Coffee, Health & Consumption: Reaching Coffee Drinkers
“The Objective of this Agreement is to strengthen the global coffee sector...by:

...promoting the development of consumption and markets for all types and forms of coffee...”
Coffee & Health: Communicating the Message

- Can Consumption Grow?
- What is Important to Consumers?
- What do Consumers know about Coffee & Health?
- Can Health Information Change Consumer Behavior?
- What does the Research say?
- How Can Health Messages be Communicated?
US Consumption: Room for Growth

- While levels vary year-to-year – currently trending up – consumption is below historical highs

% of Americans Drinking Coffee Yesterday

<table>
<thead>
<tr>
<th>Year</th>
<th>% of Americans Drinking Coffee</th>
</tr>
</thead>
<tbody>
<tr>
<td>1958</td>
<td>75.7</td>
</tr>
<tr>
<td>1968</td>
<td>69.6</td>
</tr>
<tr>
<td>1978</td>
<td>57.8</td>
</tr>
<tr>
<td>1988</td>
<td>50</td>
</tr>
<tr>
<td>1998</td>
<td>54.1</td>
</tr>
<tr>
<td>2008</td>
<td>59.9</td>
</tr>
<tr>
<td>2018</td>
<td>64</td>
</tr>
</tbody>
</table>
What is Important to Consumers?

- Consumer values are driving changes in product choices, behavior, and attitudes.
- Coffee trends include premiumization, convenience, customization, single-origin, and roast type.
- Consumers increasingly value: ethical sourcing, sustainability, certification, and products that support health (but still taste great!)
- **These changing values are seen most clearly when examining generational differences**
What is Important to Consumers?

- Baby Boomers: Born 1946-1964 (54-72 in 2018)

“Ask millennials and boomers what companies they value most, and you’ll get very different answers. If brands want to make an impact with the consumers of the future, they need a clear mission.”

*Fast Company, 5 Oct 17*
What is Important to Consumers?

% of Consumers "Much More/Somewhat More" likely to buy a brand if:

- Grown on a farm that treats workers well: 54% (54% for 25-39 years old, 46% for All Other Age Ranges)
- Free from GMOs: 48% (48% for 25-39 years old, 38% for All Other Age Ranges)
- Grown Sustainably: 54% (54% for 25-39 years old, 47% for All Other Age Ranges)
- Organic Certified: 47% (47% for 25-39 years old, 35% for All Other Age Ranges)
- Supports Charities: 50% (50% for 25-39 years old, 41% for All Other Age Ranges)
- Recycled or Compostable Packaging: 48% (48% for 25-39 years old, 39% for All Other Age Ranges)

NCA, 2018 NCDT Study
What is Important to Consumers?

What does “Healthy” Mean?

- For Baby Boomers, “being healthy” is “getting recommended screenings or checkups”…

- While for Millennials, “being healthy” is “having good eating habits” and “getting regular exercise.”

Aetna Health Survey, “What’s Your Healthy,” 2013
What is Important to Consumers?

Wellness

For Millennials, wellness is a daily, active pursuit. They’re exercising more, eating smarter and smoking less than previous generations. They’re using apps to track training data, and online information to find the healthiest foods. And this is one space where they’re willing to spend money on compelling brands.

% OF 12TH GRADERS WHO DISAPPROVE OF PEOPLE 18 OR OLDER SMOKING 1 OR MORE PACKS OF CIGARETTES A DAY

2013 83% 1998 69%

Source: monitoringthefuture.org

Goldman Sachs
Data Story: Millennials
What do Consumers Know about Coffee and Health?

<table>
<thead>
<tr>
<th>Statement</th>
<th>% of All Consumers who Agree Completely or Somewhat</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’ve heard bad things about coffee</td>
<td>26</td>
</tr>
<tr>
<td>My doctor has advised me to limit my coffee</td>
<td>21</td>
</tr>
<tr>
<td>I have heard about health risks</td>
<td>32</td>
</tr>
<tr>
<td>Coffee is good for my health</td>
<td>46</td>
</tr>
<tr>
<td>I have heard about health benefits</td>
<td>52</td>
</tr>
</tbody>
</table>

NCA, 2018 NCDT Study
What do Consumers Know about Coffee and Health?

