

# HEALTHSAVER®

**FINAL**  
**2007 National Survey Results**

Prepared by:



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# Outline

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- I. Research Overview
  - Research Background & Objectives
  - Research Methodology
  - Research Sample
- II. Key Findings
- III. Detailed Findings (Breakdown of Results)
- IV. Appendix

# Research Purpose

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- ✦ The overall purpose of this research was to gather information from a national survey on the topic of “American’s Most Caffeinated Cities.” This survey focused on American’s use of caffeine in everyday foods and beverages in the 20 largest MSAs in the U.S.

# Research Methodology

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- ✦ Prince Market Research (PMR), an independent marketing research firm, collaborated with HealthSaver to develop the questionnaire, which contained a total of 19 questions (see Appendices for a copy).
- ✦ PMR conducted a total of 2,035 telephone interviews during the period August 1 to September 18, 2007 using a randomized sample of listed households in the 20 largest MSAs\* in the U.S. Approximately 100 consumers were interviewed in each of the 20 markets. Each interview lasted about 5 minutes. The sponsor of the research was not revealed. No incentive was offered.
- ✦ The margin of error for the full sample (n=2,035 is +/- 2%); the margin of error for any given MSA is +/- 9%.

\* Based on U.S. Census Metropolitan and Micropolitan statistical areas dated December 2006. See [www.census.gov/population/www/estimates/metro\\_general/2006/CBSA-EST2006-01.xls](http://www.census.gov/population/www/estimates/metro_general/2006/CBSA-EST2006-01.xls)

# Research Methodology

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- ✦ Calculation of the index scores used in this report was based on the following methodology:
  - ✦ Calculate the average frequency of usage (overall, by city, by gender, etc.) for each caffeinated item tested. *For the purposes of this index, one “use” of each item was weighted equally – so one “use” of caffeinated coffee was equal to one “use” of tea/chocolate/soda/etc.*
  - ✦ To calculate these averages, response options were assigned the following values:
    - ✦ 7 or more times a week = 7
    - ✦ 4-6 times a week = 4
    - ✦ 1-3 times a week = 1
    - ✦ Less than once a week = 0.5
    - ✦ Never = 0

# Research Methodology

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- ✦ Calculation of the index scores (cont'd):
  - ✦ The frequency of usage averages from each city were calculated, and the average of all cities was then set to equal 100.
  - ✦ A city's index number above or below 100, therefore, indicates it's relative variance from the average index of 100 (e.g. an index of 200 indicates that a city uses twice as much caffeine as "normal").

# Research Sample

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1. New York-N. New Jersey-Long Island
2. Los Angeles-Long Beach-Santa Ana
3. Chicago-Naperville-Joliet
4. Dallas-Fort Worth-Arlington
5. Philadelphia-Camden-Wilmington
6. Houston-Sugar Land-Baytown
7. Miami-Fort Lauderdale-Miami Beach
8. Washington-Arlington-Alexandria
9. Atlanta-Sandy Springs-Marietta
10. Detroit-Warren-Livonia
11. Boston-Cambridge-Quincy
12. San Francisco-Oakland-Fremont
13. Phoenix-Mesa-Scottsdale
14. Riverside-San Bernardino-Ontario
15. Seattle-Tacoma-Bellevue
16. Minneapolis-St. Paul-Bloomington
17. San Diego-Carlsbad-San Marcos
18. St. Louis
19. Tampa-St. Petersburg-Clearwater
20. Baltimore-Towson

\*Ranked in descending order based on population.

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## II. Key Findings

# Chicago is the most caffeinated city in the U.S.

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- ✦ The “Top Five” most caffeinated cities among the top 20 MSAs included in the study were (in descending order):
  - ✦ Chicago
  - ✦ Tampa
  - ✦ Miami
  - ✦ Phoenix
  - ✦ Atlanta
- ✦ Conversely, among the top 20 MSAs included in this study, the least caffeinated cities were:
  - ✦ San Francisco
  - ✦ Philadelphia
  - ✦ New York
  - ✦ Detroit
  - ✦ Baltimore

*See Research Methodology for an explanation of the rating procedure used by PMR to determine these rankings.*

# Seattle is the city consuming the most caffeinated coffee.

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- ✦ Seattle ranked #1 in coffee consumption among the MSAs surveyed.
- ✦ Over one-half of Seattle respondents (58%) stated that coffee would be the most difficult caffeine food or drink to give up. This was the highest percentage among the 20 MSAs.
- ✦ Even though so many indicated that coffee would be difficult to give up, 71% of Seattle respondents said they are not addicted to caffeine.
- ✦ Over one-third (38%) of Seattle respondents believe caffeine is good for you. This was the highest “good for you” percentage among the 20 MSAs in this survey.

# Coffee is the most frequently consumed caffeinated food or drink.

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- ✦ One-half (49%) of all respondents said they drink caffeinated coffee every day.
  - ✦ Another 15% said they consume caffeinated coffee at least once a week (6% 4-6 times a week + 9% 1-3 times a week).
  - ✦ Thirty percent (30%) said they never or seldom drink caffeinated coffee.
- ✦ The next most frequently consumed caffeinated product is caffeinated cola.
  - ✦ 21% said that they consume cola on a daily basis.
  - ✦ About one-third (35%) said that they never drink caffeinated cola.
- ✦ Sweets containing chocolate and caffeinated teas and are also popular, but with fewer people reporting they consume them every day.
- ✦ Other caffeinated products such as energy drinks, pain relievers, and caffeine pills are used much less frequently.

# Coffee is the caffeinated product people would have the hardest time giving up.

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- ✦ Nearly one-half of all respondents (44%) said coffee would be the hardest to give up.
- ✦ Among age cohorts, the older the group the more likely they are to say that coffee would be the most difficult caffeinated product to give up.
  - ✦ Age 21-34 30%
  - ✦ Age 35-44 44%
  - ✦ Age 45-54 48%
  - ✦ Age 55-65 49%
- ✦ Whites are more likely than Non-Whites to say coffee would be the hardest to give up (46% vs 37%).
- ✦ Men are slightly more likely than women to say coffee would be the hardest to give up (47% vs 42%).

# There is no consensus on whether caffeine is good or bad for you.

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- ✦ Overall, more respondents said caffeine is bad for you (44%) than said it is good for you (31%).
- ✦ The older the age group, the more likely they are to say caffeine is good for you.

Cities most likely to say caffeine is good for you:

- ✦ Seattle
- ✦ Chicago
- ✦ Miami
- ✦ San Diego
- ✦ Boston

Cities most likely to say caffeine is bad for you

- ✦ Los Angeles
- ✦ Riverside
- ✦ San Francisco
- ✦ New York
- ✦ Atlanta

# Most people do not think they are “addicted” to caffeine.

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- ✦ Overall, 71% of all respondents said they are not addicted to caffeine.
- ✦ Among respondents working full-time, 70% say they are not addicted to caffeine.
- ✦ Females are more likely than males to say they are addicted to caffeine (31% of women vs 26% of men).

## Cities least addicted to caffeine:

- ✦ New York
- ✦ Philadelphia
- ✦ Miami
- ✦ Houston
- ✦ Tampa

## Cities most addicted to caffeine:

- ✦ Boston
- ✦ Minneapolis
- ✦ San Diego
- ✦ Chicago
- ✦ Atlanta

# Most people are consuming about the same amount of caffeine as they did a year ago.

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- ✦ A majority of respondents (60%) said they consume about the same amount of caffeine now as they did one year ago.
- ✦ Non-Whites were more likely than Whites to say the amount of caffeine they consume has changed from a year ago.
  - ✦ 36% of Non-Whites said they consume less caffeine today, while 14% said they consume more (versus 29% and 7%, respectively, for Whites).
- ✦ The older the age group, the more likely they are to say they consume the same amount of caffeine than they did one year ago. The younger the age group, the more likely they are to say they consume more caffeine than they did one year ago.

# Among those consuming less caffeine now, “seeking better health” was common reason.

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- ✦ Overall, 31% of respondents say they are consuming less caffeine now than they did one year ago.
- ✦ Among those respondents who are consuming less caffeine, 39% said it is because they are seeking to improve their health.
- ✦ One-fourth (25%) of those consuming less caffeine are doing so because of a change of diet/currently on a diet plan.
- ✦ Cities with highest percentage of respondents that are consuming less caffeine:
  - ✦ New York
  - ✦ Dallas
  - ✦ Atlanta
  - ✦ Riverside
  - ✦ Minneapolis

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## III. Detailed Findings

# Caffeine Index by MSA

## Sorted: Most to Least

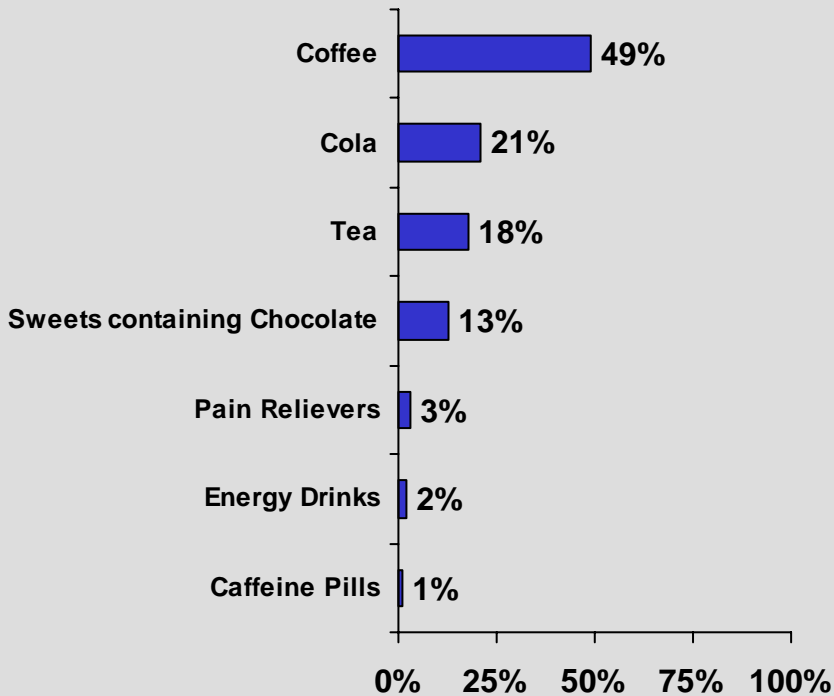
Rank	MSA	Index
1	Chicago-Naperville-Joliet	120.1
2	Tampa-St. Petersburg-Clearwater	114.5
3	Miami-Fort Lauderdale	109.9
4	Phoenix-Mesa-Scottsdale	106.1
5	Atlanta-Sandy Springs-Marietta	104.7
6	Houston-Sugar Land-Baytown	103.8
7	Boston-Cambridge-Quincy	101.3
8	St. Louis	101.1
	<b>Total</b>	<b>100</b>
9	Seattle-Tacoma-Bellevue	98.9
10	Los Angeles-Long Beach-Santa Ana	98.9
11	Riverside-San Bernardino-Ontario	98.7
12	Washington-Arlington-Alexandria	98.7
13	San Diego-Carlsbad-San Marcos	97.9
14	Minneapolis-St. Paul-Bloomington	95.3
15	Dallas-Fort Worth-Arlington	95.1
16	Baltimore-Towson	94.8
17	Detroit-Warren-Livonia	93.4
18	New York-Northern New Jersey-Long Island	93.1
19	Philadelphia-Camden-Wilmington	87.4
20	San Francisco-Oakland-Fremont	86.3

## Sorted: Least to Most

Rank	MSA	Index
1	San Francisco-Oakland-Fremont	86.3
2	Philadelphia-Camden-Wilmington	87.4
3	New York-Northern New Jersey-Long Island	93.1
4	Detroit-Warren-Livonia	93.4
5	Baltimore-Towson	94.8
6	Dallas-Fort Worth-Arlington	95.1
7	Minneapolis-St. Paul-Bloomington	95.3
8	San Diego-Carlsbad-San Marcos	97.9
9	Washington-Arlington-Alexandria	98.7
10	Riverside-San Bernardino-Ontario	98.7
11	Los Angeles-Long Beach-Santa Ana	98.9
12	Seattle-Tacoma-Bellevue	98.9
	<b>Total</b>	<b>100</b>
13	St. Louis	101.1
14	Boston-Cambridge-Quincy	101.3
15	Houston-Sugar Land-Baytown	103.8
16	Atlanta-Sandy Springs-Marietta	104.7
17	Phoenix-Mesa-Scottsdale	106.1
18	Miami-Fort Lauderdale	109.9
19	Tampa-St. Petersburg-Clearwater	114.5
20	Chicago-Naperville-Joliet	120.1

# Frequency of Use of Caffeinated Products

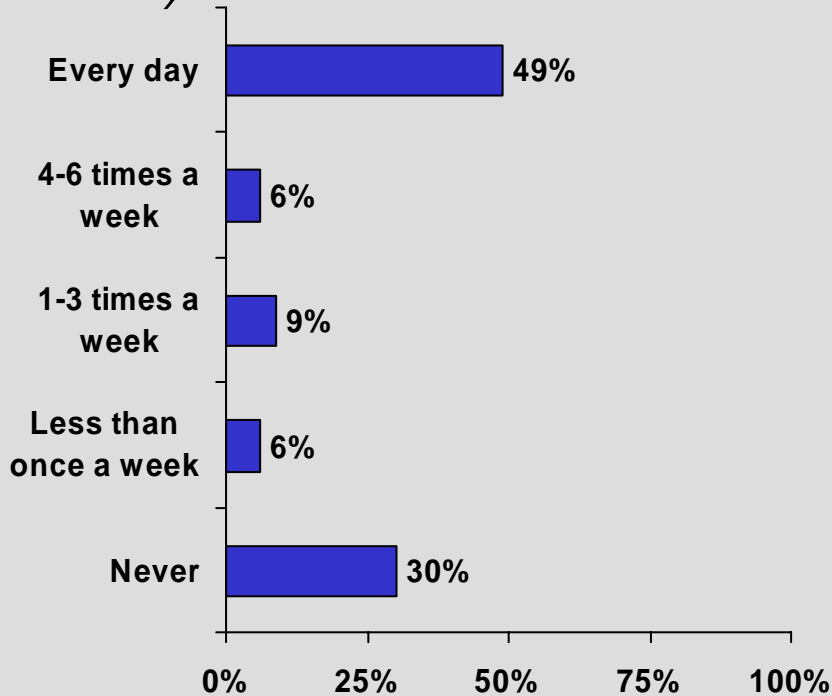
✦ Q: Frequency of use: Every day (7 or more times per week)



- ✦ Almost one-half (49%) of all respondents said they consume coffee every day.
- ✦ Twenty-one percent (21%) of the 2,035 respondents said they drink caffeinated cola every day, while 18% drink tea every day.

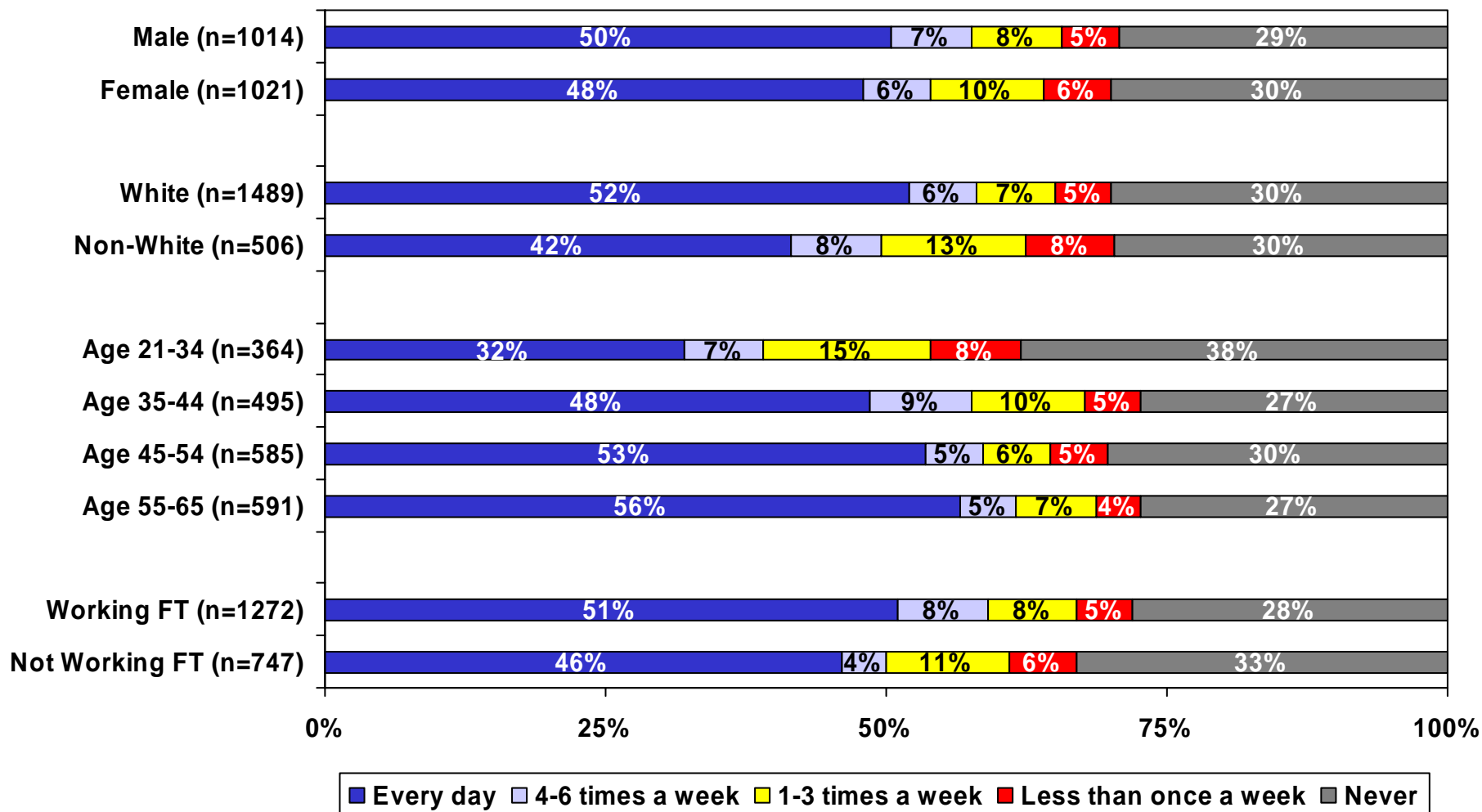
# Frequency of Use: Caffeinated Coffee

✦ Q: How often do you have: coffee that includes caffeine (i.e. regular coffee or specialty coffee drinks)?



