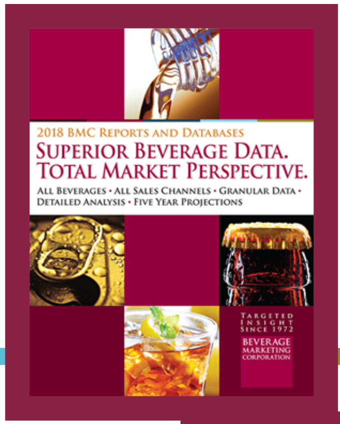
U.S. College Student Beverage Consumption and Attitudes

2018 Edition (Published June 2018. Data through 2018.)
More than 200 pages, with extensive text analysis, graphs, charts and tables



What is Gen Z drinking? What impacts college students' beverage choices? This report, a study of College Millennial Consumers (CMCs) delivers answers via a survey of more than a thousand college/university students throughout the U.S. concerning their attitudes toward and consumption of non-alcoholic and alcoholic beverages.

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The answers you need

U.S. College Student Beverage Consumption and Attitudes conducted for Beverage Marketing Corporation by Riddle & Bloom (Formerly Fluent Group), a Boston-based college marketing and insights agency, queries college/university students throughout the U.S. on their frequency of consumption as well as the students' own prediction of consumption behavior in the current year - thus helping to provide marketers with a map of where the college student consumer may be trending. This is the third year Beverage Marketing Corporation has teamed with Riddle & Bloom; thus this report provides a comparison between students' attitudes and behaviors in 2018 versus 2016 and 2017 and notes shifts and changes in their beverage preferences, opinions and consumption patterns. In addition to looking at their beverage consumption, the report also reports Gen Z's attitudes toward key beverage ingredients, flavors, packaging, looks at key influences driving their behavior and more.

Questions answered include:

- Through a series of charts, tables and commentary, this insightful beverage industry research report looks at behaviors and attitudes of college age millennial consumers (CMCs) towards a bevy of topics, including frequency of beverage consumption, future consumption intent, attitudes towards health and environment as they relate to beverages, the principal factors motivating the purchase of beverages and much more!

- How many servings of the following beverages would you estimate you drink on a weekly basis?

- Throughout 2018, do you expect to drink less, the same, or more than you did in 2017? How does this compare with the responses given in prior surveys?

- What are the 3 factors that most influence your purchase of a new beverage (one you've never tried before)?

- When in need of a "pick-me-up," which beverage type are you most likely to drink?

- What is your estimated weekly spend on alcoholic beverages? At what locations do you drink alcoholic beverages?

- Which are the most promising non-alcoholic beverage segments based on consumption intent? Which alcoholic beverage type indexes the highest among college students vis-à-vis other segments of the adult population?

This report features

This unique report pairs the survey data about the attitudes/behaviors of college students with analysis of the beverage industry which explains the "story behind the numbers." Through colorful, data-rich charts, this report examines a broad range of beverage categories, with focus on both the non-alcohol liquid refreshment beverage (LRB) market and the alcoholic beverage category. This market report is meant to provide busy executives with a quick but comprehensive view of trends. An ideal report to kick off brainstorming sessions or to set the stage for other further research. In this report, users get a feel for college student attitudes and behaviors towards beverages including:

- Frequency of consumption of 15 principal beverage types as well as trial and future intent to engage in consumption of eight key niche beverage segments

- Analysis of which beverage segments are popular with college students as well as those that are not, and whether this poses a challenge or an opportunity for beverage marketers

- The internal and external factors behind the purchase of a beverage, including need states such as wellness or refreshment as well as the role of peer recommendations, packaging and status as a "local brand," among others

- The motivators – such as taste, price, quality, meeting an immediate need – that underlie the purchase of specific beverages and how the weight of these influencers often differs from beverage to beverage

- A ranking of more than 20 flavors that college students say will influence their purchase of a new beverage

- The share of respondents who have already tried niche beverages such as coconut water and kombucha and whether they intend to repeat the purchase, as well as the number that have never tried such beverages and say they will or won't try them for the first time this year

- A look at beverage labels and ingredients and their impact on the purchase decision of college students

- College students' attitudes towards alcoholic beverage types, with specific questions about beer types in general and craft beer in particular

- Comparison of all the aforementioned data points between 2018 to results in surveys taken in 2016 and 2017

