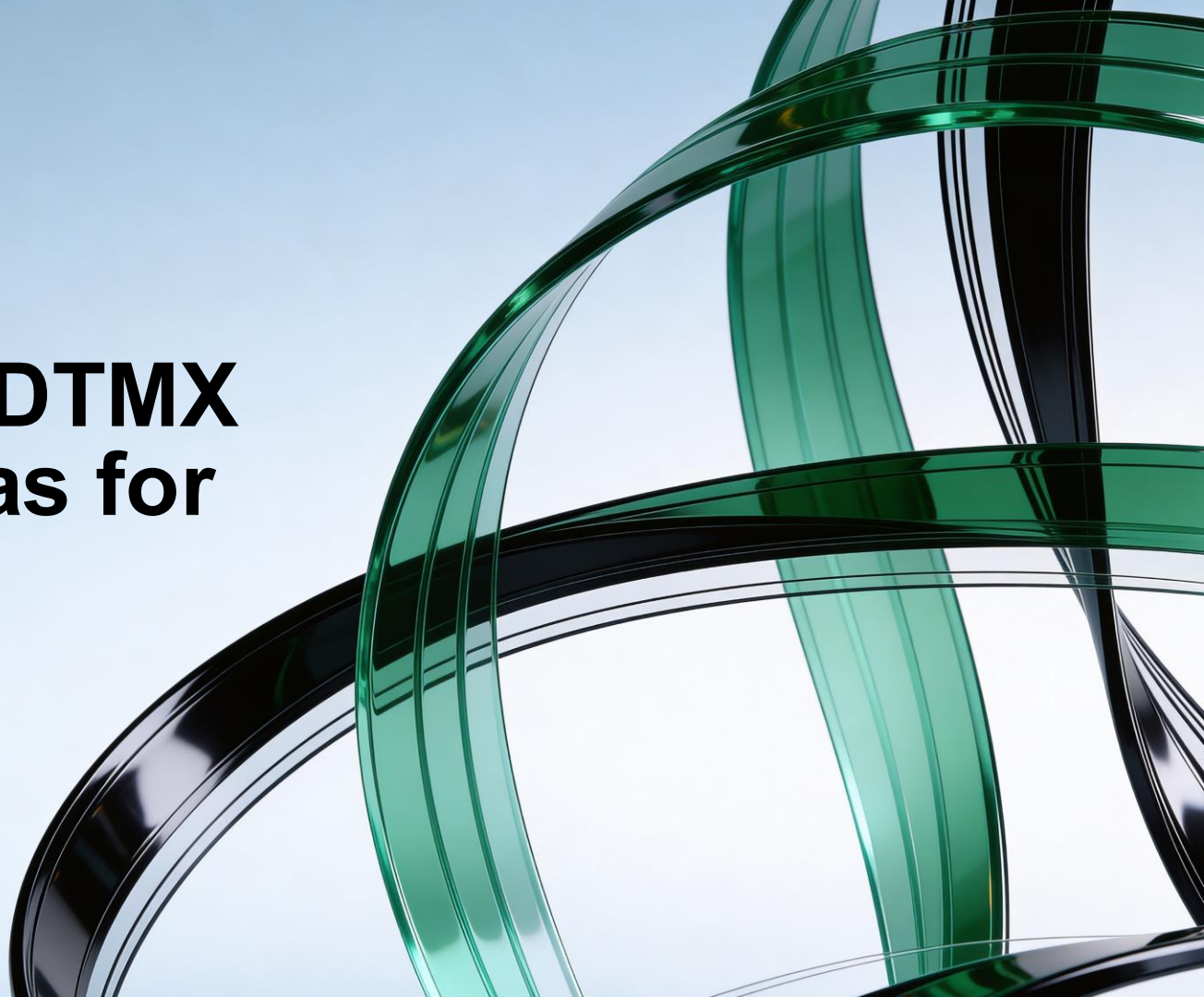


hhglobal

DTMx3.0

Coca-Cola DTMX growth ideas for the U.S.

Consumer and market insights



We're embedded in U.S.

334m U.S. population

~230m Households across the US

~70% U.S. consumers who drink CSD at least occasionally

\$90B U.S. carbonated soft drinks market (annual retail sales, est.)

KEY DISTINCTIONS

Soda is a daily habit in the U.S., embedded across occasions and need-states

Nostalgia and experimentation run in parallel, with heritage brands refreshing classics while innovation pushes bold flavors and functional drinks to meet healthy indulgence.

Sports and entertainment nation. NFL, NBA, MLB, NCAA, NASCAR, plus festivals and theme parks. Pouring rights are multi-million-dollar contracts. Tailgating and watch parties are embedded consumption rituals.

Personalization is default. Freestyle machines offer 175+ choices. Dirty soda customization has entered mainstream QSR.

Car-dependent, convenience-first. Drive-through accounts for ~70% of QSR traffic.

USA

AT A GLANCE

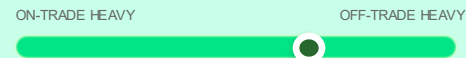
DIGITAL EMBEDDEDNESS



CULTURAL EMBEDDEDNESS OF SODA



ON/OFF CONSUMPTION LEAN



RETAIL ECOSYSTEM



We know your competitive growth context

01



Indulgence vs wellness

Per-capita soda consumption is in long-term decline as health consciousness rises. Fast growth in better-for-you and functional products.