- ✦ Overall, 49% of the 2,035 respondents said they drink coffee every day.
- ✦ About one-third (30%) said they never drink coffee.
- ✦ Among the remaining respondents, 6% consume coffee 4-6 times a week, 9% 1-3 times a week, and 6% less than once a week.

# Frequency of Use: Caffeinated Coffee



# Ranking of Cities: Caffeinated Coffee

## Sorted: Most to Least

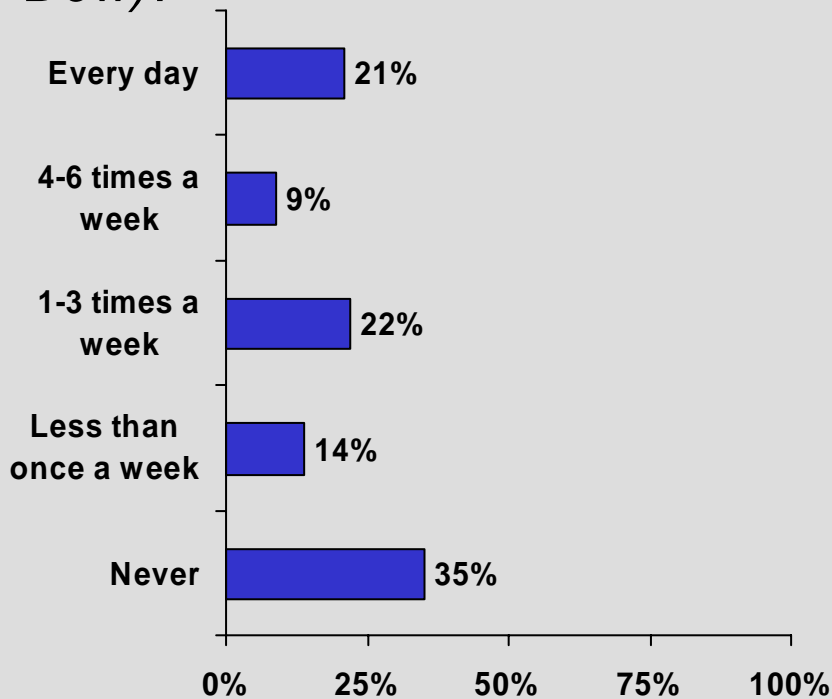
Rank	MSA	Index
1	Seattle-Tacoma-Bellevue	122.1
2	Boston-Cambridge-Quincy	116.9
3	Houston-Sugar Land-Baytown	114.1
4	Chicago-Naperville-Joliet	114.0
5	Miami-Fort Lauderdale	112.2
6	San Diego-Carlsbad-San Marcos	108.7
7	Tampa-St. Petersburg-Clearwater	107.2
8	Minneapolis-St. Paul-Bloomington	106.0
	<b>Total</b>	<b>100.0</b>
9	Los Angeles-Long Beach-Santa Ana	100.0
10	San Francisco-Oakland-Fremont	97.1
11	Washington-Arlington-Alexandria	96.3
12	Phoenix-Mesa-Scottsdale	95.3
13	Baltimore-Towson	94.8
14	Detroit-Warren-Livonia	92.9
15	Riverside-San Bernardino-Ontario	89.8
16	Philadelphia-Camden-Wilmington	88.9
17	Atlanta-Sandy Springs-Marietta	88.3
18	St. Louis	88.2
19	New York-Northern New Jersey-Long Island	84.5
20	Dallas-Fort Worth-Arlington	82.6

## Sorted: Least to Most

Rank	MSA	Index
1	Dallas-Fort Worth-Arlington	82.6
2	New York-Northern New Jersey-Long Island	84.5
3	St. Louis	88.2
4	Atlanta-Sandy Springs-Marietta	88.3
5	Philadelphia-Camden-Wilmington	88.9
6	Riverside-San Bernardino-Ontario	89.8
7	Detroit-Warren-Livonia	92.9
8	Baltimore-Towson	94.8
9	Phoenix-Mesa-Scottsdale	95.3
10	Washington-Arlington-Alexandria	96.3
11	San Francisco-Oakland-Fremont	97.1
12	Los Angeles-Long Beach-Santa Ana	100.0
	<b>Total</b>	<b>100.0</b>
13	Minneapolis-St. Paul-Bloomington	106.0
14	Tampa-St. Petersburg-Clearwater	107.2
15	San Diego-Carlsbad-San Marcos	108.7
16	Miami-Fort Lauderdale	112.2
17	Chicago-Naperville-Joliet	114.0
18	Houston-Sugar Land-Baytown	114.1
19	Boston-Cambridge-Quincy	116.9
20	Seattle-Tacoma-Bellevue	122.1

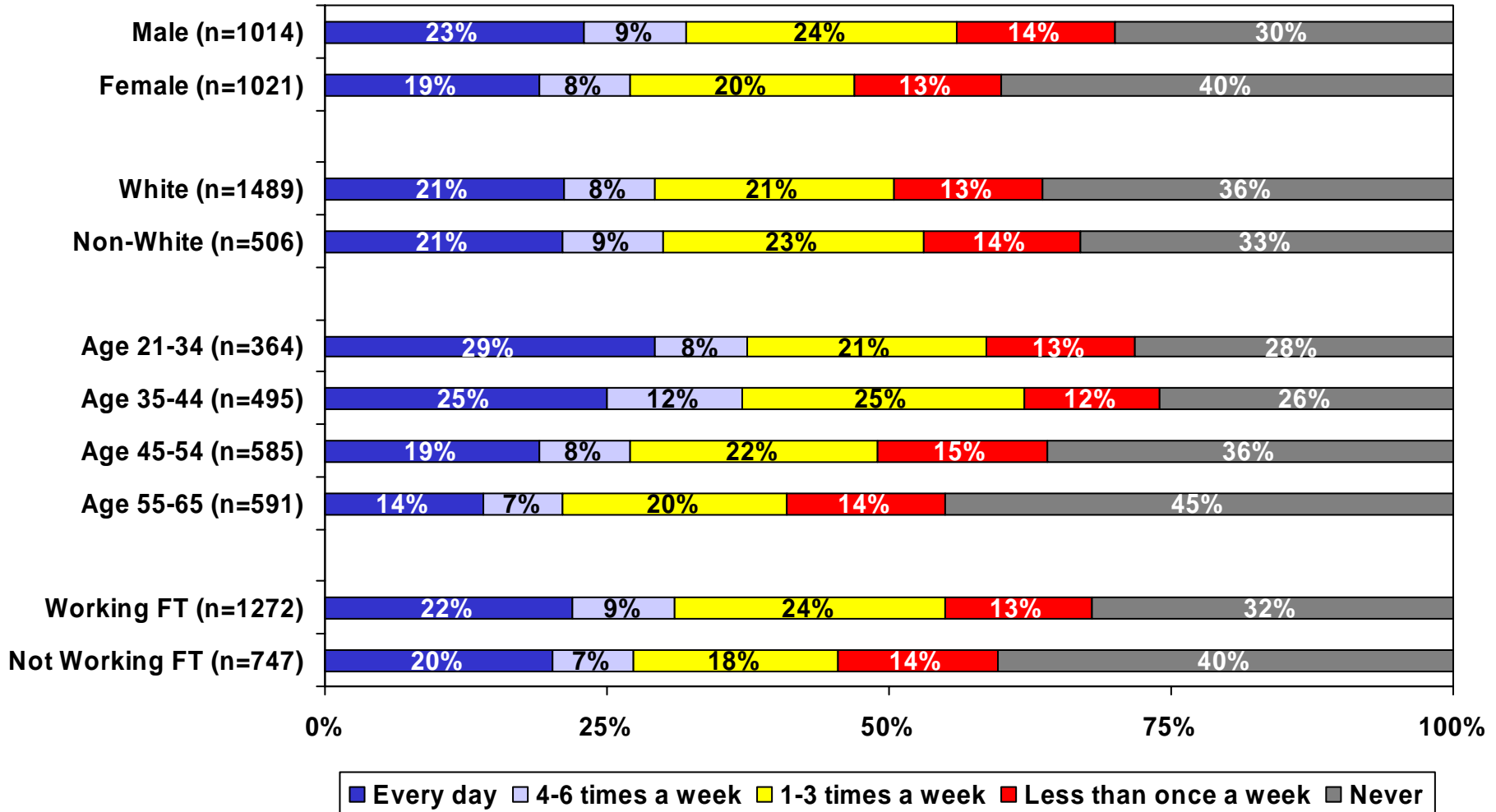
# Frequency of Use: Caffeinated Soft Drinks

✦ Q: How often do you have: cola containing caffeine (i.e. regular Coke, regular Pepsi, Mountain Dew)?



- ✦ Overall, 35% of all respondents said they never drink cola containing caffeine – while 21% said they drink it every day.
- ✦ Not quite one-fourth (22%) of respondents said they drink cola 1-3 times a week.

# Frequency of Use: Caffeinated Soft Drinks



# Ranking of Cities: Caffeinated Soft Drinks

## Sorted: Most to Least

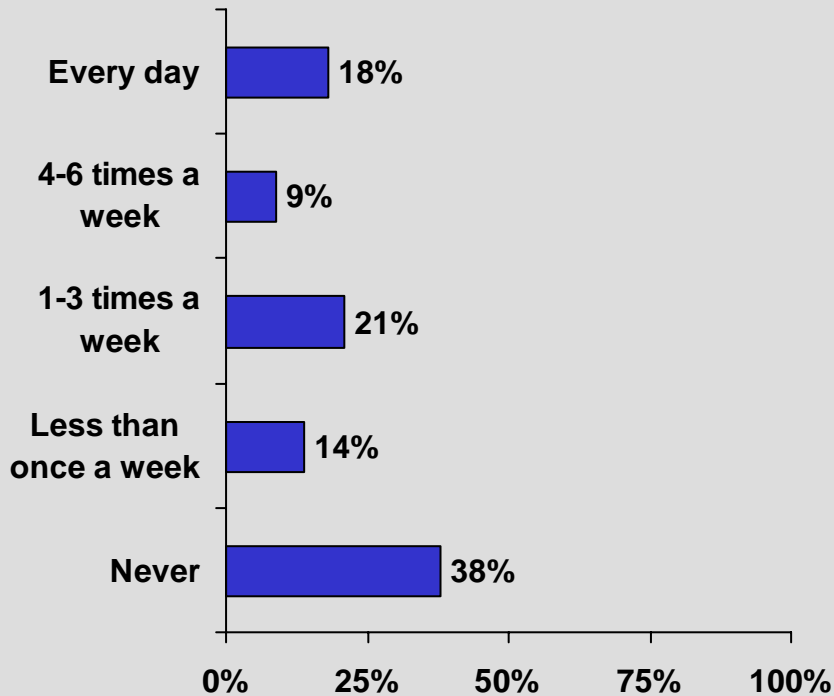
Rank	MSA	Index
1	Chicago-Naperville-Joliet	131.8
2	Dallas-Fort Worth-Arlington	128.1
3	St. Louis	123.6
4	Atlanta-Sandy Springs-Marietta	117.9
5	Tampa-St. Petersburg-Clearwater	117.6
6	Riverside-San Bernardino-Ontario	116.7
7	Phoenix-Mesa-Scottsdale	114.0
8	Houston-Sugar Land-Baytown	113.9
9	Detroit-Warren-Livonia	107.0
10	Los Angeles-Long Beach-Santa Ana	101.3
	<b>Total</b>	<b>100.0</b>
11	Boston-Cambridge-Quincy	95.5
12	Washington-Arlington-Alexandria	94.8
13	Minneapolis-St. Paul-Bloomington	92.2
14	Baltimore-Towson	84.1
15	San Diego-Carlsbad-San Marcos	83.2
16	San Francisco-Oakland-Fremont	78.7
17	Seattle-Tacoma-Bellevue	77.9
18	Miami-Fort Lauderdale	77.5
19	New York-Northern New Jersey-Long Island	74.8
20	Philadelphia-Camden-Wilmington	69.4

## Sorted: Least to Most

Rank	MSA	Index
1	Philadelphia-Camden-Wilmington	69.4
2	New York-Northern New Jersey-Long Island	74.8
3	Miami-Fort Lauderdale	77.5
4	Seattle-Tacoma-Bellevue	77.9
5	San Francisco-Oakland-Fremont	78.7
6	San Diego-Carlsbad-San Marcos	83.2
7	Baltimore-Towson	84.1
8	Minneapolis-St. Paul-Bloomington	92.2
9	Washington-Arlington-Alexandria	94.8
10	Boston-Cambridge-Quincy	95.5
	<b>Total</b>	<b>100.0</b>
11	Los Angeles-Long Beach-Santa Ana	101.3
12	Detroit-Warren-Livonia	107.0
13	Houston-Sugar Land-Baytown	113.9
14	Phoenix-Mesa-Scottsdale	114.0
15	Riverside-San Bernardino-Ontario	116.7
16	Tampa-St. Petersburg-Clearwater	117.6
17	Atlanta-Sandy Springs-Marietta	117.9
18	St. Louis	123.6
19	Dallas-Fort Worth-Arlington	128.1
20	Chicago-Naperville-Joliet	131.8

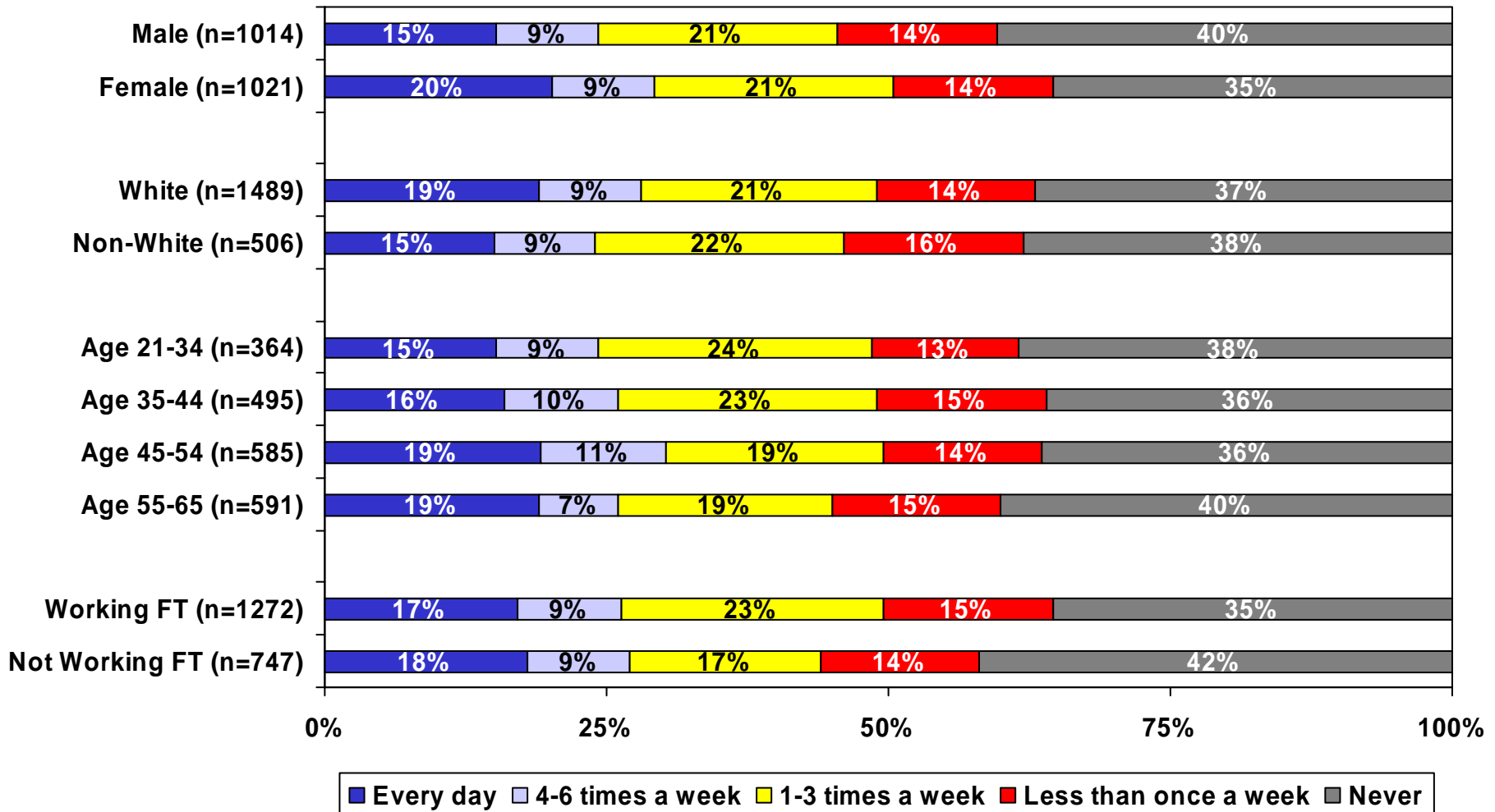
# Frequency of Use: Caffeinated Tea

✦ Q: How often do you have: teas that includes caffeine (i.e. iced tea, green tea, black tea)?



