



# State of Beverages 2025 Trend Report



A woman with voluminous curly hair, wearing a floral jacket, is smiling and holding a coffee cup with a straw. This image serves as the background for the left half of the page.

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**Tim Cofer**  
Chief Executive Officer

### Message from Tim Cofer:

From dawn to dusk, Americans sip their way through an average of 57 beverage moments a week—about 90 ounces a day—and the “why” behind those sips is changing faster than ever. Today’s consumers don’t just drink to hydrate—they drink to energize, indulge, connect, feel comforted, express themselves and more.

Welcome to the inaugural **Keurig Dr Pepper State of Beverages Trend Report**—a view into the evolving preferences defining what we drink across generations, needs and occasions in the U.S. Whether seeking well-being or a nostalgic favorite, beverages are deeply personal. As Gen Z leads a surge in flavor-forward exploration and customization, older generations are holding fast to the rituals that ground them. These behaviors are influencing this next era for the beverage industry—creating both challenges and opportunities for brands looking to stay ahead.

At KDP, we believe success today is about more than being on shelf—it means being in sync with people’s lives. It’s about showing up with the right beverage for the right moment, with the flavor, function and feeling they’re looking for.

We hope this report serves as your compass for where beverage behaviors are today, and more importantly, where they are headed tomorrow. We hope it inspires you, challenges your thinking and helps you sip smarter in 2025 and beyond.

—Cheers!





## What We're Sipping—and Why It Matters

The inaugural Keurig Dr Pepper **State of Beverages Trend Report** is a data-rich exploration of how American beverage preferences are transforming across generations, moments and needs.

Drawn from national surveys and KDP's own proprietary insights, this report uncovers trends including:

- As new generations rise, so do new habits—generational differences are the clearest dividing line shaping new drink preferences.
- Our go-to beverages are holding strong—including coffee remaining America's most essential beverage and carbonated soft drinks as the choice for a favorite refreshing fizz.
- Personalization is becoming central to how people drink—such as the consumer's desire to have diverse options to meet their mood or occasion or customizing their beverage to reflect personal taste and style.
- Consumers are seeking more intentional, flavor-rich beverage experiences—acknowledging they look for beverages to meet physical and mental well-being while also not wanting to sacrifice taste for function.

This report moves beyond what's selling to examine why we drink what we do. It's designed for those looking to understand where beverage culture is now—and where it's going next.



# 1 Beverage Essentials

Americans continue to rely on **familiar beverage staples**—especially coffee and carbonated soft drinks—to energize, comfort and indulge. At the same time, **premiumization** in beverages is fueling a growing desire for options that elevate everyday rituals.

## Coffee is America's most essential beverage

#1

beverage  
Americans say  
they **"can't live  
without"**

62%

of Americans say "my  
**day doesn't start** until  
I've had a cup of coffee"

69%

of Americans say "drinking  
coffee every morning is my  
**happy place**"

53%

of **Gen Z** drink cold coffee,  
more than any other  
generation

### For most, caffeine matters more than breakfast or a nightcap



If asked to choose...

59%

vs.

41%

prefer caffeine over  
food in the morning

prefer food over  
caffeine in the  
morning

73%

vs.

27%

of those age 21+ would  
rather skip all evening  
alcohol or alcoholic  
alternative beverages

would rather  
skip all morning  
coffee or caffeine



## Carbonated Soft Drinks (CSDs) are a refreshing indulgence



58%

find CSDs to be **more refreshing** than any other beverages

53%

of Americans **enjoy the taste** of CSDs more than any other type of drink

#1

beverage consumers choose to **treat themselves**



### Carbonated soft drinks aren't just treats...

**...they're time machines. For many Americans, they are the beverage most referenced when asked which beverages evoke the happiest memories, with comments including:**

“ Root Beer floats. The earthy flavor of the root beer combined with the creamy goodness of vanilla ice cream brings back joyful family memories of my childhood. We didn't have them often and they were a really special treat.”  
*70-year-old man*

“ I associate Dr Pepper with happy memories the most. It's delicious and I usually drink it when I'm hanging out with friends.”  
*18-year-old woman*

## Premiumization is Elevating our Daily Sips

Consumers are redefining what “premium” is in beverages and are seeking more opportunities to elevate their everyday sips. They want products that offer high quality and aesthetic appeal.