U.S. College Student Beverage Consumption and Attitudes

June 2018

BEVERAGE MARKETING CORPORATION

RIDDLE & BLOOM

RESEARCH ● DATA ● CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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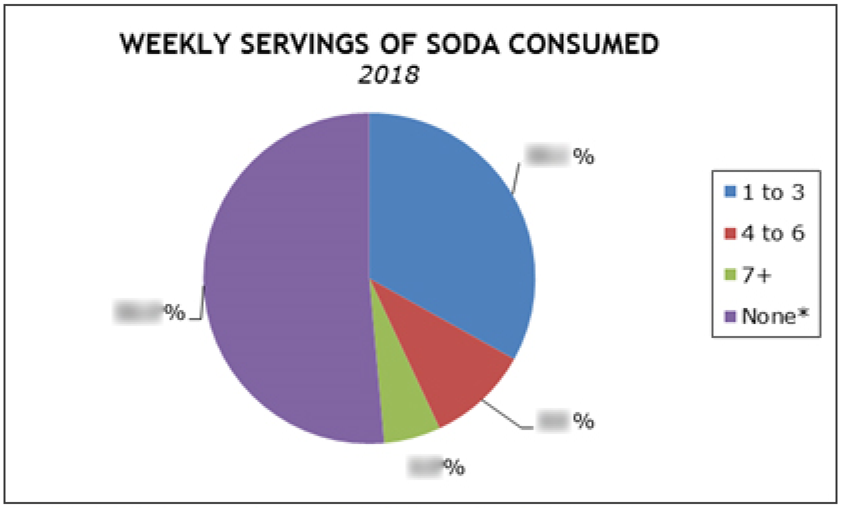

** Expressed as "I typically do not drink this beverage."*
Source: Beverage Marketing Corporation; Riddle & Bloom

Exhibit 29

COLLEGE BEVERAGE SURVEY

Intent to Consume Soda by Frequency

2016 – 2018

Do you expect to drink less, the same, or more than you did in the previous year?

	Share			Change	
Answer Choice	**2016**	**2017**	**2018**	**2016/17**	**2017/18**
Less	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Same	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
More	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
N/A*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]	[illegible]

** N/A denotes "I do not plan to drink this beverage"*
Source: Beverage Marketing Corporation; Riddle & Bloom

The beverage that college students appear to be eschewing is soda.

- This is consistent with the overall trend that has seen per capita consumption of soda drop by more than 16 gallons since 1998. This enabled bottled water to surpass CSD in volume at the end of 2016 – a circumstance that would have been deemed farcical if predicted 20 years ago.
- While soda is now the second largest beverage in the U.S., respondents to the Riddle & Bloom survey claim that soda is only their [redacted] most imbibed beverage on a servings basis. It cannot be denied that there might be some underreporting of soda consumption among college students surveyed by Riddle & Bloom based on the great discrepancy between share of servings and soda's share of volume in the general marketplace.
- However, the share of college-age beverage consumption garnered by soda increased from [redacted]% in 2017 to [redacted]% in 2018. It may take next year's survey to determine whether this is a reversal of the overall trend for soda, or just an anomaly. If it's not an anomaly, then it suggests that soda has reached its inevitable nadir, or that the "occasional indulgence of soda is okay" message has proved convincing to some young adult consumers.

The remainder of the beverages inquired about in the Riddle & Bloom survey fall mostly in what is called the alternative or New Age beverage category.

- Specialty coffee drinks such as lattes and frappes constituted [redacted]% of total beverage servings, according to survey respondents. Lattes and the like of course are part and parcel of the "Starbucks-ization" of the coffee industry in the past 25 years and often comprise the first coffee-containing beverages sampled by youthful "coffee aspirants." Thus, it is not surprising that college students continue to imbibe specialty coffee drinks with regularity. It should be noted that specialty coffee drinks had comprised higher percentage ([redacted]%) of total beverage servings in 2017.
- College students, extrapolating from the Riddle & Bloom survey, seem to drink way more bottled/can coffee drinks than the population at large. Although small volume-wise, these drinks offer marketers a higher unit price than sodas and waters.
- Also known as ready-to-drink (RTD) coffee, the bottled/can coffee segment has diversified from sweet, milky coffee drinks like category-dominant Frappuccino to include drinks with less or no dairy (i.e., black/dark coffee or containing almondmilk instead of milk) and less sugar. There are also the energy hybrids that provide a more macho positioning to attract college-age males. Last but not least, the burgeoning cold-brew coffee subsegment has introduced real innovation in terms of a less-acidic-tasting brew, with much of the incremental growth in bottled/can coffee is expected to occur in cold-brew.