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The Grocer : Soft Drinks

Research on behalf of The Grocer – April 2018

The Grocer

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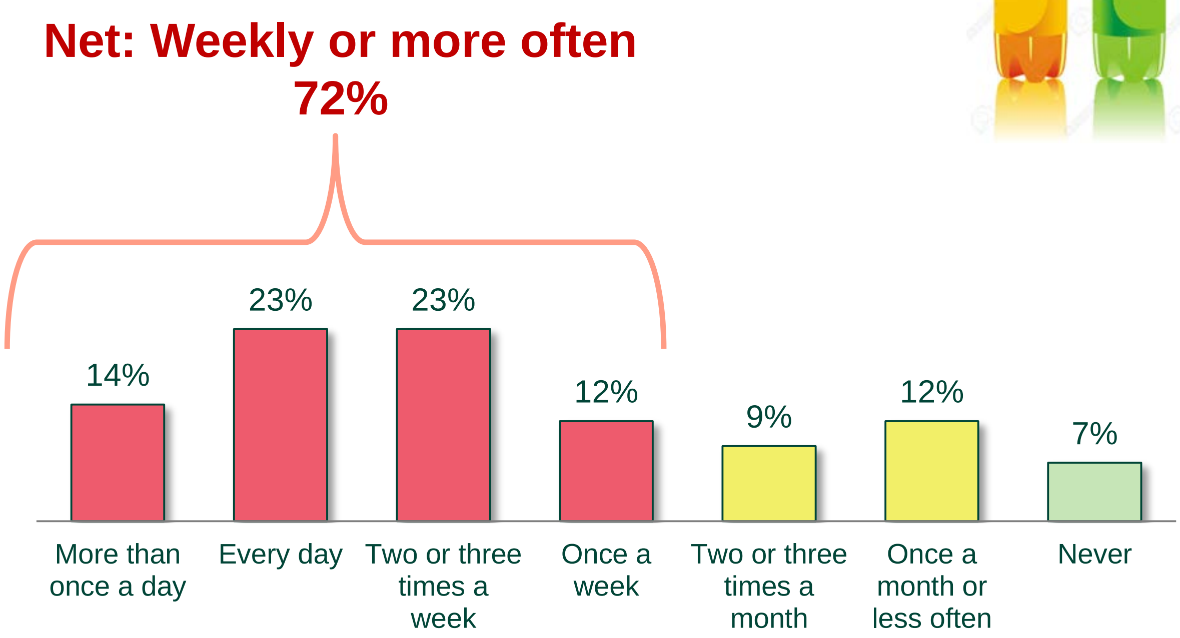
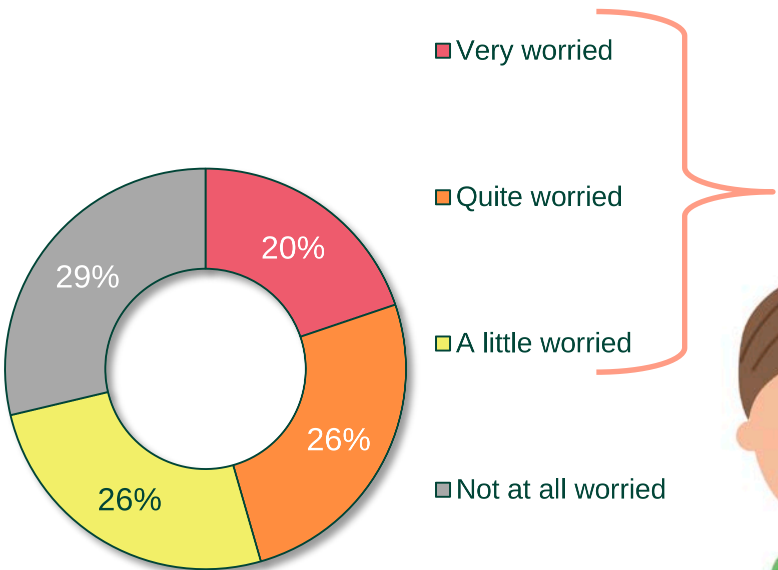
Over 7 out of 10 (72%) respondents consume a soft drink weekly (or more often), with 37% claiming they consume at least one a day.