- ✦ Overall, 38% of the 2,035 respondents said they never drink tea that includes caffeine.
- ✦ About one-sixth (18%) said they drink tea every day, 9% drink tea 4-6 times a week, and 21% drink tea 1-3 times a week.

# Frequency of Use: Caffeinated Tea



# Ranking of Cities: Caffeinated Tea

## Sorted: Most to Least

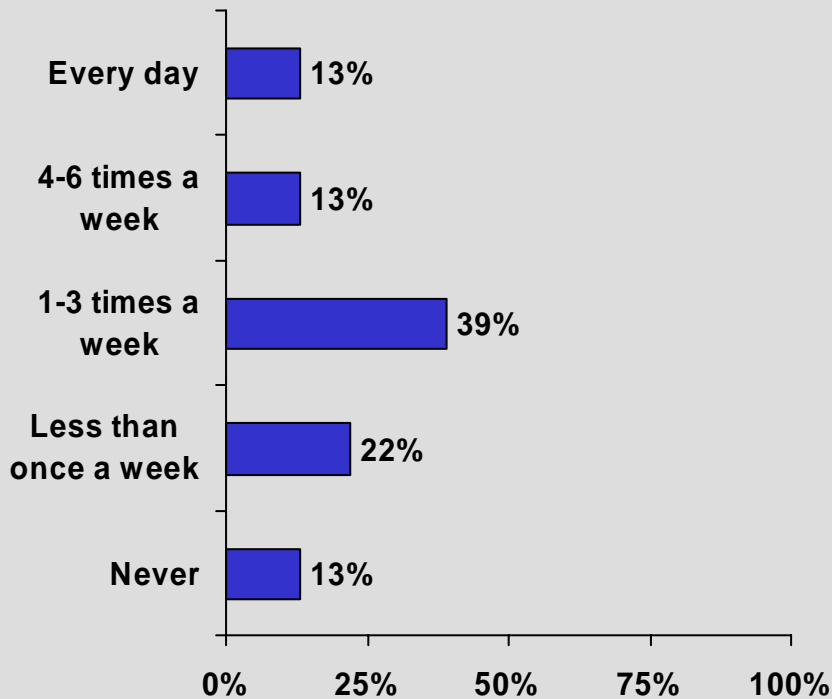
Rank	MSA	Index
1	Miami-Fort Lauderdale	131.1
2	Tampa-St. Petersburg-Clearwater	130.1
3	Washington-Arlington-Alexandria	121.2
4	Philadelphia-Camden-Wilmington	116.2
5	Atlanta-Sandy Springs-Marietta	114.4
6	Baltimore-Towson	112.2
7	Dallas-Fort Worth-Arlington	111.6
8	Houston-Sugar Land-Baytown	105.7
9	St. Louis	105.2
	<b>Total</b>	<b>100.0</b>
10	San Diego-Carlsbad-San Marcos	97.8
11	New York-Northern New Jersey-Long Island	97.6
12	Phoenix-Mesa-Scottsdale	94.8
13	Chicago-Naperville-Joliet	94.1
14	Los Angeles-Long Beach-Santa Ana	92.8
15	Riverside-San Bernardino-Ontario	88.0
16	Boston-Cambridge-Quincy	84.4
17	Seattle-Tacoma-Bellevue	81.5
18	San Francisco-Oakland-Fremont	78.1
19	Detroit-Warren-Livonia	73.1
20	Minneapolis-St. Paul-Bloomington	70.4

## Sorted: Least to Most

Rank	MSA	Index
1	Minneapolis-St. Paul-Bloomington	70.4
2	Detroit-Warren-Livonia	73.1
3	San Francisco-Oakland-Fremont	78.1
4	Seattle-Tacoma-Bellevue	81.5
5	Boston-Cambridge-Quincy	84.4
6	Riverside-San Bernardino-Ontario	88.0
7	Los Angeles-Long Beach-Santa Ana	92.8
8	Chicago-Naperville-Joliet	94.1
9	Phoenix-Mesa-Scottsdale	94.8
10	New York-Northern New Jersey-Long Island	97.6
11	San Diego-Carlsbad-San Marcos	97.8
	<b>Total</b>	<b>100.0</b>
12	St. Louis	105.2
13	Houston-Sugar Land-Baytown	105.7
14	Dallas-Fort Worth-Arlington	111.6
15	Baltimore-Towson	112.2
16	Atlanta-Sandy Springs-Marietta	114.4
17	Philadelphia-Camden-Wilmington	116.2
18	Washington-Arlington-Alexandria	121.2
19	Tampa-St. Petersburg-Clearwater	130.1
20	Miami-Fort Lauderdale	131.1

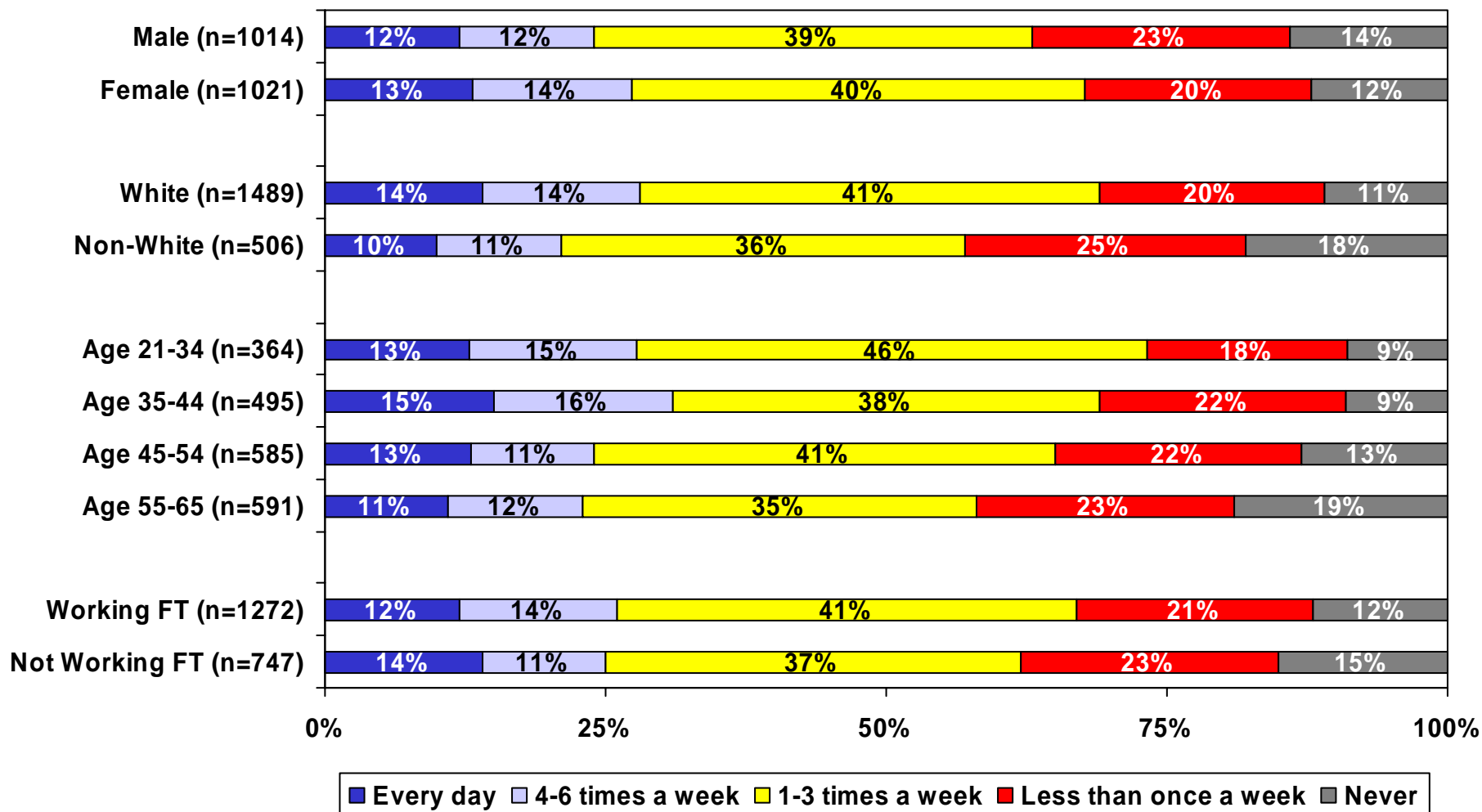
# Frequency of Use: Chocolate Sweets

✦ Q: How often do you have: sweets containing chocolate (i.e. candy, ice cream, cake, cookies)?



- ✦ Over one-third (39%) of respondents said they consume sweets containing chocolate 1-3 times a week; another 22% said they consume it less than once a week.
- ✦ The remaining respondents are equally divided (13% each) among every day, 4-6 times a week, and never.

# Frequency of Use: Chocolate Sweets



# Ranking of Cities: Chocolate Sweets

## Sorted: Most to Least

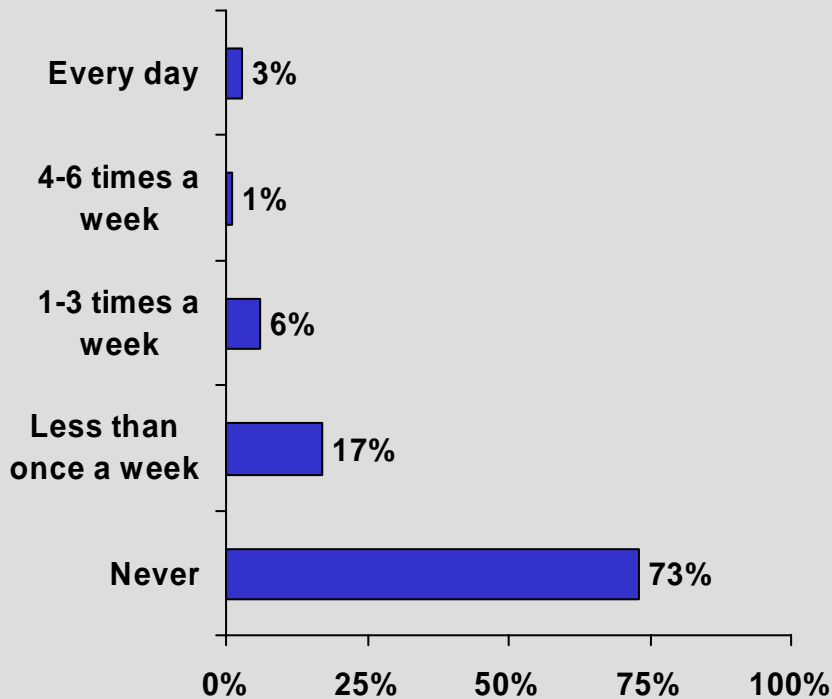
Rank	MSA	Index
1	Chicago-Naperville-Joliet	149.9
2	Atlanta-Sandy Springs-Marietta	116.8
3	Minneapolis-St. Paul-Bloomington	115.7
4	Phoenix-Mesa-Scottsdale	110.1
5	St. Louis	106.8
6	Tampa-St. Petersburg-Clearwater	104.6
7	New York-Northern New Jersey-Long Island	102.0
8	Boston-Cambridge-Quincy	101.2
9	Baltimore-Towson	100.9
	<b>Total</b>	<b>100.0</b>
10	San Diego-Carlsbad-San Marcos	96.7
11	Seattle-Tacoma-Bellevue	93.9
12	Detroit-Warren-Livonia	93.8
13	San Francisco-Oakland-Fremont	93.6
14	Washington-Arlington-Alexandria	93.0
15	Philadelphia-Camden-Wilmington	89.4
16	Dallas-Fort Worth-Arlington	88.5
17	Miami-Fort Lauderdale	87.9
18	Houston-Sugar Land-Baytown	86.5
19	Riverside-San Bernardino-Ontario	84.9
20	Los Angeles-Long Beach-Santa Ana	83.6

## Sorted: Least to Most

Rank	MSA	Index
1	Los Angeles-Long Beach-Santa Ana	83.6
2	Riverside-San Bernardino-Ontario	84.9
3	Houston-Sugar Land-Baytown	86.5
4	Miami-Fort Lauderdale	87.9
5	Dallas-Fort Worth-Arlington	88.5
6	Philadelphia-Camden-Wilmington	89.4
7	Washington-Arlington-Alexandria	93.0
8	San Francisco-Oakland-Fremont	93.6
9	Detroit-Warren-Livonia	93.8
10	Seattle-Tacoma-Bellevue	93.9
11	San Diego-Carlsbad-San Marcos	96.7
	<b>Total</b>	<b>100.0</b>
12	Baltimore-Towson	100.9
13	Boston-Cambridge-Quincy	101.2
14	New York-Northern New Jersey-Long Island	102.0
15	Tampa-St. Petersburg-Clearwater	104.6
16	St. Louis	106.8
17	Phoenix-Mesa-Scottsdale	110.1
18	Minneapolis-St. Paul-Bloomington	115.7
19	Atlanta-Sandy Springs-Marietta	116.8
20	Chicago-Naperville-Joliet	149.9

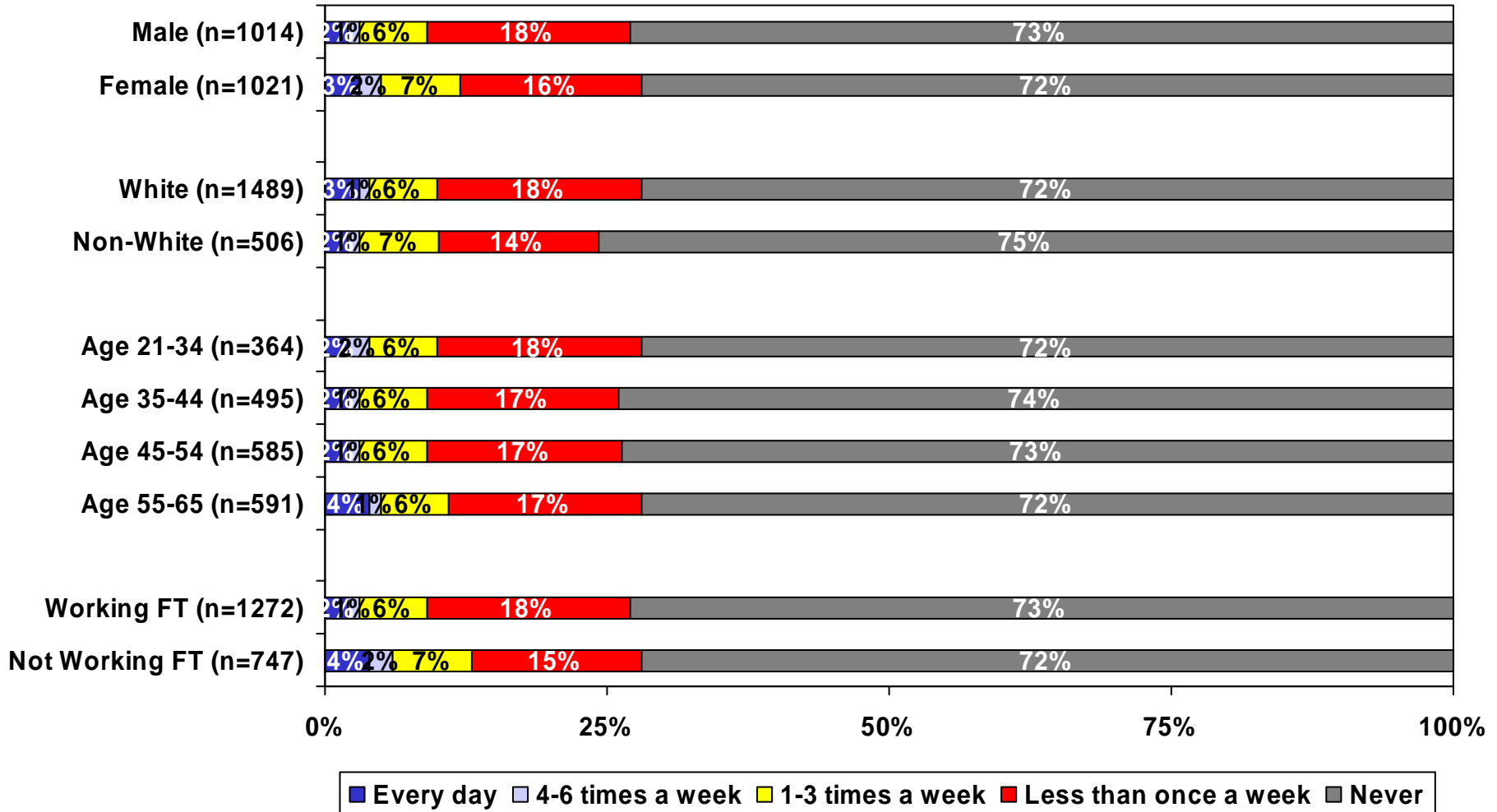
# Frequency of Use: Pain Relievers with Caffeine

✦ Q: How often do you have: pain relievers that contain caffeine (i.e. *Excedrin, Anacin*)?