46%

of consumers are **willing to pay more for** beverages that they consider premium

56%

of consumers associate premium beverages with **better ingredients** and **better quality**

42%

of consumers agree that **attractive packaging** makes a beverage feel more premium



# 2 Needs & Occasions

Day-to-day, Americans reach for drinks that match their needs moment-to-moment. These preferences demonstrate the diversity of America’s beverage landscape—and a culture that values personal choice depending on the **need or occasion**.

## Different Beverages Meet Different Needs

Our insights tell us that people choose beverages to meet the following seven **emotional needs**.



Be Healthy



Treat Myself



Feel Connected



Be Relaxed



Mood Lift



On My Game



Everyday Routine

These are the top **functional needs** consumers say each beverage fulfills.



Coffee

- Energizing
- Relaxing
- Comforting



CSDs

- Craveable
- Flavorful
- Complementing Food



Bottled Water

- Hydrating
- Thirst-quenching
- Healthy



Juice

- Healthy
- Nutritious
- Family-friendly



Energy Drinks

- Energizing
- Unique
- Performance enhancing



Tea

- Relaxing
- Natural
- Stress-relieving



## Beverage Choices are Shaped by Occasions

Whether you're starting your morning solo at home, grabbing a midday boost on-the-go, or winding down with friends in the evening, what you drink is deeply influenced by where you are, who you're with and what you're doing.

### Top Beverages by Occasion

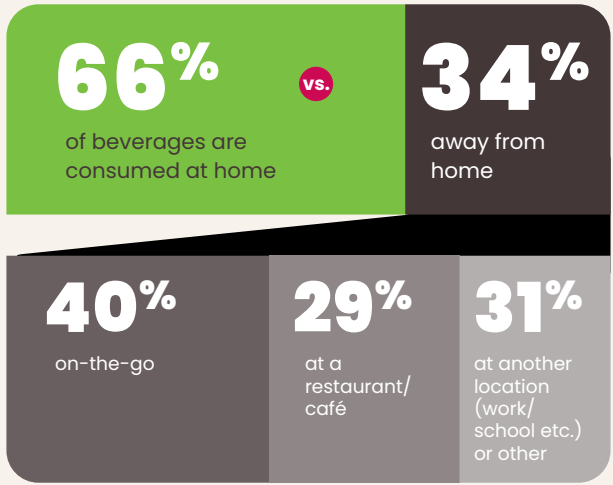


“ Our ability to build brands that resonate begins with an unmatched understanding of the consumer—grounded in rich, proprietary insights. By mapping beverage choices across people, needs and occasions, we unlock sharper marketing and innovation opportunities rooted in emotion and context.

Drew Panayiotou, Chief Marketing Officer at Keurig Dr Pepper

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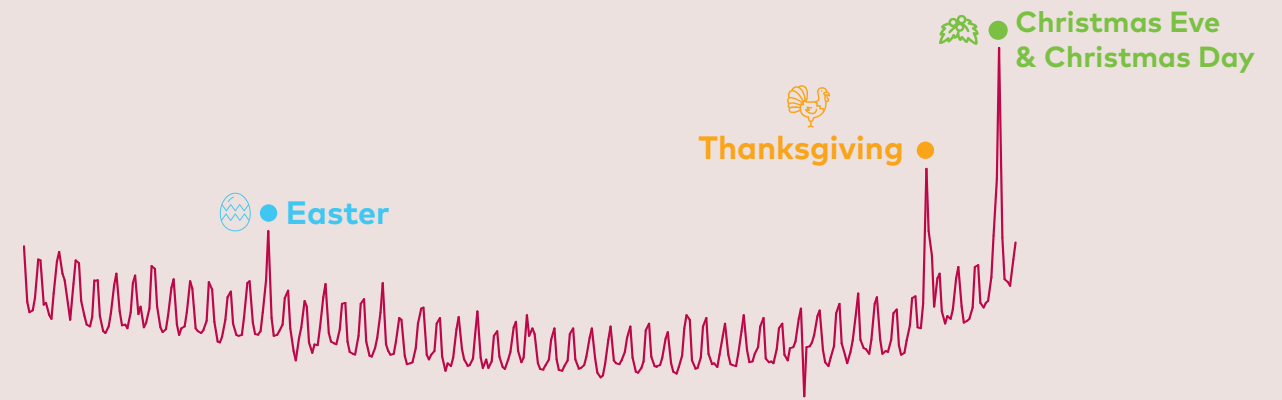
### Daily Beverage Occasions by Location and Social Setting



