RIVALMIND

2026

Caring Coffee Shops Study

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

RIVALMIND | NATIONAL CONSUMER STUDY

By Matthew Scroggs

Madison Albury
Senior Research Editor

Read the full study + award honorees →

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KEY TAKEAWAYS — The 2026 Caring Coffee Shops Study 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 caring through functional respect for their time and budget. Value (54%), Convenience (51%), and Reliability (48%) are the most-selected qualities of a "caring" 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 RivalMind 2026 Caring Coffee Shops Study measures "emotional intelligence" of commerce. Rather than tracking basic customer satisfaction, the study measures six core relational dimensions: Empathy, Transparency, Fairness, Authenticity, Trust, and Reliability. By quantifying these attributes, the study 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 RivalMind, 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.

Source: 2026 Caring Coffee Shops Study

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> ***"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."***

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FUNCTIONAL CARING: WHY RELIABILITY IS THE NEW HEART

The most striking revelation? Modern consumers have redefined "caring." In a world of rising costs and shrinking time, caring 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 caring. Respecting a customer's time through convenience and their budget through value is the ultimate form of brand empathy. As one respondent noted, caring in 2026 simply means "considering how much the average person can afford."

59%
choose based on consistent efficiency

54%
influenced by personal warmth

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

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THE GENERATIONAL DIVIDE

The data reveals a story in the numbers when comparing age groups. What feels "caring" 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, caring 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

Source: 2026 Caring Coffee Shops Study

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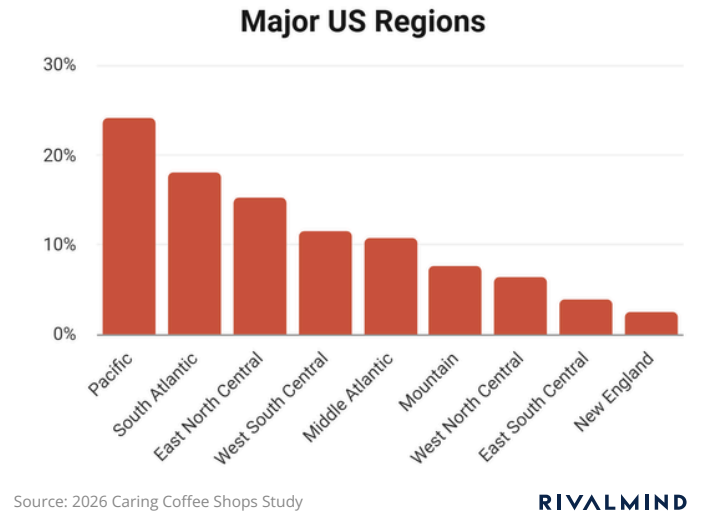

Source: 2026 Caring Coffee Shops Study

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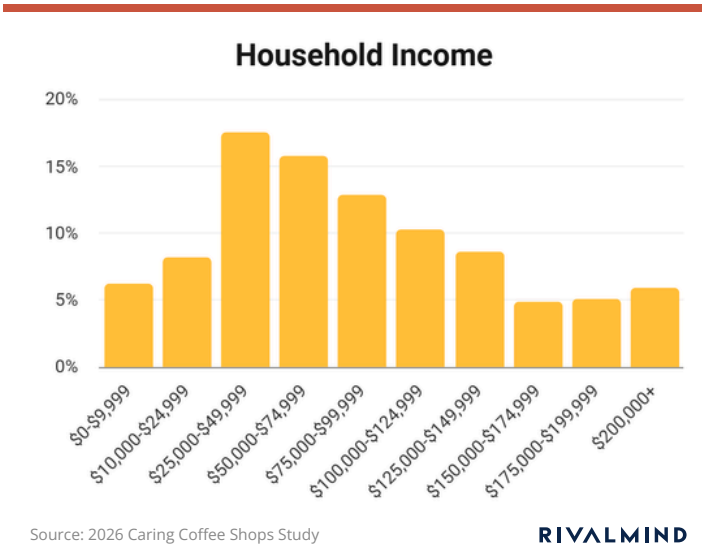

Source: 2026 Caring Coffee Shops Study

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Award Categories:
National · Super Regional · Regional · Local

