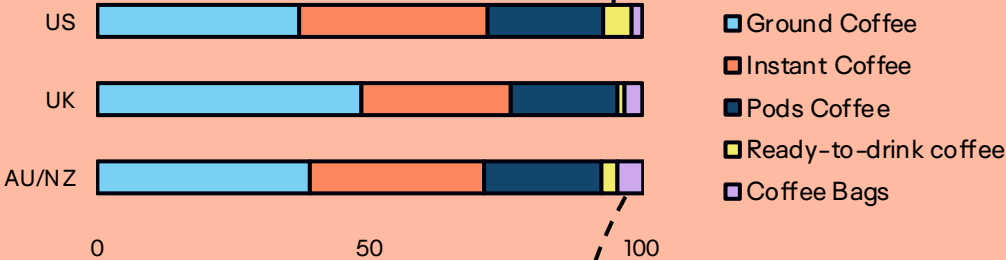
Ground coffee dominates appears the most, due to surging demand for artisanal experiences, as well subscription services catering to this kind of drinker.

Instant coffee, meanwhile, is boosted by the popularity of DIY concoctions such as Dalgona (hand-beaten) coffee, a Korean coffee trend that originated over the pandemic.

The UK, Australia and New Zealand share a common penchant for ground coffee and convenient coffee bags, potentially influenced by their tea-drinking traditions. We also uncovered evidence of individuals stocking up on coffee bags as a contingency plan. In contrast, the United States exhibits a notable surge in Ready-to-Drink (RTD) coffee, reflecting the country's robust coffee-to-go culture, driven by a preference for convenience.



Just looking at all the different coffee bean subscription companies. There's so many! Anyone got any particular recommendations and/or refer a friend discounts? 🙄



I do prefer the canned coffee drinks over Red Bull for an afternoon bump.

do your coffee bags stocked in any particular supermarket etc?? Flying out for a funeral and the coffee situation will be poor for the next couple of days so picking up some bags would be ace 🙄

# Bittersweet symphony

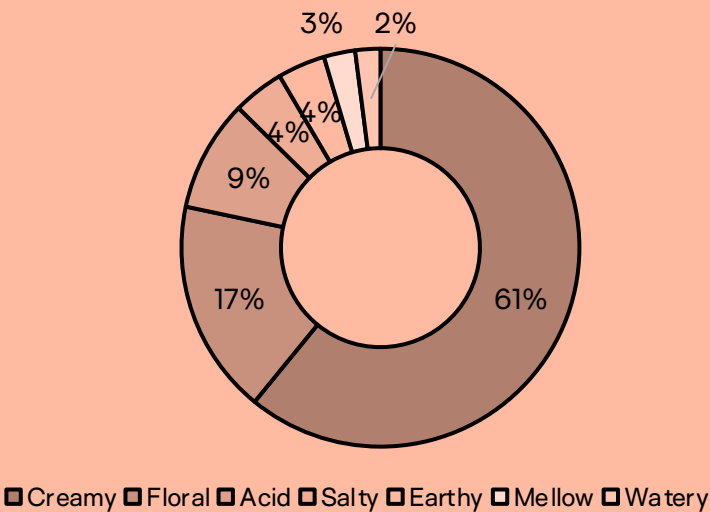
## Taste, flavor & food associations

For all that the predominant taste note in this conversation is “creamy,” foregrounding the consumption of milk (or ‘milk’) over the coffee bean itself, increasing levels of coffee connoisseurship mean that more challenging, global flavors are becoming increasingly notable.

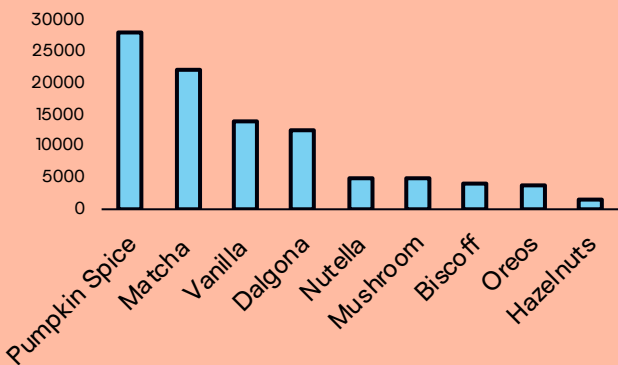
Matcha, for instance, emerges a significant presence within the conversation. To some degree, this is because it’s regularly cited as non-caffeinated alternative to coffee – but it also is increasingly mentioned as a component in at home coffee concoctions. This focus on DIY recipes was turbo-charged over the pandemic and appears to have commuted into durable behaviors.

Visualizing how often different foods are mentioned in conjunction with coffee, meanwhile, underscores the extent to which the beverage remains associated with snacking, with breakfast a distant second.

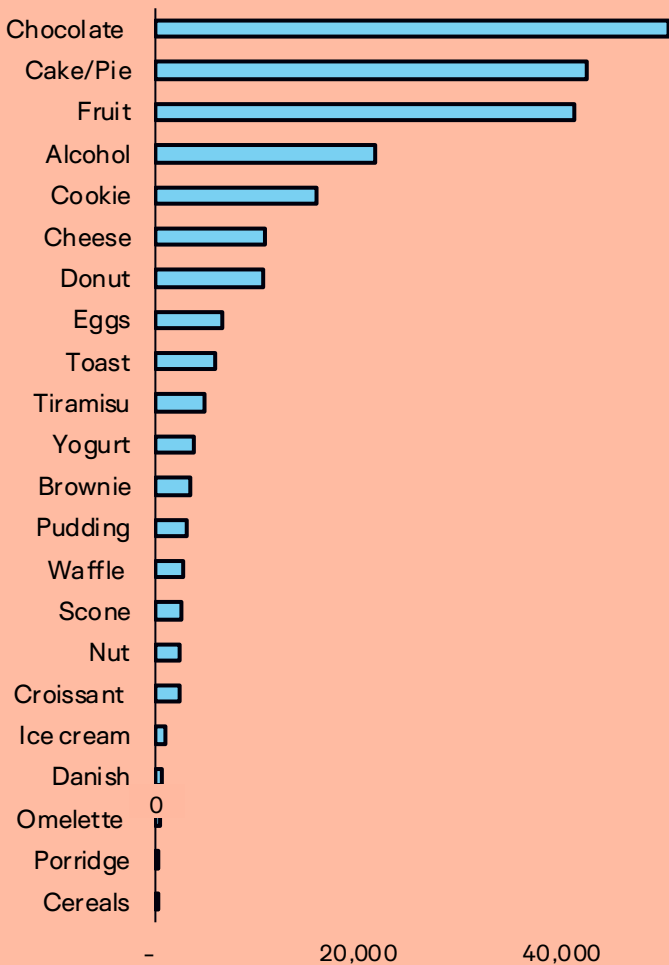
The most-mentioned texture of coffee



What flavors are mentioned alongside coffee?



