

2026

Coffee Shop Humanity Index StudySM

*Why America's Coffee Ritual is Searching for Its Soul:
From Corner Cafes to National Chains,
Mastering the Art of Connection*

1,107+

U.S. consumers
surveyed nationally

±3%

Margin of error at
95% confidence level

52%

Consistent experience =
top loyalty driver

BETTER BUYER™ | NATIONAL CONSUMER STUDY

By Matthew Scroggs | March 2026

Madison Albury
Senior Research Editor

[Read the full study + award honorees →](#)



KEY TAKEAWAYS — *The 2026 Coffee Shop Humanity Index Study* SM reveals a fundamental tension: consumers want assembly-line speed while mourning the loss of the coffee shop's soul. Our study of 1,107 U.S. consumers found:

- **Pragmatic Humanity:** Consumers define brand humanity through functional respect for their time and budget. Value (54%), Convenience (51%), and Reliability (48%) are the most-selected qualities of a "human" brand.
- **The Performance Gap:** While 59% of consumers choose shops based on consistent, efficient experiences, 54% are still influenced by personal warmth—a dual mandate that's difficult to scale.
- **The Caring Leaders:** Consumers find genuine care across the entire coffee landscape, from global chains to neighborhood corner shops.
- **The Loyalty Driver:** Consistent, efficient experience was the top loyalty driver (52%), followed closely by fair pricing (43%).

QUICK BACKGROUND

The Brand Humanity Index is Better Buyer's framework for measuring the "emotional intelligence" of commerce. Rather than tracking basic customer satisfaction, the BHI measures six core relational dimensions: Empathy, Transparency, Fairness, Authenticity, Trust, and Reliability. By quantifying these attributes, the Index identifies which brands have moved beyond simple transactions to build genuine connections that drive long-term loyalty and advocacy.

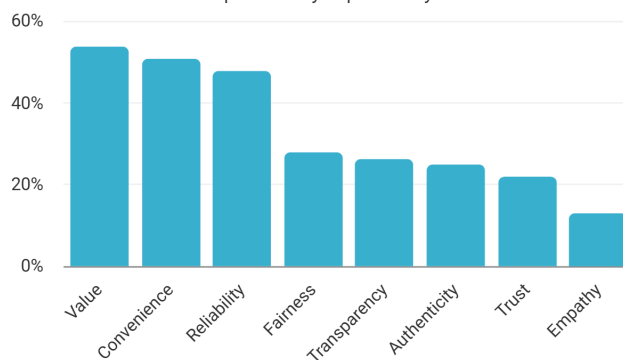
THE BATTLE FOR THE "THIRD PLACE"

Every morning, millions of Americans engage in a ritual that's part biological habit and part emotional anchor. Traditionally, the coffee shop served as the "Third Place"—a sociological term describing the vital social environment separate from home and work. But as we enter 2026, this space is caught in an identity crisis: Is it a high-speed distribution center for caffeine, or a community anchor?

At Better Buyer, we conducted a nationally representative study of more than 1,100 consumers to find out. With a ±3% margin of error and 95% confidence level, this high-precision study uncovers the hidden truths of the coffee industry. To ensure data integrity, all answer choices in our survey were randomized to eliminate order bias.

Satisfaction Drivers

When choosing a coffee shop, which of these qualities are most important to you personally?



Source: 2026 Coffee Shop Humanity Index Study



“Don’t make it an assembly line — I want to feel like the 90’s early 00’s...”

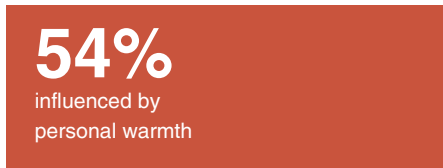
“A fast, efficient way that’s the least awkward or socially forced.”

“Considering how much the average person can afford.”

FUNCTIONAL HUMANITY: WHY RELIABILITY IS THE NEW HEART

The most striking revelation? Modern consumers have redefined "humanity." In a world of rising costs and shrinking time, humanity is measured by how a brand respects a customer's resources.