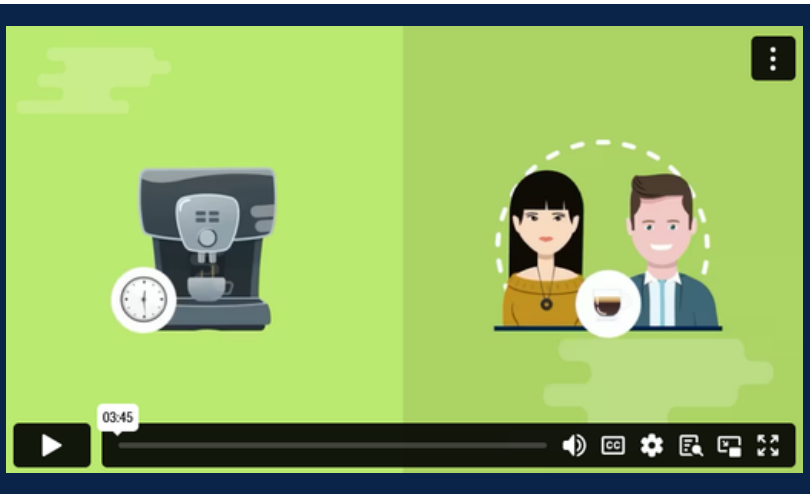
SCALING CARE: THE 2026 HONOREES

Earning the perception of "caring" is difficult, especially given that 8% of Americans believe "no coffee shop brand truly cares about its customers." This baseline skepticism makes the ranking of the top national brands even more significant. The 2026 Caring Brand Awards don't crown a single winner—because authentic connection isn't a zero-sum game. Consumers find genuine care across the entire coffee landscape, from global chains to neighborhood corner shops. Every brand recognized here has achieved something remarkable: they've broken through modern consumer skepticism and proven that the "caring" side of business can be mastered at any scale.

To reflect how operational size shapes the customer experience, we've organized awards across four tiers. National brands prove that ubiquity doesn't have to mean soullessness—you can be everywhere and still feel personal. Super Regional brands (11+ states) and Regional brands (2-10 states) walk the tightrope between aggressive growth and localized charm. Local brands, operating primarily within a single state, remind us of the power of deep community roots and unscripted authenticity. Across every tier, one truth holds: whether your footprint is massive or modest, consumers still demand the same core things—respect, value, and reliability.

Watch: Key Findings from the 2026 Caring Coffee Shops Study

Click to view the animated study breakdown at rivalmind.com



SCALING CARE

8%
believe no coffee shop truly cares about customers

25%
authenticity = top quality (genuine, not scripted)

54%
influenced by a warm, personal experience

FINAL THOUGHTS

As we look toward the remainder of 2026 and beyond, the coffee industry faces a defining question: In the race to accelerate and automate, are we accidentally stripping away the very "friction" that makes the coffee ritual human? The data shows that while we demand the efficiency of an assembly line, we're wary of the sterile future it implies.

The coffee shop brands that rank highest in the coming years will be those that master the "unscripted moment"—the ability to be perfectly efficient without feeling like a machine

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CARING BRAND AWARD

The Caring Brand Award honors companies named by consumers, unaided, in our national study as the brands they believe care most about their customers. Honorees must meet a minimum mention threshold (see awards methodology online).

NATIONAL

- Dunkin'
- McDonald's
- Starbucks

SUPER REGIONAL

- 7 Brew Coffee — Southeast
- Biggby Coffee — Midwest
- Caribou Coffee — Midwest
- Dutch Bros Coffee — West
- Peet's Coffee — West
- Scooter's Coffee — Midwest
- Tim Hortons — Northeast

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

A mark of excellence, backed by the voices of real consumers.

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

METHODOLOGY

The 2026 Caring Coffee Shops Study was conducted by RivalMind in early 2026, surveying a nationally representative sample of 1,107 U.S. consumers. The study carries a margin of error of ±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.

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Helping brands make better decisions.

We exist to help companies thrive, driving transformational growth through innovative digital marketing. Our consumer research equips businesses with practical insights that guide improvements across the entire customer experience.

Watch Now

Every day we strive to be...

1 Your guide to smarter marketing.

We uncover what customers value most to help you focus and improve.

2 Your competitive advantage.

Informed by the experiences of real people, we consult, educate, and execute.

3 Your favorite employee.

We take an owner's perspective, leveraging our business brains and marketing savvy.

ABOUT OUR STUDIES

RivalMind's caring brand studies measure the "emotional intelligence" of commerce.

Rather than tracking basic customer satisfaction, our studies measure six core relational dimensions:

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

By quantifying these attributes, our studies identify 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, Matt makes this standard of survey research accessible to the entire market—studying consumer opinions at scale to reveal what real people actually think.
Not only does this fuel intelligent marketing, it serves as the ultimate reality check for business leaders—equipping brands with practical insights to drive improvements across the entire customer experience.

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