Top-mentioned foods associated with coffee



# Where's your coffee bean from?

## Conversations around beans and origins

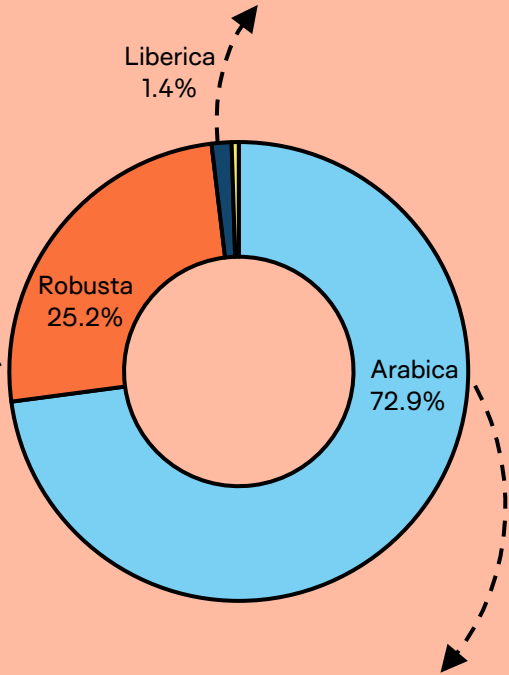
Arabica, long-established as the dominant cultivar across the world, continues to lead the coffee bean conversation. In fact, given that it accounts for approximately 60% of global production, its conversational share of over 70% suggests the dominant hold it has in within culture.

Not all of this conversation has been positive. Arabica, farmed in Africa – has been critiqued as a factor within environmental degradation.

Robusta, conversely, appears slightly under-represented (30% cultivation, against around 25% conversational share). However, the bean, with its sour taste and high caffeine content, have become steadily more popular within Asia. This is largely a matter of geography, given that the bean is largely cultivated within that continent. At the same time, the proliferation of Asian flavors across the world – a trend previously noted in the popularity of Matcha, has also helped foster appreciation for the bean amongst select audiences.

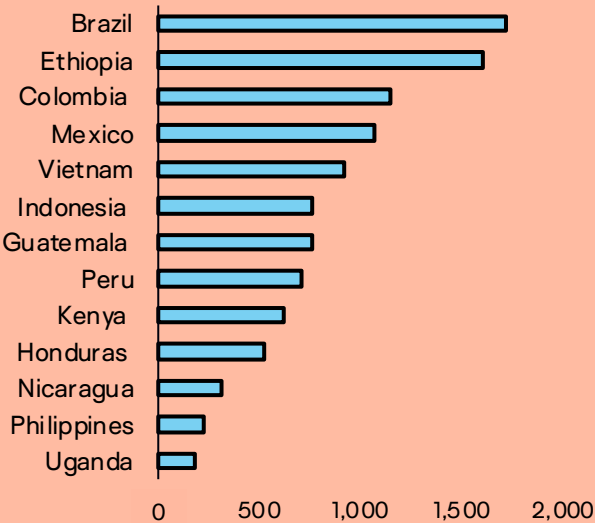
ⓧ  
In a warmer world, we're going to need a more resilient coffee bean as conventional species are forced out of their typical growing areas. Step forward liberica...

📷  
Vietnamese slow drip coffee is my personal favourite. saigondrip uses robusta beans from Vietnam which when cultivated and prepared properly has a sweet and nutty aftertaste.



📖  
We like to make our own coffee at home every morning, 100% Arabica Colombian, medium roast, ground coffee, what's not to like? Great daily choice for coffee.

Brazil & Ethiopia, the most popular coffee origins



# Grinds, gear & gadgets

## Coffee connoisseurship drives interest in equipment

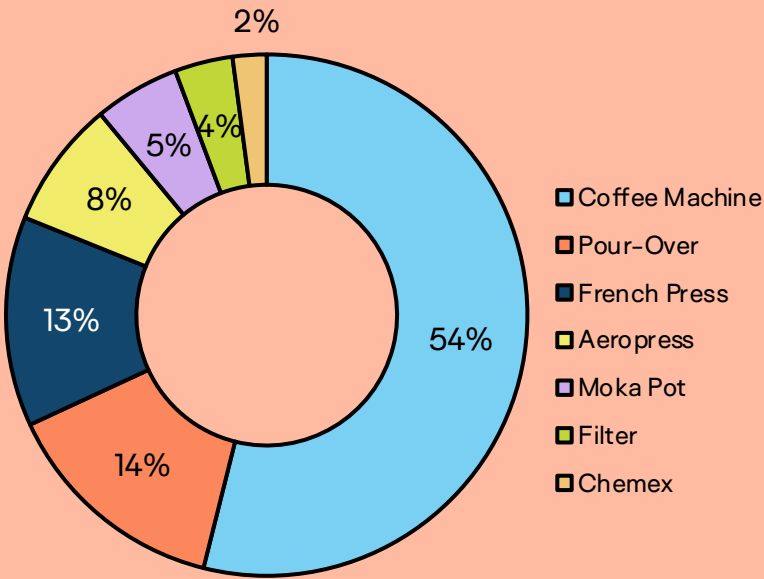
Coffee connoisseurship is nothing new, with clear preferences as to how the “right” or “best” cup of coffee is made long assumed to confer a sophistication and worldliness on the individual.

However, while these long-term fans still underscore the conversation around gear and equipment, the pandemic’s impact is felt here too.

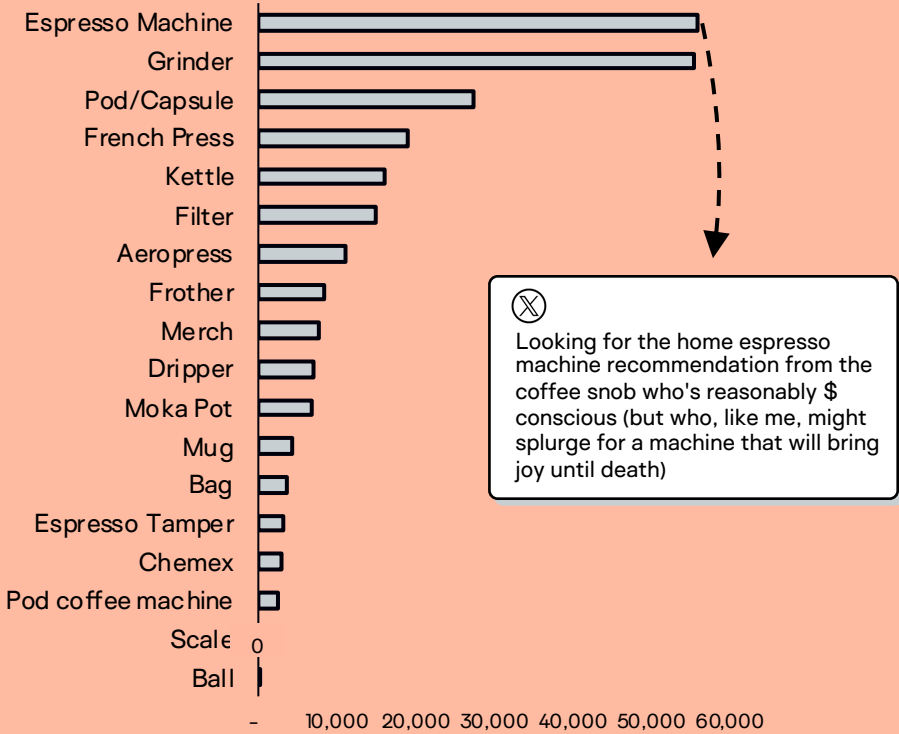
Cut off from their favored cafes, individuals under lockdown became far more likely to experiment with their own at-home brews. On the one hand, this looks like building the “dream” set-up at home – even using professional machines that replicate café-standard quality and intensity.