Q1. How often do you consume a soft drink? Base - 2142

72% of respondents who drink soft drinks state they are worried about the sugar contents of soft drinks – a fifth of whom are very worried.

Level of worrying about the sugar content of soft drinks



Net: worried
71%

Q2. How worried are you about the sugar content of soft drinks? Base (all who drink soft drinks) - 1984

When choosing a soft drink, around half consider flavour the most important factor (51%), whilst over two-fifths believe sugar content is important (42%). Interestingly, less than a fifth claim to select their soft drink based on brand.

Most important factors when choosing a soft drink – Top 3

Flavour
51%

Sugar content
42%

Price
36%

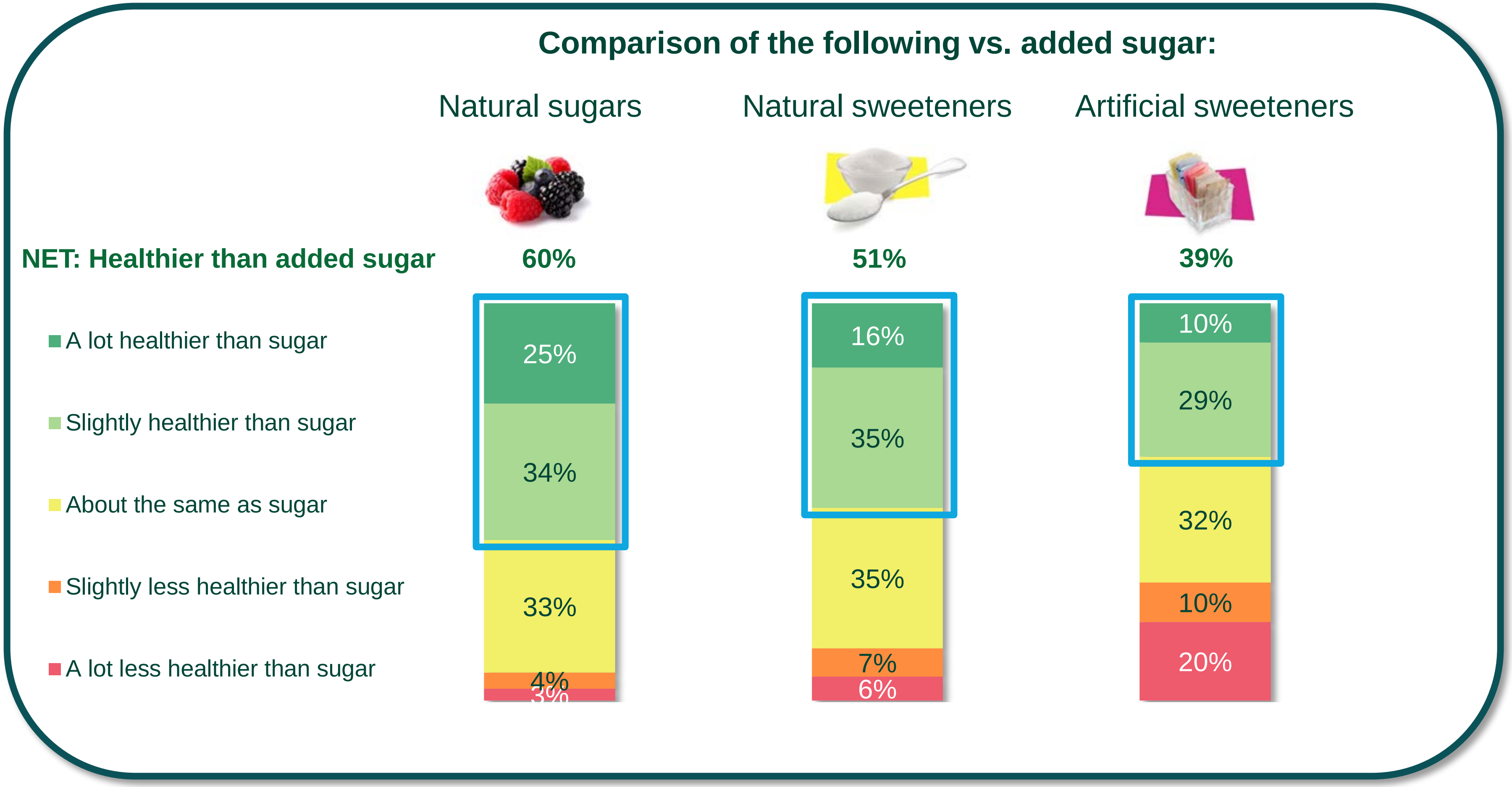
Calories
24%

Natural ingredients
22%

Brand
18%

Q3. Which of the following factors are most important to you when choosing a soft drink? Base (all who drink soft drinks) - 1984

