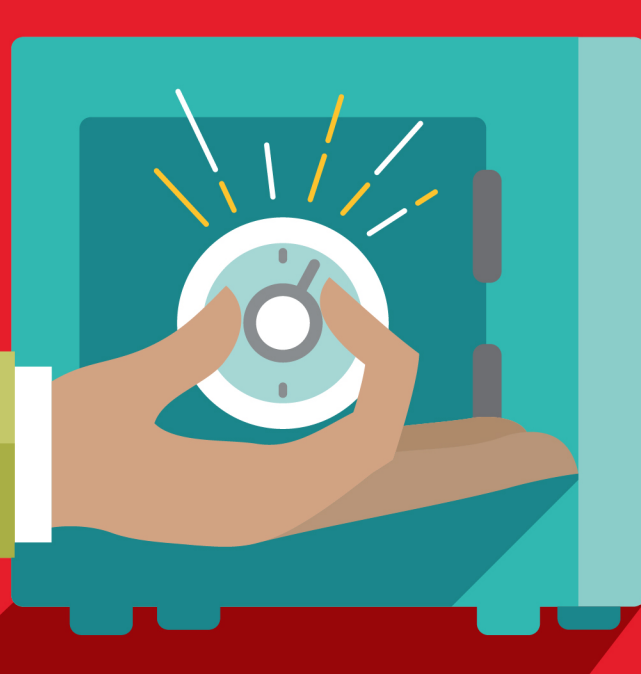


# Unlocking the Beverage Opportunity in Foodservice

Insights on the Away from Home beverage\* opportunity for foodservice operators from the Coca-Cola Away From Home Landscape Study, 2016



The Away from Home growth opportunity is

**BIGGER THAN YOU THINK**

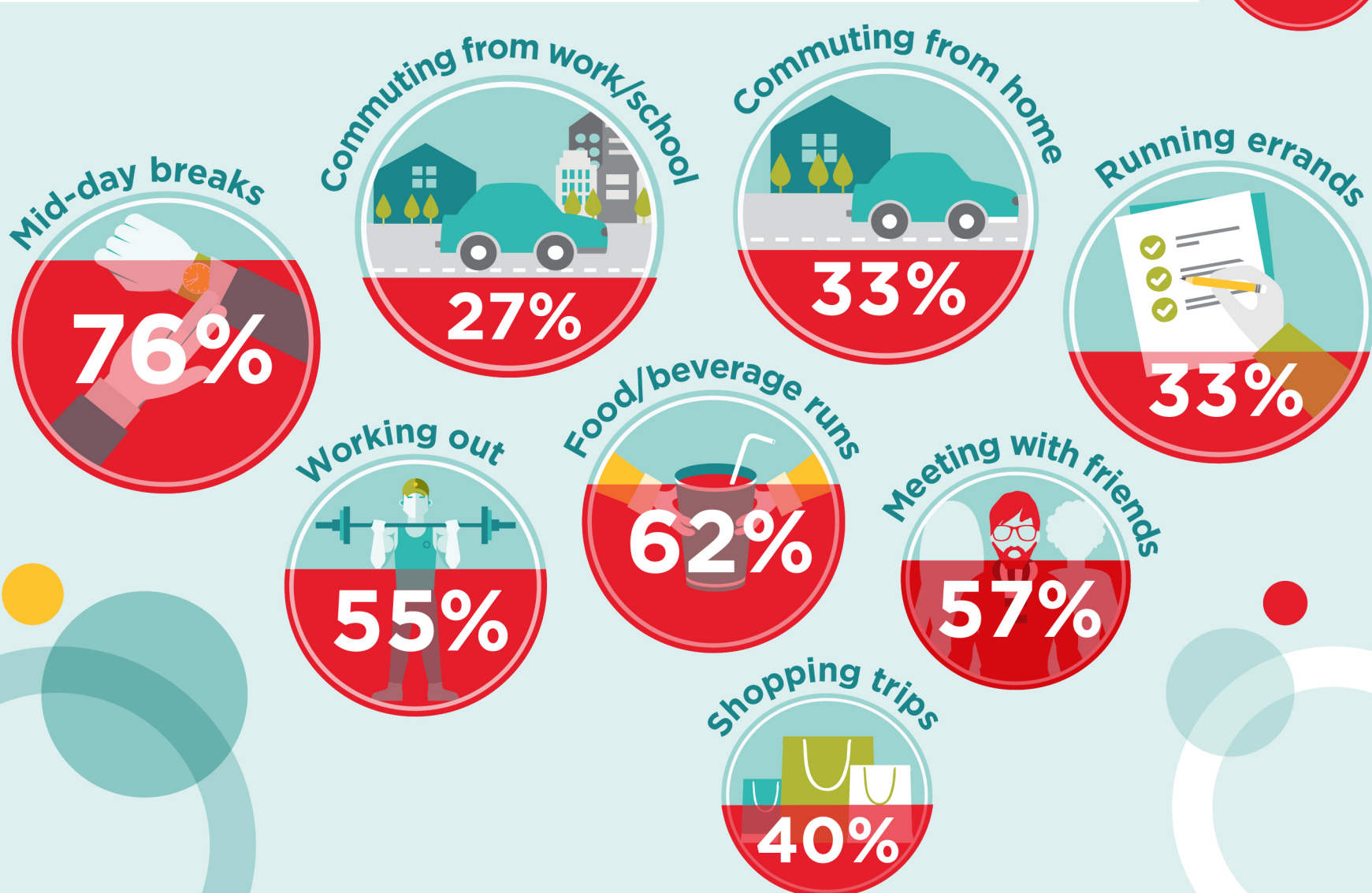
The average American has **22 AWAY FROM HOME** life situations every week