But it also opened the door onto experimentation less dictated by café society norms than by viral recipes and instantaneity.

How do people enjoy making coffee?



Brewing gear mentioned in the coffee conversation



The ways of drinking coffee (left) and most-mentioned gear (right) in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023.. Source: Pulsar TRAC

Coming to the boil: the growth of coffee as a topic

What gets people talking coffee

When coffee becomes a mindset

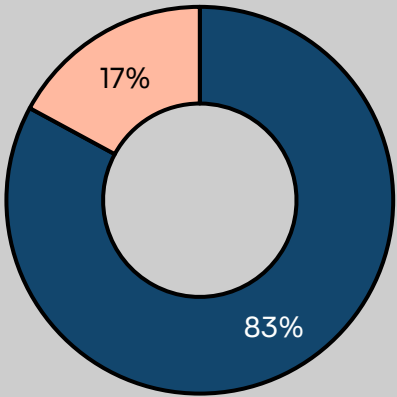
Coffee industry highlights

# What activities does coffee fuel?

## Productivity bound to consumption

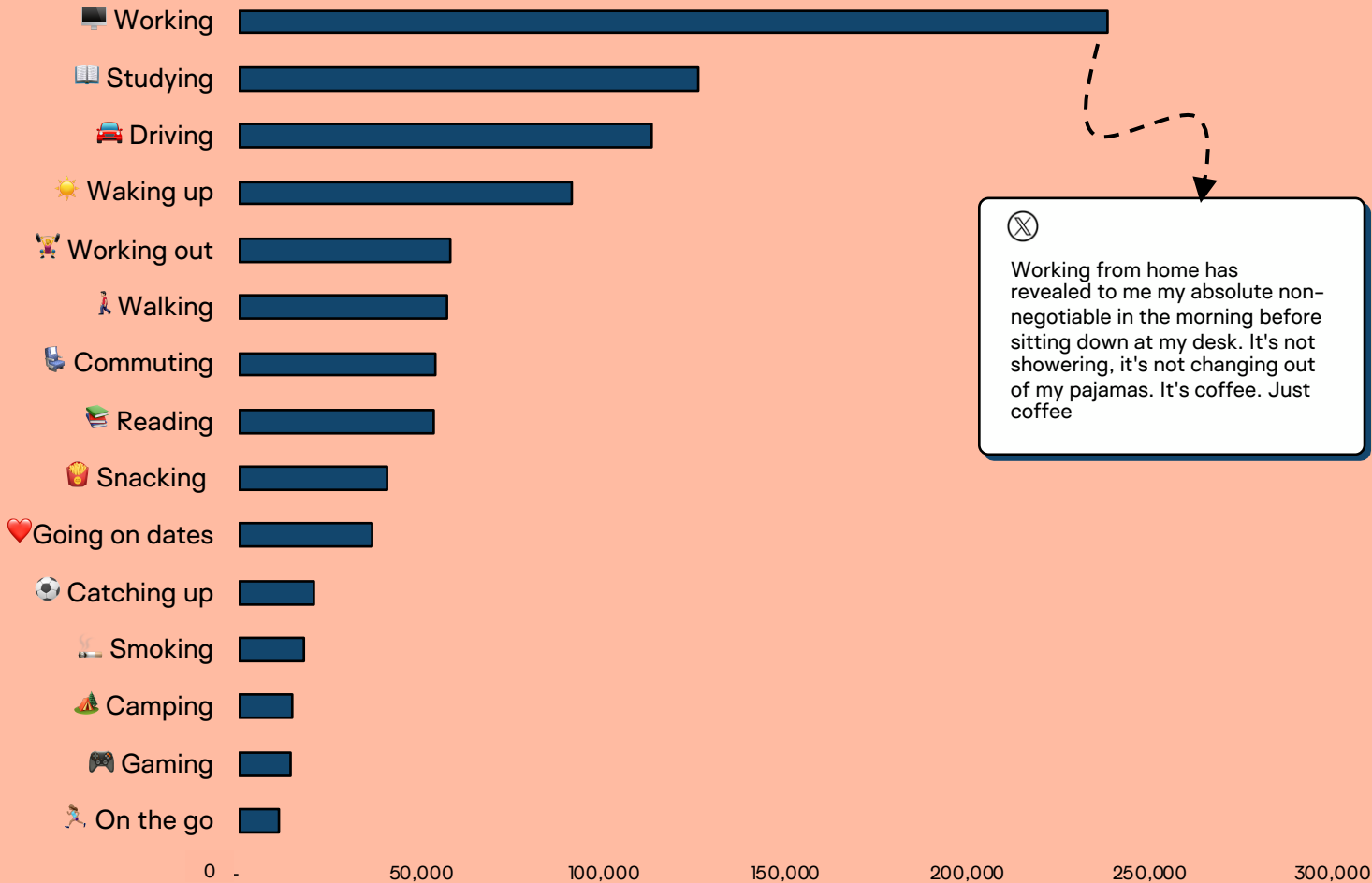
For all that coffee is linked with the community, the individual activities most discussed are working, studying and driving. Activities often case as onerous or necessities, each of these can clearly be identified with a sense of ritual, as too can the next two on the list: waking up and working out.

It seems likely coffee is therefore not only being utilised for it's caffeine content, but also for its role in ritualistically preparing for a task or activity.