02



Hyper-competitive market

Rise of energy and functional drinks, taking market share from already competitive market.

03



Regulatory complexity

Local taxes create a patchwork that complicates pricing and activation.

The background features several thick, glossy, green, wavy lines that flow across the frame, creating a sense of motion and depth. The lines are set against a plain white background.

DTMx3.0

We can help you grow

By showing up with the
right message, in the right
format, at the right moment.

Move at the speed of culture with limited edition collectibles and branded merch

Limited-edition cans, short-run packs, and IP-led merch drops now function as cultural currency, especially among Gen Z and millennials.

- 39% of Gen Z consumers say they are more likely to purchase a product when it carries a limited-edition label
- 69% of beverage subcategories now run at least one limited-edition SKU, up from 57% in 2021
- 85% of consumers are more likely to choose a brand after receiving branded merch

The opportunity is to close the gap between cultural moment and physical product.



Hyperlocalize POSM with smart culture tracking

The U.S. is one of the most culturally diverse consumer markets on earth with over 430 languages spoken, and demographic makeup can shift from one zip code to the next.

- 57% of Hispanic consumers say it's important that brands reflect their personal values. 67% of Black consumers pay more attention to brands that reflect their culture
- Retailers are localizing assortments by neighborhood. Localized culture shape formats and messaging, like Utah's dirty soda and border towns in Texas being bilingual by default

The opportunity is to use localized intelligence to design POSM that reflects the language, food culture, and occasions of the communities it's placed in.



Focus POSM on occasion-driven need states to cut through the noise

Beverage is one of the most habitual purchases in the U.S.—but the real growth is coming from moments when consumers are solving a specific need: hosting, hydration, energy, food pairing, or choosing not to drink alcohol.

- 73% of consumers feel overwhelmed by choice, and 71% of grocery shoppers wish they could find options that suit their needs more quickly
- In online search, and increasingly Gen AI, consumers search by occasion—"what pairs with this," "what do I bring," "what can I drink that isn't alcohol."
- Weather-triggered DOOH increases engagement by up to 50%. Contextually relevant DOOH content boosts ad effectiveness by 17%

The opportunity is to reorganize POSM around occasion and need-state cues: refreshment, pairing, zero sugar, hosting, game day—so it works as a decision shortcut.

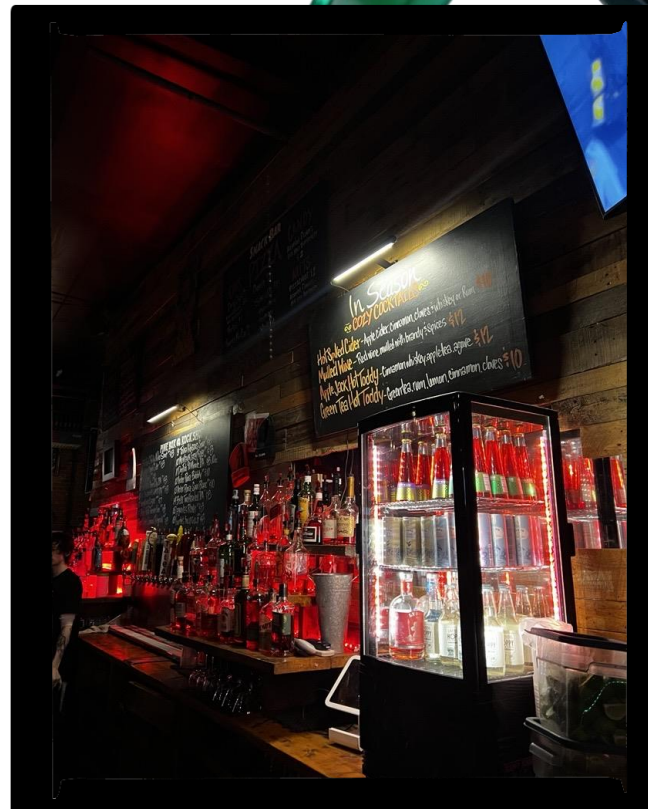


Use on-trade POSM to position Coke as the “zebra-stripe” of choice

Zebra striping—alternating between alcoholic and non-alcoholic drinks in a single session—is one of the fastest-growing consumption behaviors in U.S. on-trade. 47% of on-premise visitors already do it.

- 53% of alcohol consumers are actively trying to cut back, up from 44% five years ago. 65% of Gen Z plan to drink less in 2025
- The no-alcohol category is projected to grow at 18% CAGR through 2028

The opportunity is to design on-trade POSM that positions Coca-Cola brands as the go-to non-alcoholic option.



Capture decision moments at forecourts

With over 150,000 convenience stores, 150,000+ gas stations, and a car-dominant culture outside a handful of transit-oriented cities, the forecourt and c-store channel is a critical impulse-purchase battleground.

- 70% of c-store transactions include an impulse buy. The soda fountains are a key channel for drink purchases and competition is high
- The average c-store visit lasts under four minutes. Shoppers pass 606 product displays at 0.3 seconds each. 69% read promotional signage at the pump before they walk in

The opportunity is to activate the forecourt as a beverage decision point.





hhglobal

DTMx3.0

Thank
you