- ✦ Nearly three-fourths (73%) of respondents said they never consume pain relievers that contain caffeine.
- ✦ Another 17% said they take pain relievers with caffeine less than once a week.

# Frequency of Use: Pain Relievers with Caffeine



# Ranking of Cities: Pain Relievers with Caffeine

## Sorted: Most to Least

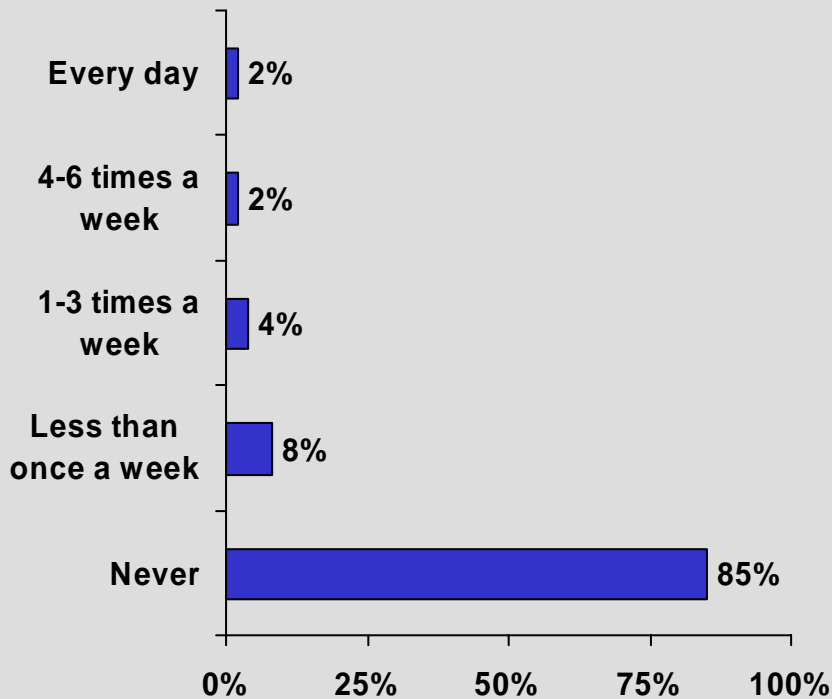
Rank	MSA	Index
1	Phoenix-Mesa-Scottsdale	208.1
2	Tampa-St. Petersburg-Clearwater	171.3
3	Miami-Fort Lauderdale	149.0
4	New York-Northern New Jersey-Long Island	139.7
5	Riverside-San Bernardino-Ontario	123.0
6	Atlanta-Sandy Springs-Marietta	111.1
7	Detroit-Warren-Livonia	106.1
	<b>Total</b>	<b>100.0</b>
8	Washington-Arlington-Alexandria	95.8
9	Boston-Cambridge-Quincy	93.2
10	Los Angeles-Long Beach-Santa Ana	87.6
11	Philadelphia-Camden-Wilmington	86.7
12	Chicago-Naperville-Joliet	82.8
13	Houston-Sugar Land-Baytown	82.0
14	San Francisco-Oakland-Fremont	80.7
15	St. Louis	75.9
16	Seattle-Tacoma-Bellevue	75.8
17	Baltimore-Towson	75.2
18	Minneapolis-St. Paul-Bloomington	67.3
19	San Diego-Carlsbad-San Marcos	51.3
20	Dallas-Fort Worth-Arlington	37.2

## Sorted: Least to Most

Rank	MSA	Index
1	Dallas-Fort Worth-Arlington	37.2
2	San Diego-Carlsbad-San Marcos	51.3
3	Minneapolis-St. Paul-Bloomington	67.3
4	Baltimore-Towson	75.2
5	Seattle-Tacoma-Bellevue	75.8
6	St. Louis	75.9
7	San Francisco-Oakland-Fremont	80.7
8	Houston-Sugar Land-Baytown	82.0
9	Chicago-Naperville-Joliet	82.8
10	Philadelphia-Camden-Wilmington	86.7
11	Los Angeles-Long Beach-Santa Ana	87.6
12	Boston-Cambridge-Quincy	93.2
	Washington-Arlington-Alexandria	95.8
13	<b>Total</b>	<b>100.0</b>
14	Detroit-Warren-Livonia	106.1
15	Atlanta-Sandy Springs-Marietta	111.1
16	Riverside-San Bernardino-Ontario	123.0
17	New York-Northern New Jersey-Long Island	139.7
18	Miami-Fort Lauderdale	149.0
19	Tampa-St. Petersburg-Clearwater	171.3
20	Phoenix-Mesa-Scottsdale	208.1

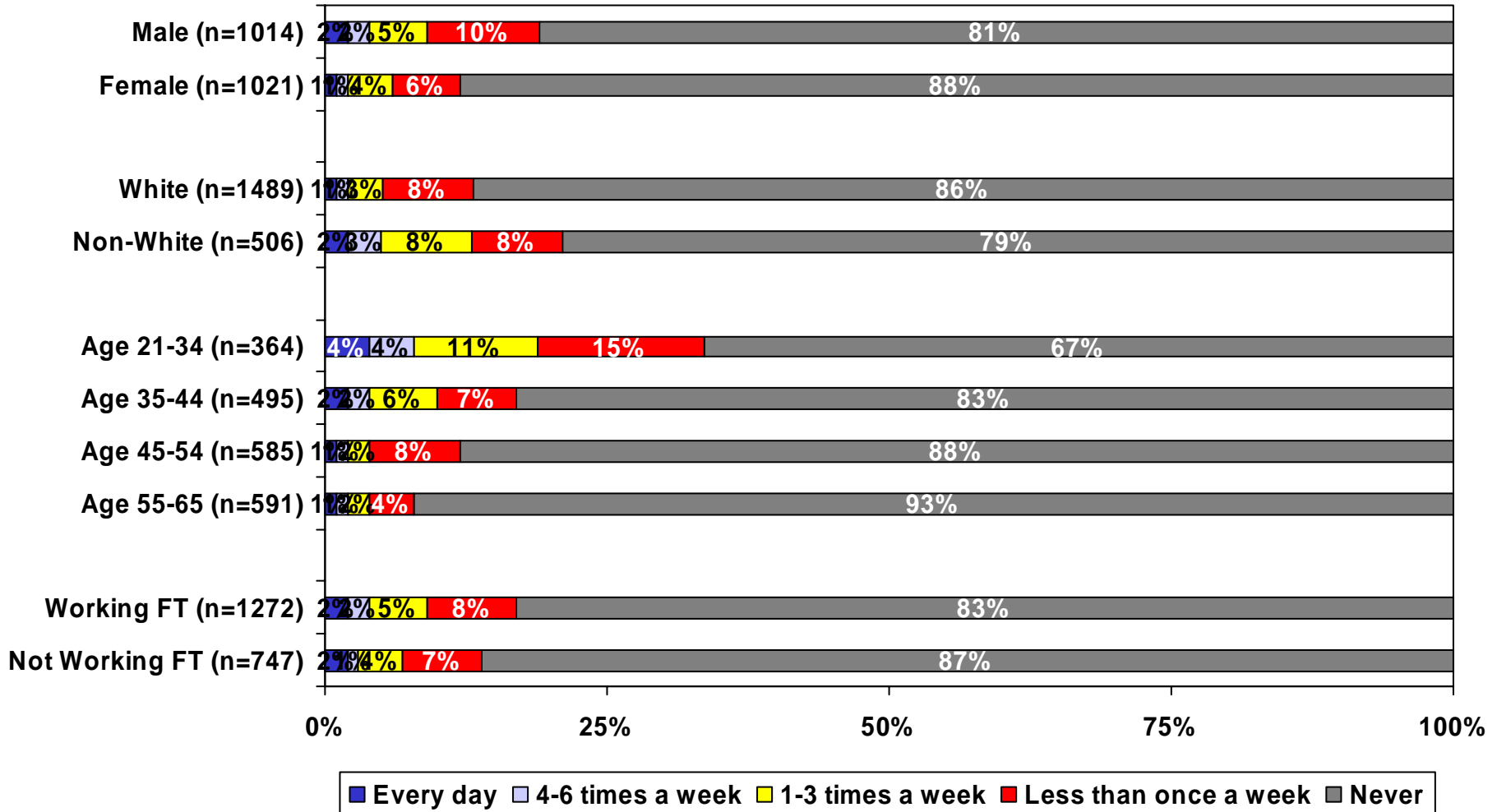
# Frequency of Use: Energy Drinks

✦ Q: How often do you have: energy drinks (i.e. Red Bull)?



- ✦ Overall, 85% of respondents said they never consume energy drinks.
- ✦ Another 8% said they consume energy drinks less than once a week.
- ✦ Just 8% of respondents said they consumed energy drinks once a week or more (2% every day, 2% 4-6 times a week, and 4% 1-3 times a week).

# Frequency of Use: Energy Drinks



# Ranking of Cities: Energy Drinks

## Sorted: Most to Least

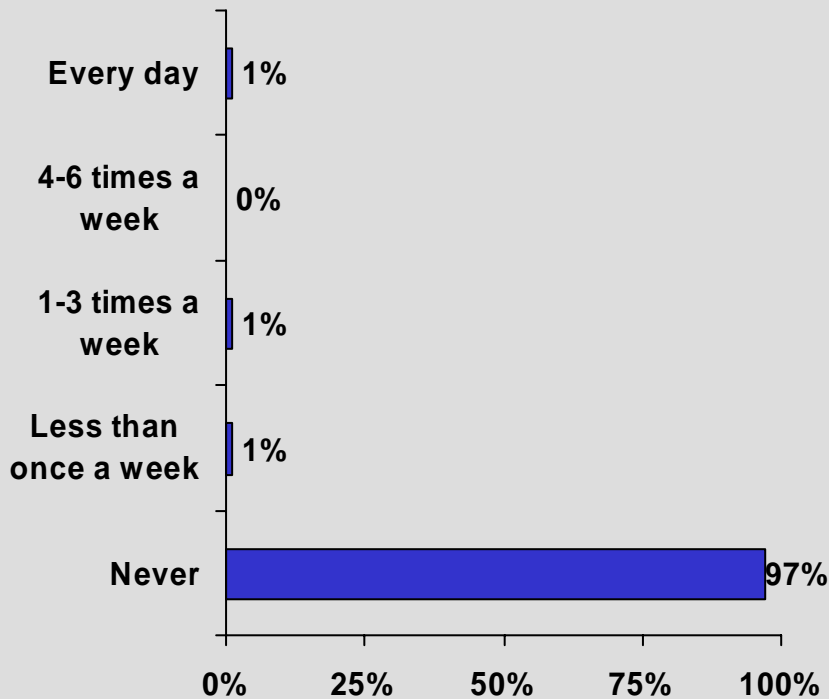
Rank	MSA	Index
1	Riverside-San Bernardino-Ontario	245.3
2	Los Angeles-Long Beach-Santa Ana	183.6
3	Chicago-Naperville-Joliet	165.2
4	Miami-Fort Lauderdale	165.0
5	New York-Northern New Jersey-Long Island	161.7
6	Seattle-Tacoma-Bellevue	126.1
7	San Diego-Carlsbad-San Marcos	110.9
8	Detroit-Warren-Livonia	110.1
9	Tampa-St. Petersburg-Clearwater	103.8
10	Phoenix-Mesa-Scottsdale	102.6
	<b>Total</b>	<b>100.0</b>
11	Atlanta-Sandy Springs-Marietta	70.4
12	St. Louis	68.9
13	Washington-Arlington-Alexandria	67.9
14	Baltimore-Towson	64.7
15	Minneapolis-St. Paul-Bloomington	56.9
16	Boston-Cambridge-Quincy	55.1
17	Dallas-Fort Worth-Arlington	50.9
18	Houston-Sugar Land-Baytown	47.3
19	San Francisco-Oakland-Fremont	27.3
20	Philadelphia-Camden-Wilmington	16.5

## Sorted: Least to Most

Rank	MSA	Index
1	Philadelphia-Camden-Wilmington	16.5
2	San Francisco-Oakland-Fremont	27.3
3	Houston-Sugar Land-Baytown	47.3
4	Dallas-Fort Worth-Arlington	50.9
5	Boston-Cambridge-Quincy	55.1
6	Minneapolis-St. Paul-Bloomington	56.9
7	Baltimore-Towson	64.7
8	Washington-Arlington-Alexandria	67.9
9	St. Louis	68.9
10	Atlanta-Sandy Springs-Marietta	70.4
	<b>Total</b>	<b>100.0</b>
11	Phoenix-Mesa-Scottsdale	102.6
12	Tampa-St. Petersburg-Clearwater	103.8
13	Detroit-Warren-Livonia	110.1
14	San Diego-Carlsbad-San Marcos	110.9
15	Seattle-Tacoma-Bellevue	126.1
16	New York-Northern New Jersey-Long Island	161.7
17	Miami-Fort Lauderdale	165.0
18	Chicago-Naperville-Joliet	165.2
19	Los Angeles-Long Beach-Santa Ana	183.6
20	Riverside-San Bernardino-Ontario	245.3

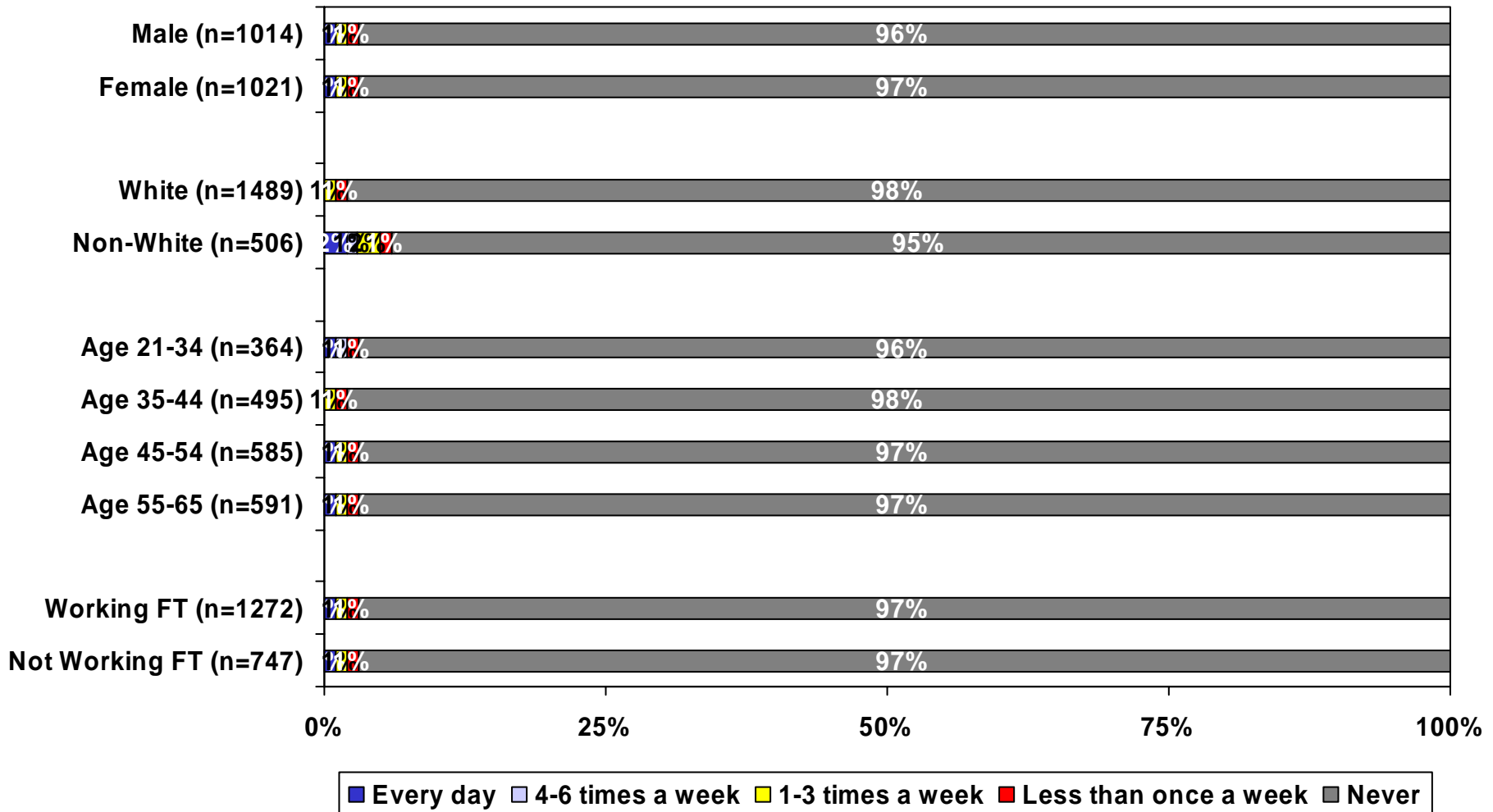
# Frequency of Use: Caffeine Pills

✦ Q: How often do you have: caffeine pills (i.e. NoDoz)?