■ At Home  
■ Out-of-Home

Mentions of coffee occasions in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC



ⓧ

Working from home has revealed to me my absolute non-negotiable in the morning before sitting down at my desk. It's not showering, it's not changing out of my pajamas. It's coffee. Just coffee



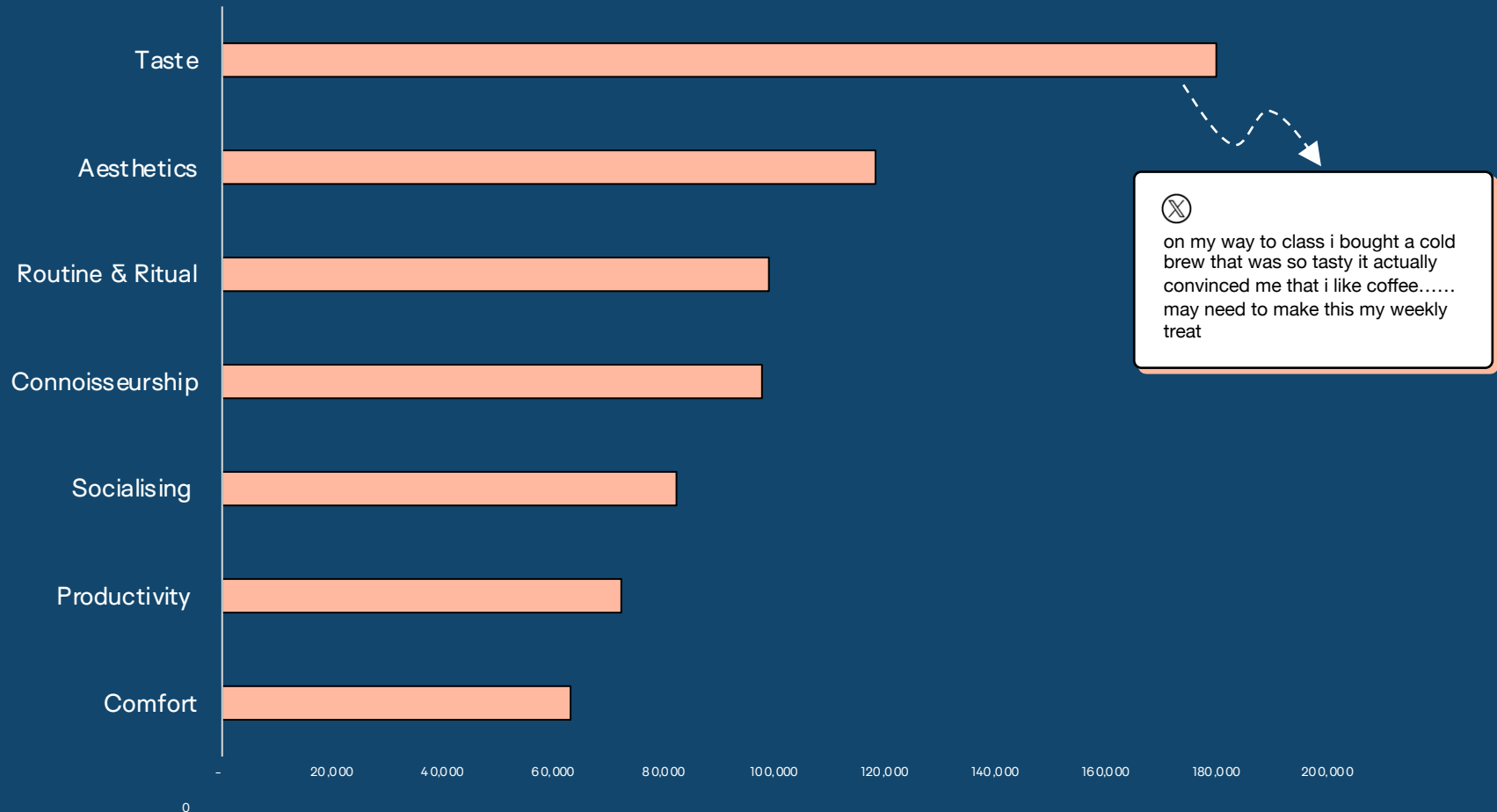
# Why do we drink coffee?

## The motivating factors

Taste emerges as the single greatest driver for buying coffee. Why is this?

We've already established the importance of routine, connoisseurship and productivity. And those likely remain more *powerful* drivers of behavior. But taste is simply more universal, frequently emerging as a secondary or tertiary consideration in almost all instances of consumption. At the same time, it can also become a primary driver when coffee is case as a 'treat' or alternative to soft drinks or alcohol.

Aesthetics sit in second place. In this instance, it reflects a less widespread consumer behavior, and more the specificity of online conversations around coffee. The drink is frequently cited as a "vibe" in everything from idealized work station set-ups, to posed selfies and comments on fictional characters.



Mentions of motivations the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC

## ... and why do we quit it?

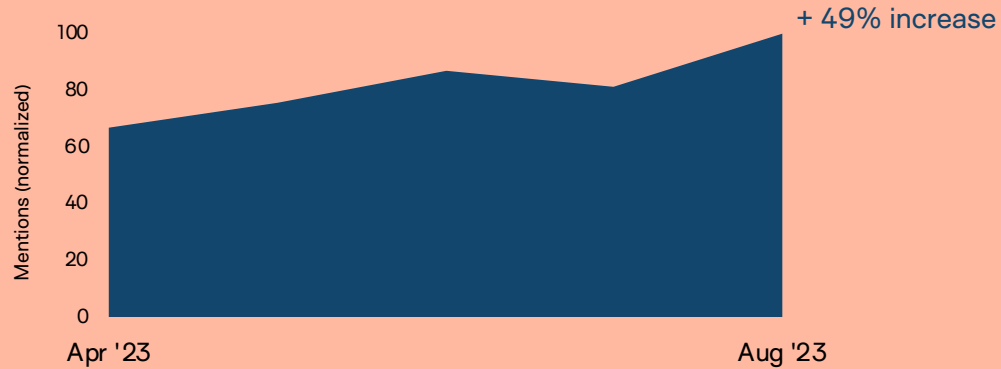
### The reasons for stopping coffee consumption

Even as coffee grows as a topic, so too does the conversation around quitting it. In fact, the six months in the middle of 2023 have the seen this conversation escalate, as narratives around caffeine and sugar take hold and compel behavioral change.

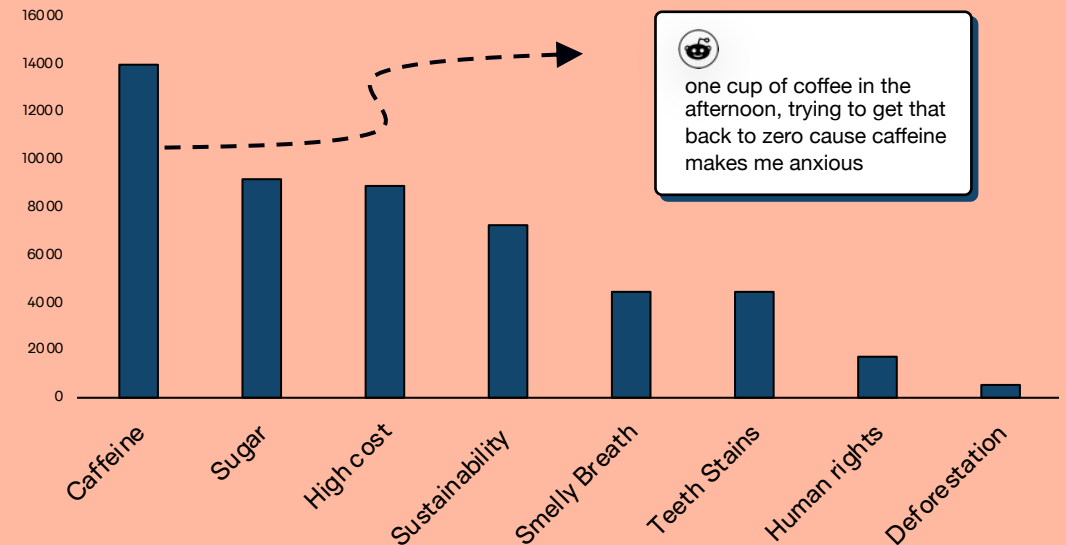
This can propel individuals towards decaf and tea alternatives. And this trend appears particularly pronounced in long-term, regular consumers, for whom coffee has become neither indulgence nor even ritual, but rather just another habit.

