



Food Insights
Spotlight Report:

Hot Beverages

2024/25





- **Do you understand the Out-Of-Home Hot Beverages consumer?**
- **How have consumer behaviours changed compared to a year ago?**
- **Do you know what formats and flavours are expected to grow in the next year?**
- **Have you achieved a balanced offering around premium, price & value for money?**

The Hot Beverages Spotlight Report provides a comprehensive understanding of **who** the hot drink* consumer is, what their **preferences** are and **occasions** to target.

It highlights the **threats, opportunities** and **key channels** to help inform and shape a **winning hot beverage strategy**.

- ***Gain insights into the performance of the Hot Drinks market***

- Types of tea and coffee consumed
- Consumption of hot chocolate, iced coffee and iced tea
- Expectations in alternative milks
- Flavour profiles from syrups
- Interest in NPD
- Appeal of trends
- Future growth of category
- Predicted increased price margin

- ***Understand the OOH Hot Beverages Consumer***

- Who is the hot beverage consumer?
- Visit frequency
- Current drivers to consumption

- ***Take a bird's eye view on the hot drinks market***

- Share of consumption as a mega category
- Types of hot drinks consumed OOH
- Frequency of consumption
- Likelihood to upgrade

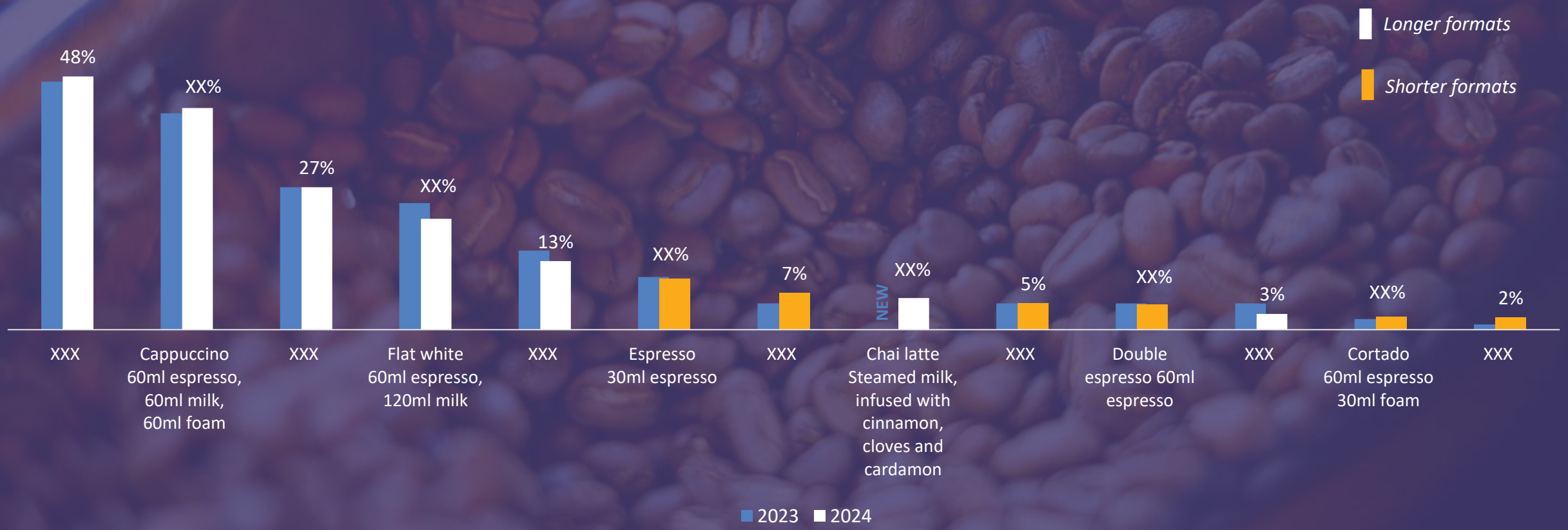


Nationally representative sample of 5000 UK respondents

Example Output

Consumers remain leaders with current consumption increasing highlighting the importance for inclusion in OOH offerings

You have said that you drink coffee whilst out, which types of coffee would you typically choose?