Respondents consider natural sugars (60%) to be the most healthy alternative to added sugars, followed by natural sweeteners (51%), and finally artificial sweeteners (39%).



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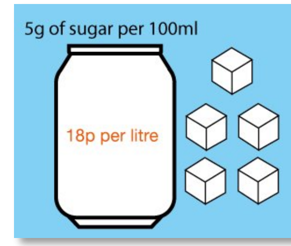
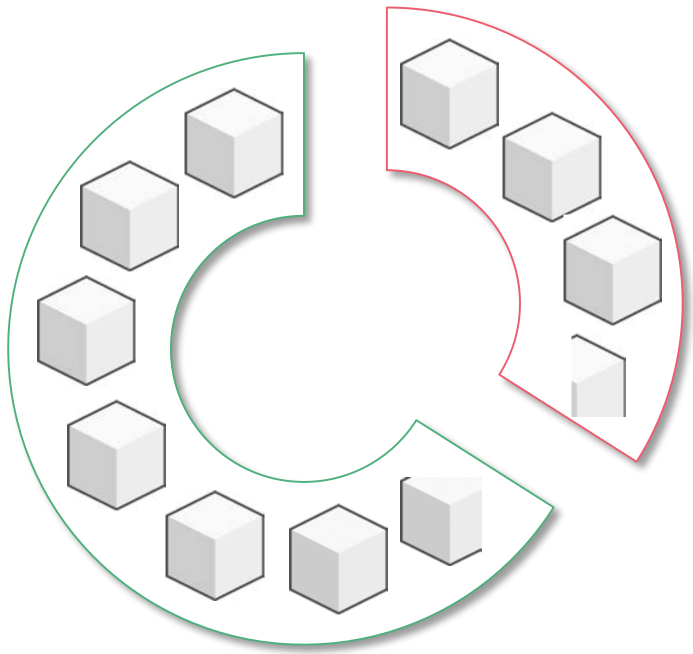
Q5. How do you feel about artificial sweeteners such as aspartame and saccharin?
Q6. How do you feel about natural sweeteners such as stevia?
Q7. How do you feel about naturally occurring sugars such as those found in fruit (fructose)?
Base - 2142

When considering the ‘sugar tax’ levy, two-thirds of respondents are aware of the new legislation (66%), compared to a third who were unaware.

Level of awareness for ‘Sugar Tax’ levy



66%
Are aware of the levy



34%
Are not

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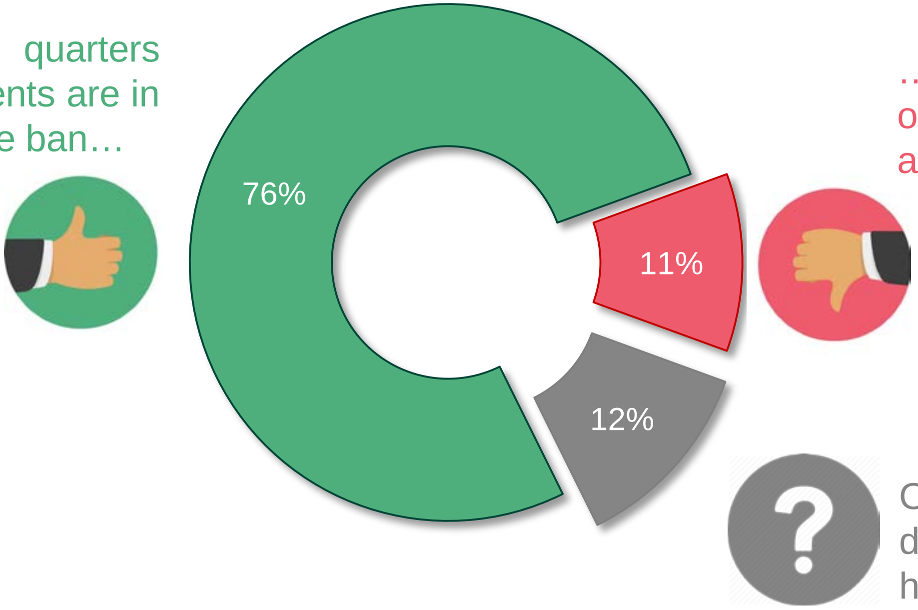
Q4. Are you aware that from 1 April, soft drink brands with a total sugar content over 5g per 100ml will have to pay a levy to the government, dubbed the ‘sugar tax’? Base - 2142