- **The Hierarchy of Choice:** When consumers select the qualities that define their ideal shop, Value (54%), Convenience (51%), and Reliability (48%) lead the rankings.
- **The Empathy Gap:** Classic emotional traits like Empathy (understands unique needs) and Trust were selected by only 13% and 22% of respondents, respectively.
- **The Analysis:** For the modern coffee drinker, functional excellence is an act of humanity. Respecting a customer's time through convenience and their budget through value is the ultimate form of brand empathy. As one respondent noted, being human in 2026 simply means "considering how much the average person can afford."



THE AUTHENTICITY TRAP: CONNECTION VS. THE ASSEMBLY LINE

While 54% of consumers say a "warm, personal experience" influences their choice of shop, the data suggests that connection cannot be manufactured. When it feels scripted, it fails.

- **Socially Forced Interactions:** Qualitative feedback reveals growing fatigue with "corporate kindness." Verbatim responses indicate that connection feels inauthentic when it's mandated. One respondent noted: "Having a conversation with me because you're told to comes across as inauthentic... a lot of the time it's just awkward."
- **Verbatim Insight:** "Don't make it an assembly line," one participant pleaded. "I want to feel like the 90's early 00's where you can... hide away in a corner with a drink, small bite and good book alone or catching up with your friend." Another requested a "fast, efficient way that's the least awkward or socially forced."
- **Authenticity Scores:** Authenticity (genuine interaction) was a top quality for 25% of respondents. Consumers want warmth, but they can often sense a corporate manual behind a smile.



Josiah Flex
Senior Analyst

THE GENERATIONAL DIVIDE

The data reveals a story in the numbers when comparing age groups. What feels "human" to a student is often fundamentally different from a retiree's expectations.

THE FAIRNESS DIVIDE

Consumers over 60 are nearly twice as likely to prioritize Fairness (35%) than those aged 18–29 (18%). For older demographics, being "human" means treating every customer equally and reasonably.

THE "LINGO" BARRIER

A recurring theme in qualitative feedback was frustration with specialized coffee jargon. One verbatim response requested that baristas "not look at me like I have five heads when I ask for a large... not everyone understands the lingo!"

RELIABILITY BY AGE

59% of those over 60 selected Reliability as a top quality, compared to just 46% of those under 30. Older consumers view a lack of reliability as a fundamental failure of the brand relationship.



Jessica Goodrum
Content Marketing Director

Influential Factors

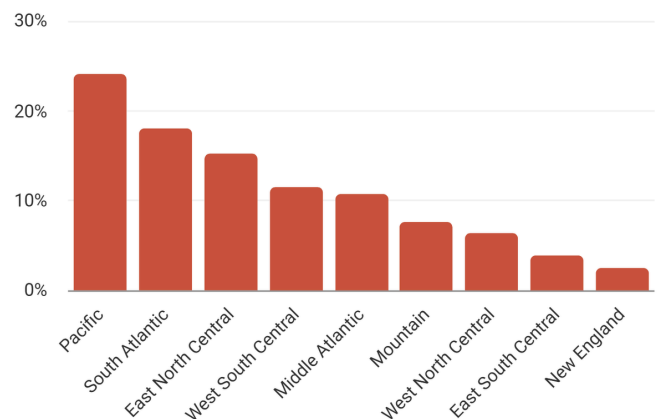
If two coffee shops were located the same distance from you, which of these factors would influence you to choose one over the other?



Source: 2026 Coffee Shop Humanity Index Study



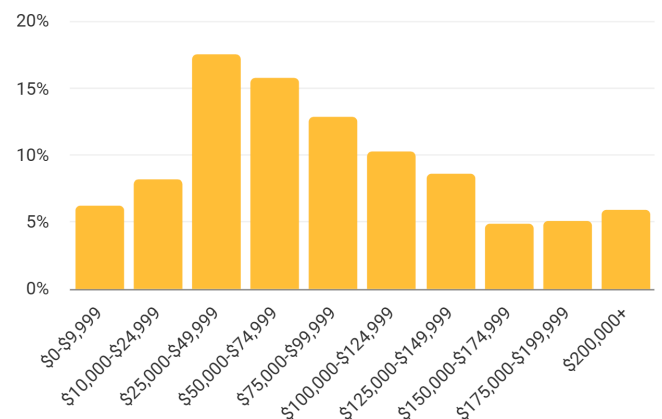
Major US Regions



Source: Better Buyer



Household Income



Source: Better Buyer



BRAND HUMANITY AWARD

The Brand Humanity Award honors companies that consumers identify as caring and people-first based on perceptions of empathy, transparency, fairness, trust, reliability, and authenticity.