## UNTAPPED DEMAND EXISTS IN ALL SITUATIONS

only half of Away from Home situations include a beverage\*\*

size of situation  
% with a beverage



## BEVERAGES PLAY AN IMPORTANT ROLE

they influence outlet choice

### BEVERAGES DRIVE OUTLET CHOICE

in about

**45%**

of all Away from Home eating and/or drinking situations

1.2 BILLION BEVERAGE-ONLY

1.2 BILLION FOOD & BEVERAGE

600 MILLION FOOD-ONLY



100% of the time



10% of the time



0% of the time

BEVERAGES INFLUENCE CHOICE

## SITUATIONS AND MOODS CAN PREDICT CONSUMER BEHAVIOR,

even more so than demographic factors



MOOD > MOTIVE > BEVERAGE\*\*\*

EXCITED	INDULGE	CSD, iced tea, coffee
CAREFREE	BE SOCIAL	CSD, iced tea, coffee, tea
PROUD	BE RESPONSIBLE	water, seltzer/flavored water
UNPREPARED	COPE	juice, lemonade, smoothie, energy drink
STRESSED	INDULGE	CSD, coffee
BURDENED	ESCAPE	juice, lemonade, smoothie, energy drink

### EXAMPLES:

SITUATION > MOOD > MOTIVE > BEVERAGE\*\*\* > OUTLET



MEETING FRIENDS



HAPPY/RELAXED/CAREFREE



SAVOR SOCIAL EXPERIENCE



DIET CARBONATED SOFT DRINK



FULL-SERVICE RESTAURANT



COMMUTING TO WORK



RUSHED/STRESSED



INDULGE



HOT BREWED COFFEE



COFFEE SHOP OR C-STORE

## DON'T UNDERESTIMATE CSDs

they are flexible and play a multifaceted role

Carbonated soft drinks are among the

**TOP 3 CHOICES\*\*\*\***

in all:

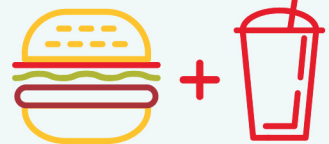
**Away from Home situations**



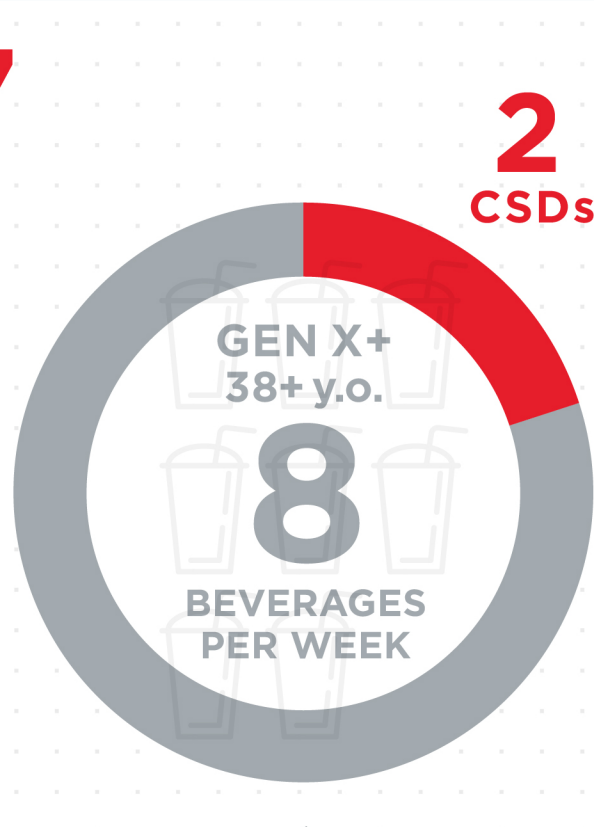
**Mood states**



**Food pairings (including breakfast)**



## MILLENNIALS DRIVE AWAY FROM HOME BEVERAGE VOLUME, including CSDs



Millennials are driving

**1.3x** more beverage volume than older generations

## KEY TAKEAWAY

Understanding situations and moods can help predict consumers' behavior and be a basis for a powerful sales-building strategy.

Coca-Cola

\*Only non-alcoholic beverages and Away from Home situations were considered in this study.  
\*\*17 common Away from Home life situations were identified. The eight most frequent situations are shown here (80% of total). The other nine situations not illustrated are: Entertainment event, Finding a place to spend time, Road trip, Taking kids to/from places, Religious service, Playdate, Vacation, Traveling and Business Trip (20% of total).  
\*\*\*Top indexing beverage type within each mood/motive combination.  
\*\*\*\*Most popular beverage category by volume.