The majority of respondents agree with the proposed ban on the sale of certain drinks to children aged under 16, with only one in ten disagreeing with the idea.

Level of agreement with retailer pledge to ban the sale of high caffeine/ sugar energy drinks to children aged under 16

Over three quarters of respondents are in favour of the ban…

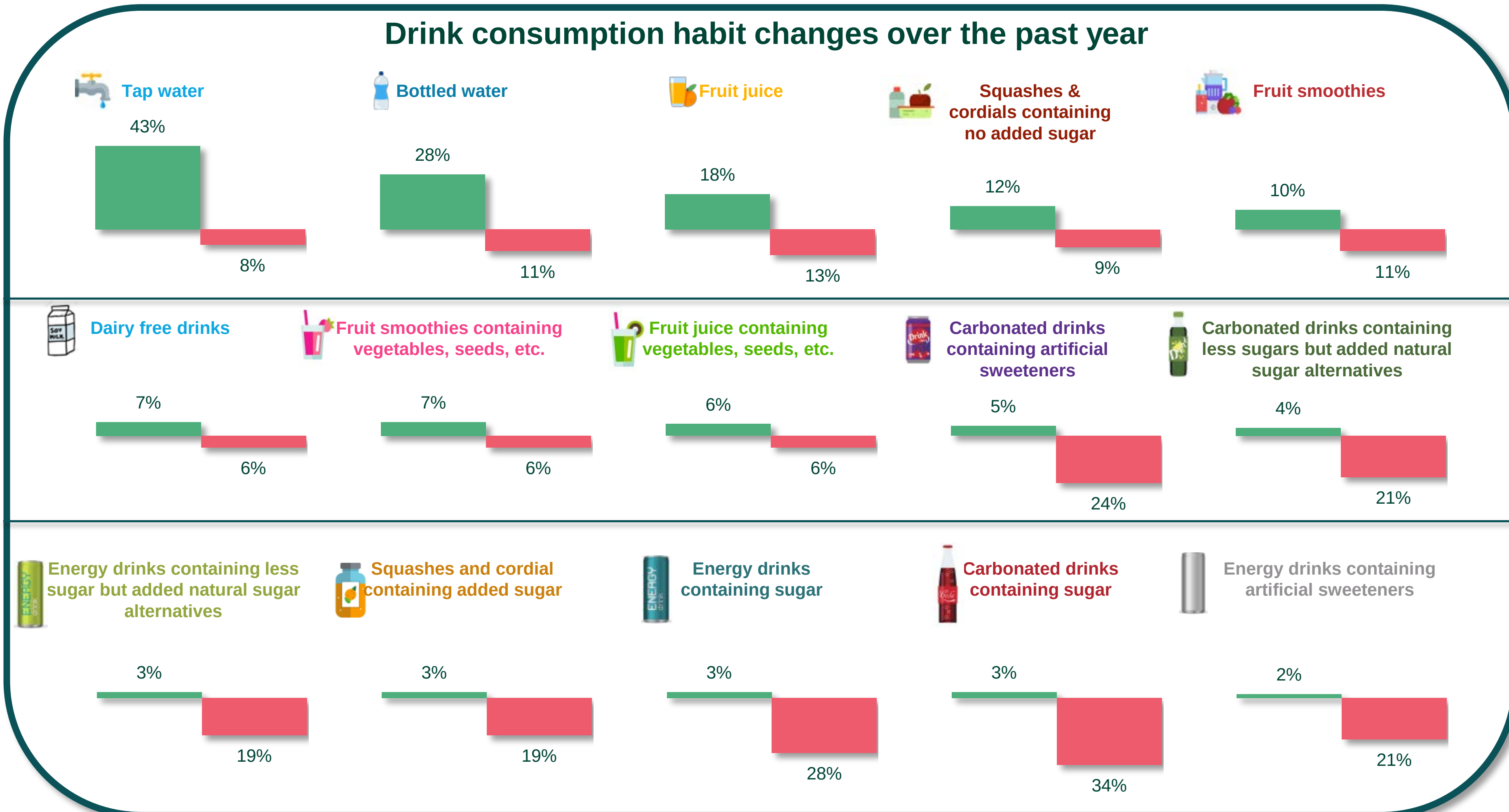


… whereas around one in ten are against the pledge.

Over one in ten did not know how to respond.

Q8. In the past year, a number of retailers have pledged to ban the sale of high caffeine and sugar energy drinks to children aged under 16. Do you agree with the move? Base - 2142

Consumers are actively moving away from all variants of energy and carbonated drinks, as well as squashes and cordials containing added sugar, in favour of water, fruit juice/smoothies and squashes with no added sugar.



Key: Drinks consumed **more** of in the past year | Drinks consumed **less** of in the past year

Q9. Which of the following drinks, if any, have you made a conscious decision to drink less of in the past year? Base - 2142
Q10. Which of the following drinks, if any, have you made a conscious decision to drink more of in the past year? Base (all who drink soft drinks) - 1984

Respondents who are actively drinking more water/ fruit juices/ smoothies do so primarily because they are trying to consume more natural foods with perceived functional benefits. The concern around sugar content is the main driver choosing carbonated drinks with artificial sweeteners/ less sugar.

Motivations for drinking more	Tap water (n=843)	Bottled water (n=552)	Fruit juice (n=359)	Fruit smoothies (n=201)	Fruit smoothies containing vegetables, seeds, etc. (n=137)	Fruit juice containing vegetables, seeds, etc. (n=118)	Carbonated drinks containing artificial sweeteners (n=108)	Carbonated drinks containing less sugars buy added natural sugar alternatives (n=79)
I'm worried about the effect too much sugar has on my health	31%	30%	23%	29%	33%	25%	30%	32%