- ✦ Overall, 97% of respondents said they never consume caffeine pills.
- ✦ Just 1% consume caffeine pills everyday.

# Frequency of Use: Caffeine Pills



# Ranking of Cities: Caffeine Pills

## Sorted: Most to Least

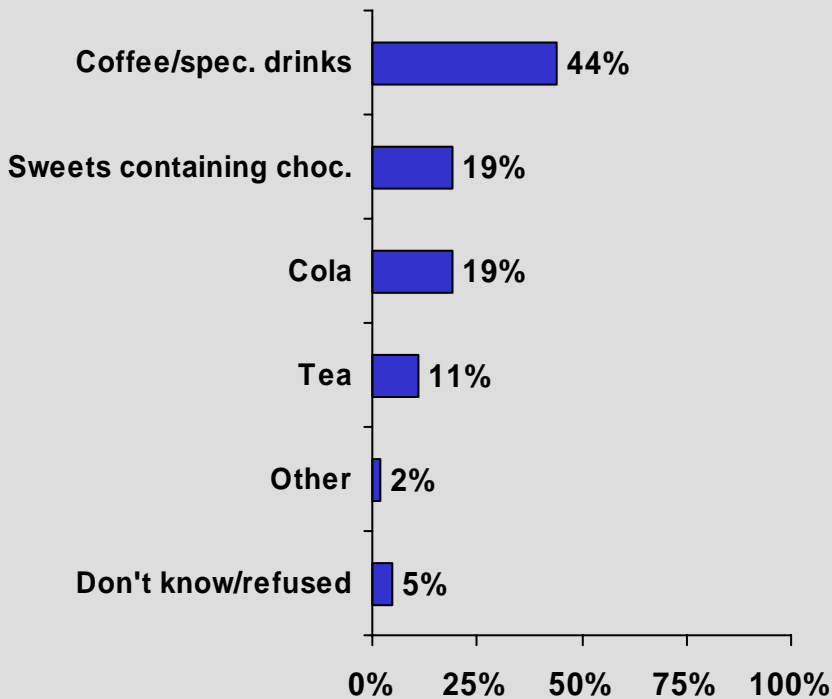
Rank	MSA	Index
1	Miami-Fort Lauderdale	509.2
2	Los Angeles-Long Beach-Santa Ana	268.5
3	New York-Northern New Jersey-Long Island	209.5
4	San Diego-Carlsbad-San Marcos	178.7
5	St. Louis	125.7
6	Phoenix-Mesa-Scottsdale	109.9
7	Atlanta-Sandy Springs-Marietta	106.9
8	Detroit-Warren-Livonia	105.8
	<b>Total</b>	<b>100.0</b>
9	Boston-Cambridge-Quincy	99.6
10	Seattle-Tacoma-Bellevue	94.3
11	Washington-Arlington-Alexandria	37.3
12	Riverside-San Bernardino-Ontario	24.7
13	Tampa-St. Petersburg-Clearwater	18.9
14	Chicago-Naperville-Joliet	18.7
15	Minneapolis-St. Paul-Bloomington	18.7
16	Dallas-Fort Worth-Arlington	18.5
17	San Francisco-Oakland-Fremont	18.5
18	Philadelphia-Camden-Wilmington	12.4
19	Houston-Sugar Land-Baytown	12.3
20	Baltimore-Towson	11.9

## Sorted: Least to Most

Rank	MSA	Index
1	Baltimore-Towson	11.9
2	Houston-Sugar Land-Baytown	12.3
3	Philadelphia-Camden-Wilmington	12.4
4	Dallas-Fort Worth-Arlington	18.5
5	San Francisco-Oakland-Fremont	18.5
6	Chicago-Naperville-Joliet	18.7
7	Minneapolis-St. Paul-Bloomington	18.7
8	Tampa-St. Petersburg-Clearwater	18.9
9	Riverside-San Bernardino-Ontario	24.7
10	Washington-Arlington-Alexandria	37.3
11	Seattle-Tacoma-Bellevue	94.3
12	Boston-Cambridge-Quincy	99.6
	<b>Total</b>	<b>100.0</b>
13	Detroit-Warren-Livonia	105.8
14	Atlanta-Sandy Springs-Marietta	106.9
15	Phoenix-Mesa-Scottsdale	109.9
16	St. Louis	125.7
17	San Diego-Carlsbad-San Marcos	178.7
18	New York-Northern New Jersey-Long Island	209.5
19	Los Angeles-Long Beach-Santa Ana	268.5
20	Miami-Fort Lauderdale	509.2

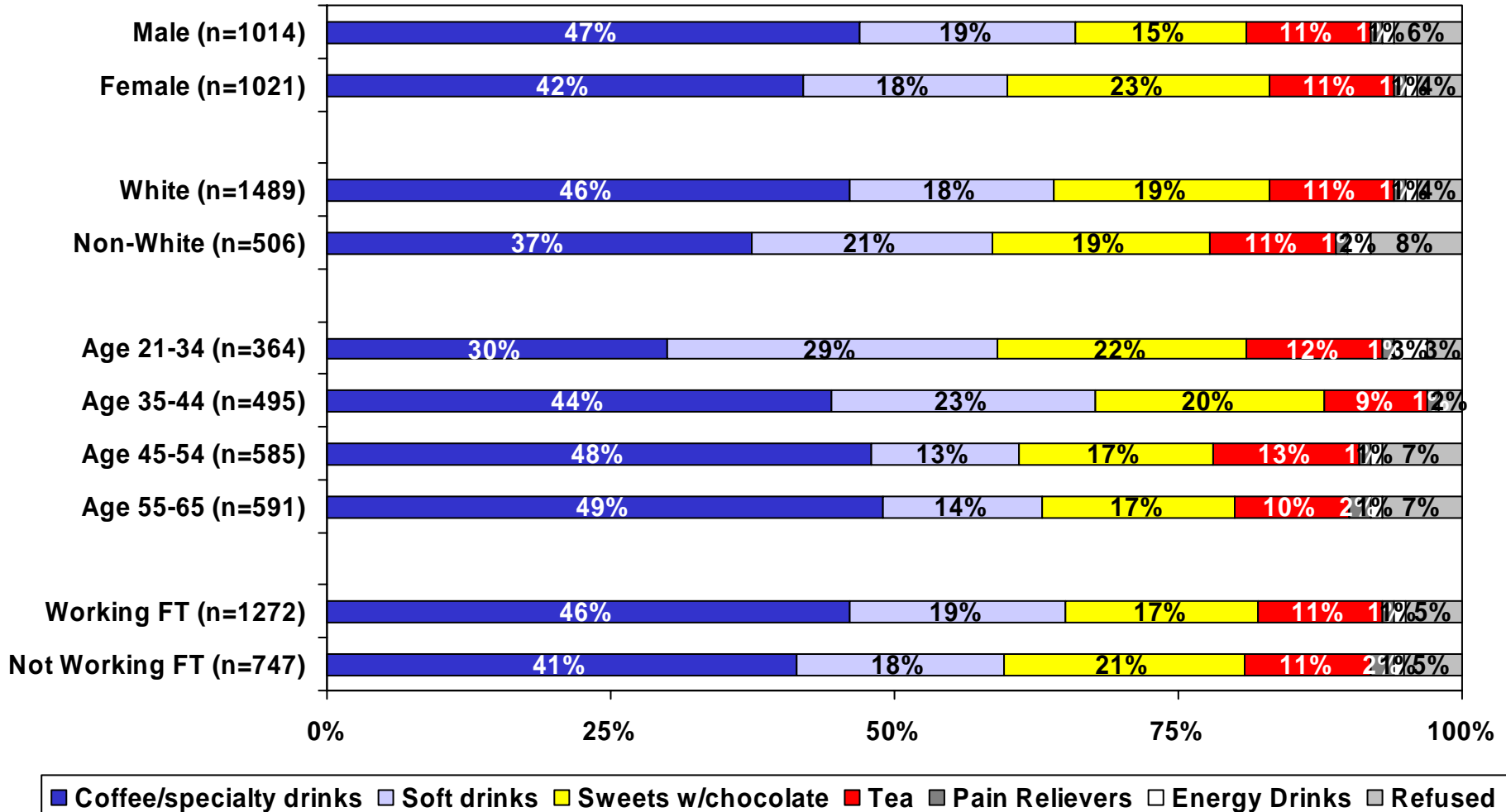
# Caffeine Product Most Difficult to Give Up

✦ Q: Which drink or food containing caffeine would be the most difficult for you to give up?



- ✦ The caffeinated product that respondents stated would be the most difficult to give up is Coffee (44%).
- ✦ About one in five (19%) said sweets containing chocolate would be the most difficult to give up, while an equal percentage (19%) said cola would be the most difficult.
- ✦ Another 11% said tea would be the most difficult to give up.

# Caffeine Product Most Difficult to Give Up



# Caffeine Product Most Difficult to Give Up

## Coffee

Rank	MSA	Coffee
1	Seattle-Tacoma-Bellevue	58%
2	Boston-Cambridge-Quincy	51%
3	Chicago-Naperville-Joliet	50%
4	San Francisco-Oakland-Fremont	48%
5	San Diego-Carlsbad-San Marcos	47%
6	Washington-Arlington-Alexandria	47%
7	Miami-Fort Lauderdale	46%
8	Los Angeles-Long Beach-Santa Ana	45%
9	Philadelphia-Camden-Wilmington	45%
10	Minneapolis-St. Paul-Bloomington	45%
11	Houston-Sugar Land-Baytown	44%
	<b>TOTAL</b>	<b>43%</b>
12	Tampa-St. Petersburg-Clearwater	43%
13	Phoenix-Mesa-Scottsdale	42%
14	St. Louis	41%
15	Riverside-San Bernardino-Ontario	40%
16	Baltimore-Towson	40%
17	Detroit-Warren-Livonia	37%
18	New York-Northern New Jersey-Long Island	36%
19	Atlanta-Sandy Springs-Marietta	34%
20	Dallas-Fort Worth-Arlington	30%

## Tea

Rank	MSA	Tea
1	Baltimore-Towson	16%
2	Dallas-Fort Worth-Arlington	16%
3	Miami-Fort Lauderdale	14%
4	Philadelphia-Camden-Wilmington	14%
5	Houston-Sugar Land-Baytown	14%
6	Boston-Cambridge-Quincy	13%
7	New York-Northern New Jersey-Long Island	13%
8	St. Louis	12%
9	Washington-Arlington-Alexandria	12%
10	Phoenix-Mesa-Scottsdale	12%
11	Atlanta-Sandy Springs-Marietta	11%
	<b>TOTAL</b>	<b>11%</b>
12	San Francisco-Oakland-Fremont	11%
13	Tampa-St. Petersburg-Clearwater	10%
14	Chicago-Naperville-Joliet	10%
15	Detroit-Warren-Livonia	8%
16	Riverside-San Bernardino-Ontario	8%
17	San Diego-Carlsbad-San Marcos	8%
18	Seattle-Tacoma-Bellevue	7%
19	Los Angeles-Long Beach-Santa Ana	7%
20	Minneapolis-St. Paul-Bloomington	3%

# Caffeine Product Most Difficult to Give Up

## Chocolate/Sweets

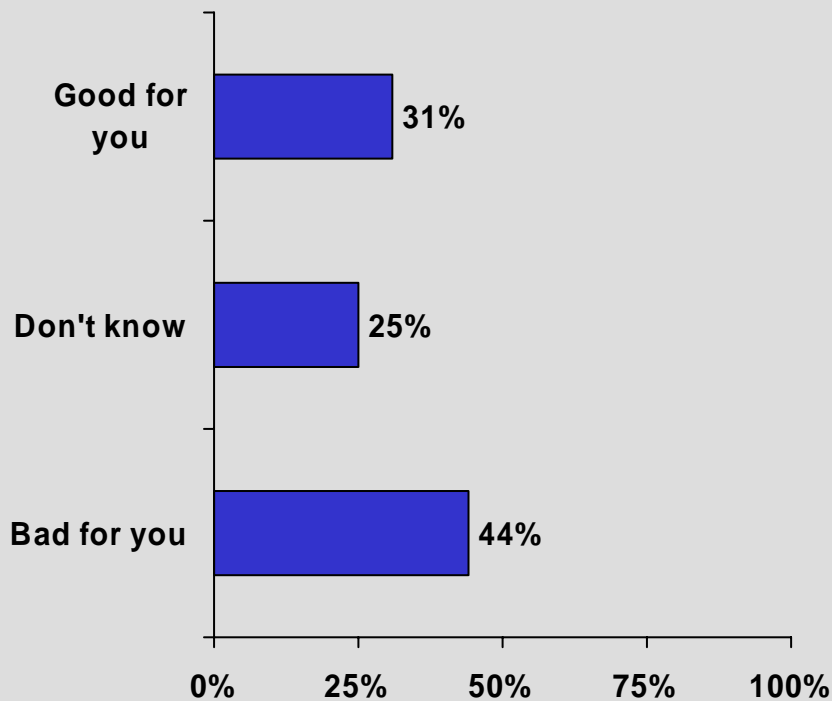
Rank	MSA	Choc.
1	Minneapolis-St. Paul-Bloomington	32%
2	New York-Northern New Jersey-Long Island	24%
3	Los Angeles-Long Beach-Santa Ana	22%
4	Philadelphia-Camden-Wilmington	22%
5	Detroit-Warren-Livonia	22%
6	Baltimore-Towson	21%
7	San Francisco-Oakland-Fremont	20%
8	San Diego-Carlsbad-San Marcos	20%
9	Miami-Fort Lauderdale	19%
10	Washington-Arlington-Alexandria	19%
	<b>TOTAL</b>	<b>18%</b>
11	Atlanta-Sandy Springs-Marietta	18%
12	Tampa-St. Petersburg-Clearwater	18%
13	Houston-Sugar Land-Baytown	18%
14	Riverside-San Bernardino-Ontario	17%
15	Seattle-Tacoma-Bellevue	16%
16	Chicago-Naperville-Joliet	16%
17	Boston-Cambridge-Quincy	14%
18	Dallas-Fort Worth-Arlington	13%
19	Phoenix-Mesa-Scottsdale	11%
20	St. Louis	10%