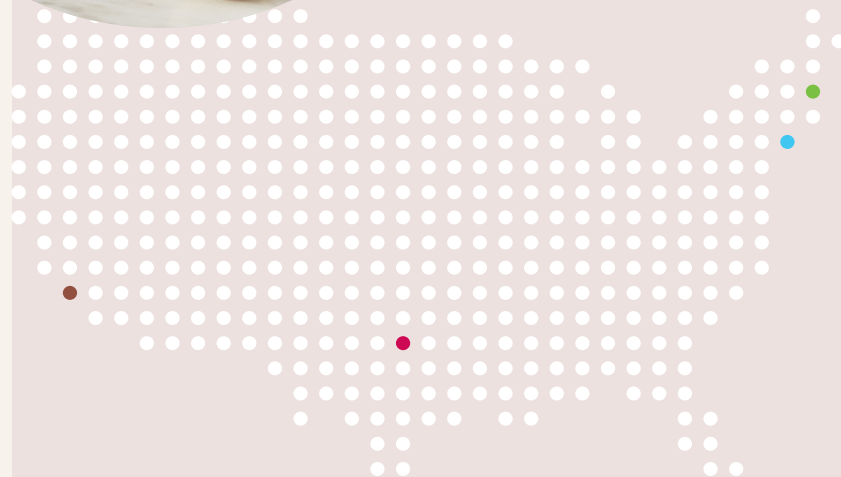
## Coffee Brewing Occasions Shift with the Calendar and the Map



Proprietary data from Wi-Fi®-enabled Keurig® brewers shows that daily coffee consumption spikes on holidays traditionally spent at home with family and friends, revealing how shared time together fuels our sipping habits.



Annual view of average # of coffee brews per household per day



We also see that where you live shapes when you brew your coffee throughout the day, reflecting differences in local rhythms and routines after adjusting for time zones.

- **Boston** brews earliest, leading in **early morning brewing (4 a.m. – 7 a.m.)**, followed by Los Angeles then Chicago
- **Dallas** shows the strongest morning coffee culture, with the **vast majority of brews happening before noon**, followed by Atlanta then Boston
- **New York** leads in coffee consumption **during non-peak hours (mid-day through night)**, highlighting a culture of sustained coffee use throughout the day
- **Los Angeles** shows the most active **late-night brewing (11 p.m. – 4 a.m.)** among all other major metros

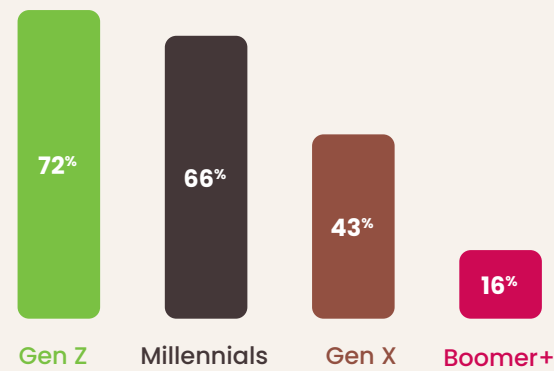


# 3 Discovery & Beverage Personalization

Younger consumers are driving a wave of **beverage curiosity**, fueled by a desire for variety, bold flavors and cultural relevance. For Gen Z in particular, drinks aren't just about taste—they're a **form of self-expression**.