Example Output

Over the **next year**, there is expected growth for **short format coffees**

Do you expect the frequency that you order the following hot drinks out to change over the next year? – Of consumers who typically choose these hot drinks

+XX%

Order frequency for Macchiatos

Order frequency for Single Espresso

+XX%



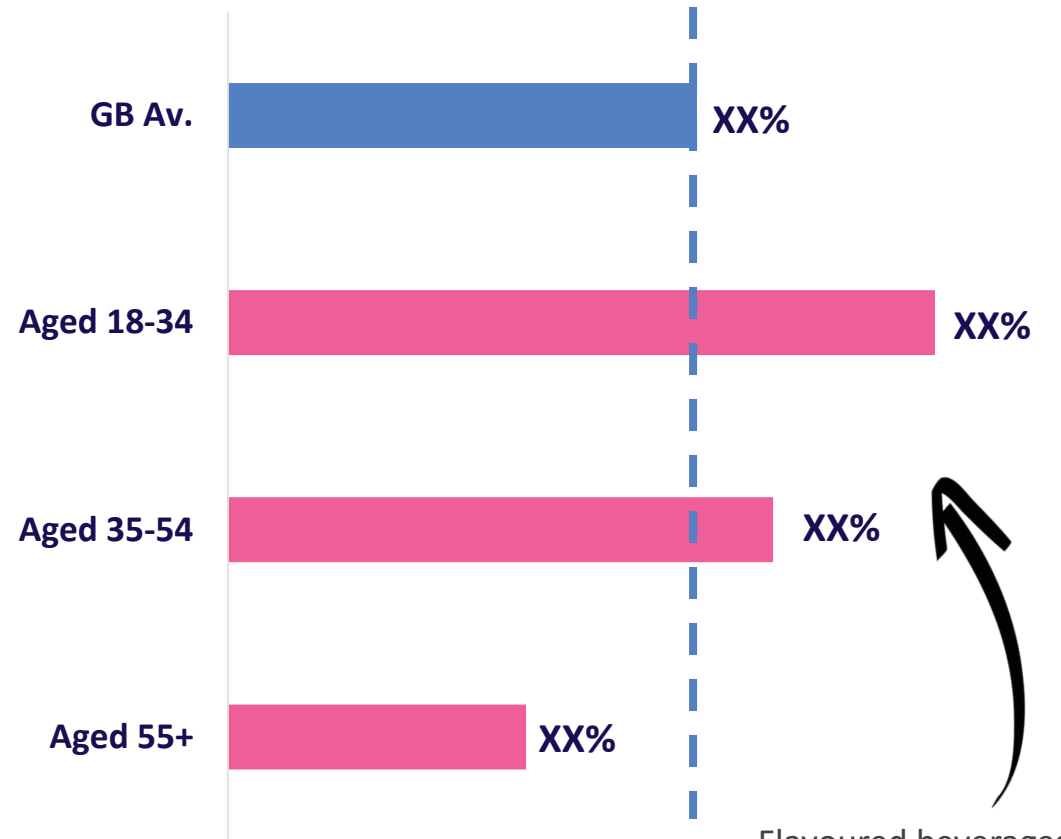
Example Output

XX%

Of consumers drink **flavoured hot beverages** in the Out-Of-Home

The appetite for flavoured hot drinks reduces significantly as you move through the age groups

Do you typically drink flavoured hot drinks when out?
– Split by Age



Flavoured beverages driven by younger consumers

Example Output

Compared to a year ago, all beverages have grown in frequency consumed in the Out-of-Home, especially by consumers who are under the age of 54

Are you drinking these in pubs, bars, restaurants and other similar venues more frequently or less frequently compared to a year ago?