## Soda/Cola

Rank	MSA	Soda
1	Dallas-Fort Worth-Arlington	30%
2	St. Louis	29%
3	Atlanta-Sandy Springs-Marietta	28%
4	Riverside-San Bernardino-Ontario	26%
5	Phoenix-Mesa-Scottsdale	21%
6	Chicago-Naperville-Joliet	20%
7	Los Angeles-Long Beach-Santa Ana	18%
	<b>TOTAL</b>	<b>18%</b>
8	Tampa-St. Petersburg-Clearwater	18%
9	Boston-Cambridge-Quincy	18%
10	Minneapolis-St. Paul-Bloomington	18%
11	Houston-Sugar Land-Baytown	18%
12	Baltimore-Towson	17%
13	Washington-Arlington-Alexandria	17%
14	Detroit-Warren-Livonia	16%
15	San Diego-Carlsbad-San Marcos	14%
16	Miami-Fort Lauderdale	13%
17	New York-Northern New Jersey-Long Island	13%
18	Philadelphia-Camden-Wilmington	11%
19	Seattle-Tacoma-Bellevue	10%
20	San Francisco-Oakland-Fremont	10%

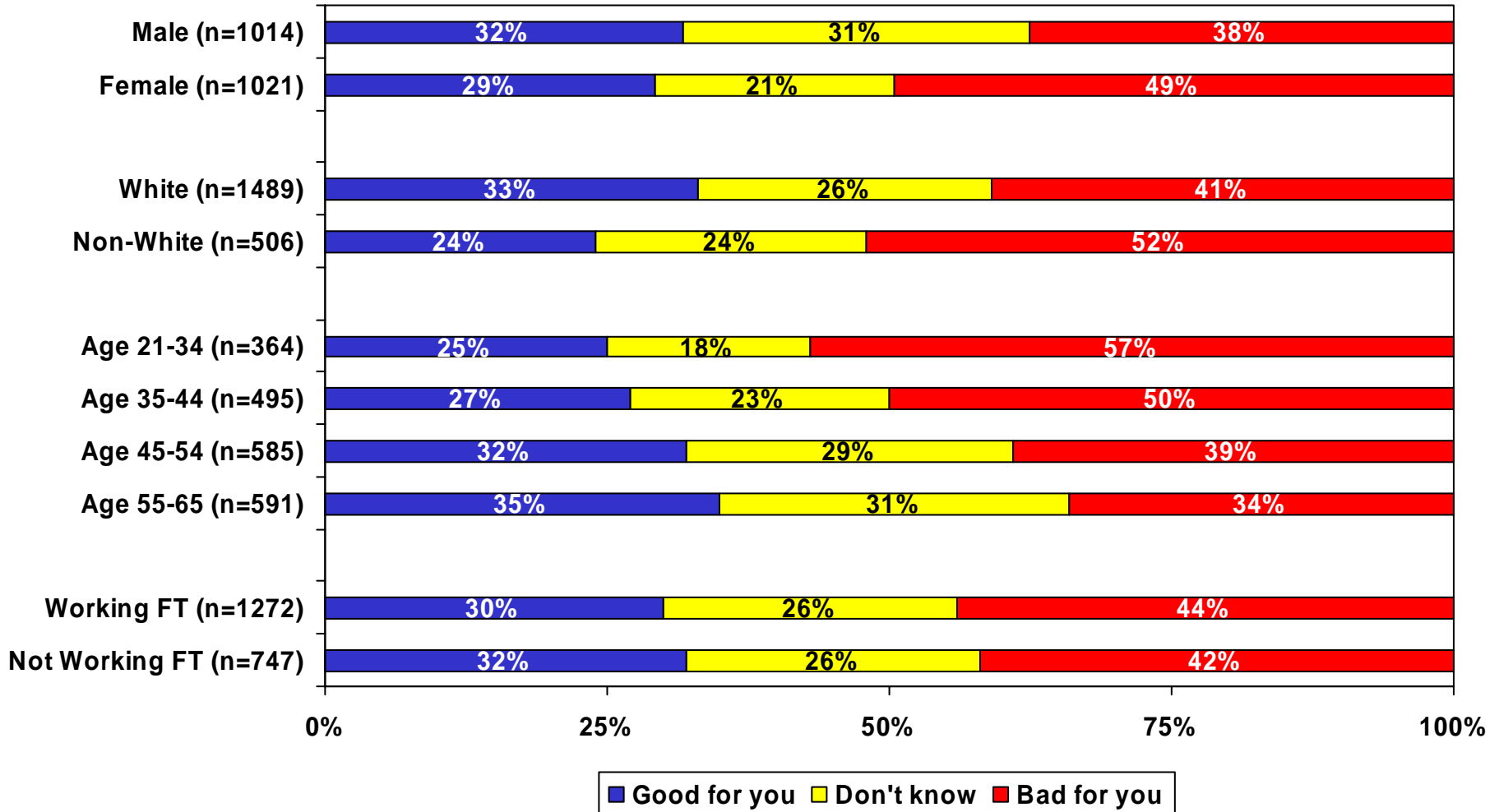
# Caffeine Good or Bad for You

✦ Q: Do you think caffeine is good or bad for you?



- ✦ Almost one-half of all respondents (44%) said caffeine is bad for you, while somewhat fewer (31%) said caffeine is good for you.
- ✦ One-fourth (25%) said they don't know.

# Caffeine Good or Bad for You



# Caffeine Good or Bad for You

## Highest Percentage “Good for you”

Rank	MSA	Good
1	Seattle-Tacoma-Bellevue	38%
2	Chicago-Naperville-Joliet	37%
3	Miami-Fort Lauderdale	36%
4	San Diego-Carlsbad-San Marcos	36%
5	Boston-Cambridge-Quincy	35%
6	Philadelphia-Camden-Wilmington	34%
7	Minneapolis-St. Paul-Bloomington	33%
8	Dallas-Fort Worth-Arlington	33%
9	San Francisco-Oakland-Fremont	33%
10	Tampa-St. Petersburg-Clearwater	32%
11	Baltimore-Towson	31%
	<b>Total</b>	<b>31%</b>
12	New York-Northern New Jersey-Long Island	31%
13	Washington-Arlington-Alexandria	29%
14	Los Angeles-Long Beach-Santa Ana	28%
15	Houston-Sugar Land-Baytown	27%
16	Detroit-Warren-Livonia	26%
17	St. Louis	26%
18	Phoenix-Mesa-Scottsdale	25%
19	Atlanta-Sandy Springs-Marietta	23%
20	Riverside-San Bernardino-Ontario	23%

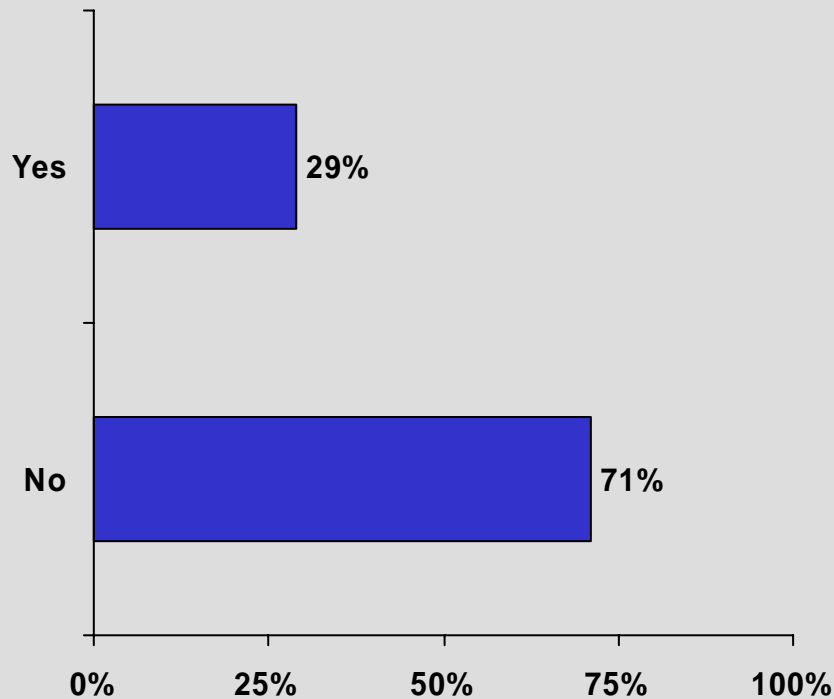
## Highest Percentage “Bad for you”

Rank	MSA	Bad
1	Los Angeles-Long Beach-Santa Ana	57%
2	Riverside-San Bernardino-Ontario	51%
3	San Francisco-Oakland-Fremont	50%
4	New York-Northern New Jersey-Long Island	49%
5	Atlanta-Sandy Springs-Marietta	48%
6	Phoenix-Mesa-Scottsdale	48%
7	Detroit-Warren-Livonia	45%
8	Minneapolis-St. Paul-Bloomington	45%
9	Washington-Arlington-Alexandria	44%
	<b>Total</b>	<b>44%</b>
10	St. Louis	43%
11	Houston-Sugar Land-Baytown	43%
12	Philadelphia-Camden-Wilmington	42%
13	Miami-Fort Lauderdale	41%
14	Dallas-Fort Worth-Arlington	41%
15	Baltimore-Towson	41%
16	Chicago-Naperville-Joliet	40%
17	San Diego-Carlsbad-San Marcos	40%
18	Tampa-St. Petersburg-Clearwater	40%
19	Boston-Cambridge-Quincy	39%
20	Seattle-Tacoma-Bellevue	31%

# Addicted to Caffeine

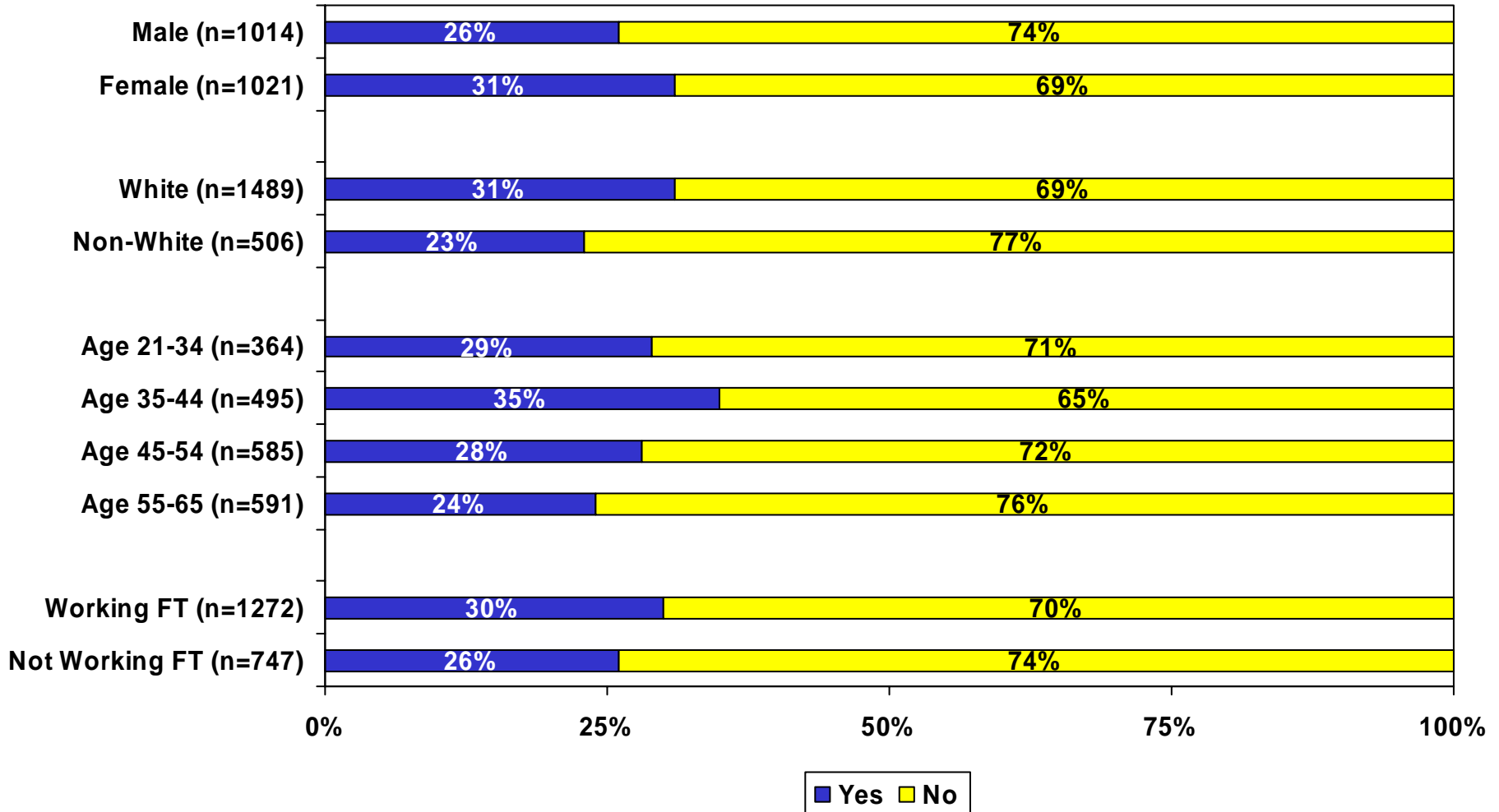
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✦ Q: Do you think you are “addicted” to caffeine?



- ✦ A total of 71% of all respondents said they are not addicted to caffeine, compared to 29% that said they are addicted to caffeine.

# Addicted to Caffeine



# Addicted to Caffeine

## Highest Percentage “Yes”

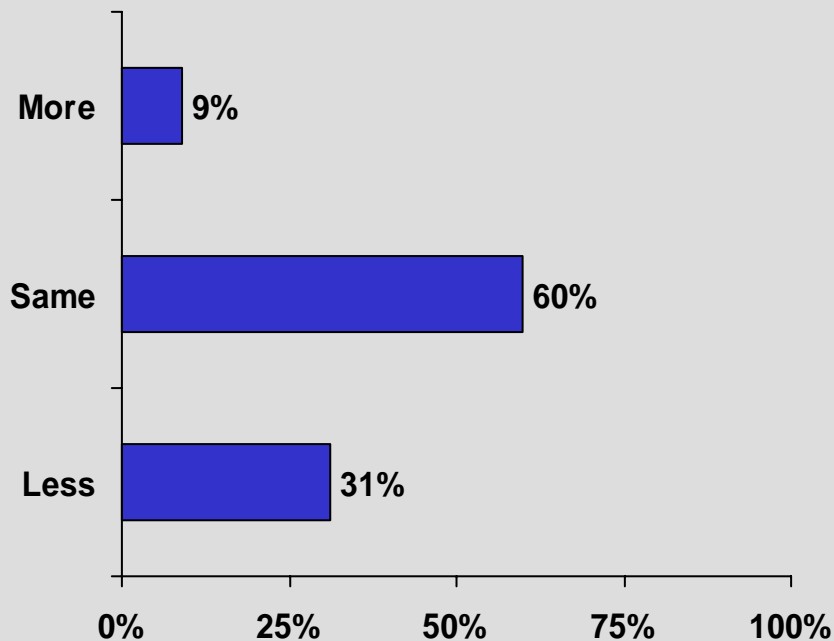
Rank	MSA	Yes
1	Boston-Cambridge-Quincy	43%
2	Minneapolis-St. Paul-Bloomington	37%
3	San Diego-Carlsbad-San Marcos	35%
4	Chicago-Naperville-Joliet	35%
5	Atlanta-Sandy Springs-Marietta	33%
6	Riverside-San Bernardino-Ontario	31%
7	Detroit-Warren-Livonia	31%
8	St. Louis	30%
9	Washington-Arlington-Alexandria	30%
	<b>Total</b>	<b>29%</b>
10	Seattle-Tacoma-Bellevue	29%
11	Baltimore-Towson	28%
12	Los Angeles-Long Beach-Santa Ana	27%
13	Dallas-Fort Worth-Arlington	26%
14	Phoenix-Mesa-Scottsdale	26%
15	San Francisco-Oakland-Fremont	26%
16	Houston-Sugar Land-Baytown	25%
17	Tampa-St. Petersburg-Clearwater	25%
18	Miami-Fort Lauderdale	21%
19	Philadelphia-Camden-Wilmington	19%
20	New York-Northern New Jersey-Long Island	15%

## Highest Percentage “No”

Rank	MSA	No
1	New York-Northern New Jersey-Long Island	85%
2	Philadelphia-Camden-Wilmington	81%
3	Miami-Fort Lauderdale	79%
4	Houston-Sugar Land-Baytown	75%
5	Tampa-St. Petersburg-Clearwater	75%
6	San Francisco-Oakland-Fremont	74%
7	Phoenix-Mesa-Scottsdale	74%
8	Dallas-Fort Worth-Arlington	74%
9	Los Angeles-Long Beach-Santa Ana	73%
10	Baltimore-Towson	72%
11	Seattle-Tacoma-Bellevue	71%
	<b>Total</b>	<b>71%</b>
12	Washington-Arlington-Alexandria	70%
13	St. Louis	70%
14	Detroit-Warren-Livonia	69%
15	Riverside-San Bernardino-Ontario	69%
16	Atlanta-Sandy Springs-Marietta	67%
17	Chicago-Naperville-Joliet	65%
18	San Diego-Carlsbad-San Marcos	65%
19	Minneapolis-St. Paul-Bloomington	63%
20	Boston-Cambridge-Quincy	57%