Simultaneously, new obstacles have emerged in the form of both escalating costs and mounting sustainability concerns, adding financial and moral reasons for individuals to relinquish their coffee habits.

Growth of the quitting coffee conversation



Reasons for quitting coffee



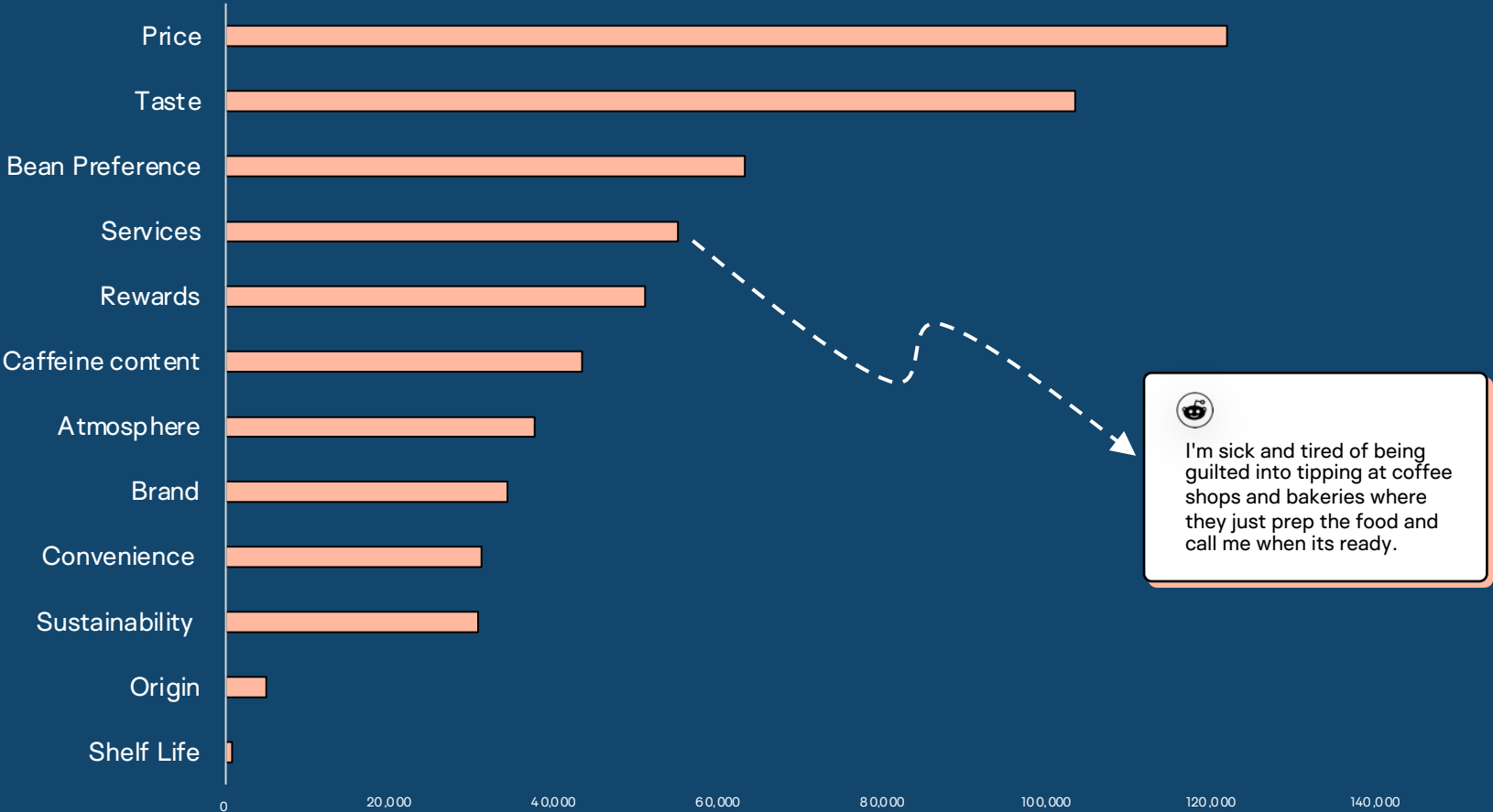
# What makes us choose certain types of coffee over others?

As inflation bites, price concerns come into focus

Given the economic context, it's unsurprising that price has become the number one purchasing factor, due to escalating prices, less disposable income and the spectre of shrinkflation (in which the size of items decreases while prices remain static).

Beyond price and taste, an affinity towards specific cultivars and sources helps steer decision-making amongst connoisseurs.

Services and rewards, meanwhile, show how the broader CX experience can also condition decision-making. This can be positive, in the instance of rewards from brands like Starbucks and Dunkin'. Conversely, the service conversation captures disquiet around tipping culture in the US, which robs the café environment of some of its appeal for audiences.



Purchasing factors mentioned the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC

# Where you live impacts what goes in your cup

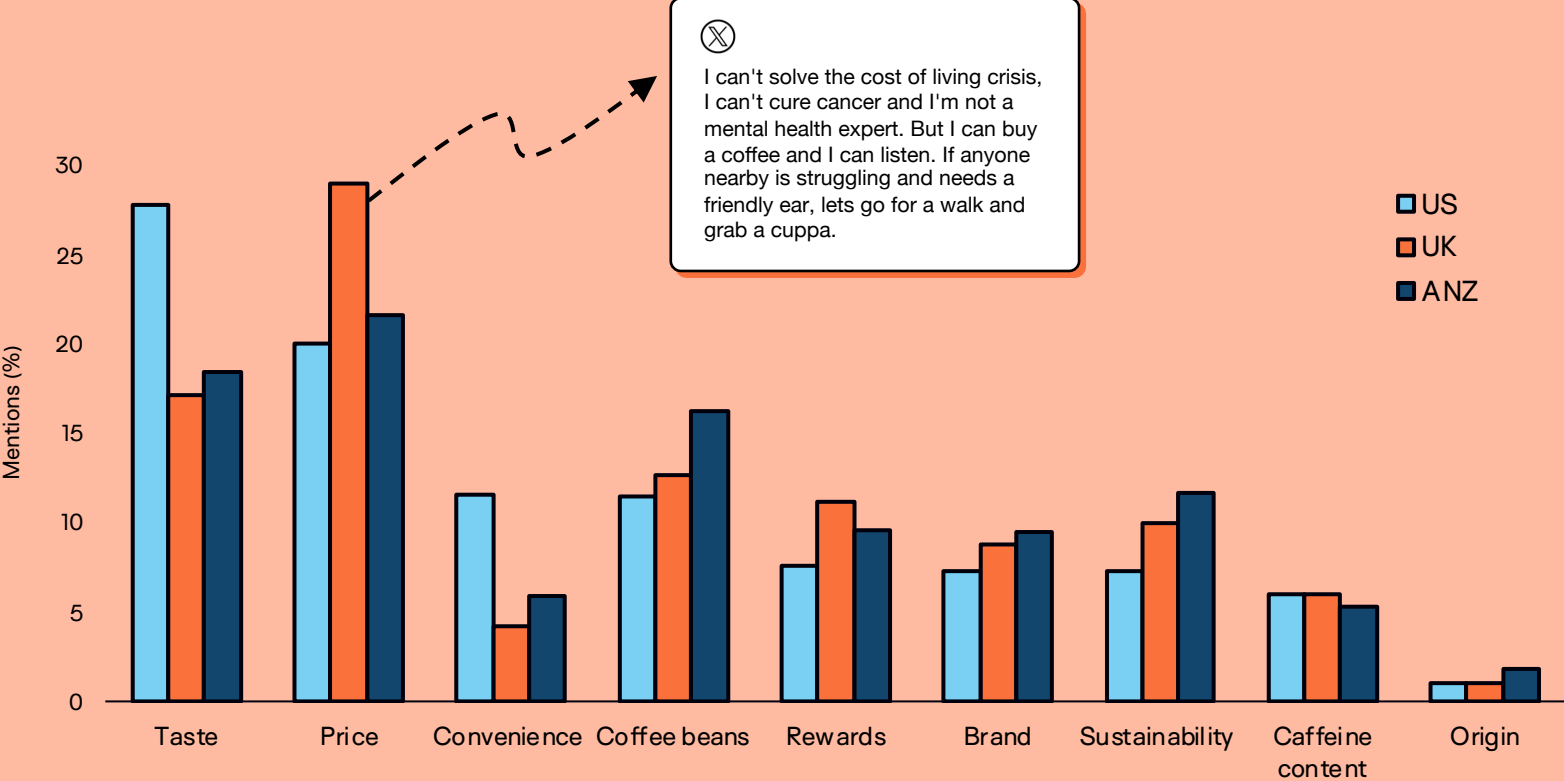
Unpacking US, UK & ANZ preferences

The popularity of different purchasing factors is distributed relatively evenly across much of the English-speaking world – with a few notable exceptions.

In the US, for instance, taste and convenience both emerge as key factors, a nod towards a longstanding coffee culture rooted in takeaway culture and the economies of scale practised by big brands.

The UK, meanwhile, has seen its exposure to the global cost of living crisis send price rocketing to the top of buyer consideration.

Australia and New Zealand, on the other hand, see significant interest in the coffee beans themselves. This reflects the sophistication and importance of the coffee scene in cities such as Melbourne and Sydney (where the flat white was invented).



Purchasing factors by region in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 – Aug 31 2023. Source: Pulsar TRAC

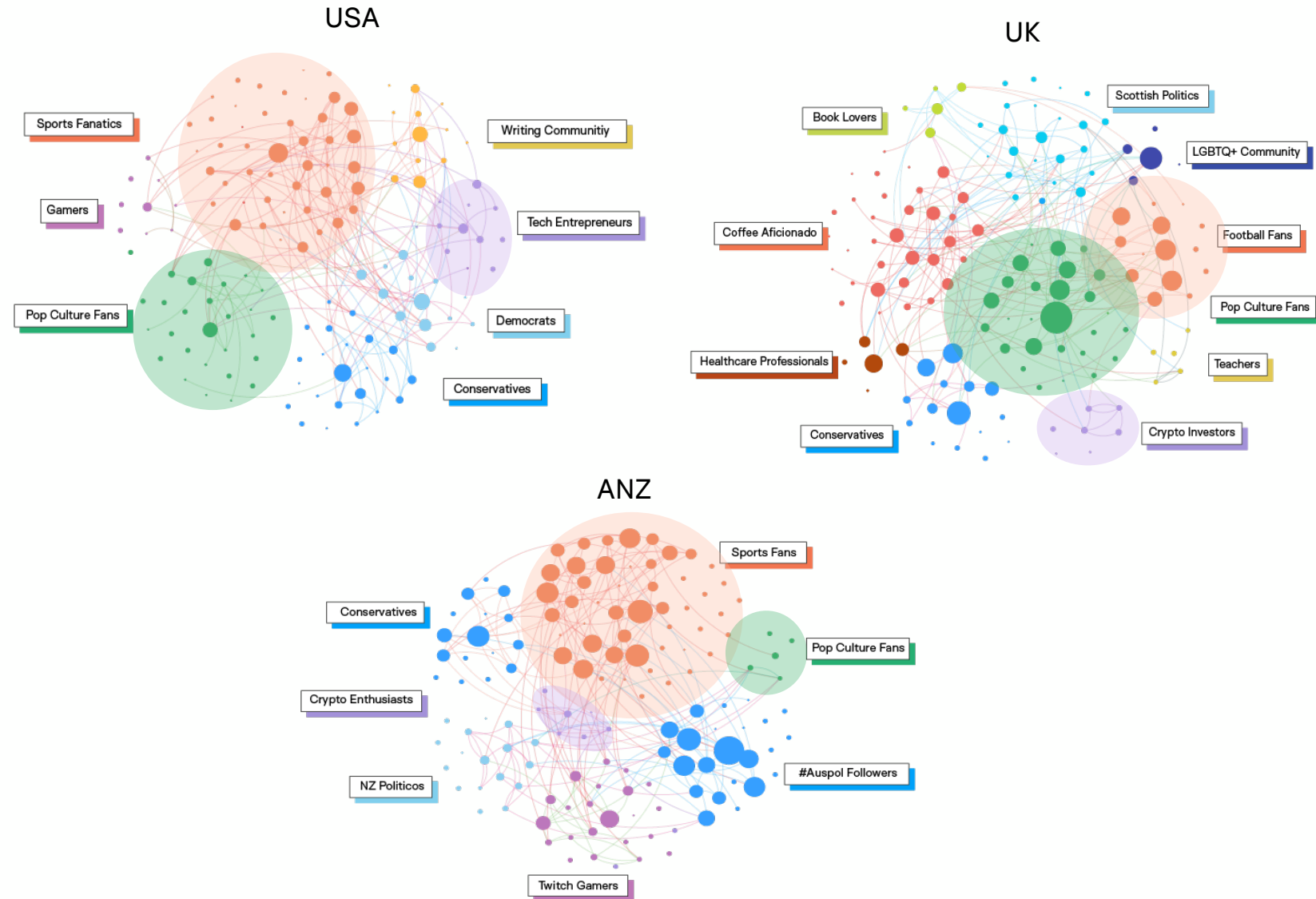
# Who's driving the coffee conversation?

