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**MODERN
BEVERAGE
CULTURE
2023**

A Hartman Group Syndicated Research Study


**Fielding April– June 2023
Market Coverage: U.S. Market**



**CONSUMER/
SHOPPER INSIGHTS**



**FORESIGHT
AND TRENDS**



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Modern Beverage Culture 2023 explores in-depth the spectrum of consumer attitudes, beliefs and need states related to beverage choice and addresses how companies should engage and communicate with consumers about claims and aspirations.

Hartman Group Syndicated Report Published: June 2023 | Report Length: 102 pages | Market Coverage: US Market

Grounded in primary quantitative and qualitative research, the report offers a comprehensive consumer-based perspective on key topics, motivations, tensions and drivers associated with beverage culture in the US.

What's included?

- Executive summary
- General report (PowerPoint and PDF)
- Demographic data tables (Excel)

Explore the report

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Methodology

- **Quantitative:** Online national survey April 14, 2023–May 5, 2023, n=2253 U.S. residents aged 16-77. (MOE) ± 2.1 pts at 95% confidence level. Respondents recruited as a nationally representative sample. Balanced by age, gender, division, income, race / ethnicity, and presence of children to match the 2023 Census Bureau Current Population Survey.
- **Qualitative:** Digital Ethnographies: n=17 participants. Week-long immersive engagement via asynchronous virtual platform.
- **Qualitative:** Follow-up In-depth Interviews, n=8 participants. Hour-long interview focused on delving into responses from digital ethnography, including perceptions of sugar, alcohol and alternatives, inspiration and desires, beverage procurement from retail and restaurants.
- **Beverage Categories:** Alcohol, Coffee, Tea, Dairy, Dairy Alternative, Soda/Soft drink, Sports/Energy drink, Juice or Smoothie, Water, Functional or Fermented, Meal Replacement, Shakes, Nutritional Powders/Drops, No/Low Alcohol



Modern Beverage Culture 2023

Chapter One: Executive Summary

Chapter Two: Modern Beverage Culture

The US beverage landscape is growing increasingly diverse.

Selected timeline of the US beverage landscape (analysis)*

Consumers and the importance of beverage and choice (analysis)

Consumer beverage decisions and three interconnected choices (model)*

Consumer needs reflected in cultural and economic trends (analysis)

Consumer needs states pivotal in choice related to specific occasion (analysis)

Consumer routines, desire for discovery point to beverage choice (analysis)

Cultural importance of hydration (analysis)

Interaction with beverages shaped by technology (analysis)

Chapter Three: Beverage Considerations and Procurement

Consumers' aspirations for healthier beverage habits are challenged by habitualized behavior and yet they continue to seek out less processed and lower sugar beverages to meet expectations. Sustainability interest trails wellness across beverage categories.

Better-for-you options represent a growing opportunity in beverage (chart)*

Barriers to aspirations in beverage (chart)

Attributes most important when shopping for beverages (chart)

Consumer willingness to pay more for quality (data, analysis)*

Attributes sought and avoided when shopping for kids' beverages (chart)

Sweeteners as key area of concern (data, analysis)

Consumer reliance on caloric count in relation to occasions needs (data, analysis)

Consumer expectations in relation to packaging design (analysis)

Importance of occasions needs related to pack size (analysis)

Environmental concerns and packaging (chart and analysis)

Information sources important to evaluation of beverages (chart)

Role of restaurants and retail in beverage procurement (chart)



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Chapter Four: Modern Beverage Need State Model

Understanding need states illuminates opportunity in beverages. This chapter takes a fresh look at the Modern Beverage Need State model, which highlights six key need states driving beverage choices while illustrating how consumers engage with beverages today.

The Modern Beverage Need State Model identified from 12 different beverage categories (model)

Consumers consider multiple needs on a given occasion (analysis)

Six key need states behind today's beverage consumption (analysis)

Consumer components of taste (chart)

Consumer components of hydration (chart)

Consumer components of nutrition (chart)

Consumer components of experience (chart)

Consumer components of energy (chart)

Consumer components of pairing (chart)

Chapter Five: Beverage Category Deep Dive

We explore 12 beverage categories in this report (see list below) and while each beverage category has a unique combination of strengths, there are key need states leading most categories. The similarities and differences across the categories illustrate the primacy of wellness alongside consumers' varied beverage approaches.

Alcohol (chart)

Low/no alcohol (chart)

Coffee (chart)

Tea (chart)

Water (chart)

Dairy (chart)

Dairy Alternatives (chart)

Juices and Smoothies (chart)

Soda and Soft Drinks (chart)

Sports and Energy Drinks (chart)

Functional + Fermented (chart)

Meal Replacements, Protein Shakes, Nutritional Powders/ Drops (chart)



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Chapter Six: Innovation Within the Experience Need State

Beverages have uniquely high permissibility to experiment outside the box compared to foods. The strongest pockets of beverage innovation center around cultivating exciting beverage experiences through novelty, functionality, and personalization.

Consumer motivations for choosing non-alcoholic beverages (analysis)

Consumer demand for premium canned cocktails (analysis)

Emerging functional beverages blurring traditional category boundaries (analysis)

Generational distinctions in personalized beverages (data)

Chapter Seven: Implications and Recommendations

*Glossary of Terms:

Analysis: Skilled interpretation and translation of consumer culture.

Model: Hartman's proprietary model provides a framework for explaining how and why consumers make purchase/consumption decisions, thus helping brands navigate the consumer journey and ensuring relevancy within the marketplace.

Chart: Visual representation of quantitative survey responses, such as a bar chart.

Data: Specific data point(s) from quantitative survey used to highlight a compelling insight.



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Report Price: \$12,500 (until July 31, 2023. \$15,000 after August 1, 2023.)

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