

Tracking Measures

By Type of Coffee

- Daily, weekly, annual
- 50-year trending

By Age

- Daily, weekly, annual
- By coffee type
- Total, Traditional, Gourmet

By Region

- Total, Traditional, Gourmet

By Time of Day

- By coffee type
- By age
- By location and share of cups

By Location

- In home vs. out of home
- By age
- By share of cups

Drivers and Barriers

- Consumer attitudes
- By age
- Health messages

Consumer Perspective— Past 6 Months

- Changes in Consumption
- Changes in Location

Coffee Origins/Certifications

- Country associations
- Certification awareness

Additives and Flavorings

- Breakout of additives by type and by age

Consumer Profiles

- Demographics, traditional vs. gourmet drinkers
- Gourmet drinkers over time
- Non drinkers

Since 1950, the National Coffee Association of U.S.A. has commissioned an annual survey of Americans regarding their consumption of coffee and, since 1993, their habits and practices related to espresso-based beverages including cappuccino, espresso, latte and iced/coffee blended with ice, café mocha – with the addition of macchiato this year. The study provides the longest available statistical series on consumer drinking patterns related to coffee and other beverages. In the earliest years, the study was sponsored by the Pan American Coffee Bureau and then the International Coffee Organization. Since 1991, the study has been financed and conducted by the National Coffee Association of U.S.A., Inc.

The sample size of this year's study is 2,956 beverage drinkers, similar to the sample sizes achieved from 1993 to 2008. Prior to the 1993 study, sample sizes of 7,500 beverage drinkers were obtained. While care should be given when evaluating year-to-year changes in data among some of the smaller sub-segments of the coffee-drinking population, the change in sample size increased the margin of error by less than 1% and, as such, did not result in any substantive loss of information accuracy.

Study Enhancements

The tracking of habits and practices as they relate to the consumption of cappuccino, espresso, latte and iced/coffee blended with ice began in 1993, café mocha was added in 1999 and macchiato was added in 2009. In the past, these coffee types had been presented separately from what was historically defined as coffee: regular, soluble (instant) and decaffeinated coffee. This separation was maintained to ensure comparable historical trends. Given the increase in consumption of these coffee types, however, their data have now been aggregated with the traditionally defined coffee consumption data in defining the total U.S. market and in tracking the consumption of total coffee. Of course, statistics breaking out these newer additions to the market are also presented separately and titled accordingly.

As a result, since 1999, the total coffee market includes all coffee types:

Regular, Instant and Decaffeinated coffee and Gourmet Coffee Beverages, which includes espresso-based products, such as Cappuccino, Espresso, Latte, Café Mocha, Macchiato and Iced/Coffee blended with ice products and Gourmet (premium whole bean or ground) coffee.

Beginning in 2006, profiling non drinkers of coffee was added to the study. In 2007, segmentation was initiated to better understand which consumers drink coffee and why.

The 2009 National Coffee Drinking Trends survey was conducted via telephone. The telephone survey interviewed approximately 3,000 males and females, 18 years of age or older, who consumed some beverage (other than tap water) the day prior to being interviewed. The samples are representative of the population of the continental U.S. (225,849,000 age 18 years or older).

The methodology for the telephone survey is:

- National representative sample of 2,956 people
- Random digit telephone dialing
- Data collection mid-January to mid-February 2009

Each respondent was interviewed regarding the beverages (other than tap water) that he or she consumed “yesterday” — i.e., the day before being contacted. Specifically, consumption information was collected for each of six time periods:

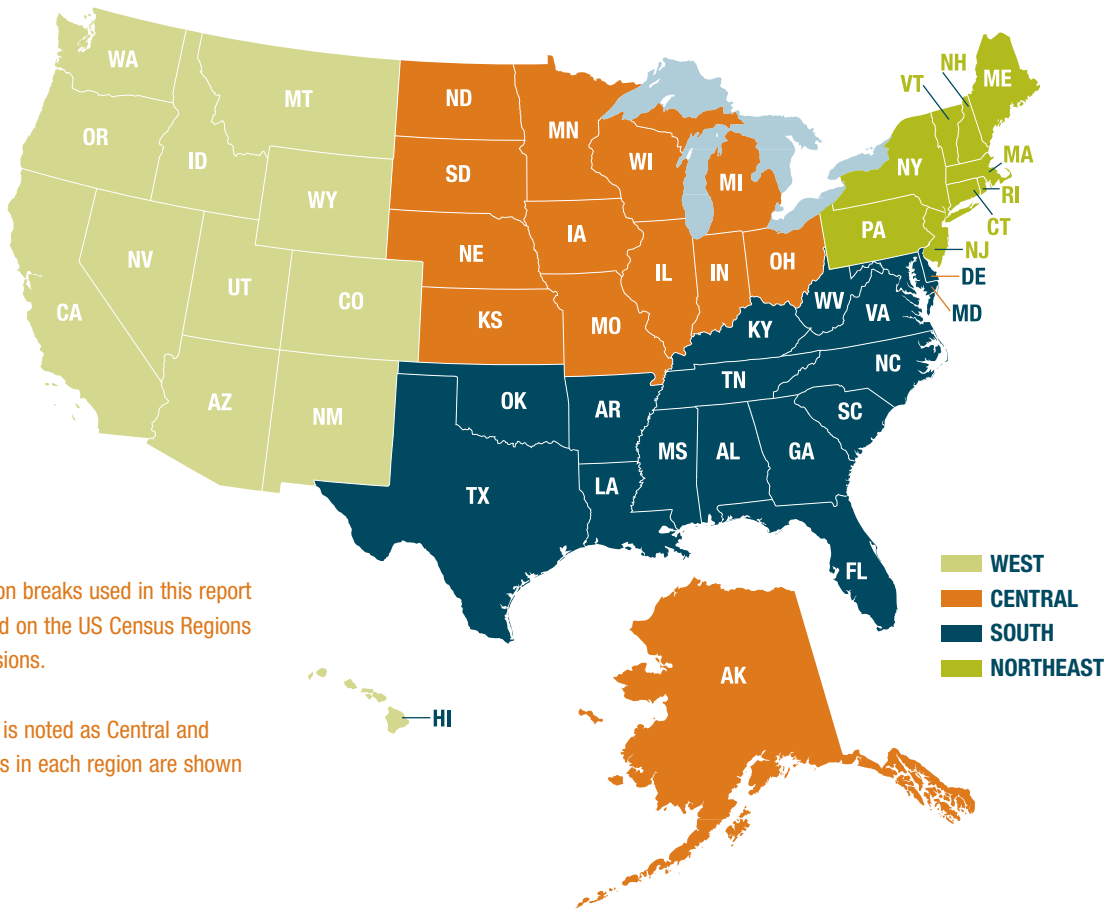
- **Breakfast** – defined to respondents as “the first meal after rising, even if you only had fruit juice or coffee”
- **Morning** – defined as “between breakfast and lunch”
- **Lunch**
- **Afternoon** – defined as “between lunch and dinner”
- **Dinner**
- **Evening** – defined as “after dinner”

If coffee was consumed during one or more of these time periods, details of coffee consumption practices for each time period were collected. In addition to this time period-specific information, coffee drinkers were asked in detail about more general coffee consumption practices, as well as attitudes and perceptions with respect to coffee beverages.

All survey participants were asked about the length of time since they last drank coffee...

- For each coffee beverage not consumed yesterday, respondents were asked if they had consumed any in the past week. For each beverage consumed in the past week, they were asked about the details of their consumption.
- For each coffee beverage not consumed yesterday or in the past week, respondents were asked if they had consumed any in the past year.
- Finally, a demographic profile of all survey participants – whether coffee drinkers or not – was collected.

The resulting data were aggregated, weighted for age, gender, and household size within region (based on census data) and quantified. The salient highlights of the data are included in this summary report. At the conclusion of this report are Annex tables that summarize critical consumption measures from 1950 to the present.



The region breaks used in this report are based on the US Census Regions and Divisions.

Midwest is noted as Central and the states in each region are shown at right.

Nomenclature

Total Coffee:

- Includes all coffee types, including traditional coffee and gourmet coffee beverages.

Traditional Coffee:

- Regular Coffee: Non-instant coffee, excluding cappuccino, espresso, latte, iced/ice-blended coffee, café mocha, macchiato and gourmet coffee.
- Instant Coffee: Used interchangeably with soluble coffee.
- Flavored Coffee: Pre-flavored with a flavor such as French Vanilla or Hazelnut.

Gourmet Coffee Beverages:

- Espresso-Based Beverages: Includes cappuccino, espresso, latte, café mocha and macchiato.
- Iced/Ice-Blended Coffee: Includes blended and frozen coffee drinks.
- Gourmet Coffee: Defined to respondents as "premium whole bean or ground varieties".

Daily Consumption:

"Daily" consumption refers to respondents who drank coffee or gourmet coffee beverages the day before they were interviewed. These respondents may not necessarily consume coffee or gourmet coffee beverages every day.