Consumption growth / decline

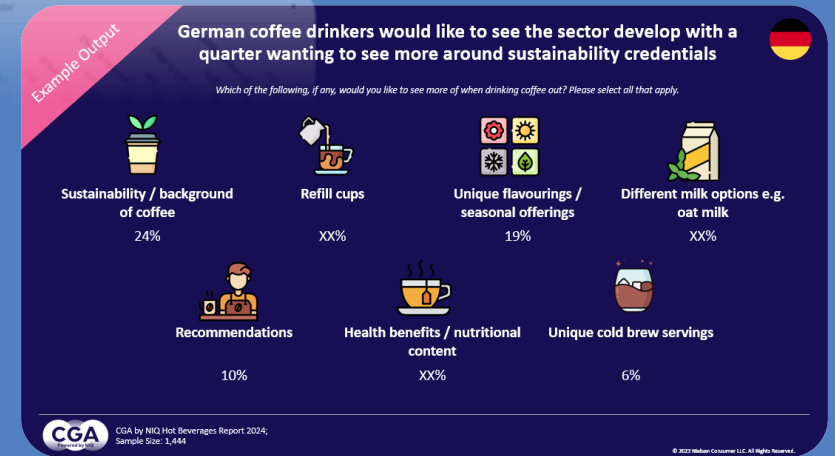
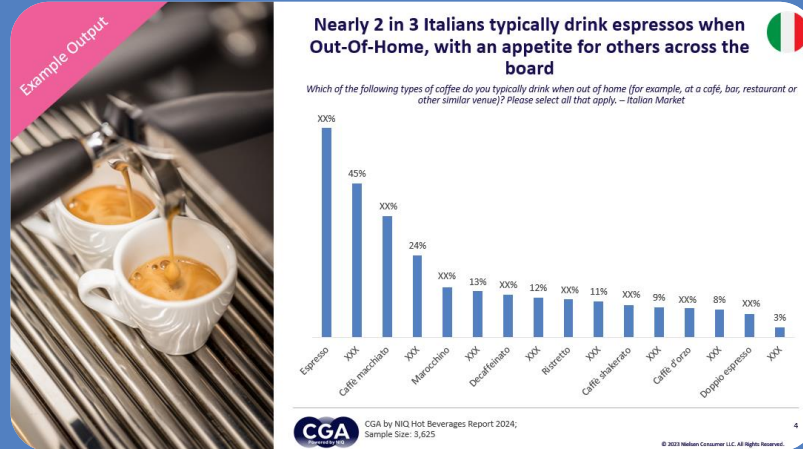
	Hot Coffee	Hot Tea	Hot Chocolate	Iced Coffee	Iced Tea
GB Av.	XX%	XX%	XX%	XX%	XX%
18-34	XX%	XX%	XX%	XX%	XX%
35-54	XX%	XX%	XX%	XX%	XX%
55+	XX%	XX%	-XX%	-XX%	-XX%



Want more insights?

The Hot Beverages Enhanced Report delves into consumer consumption and attitudes in other European Markets*

Topics	Italy	France	Germany
Category Overview		✓	✓
Current Consumption	✓	✓	✓
Coffee category deep dive	✓	✓	✓
Occasions	✓		
Dayparts		✓	✓
Consumer drivers	✓	✓	✓
Consumer spending	✓	✓	✓
Alternative Milks	✓		✓
Future developments	✓		✓



Please contact your account manager for more information



*Covering Italian, German and French Markets

Food Insights Series

CGA by NIQ



*Previous reports can now be purchased at a discounted rate.
Please contact your account manager for more information.*

Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:



JAMES ASHURST

foodservice client director

james.ashurst@nielseniq.com



ANDY HODGSON

client business partner

andrew.hodgson@nielseniq.com



SHIRLEY TAN

client manager

shirley.tan@nielseniq.com