Sports Fans, Pop Culture Fans, Tech-Finance Enthusiasts emerge as key audiences

Different people talk about the same topic differently, and Pulsar allows you to detect how each community engages with any given topic based on their shared affinity & behaviors.

The UK and US both see literary communities play a small but notable part, emphasising the age-old connection between books and coffee. Political affiliations towards major parties, and an affinity towards pop culture, on the other hand, both underline to the extent to which coffee is a truly mainstream conversation.

Variant on this latter group, pop culturalists, are – like sports fans and techies – recurrent features across these audiences. To understand why this is, we can take a closer look at the topics each distinct community is talking about.

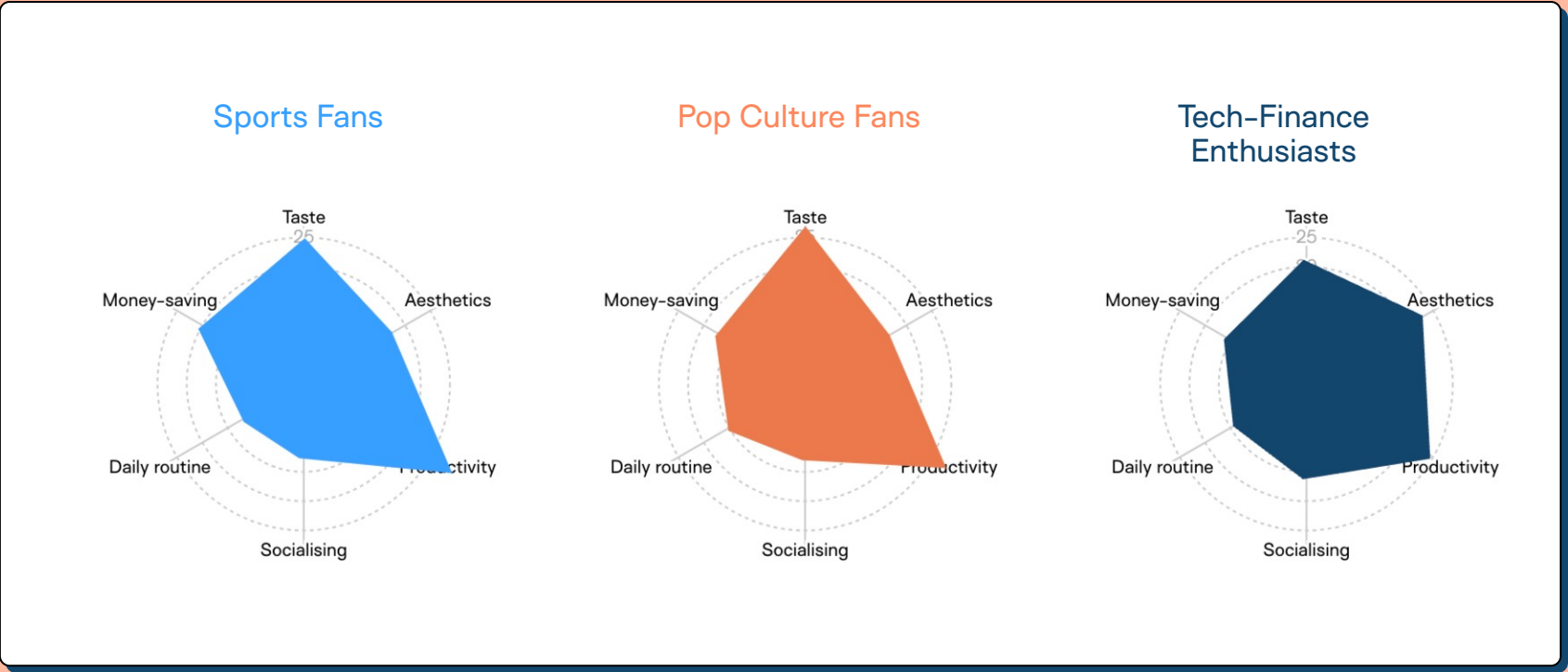


# Audiences talk about – and drink – coffee differently

When we amalgamate these community types, so that we’re looking at all UK-US-ANZ sports fans together, for instance, it enables us to arrive at a better understanding of how each group views itself in relation to coffee.

Sports Fans' increased interest in health and productivity corresponds to their heightened concern about caffeine and their predilection for consuming coffee as an energy drink. Intriguingly, this segment also reveals a more pronounced sensitivity to coffee taste compared to other cohorts – perhaps because it is viewed as more as a “treat” before or after physically demanding activities.

Pop Culture Fans, meanwhile champion financial prudence and enhanced productivity, channelling their coffee inclinations towards crafting cost-effective yet top-notch home brew while Techies shade towards hipsterdom in their discussions of fashionable coffee choices.





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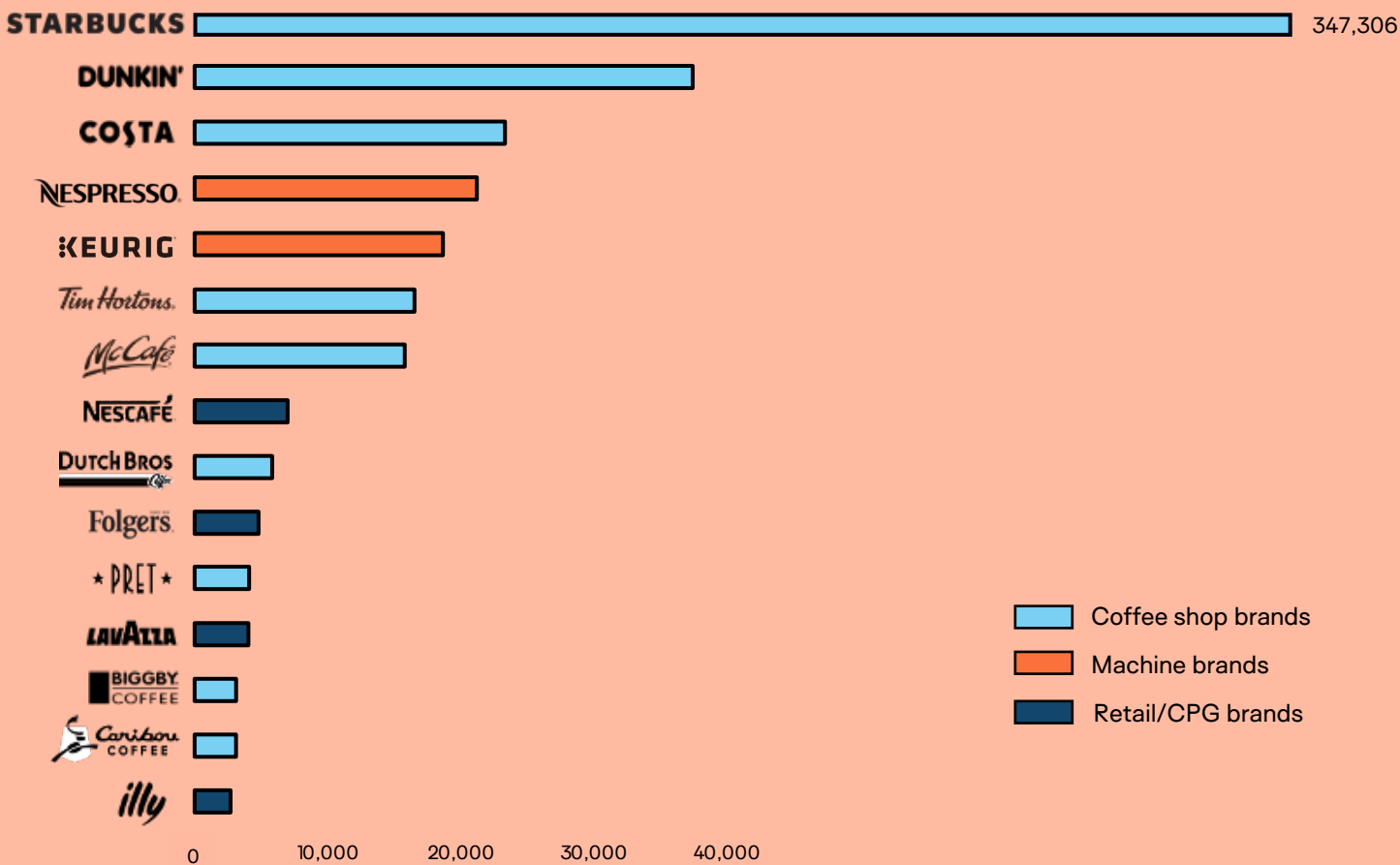
# Which brands dominate the global coffee conversation?