% of Consumers who Agree Completely or Somewhat:

- I'VE HEARD BAD THINGS ABOUT COFFEE: 26%
- MY DOCTOR HAS ADVISED ME TO LIMIT MY COFFEE: 21%
- I HAVE HEARD ABOUT HEALTH RISKS: 32%
- COFFEE IS GOOD FOR MY HEALTH: 46%
- I HAVE HEARD ABOUT HEALTH BENEFITS: 52%

NCA, 2018 NCDT Study
What Do Consumers Know About Coffee and Health?

- 69% of Consumers have Not Heard About Coffee’s Beneficial Effect on Specific Diseases
Changing Behavior: Opportunities

% of Consumers Who Have Heard About Health Benefits/Would Drink More if They Heard

- Heart Disease: 47%
- Diabetes: 37%
- Stroke: 39%
- Parkinson's Disease: 29%
- Liver Disease: 30%
- Multiple Sclerosis: 25%

#1 Cause of Death

NCA, 2018 NCDT Study
The Research: Substantial and Clear

• Coffee is one of the most heavily studied foods in history

• When the UN’s World Health Organization (IARC) studied coffee and cancer in 2015-2016, they examined over 1,000 studies solely with respect to coffee and cancer (omitting other studies i.e. Type II Diabetes, etc.)

• “Literature Reviews,” “meta-analyses” or “umbrella studies” allow us to look across this body of research
Communications: How Consumer Perception of Coffee & Health Is Shaped

Many mixed messages on Coffee & Health come from:

- Physicians / Medical Practitioners
- Media – Newspapers, Magazines, Websites, Blogs, Tweets
- Family & Friends
- Researchers
“A group of medical scientists have reported data that just uncovered that your morning cup o’ joe can also lead to hearing loss.”
Association of Caffeine and Hearing Recovery After Acoustic Overstimulation Events in a Guinea Pig Model

Faisal Zawawi, MD, FRCSC¹; Aren Bezdjian, MSc¹; Mario Mujica-Mota, MD, MSc¹; et al
Design, Setting, and Subjects  This experiment at the McGill University Auditory Sciences Laboratory used **24 female albino guinea pigs** (age, 6 months; weight, 500-600 g)...Group 1 was exposed to caffeine; group 2, acoustic overstimulation events (AOSEs); and group 3, both.

**Interventions**  Daily caffeine dose for groups 1 and 3 consisted of **25 mg/kg** administered intraperitoneally for 15 days. The AOSEs were administered on days 1 and 8 and consisted of 1 hour of 110-dB

(Injected with the equivalent of about 18 cups of coffee/day)
Messages from California
Prop 65 Legal Ruling

Health & Science

California ordered to add cancer warning to coffee, but the science doesn’t hold up

Carcinogenic Laws: Coffee Shop Cancer Warnings Do More Harm Than Good

The science behind cancer warnings on coffee is murky at best

Experts say there is 'no firm evidence' that drinking coffee comes with a carcinogenic risk


• Tailor communications to targeted audiences in accessible and convenient forms/channels
• Use and repeat key messaging points
• Targeted audiences: Doctors / Medical professionals, Media, Consumers, Influencers, and Industry
• Identify and Engage 3rd party independent experts and allies
• *Let audience draw their own conclusions.*
Coffee, Caffeine & Health

Independent research by scientists worldwide continues to link coffee to significant (and surprising) healthful properties.

Coffee has a naturally complex botanical profile, with at least 1,000 natural compounds in the bean (including caffeine) and another 300 created in the roasting process. Scientists have linked a number of them, including some strong antioxidants, with a host of physiological benefits.