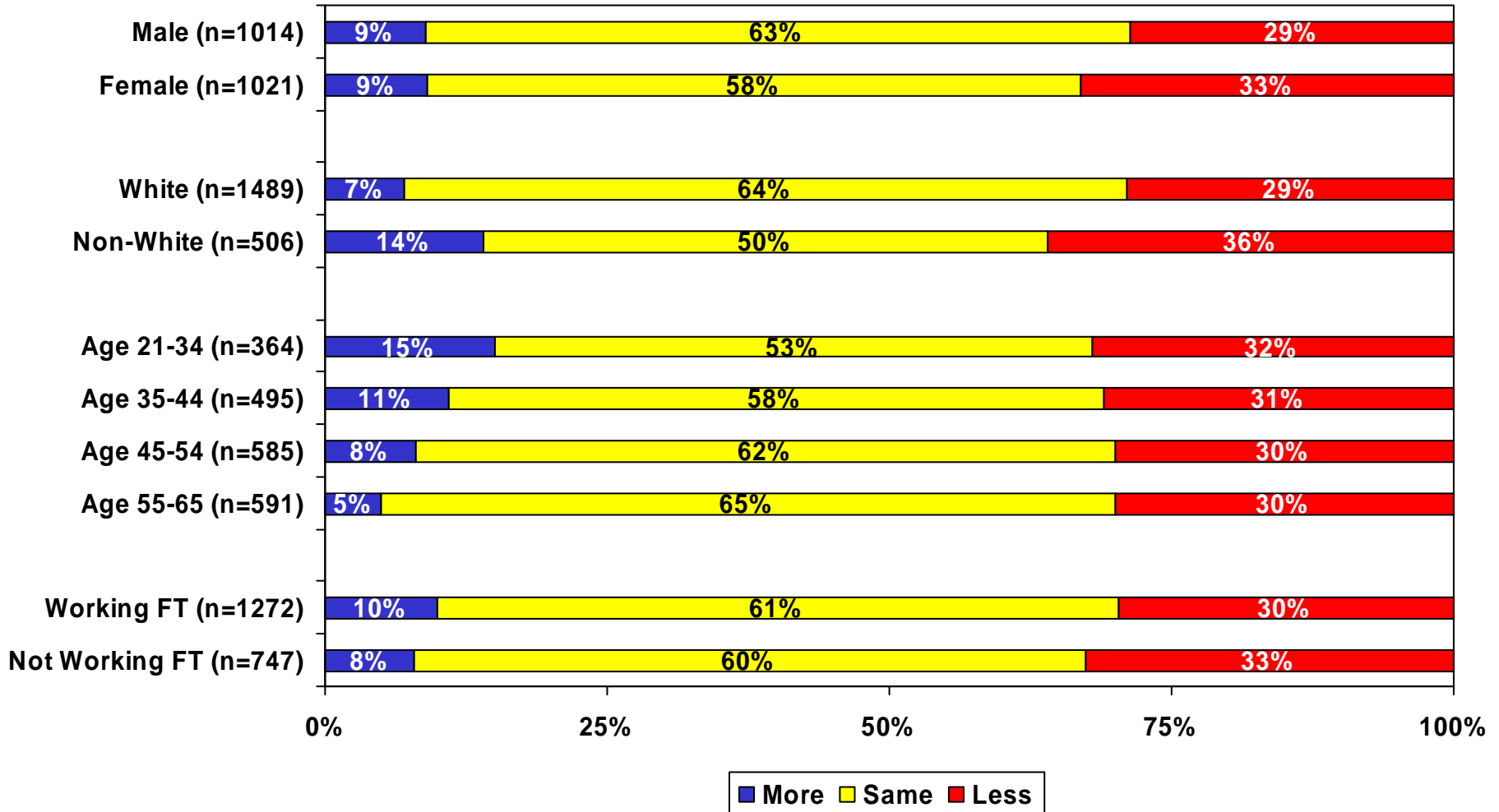
# Change in Caffeine Consumption

✦ *Q: Do you think you are consuming more, about the same, or less caffeine (in any form) now than you did one year ago?*



- ✦ Over one-half of respondents (60%) said they consume the same amount of caffeine they did one year ago.
- ✦ Respondents were three times more likely to say they are consuming less caffeine now (31%) than to say they are consuming more caffeine now (9%).

# Change in Caffeine Consumption



# Change in Caffeine Consumption

## Highest Percentage “More”

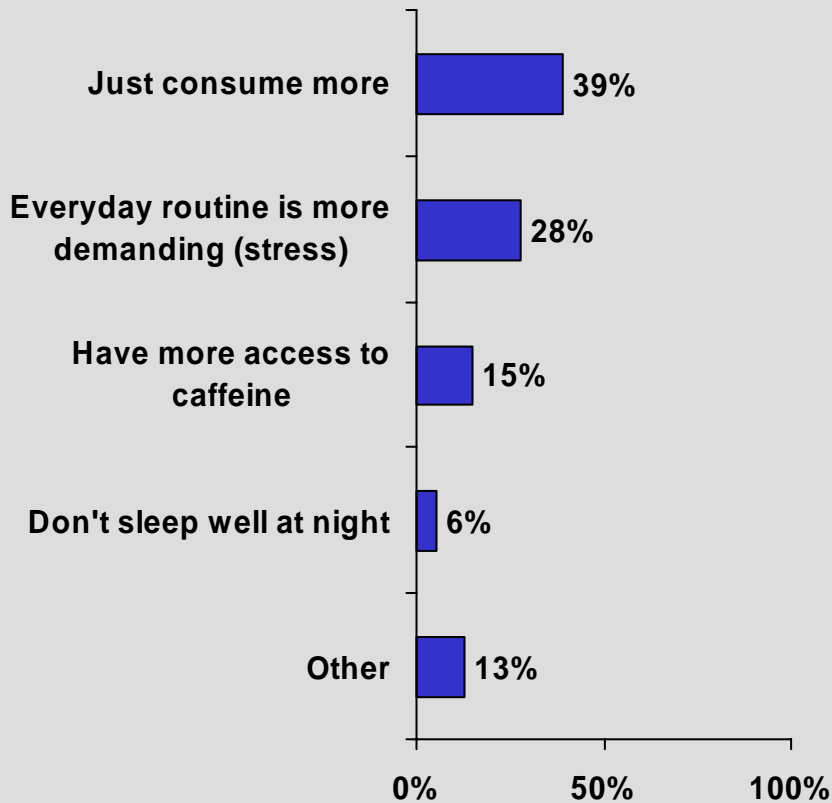
Rank	MSA	More
1	San Francisco-Oakland-Fremont	14%
2	Phoenix-Mesa-Scottsdale	14%
3	Seattle-Tacoma-Bellevue	13%
4	Minneapolis-St. Paul-Bloomington	12%
5	Los Angeles-Long Beach-Santa Ana	12%
6	Riverside-San Bernardino-Ontario	11%
7	Chicago-Naperville-Joliet	9%
8	Dallas-Fort Worth-Arlington	9%
9	Miami-Fort Lauderdale	9%
	<b>Total</b>	<b>9%</b>
10	New York-Northern New Jersey-Long Island	8%
11	San Diego-Carlsbad-San Marcos	8%
12	Houston-Sugar Land-Baytown	8%
13	Baltimore-Towson	8%
14	Tampa-St. Petersburg-Clearwater	7%
15	Philadelphia-Camden-Wilmington	7%
16	Detroit-Warren-Livonia	7%
17	St. Louis	7%
18	Atlanta-Sandy Springs-Marietta	6%
19	Boston-Cambridge-Quincy	5%
20	Washington-Arlington-Alexandria	5%

## Highest Percentage “Less”

Rank	MSA	Less
1	New York-Northern New Jersey-Long Island	39%
2	Dallas-Fort Worth-Arlington	38%
3	Atlanta-Sandy Springs-Marietta	36%
4	Riverside-San Bernardino-Ontario	36%
5	Minneapolis-St. Paul-Bloomington	35%
6	Philadelphia-Camden-Wilmington	34%
7	Miami-Fort Lauderdale	34%
8	Tampa-St. Petersburg-Clearwater	33%
9	Houston-Sugar Land-Baytown	32%
10	St. Louis	32%
	<b>Total</b>	<b>31%</b>
11	San Diego-Carlsbad-San Marcos	30%
12	Boston-Cambridge-Quincy	29%
13	Detroit-Warren-Livonia	29%
14	Los Angeles-Long Beach-Santa Ana	28%
15	Phoenix-Mesa-Scottsdale	27%
16	Seattle-Tacoma-Bellevue	27%
17	Baltimore-Towson	27%
18	Washington-Arlington-Alexandria	23%
19	San Francisco-Oakland-Fremont	23%
20	Chicago-Naperville-Joliet	20%

# Reasons for Increase in Caffeine

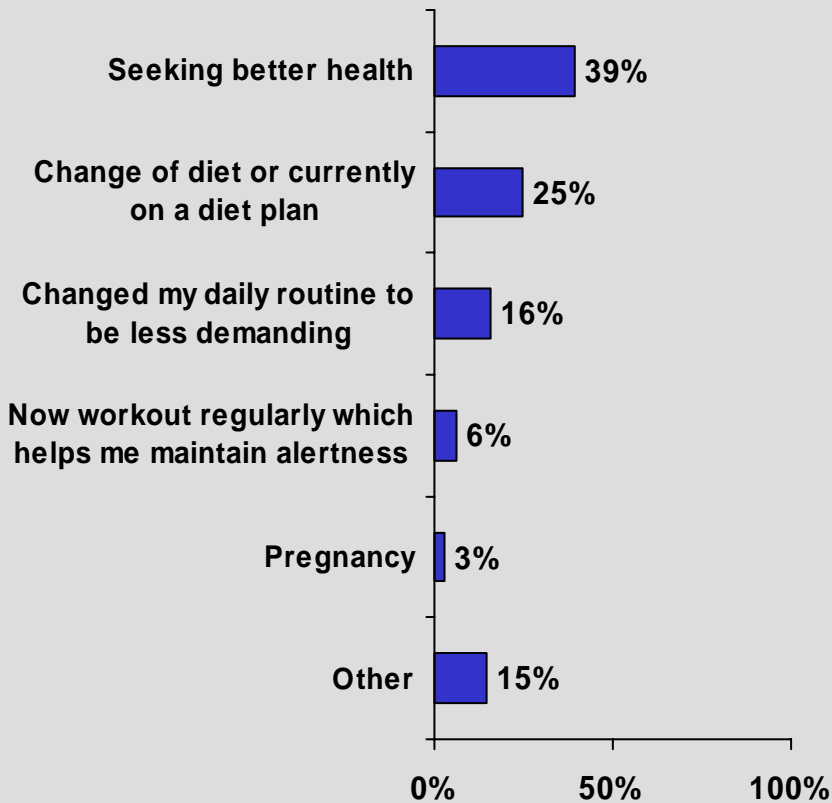
✦ Q: *Why more?*



- ✦ Most of those that said they consume more caffeine today than a year ago said they just consume more (39%) or they do it because their everyday routine is more demanding (28%).
- ✦ Another 15% said it was because they have more access to caffeine, and 6% said they consume more caffeine because they don't sleep well at night.

# Reasons for Decrease in Caffeine

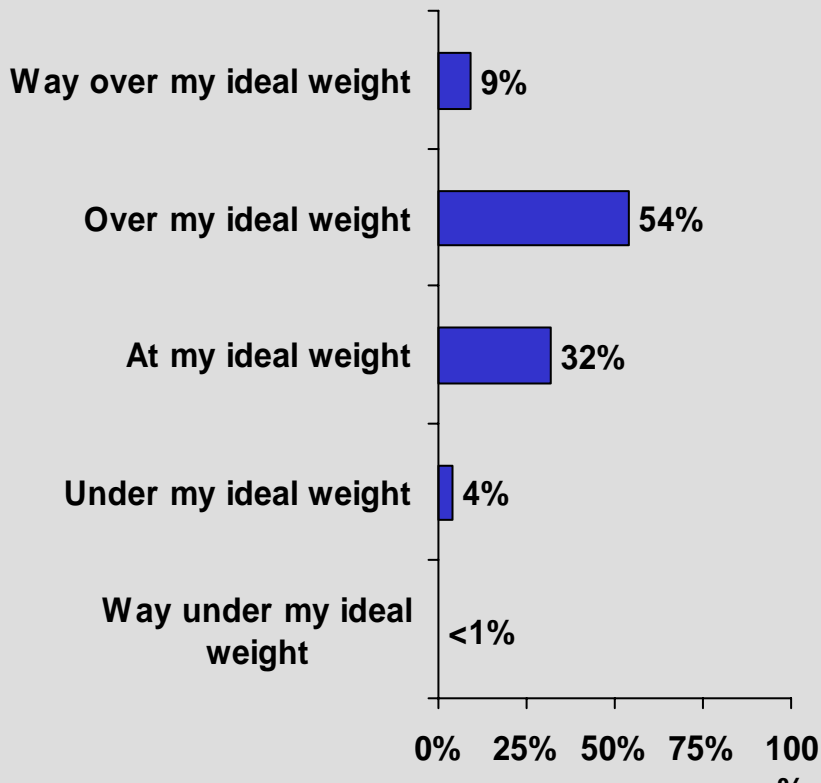
✦ Q: *Why less?*



- ✦ Among those that said they consume less caffeine now than a year ago, 39% said it is because they are seeking better health.
- ✦ One-fourth (25%) of those that consume less caffeine now said it was because of a change in diet or they are currently on a diet plan.
- ✦ Changing daily routine (16%) and working out regularly (6%) were other frequently mentioned reasons for consuming less caffeine.

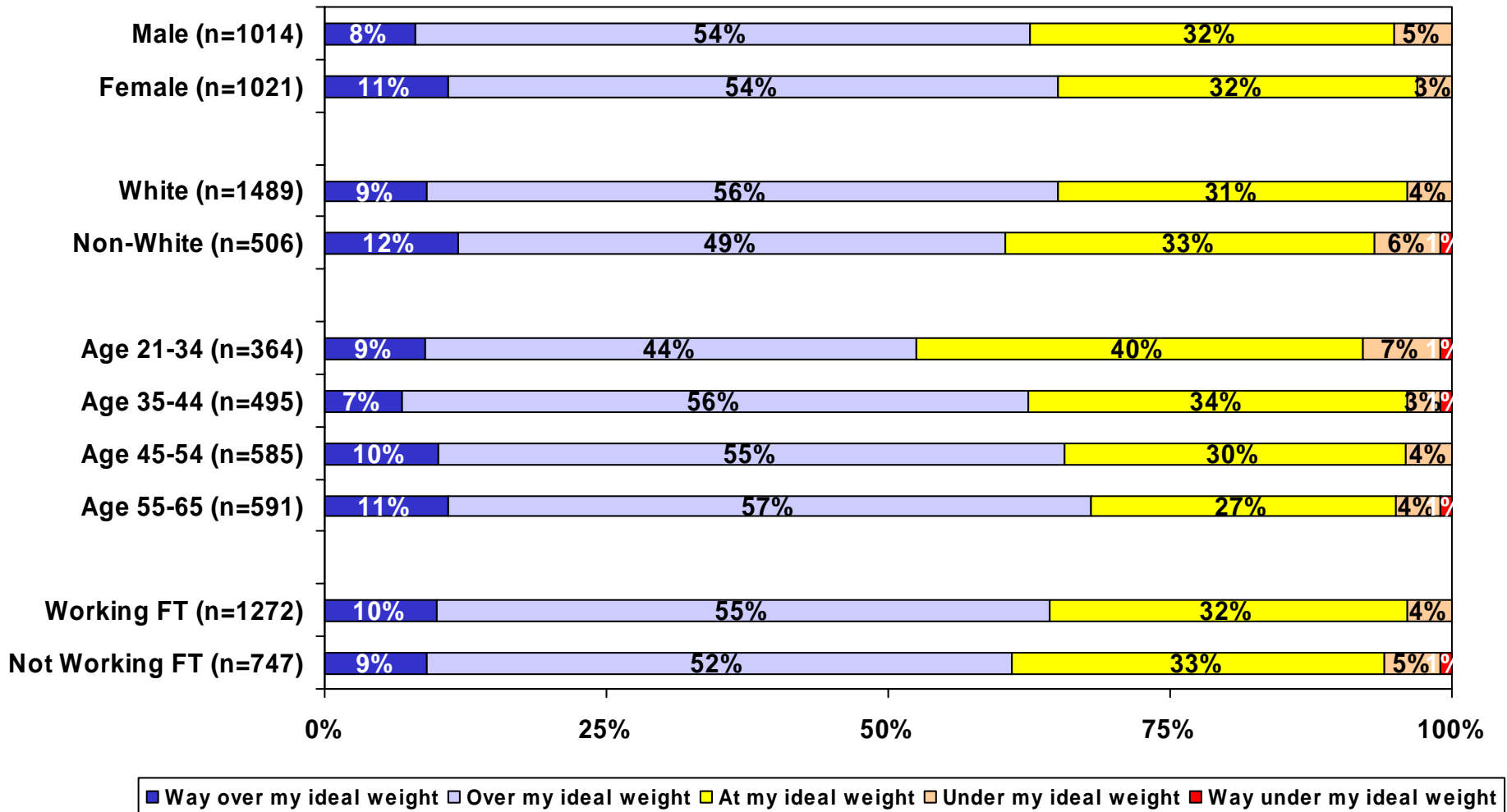
# Relative to Ideal Weight

✦ Q: How close to your “ideal” weight are you, right now?