I'm worried about the effect sweet food & drink has on my health	25%	27%	21%	23%	24%	20%	30%	31%
I'm trying to consume more natural/less processed food & drink	46%	44%	45%	48%	44%	46%	18%	19%
I'm trying to consume more food & drink with functional benefits	28%	33%	41%	51%	58%	47%	18%	24%
I'm trying to consume less caffeine and other stimulants	29%	31%	25%	30%	24%	30%	21%	16%
I need extra energy	13%	16%	27%	33%	36%	31%	21%	23%
None of these	16%	13%	9%	7%	4%	7%	14%	12%

Key: Highest score; Second highest score; Third highest score

Q12. Thinking of some of the drinks you said you are trying to drink more of, what are your motivations? Base - variable

For carbonated drinks and fruit juices/ smoothies, consumers are primarily worried about the effect of sugar on their health – and this is significantly higher for carbonated drinks containing sugar. For fruit juice/ smoothies containing seeds, vegetables, consumers are mainly cutting down due to expense

Motivations for drinking less	Carbonated drinks containing sugar (n=720)	Carbonated drinks containing artificial sweeteners (n=512)	Carbonated drinks containing less sugars buy added natural sugar alternatives (n=446)	Fruit juice (n=285)	Fruit smoothies (n=240)	Fruit smoothies containing vegetables, seeds, etc. (n=138)	Fruit juice containing vegetables, seeds, etc. (n=124)
I'm worried about the effect too much sugar has on my health	66%	50%	50%	48%	43%	31%	26%
I'm worried about the impact plastic has on the environment	33%	36%	37%	26%	25%	34%	23%
I'm worried about the effect artificial sweeteners have on my health	31%	52%	36%	15%	23%	24%	15%
I'm worried about the effect sweet food & drink has on my health	52%	45%	44%	35%	40%	32%	22%
I'm trying to consume more natural/less processed food & drink	36%	42%	40%	28%	21%	19%	23%
These products are getting too expensive	17%	21%	23%	25%	33%	35%	32%
I'm trying to consume less caffeine and other stimulants	33%	36%	34%	14%	15%	16%	26%
None of these	5%	8%	8%	12%	12%	16%	19%