Research has shown that moderate coffee consumption (or 3-5 cups daily) may be associated with many positive effects, including:

- Liver disease prevention
- Improved cognitive function in older adults
- Sharper memory
- Increased athletic endurance
- Reduced risk of type 2 diabetes
- Longevity

Due to the increasing scientific evidence, coffee has earned a new – and improved – reputation. The latest U.S. Dietary Guidelines recently made an unprecedented recommendation for coffee as part of a healthy lifestyle.
Coffee drinkers live longer than non coffee drinkers

Analysis, from Harvard University amongst others, that followed millions of people suggests that coffee drinkers live longer than non coffee drinkers. In fact, research suggests this amazing beverage may actually help lower the risk of many different cancers and drinking between one and five cups a day is associated with lower rates of heart disease, neurological disorders and liver disease.”
Coffee is #1 source of antioxidant in the US diet

Research ranks coffee as the number one source of antioxidants in the US diet. A study suggested that Americans got more of their antioxidants from coffee (1299mg per day) than any other dietary source, far ahead of black tea (294mg) and bananas (76mg).

Learn more: eurekalert.org

3rd Party Validation
Coffee & Heart Health


3rd Party Validation
Coffee may help lower the risk of getting certain cancers

The World Health Organization's cancer research arm recently concluded that coffee could no longer be classified as a possible carcinogen and its experts say there is evidence that coffee drinking actually lowers the risk of developing specific cancers such as liver cancer and a cancer in the lining of the uterus.

Learn more: The Lancet
How Much Caffeine Is In Your Coffee?

Brewed coffee
8 oz
Average: 95 mg
Range: 75 - 165

Brewed decaf
8 oz
Average: 2 mg

### Secondary Messages

**Economic Burden of Non-Alcoholic Fatty Liver Disease**

<table>
<thead>
<tr>
<th>TABLE 5. Annual Predicted Economic Burden of NAFLD by Country</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Country</strong></td>
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<tr>
<td>-----------</td>
</tr>
<tr>
<td><strong>Total costs (in billions)</strong></td>
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<tr>
<td>Direct costs</td>
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<tr>
<td>Societal costs</td>
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<tr>
<td>Total costs</td>
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<tr>
<td><strong>Total costs (per patient)</strong></td>
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<tr>
<td>Direct costs</td>
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<tr>
<td>Societal costs</td>
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<tr>
<td>Total costs</td>
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<tr>
<td><strong>Costs (in millions) due to</strong></td>
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<td>NAFL</td>
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<td>LT</td>
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<td>PLT</td>
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</table>
Coffee is good for the economy

The coffee industry is critically important to the US economy. In the US, coffee—directly or indirectly—accounts for over 1.6m jobs with wage compensation of $58.08bn. In 2015, coffee represented $220.98bn of the US economic output i.e. 1.2% of US GDP. That is more than 4bn every week or 605m every day.

The coffee industry brought in $27bn in taxes at Federal, State and Local level in 2015. Around 125 million people worldwide depend on coffee for their livelihoods. Coffee is the most valuable and widely traded tropical agricultural product.
Caution on Labeling & Health Claims

• Most countries have stringent requirements on health-related information such as:
  
  – Nutritional information on product packaging
  – Advertising & Marketing claims
  – Product informational sources

• Adhere to local regulations, and seek the advice of knowledgeable experts before communicating the science!

• Important to distinguish between reporting on research and making statements about health and coffee.
Conclusions

- Consumer attitudes are changing – and need to know more about “value” related aspects of their food, including health
- “Values” can help drive consumption, such as by promoting the good news on Coffee & Health
- Important to separate the clutter from the credible science
- Communicate in factually accurate, simple, and straightforward messages
- Develop key messaging points, and reinforce these with examples, 3rd party experts, stories, and repeat, repeat.

*There is a very positive story to tell on Coffee & Health.*

*Please help spread the message*
"Let food be thy medicine and medicine be thy food.” - Hippocrates

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