- ✦ Nearly two-thirds of respondents (63%) said they are way over their ideal weight (9%) or over their ideal weight (54%).
- ✦ One in three (32%) said they are at their ideal weight while only 4% said they are under their ideal weight.
- ✦ Less than 1% said way under my ideal weight.

# Relative to Ideal Weight



# At My Ideal Weight

Sorted: Most to Least

Rank	MSA	At ideal weight
1	Washington-Arlington-Alexandria	42%
2	San Diego-Carlsbad-San Marcos	41%
3	Miami-Fort Lauderdale	41%
4	Phoenix-Mesa-Scottsdale	39%
5	Los Angeles-Long Beach-Santa Ana	37%
6	New York-Northern New Jersey-Long Island	34%
7	Houston-Sugar Land-Baytown	34%
8	Atlanta-Sandy Springs-Marietta	34%
9	Tampa-St. Petersburg-Clearwater	34%
	<b>TOTAL</b>	<b>32%</b>
10	Seattle-Tacoma-Bellevue	31%
11	Detroit-Warren-Livonia	30%
12	Minneapolis-St. Paul-Bloomington	30%
13	San Francisco-Oakland-Fremont	29%
14	Riverside-San Bernardino-Ontario	29%
15	Baltimore-Towson	28%
16	Dallas-Fort Worth-Arlington	27%
17	Chicago-Naperville-Joliet	27%
18	Philadelphia-Camden-Wilmington	25%
19	Boston-Cambridge-Quincy	23%
20	St. Louis	22%

Sorted: Least to Most

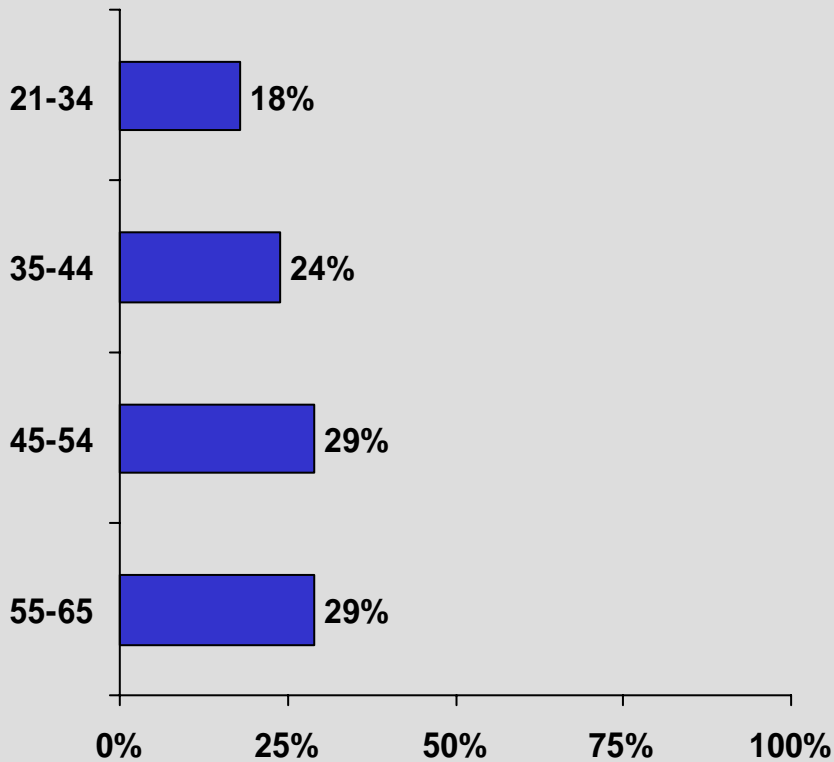
Rank	MSA	At ideal weight
1	St. Louis	22%
2	Boston-Cambridge-Quincy	23%
3	Philadelphia-Camden-Wilmington	25%
4	Chicago-Naperville-Joliet	27%
5	Dallas-Fort Worth-Arlington	27%
6	Baltimore-Towson	28%
7	San Francisco-Oakland-Fremont	29%
8	Riverside-San Bernardino-Ontario	29%
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17	Phoenix-Mesa-Scottsdale	39%
18	Miami-Fort Lauderdale	41%
19	San Diego-Carlsbad-San Marcos	41%
20	Washington-Arlington-Alexandria	42%

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# Respondent Demographics (n=2,035)

# Demographics: Age

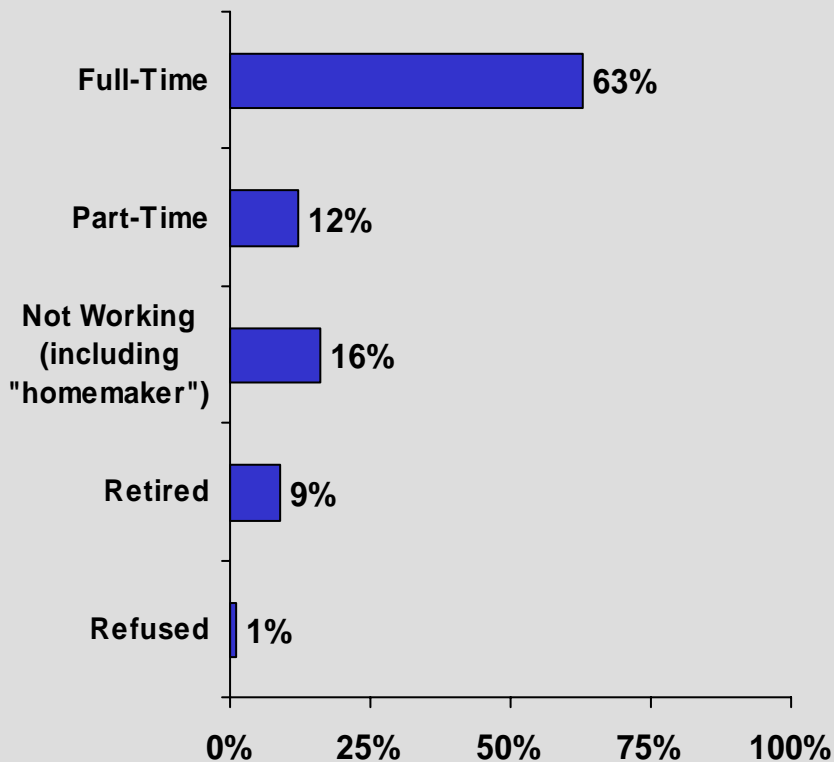
✦ Q: Which of the following includes your age?



- ✦ Overall, 42% of the sample was below the age of 45.
- ✦ The other 58% were equally split between ages 45-54 (29%) and ages 55-65 (29%).

# Demographics: Work Status

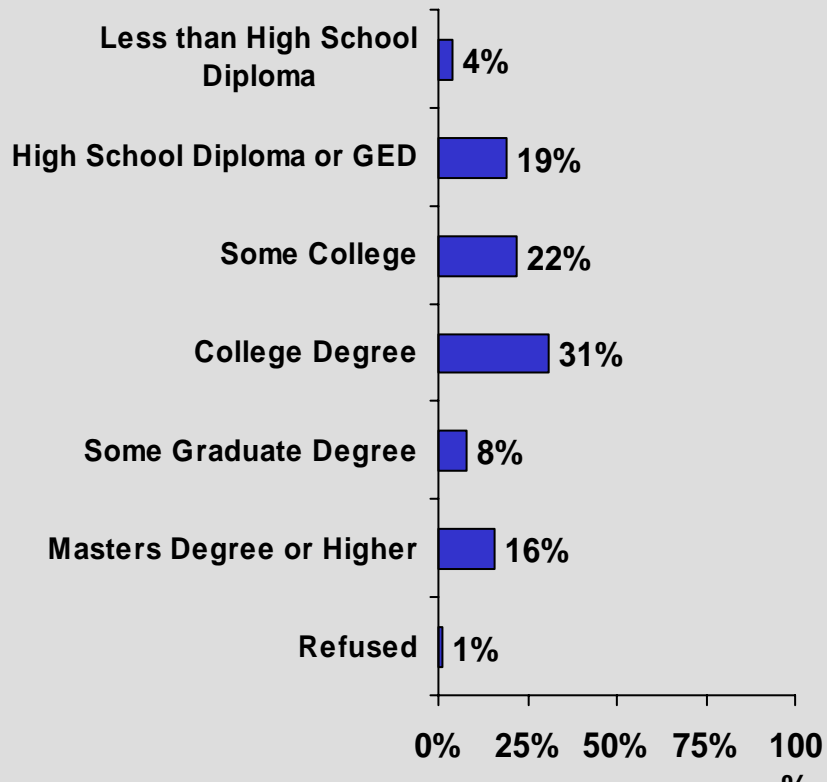
✦ Q: Are you currently working... full-time, part-time, or not at all?



- ✦ Almost two-thirds of respondents (63%) said they work full-time, and another 12% said they work part-time.
- ✦ One-fourth (25%) said they are not currently working (16%) or are retired (9%).

# Demographics: Education

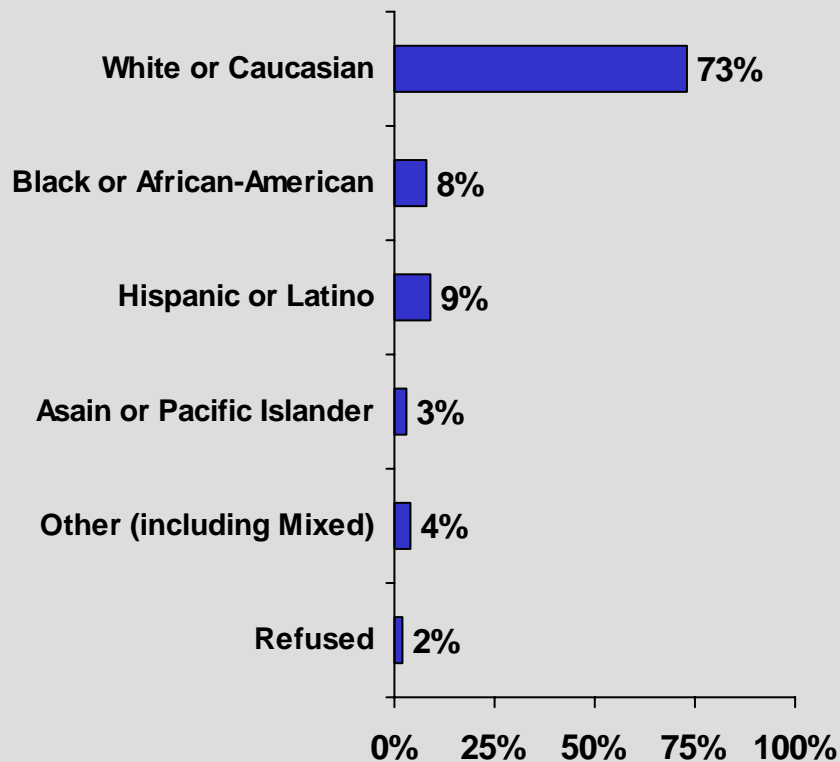
✦ Q: *What is the highest level of education you have received?*



- ✦ Overall, 55% of respondents have at least a college degree; another 22% have some college.
- ✦ One in five (19%) have only a high school diploma or GED.

# Demographics: Race

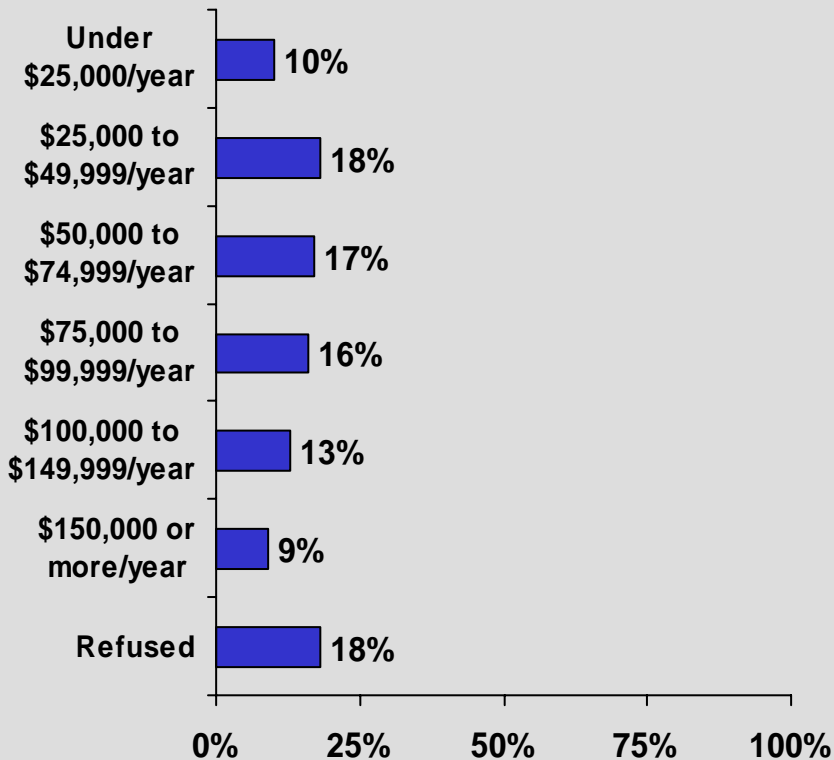
✦ Q: *What is your race or ethnic group?*



- ✦ Among all respondents, 73% indicated they are White/Caucasian.
- ✦ Another 9% said they are Hispanic or Latino, 8% are Black or African-American, 3% are Asian or Pacific Islander, and 4% are Other (including mixed race).

# Demographics: Income

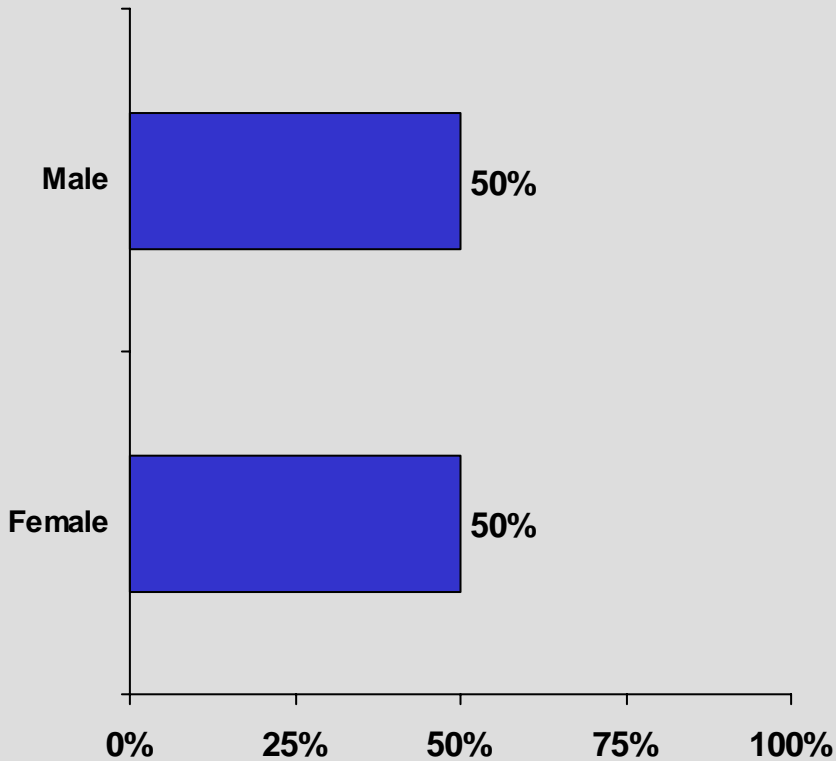
✦ Q: Which of the following includes your total annual household income?



- ✦ Overall, 18% of respondents said their HHI is \$25,000-49,999 a year while 17% said it is \$50,000-74,999 a year and 16% said \$75,000-99,999 a year.
- ✦ One in ten (10%) earn under \$25,000 while 22% earn \$100,000 or more a year.

# Demographics: Gender

✦ Q: Gender?



- ✦ There was equal participation between both male and female.

***\*Quota control was used to ensure an equal distribution between males and females.***

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# IV. Appendix