Starbucks are not only the single biggest brand – they’re literally off the chart.

And yet, while the coffee shop giant maintains its position at the front of the pack, at-home coffee brands such as Keurig and Nespresso emerge as the beneficiaries of behavioral patterns that first became established over the pandemic.

Their mentions far exceed those more associated with other brands producing items for consumption. Why? For one thing, this one-stop shop for a high-quality at-home experience echoes the prevailing move towards convenience.

Equally, conversations around equipment are more likely thrive online given the aspirational nature of owning expensive gear.



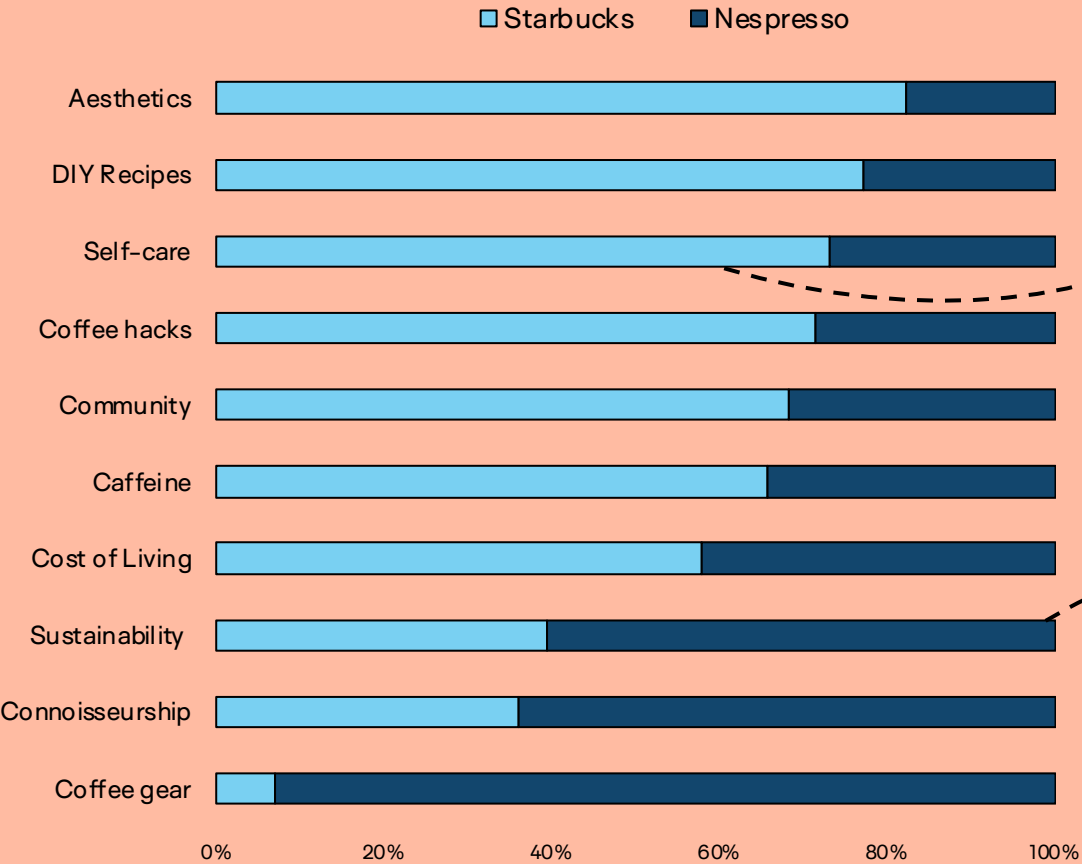
# What's driving brand conversation?

## Starbucks vs Nespresso

Audiences have their own associations with brands. When we break these down according to specific topic, it helps us dig deeper into the nature of a brand's reputation and relationship with consumers.

Starbucks' drinks have become synonymous with aesthetics. Counterintuitively, this doesn't always relate to Starbucks' own products, but also to "copycat" recipes made at home, which contribute to individuals' self-image and identification with a certain "aesthetic" or "vibe." In contrast, their association with community can trend towards negativity, due to discussions around employee labor challenges.

Meanwhile, Nespresso, the most-mentioned at-home brand, are able to project a sense of functional or convenient connoisseurship. Clearly, for the home-brewing diehards, pods are inferior to any number of more traditional or time-intensive methods. Yet, an association with efficiency and convenience, together with the move towards more sustainable practices, appeals to consumers who value a balance between quality, ease and broader societal concerns.



Starbucks iced coffee & listening to your favorite playlist to vibe to begin your day is self care

Choosing Nespresso reusable capsules has been a game-changer for me. Not only do I get to enjoy my favorite coffee blends, but I'm also reducing waste and helping the environment. Join me in embracing sustainability without compromising on taste.

Breaking down mentions of Starbucks and Nespresso by topic in the Coffee conversation across X, Facebook, Instagram, TikTok, Pinterest, News, Tumblr, YouTube, Forums, Blog and more, Mar 1 - Aug 31 2023. Source: Pulsar TRAC

# PULSAR\*

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