NATIONAL	SUPER REGIONAL	REGIONAL	LOCAL
<ul style="list-style-type: none"> • Dunkin' • Starbucks 	<ul style="list-style-type: none"> • 7 Brew Coffee — SE • Bigby Coffee — MW • Caribou Coffee — MW • Dutch Bros Coffee — W • Peet's Coffee — W + more honorees... 	<ul style="list-style-type: none"> • Cabin Coffee Co. — MW • Caffè Nero — NE • Colectivo Coffee — MW • French Truck Coffee — SE • Philz Coffee — W + more honorees... 	<ul style="list-style-type: none"> • BagelZ — RI • Baltimore Coffee & Tea — MD • Barking Bee Coffee — AL • Brevity Coffee Co. — TX • Buddy Brew Coffee — FL + more honorees...

*Only companies identified by consumers in the study can be named honorees.

45 institutions recognized across all four categories.

View the full award list and learn more about each honoree at betterbuyer.com



METHODOLOGY

The 2026 Coffee Shop Humanity Index Study was conducted by Better Buyer in early 2026, surveying a nationally representative sample of 1,107 U.S. consumers. The study carries a margin of error of $\pm 3\%$ at a 95% confidence level. To ensure data integrity, all answer choices were randomized to eliminate order bias. The respondent pool was 56% Female and 44% Male. Geographically, participants represented all major US regions, including the Pacific (24%) and South Atlantic (18%). Household income was distributed across all brackets, with the largest group (18%) earning between \$25,000 and \$49,999.

PROMOTIONAL USE

Our awards are derived from independent consumer perception research conducted through nationally representative surveys. Companies named in this study may reference their recognition in editorial or news contexts. However, using the designation name, title, badge, or logo in advertising, marketing, or sales materials requires prior written authorization and an active licensing agreement.



Helping buyers make better decisions.

Backed by real consumer feedback, our ratings, reviews, studies, and videos help people make better purchasing decisions while equipping businesses with practical insights that guide improvements across the customer experience.



Every day we strive to be...



Your guide to smarter buying.

We share insights from real customers to help you make more confident decisions.



Trusted research for better choices.

We help you compare companies based on the experiences of real people like you.



Insight that helps brands improve.

We uncover what customers value most—helping businesses focus and improve.

ABOUT THE BRAND HUMANITY INDEX

The Brand Humanity Index is Better Buyer's framework for measuring the "emotional intelligence" of commerce.

Rather than tracking basic customer satisfaction, the BHI measures six core relational dimensions:

- Empathy
- Transparency
- Fairness
- Authenticity
- Trust
- Reliability

By quantifying these attributes, the Index identifies which brands have moved beyond simple transactions to build genuine connections that drive long-term loyalty and advocacy.



MATTHEW SCROGGS

Drawing on more than a decade of experience at one of the world's most respected market research firms, Matt witnessed the immense value of authoritative consumer data. He saw how global, iconic brands used structured research to measure satisfaction, refine their customer experiences, and dominate their markets. But he also noticed a gap. It isn't just the Fortune 500 that need to know exactly where they stand with their customers—businesses of every size deserve that insight.

Today, as CEO of RivalMind (publisher of Better Buyer), Matt makes this standard of survey research accessible to the entire market—studying consumer opinions at scale to reveal what real people actually think. For the consumer, Better Buyer acts as a guide to smarter buying. For the business leader, it serves as the ultimate reality check—equipping brands with practical insights to drive improvements across the customer experience.