On average,  
**44%** of Americans try new beverages **each month**—  
and that number rises sharply among younger adults

Try a new monthly beverage:



“

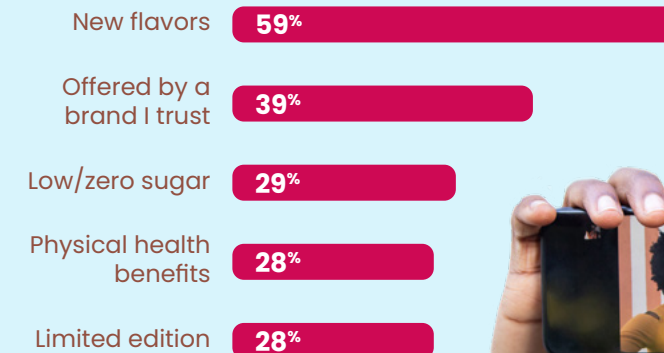
As a leader in successful flavor innovation – like Canada Dry Fruit Splash Cherry, last year's top new CSD flavor, and Dr Pepper Creamy Coconut, our best limited-time offering – we know bold flavors spark curiosity, drive relevance and create personal, memorable experiences.

Eric Gorli, President, U.S. Refreshment Beverages at Keurig Dr Pepper

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## Motivational Attributes

Among Those Who Try New Beverages





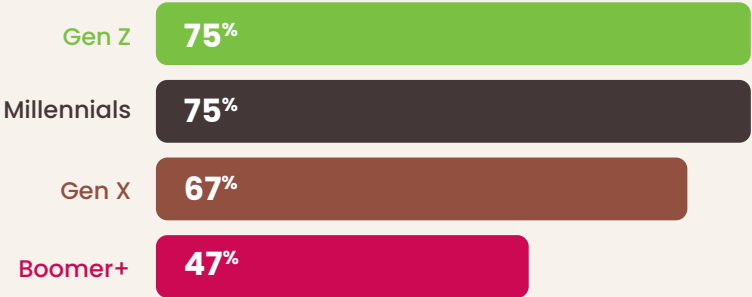
## Hot and Cold Sips are Being Personalized

Beverage customization allows consumers to showcase identity, reflect cultural trends and highlight personal style—making every sip feel **uniquely their own**.

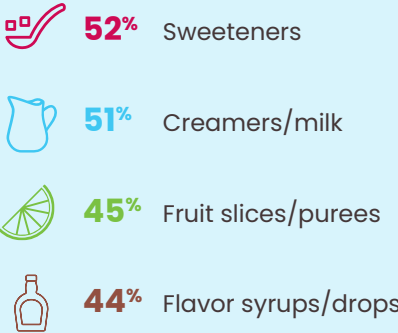
**65%** of adults customize their beverages

This trend is led by **Gen Z** and **Millennials**, with **75%** in each group customizing their beverages

Beverage customization:



### Most popular customization ingredients:



### Sippable Self-Expression

Gen Z is embracing beverages as a way to express their identity, showcase cultural relevance and reflect their personal style. Social media is fueling discovery and shaping taste by turning drink choices into shared moments of self-expression and community, especially among Gen Z, highlighting a generational shift in how consumers discover new beverage ideas.

**74%** of Gen Z are **turning to social media** to learn about beverage trends

**53%** of Gen Z choose beverages to **“stand out”**

### Flavor Spotlight

Our exclusive insights show us that some flavors dominate in certain seasons and one flavor stands out as a deal-breaker.

Data from Keurig® brewers in households across the U.S. show flavored K-Cup® pods are consumed across seasons. While staples like caramel, brown sugar and vanilla are consumed all year, other unique flavors gain popularity seasonally.



When asked to name their top ‘no-go’ beverage flavor...



Licorice was the most unpopular flavor among all generations and demographics

# 4 The Wellness Wave

Today’s beverages are expected to **do more**. With flavor as a given, beverage choices are increasingly guided by what they do—especially when it comes to mental and functional benefits. At the same time, more consumers are exploring sober-curious lifestyles, seeking alternatives that give them a benefit without the buzz.



**82%**  
say drinking their favorite  
beverages helps restore  
their **mental health**



**2/3**  
seek out beverages  
that improve their  
**physical health**



**Nearly  
HALF**  
regularly drink  
beverages beneficial  
for **gut health**



**59%**  
look for beverages that  
help them meet daily  
**essential nutrient needs**

Younger generations are more likely than older ones to:



Add electrolytes to  
their water

**42%** vs. **11%**  
Gen Z Boomers+



Choose beverages based  
on their functional benefits

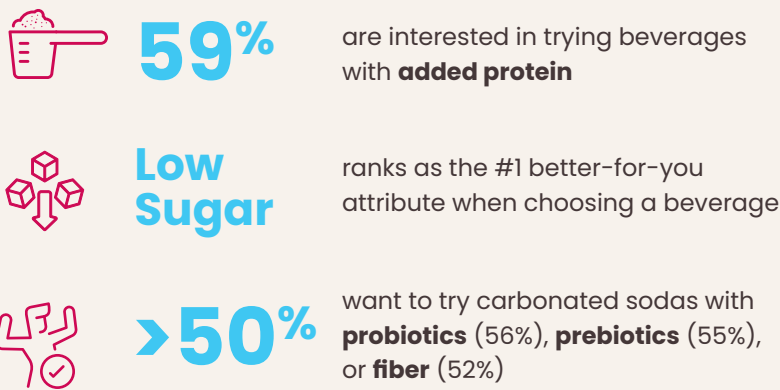
**74%** vs. **61%**  
Gen Z Boomers+



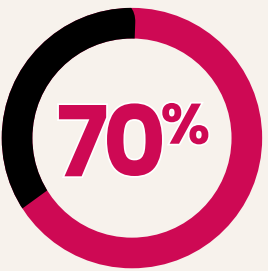
## Growing Demand for Better-for-You Benefits

Consumers are increasingly seeking beverages with better-for-you attributes and functional ingredients, and we also see growing interest in reducing alcohol consumption. Taste remains non-negotiable, and consumers are unwilling to sacrifice flavor for benefits.

### What Consumers Want in Better-For-You Beverages:



Most Americans would rather enjoy what they drink



Say they'd rather drink something that tastes amazing with no benefits than something beneficial that tastes awful



“

As consumer preferences evolve, we continue to broaden the better-for-you and zero sugar product offerings within our portfolio – with 60% of our products offering positive hydration, meaning they are either providing a serving of fruit with no added sugar or are low calorie with functional ingredients and nutrients.v

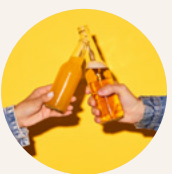
Dr. Karin Rotem-Wildeman,  
Chief R&D Officer at  
Keurig Dr Pepper

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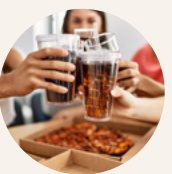
## Sober-Curious Is on the Rise



**56%**  
of consumers have **cut back on alcohol** for wellness or lifestyle reasons



**42%**  
of consumers, and 60% of Gen Z (21+), are **interested in exploring** non- or low-alcohol beverage options



**58%**  
of Americans prefer non-alcoholic beverages when **hanging out with friends**

### Prefer non-alcoholic beverages when hanging out with friends



# Methodology



The Keurig Dr Pepper State of Beverages Trend Report was derived from a variety of quantitative and qualitative data sources, including national surveys from Harris Poll, Ipsos and Morning Consult, as well as KDP's own proprietary data.

The Harris Poll, on behalf of KDP, conducted an online survey among 4,031 U.S. adults 18+ who consume beverages. The survey was conducted from March 11 to March 19, 2025. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For the Harris study, the sample Gen Pop 18+ data is accurate to within  $\pm 2.0$  percentage points using a 95% confidence level. Our KDP IPSOS consumption tracker is an ongoing proprietary online survey, with responses from over 34,000 consumers to date. The Morning Consult survey data presented is based on a nationally representative online survey among 2,202 U.S. adults aged 18+, fielded from May 12 to 14, 2025.

All coffee brewing data is derived from KeurigIQ, a proprietary opt-in data stream sourced from Wi-Fi-enabled Keurig® SMART brewers, including the K-Supreme® SMART, K-Supreme Plus® SMART, and K-Cafe® SMART coffee makers. These Wi-Fi-enabled brewers provide real-time consumption data directly from the brewers, offering a unique, in-home view of how consumers engage with the Keurig system.