Key: Highest score | Second highest score | Third highest score

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Q11. Thinking of some of the drinks you said you are trying to drink less of, what are your motivations? Base - variable

Key Take Outs…

- Over **7 out of 10 consume soft drinks at least weekly**, with more than a third claiming they consume drinks once a day or more often.
- Sugar levels are of concern for the majority of respondents, **with 7 out of 10 being at least a little worried about the sugar content of soft drinks** – a fifth of whom are very worried.
- Sugar content is the second most important factor when choosing a soft drink, with **flavour being the most important driver of soft drink selection**.
- **Natural sugars are considered to be the most healthy alternative to sugar**, followed by natural sweeteners and then artificial sweeteners.
- 'Sugar tax' has relatively high awareness, with **two-thirds of respondents aware of the new government levy**.
- When considering the idea of preventing the sale of high caffeine/ sugar energy drinks to children under 16, **three-quarters of consumers are in favour of the proposed ban by retailers**, with only one in ten disagreeing with the idea.
- Consumers claim to be **moving away from all variants of energy and carbonated drinks**, as well as beverages with added sugars (e.g. squashes/ cordials) in favour of water, fruit drinks and no added sugar squashes.
- Respondents who are trying to drink more water/ fruit juices/ smoothies are primarily doing so to **consume more natural foods with a perceived functional benefit**.
- The reduced consumption of carbonated drinks tends to be due to concerns about the effect of too much **sugar consumption**.

Appendix

Approach & Demographics

Approach and Panel

- We conducted an ***online omnibus survey*** with ***2,142 adults*** aged ***18+*** across ***England***, ***Scotland***, and ***Wales*** between ***5th - 9th March 2018.***

- The survey took place using our sister-company ***toluna.com online panel*** which consists of members of the ***general public*** who have opted in and voluntarily agreed to participate in online research studies.
  - Through careful recruitment and management, ***we are able to rapidly survey large numbers of the general population*** and accurately ***represent the views of the nation***.

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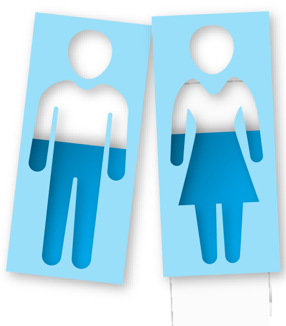
Omnibus Audience

A representative Sample

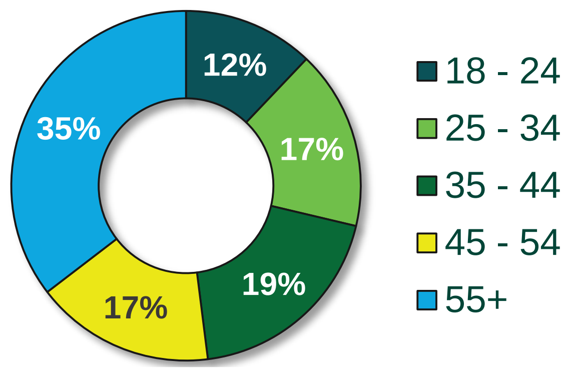
- The results of the study were weighted to best reflect the size and shape of the population of the nation
- This means that the results in this report reflect an audience that is as true as possible of the GB population with the same age, gender and regional profile. The audience profile is detailed below.

Gender

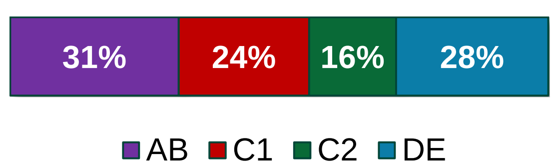


49% 51%

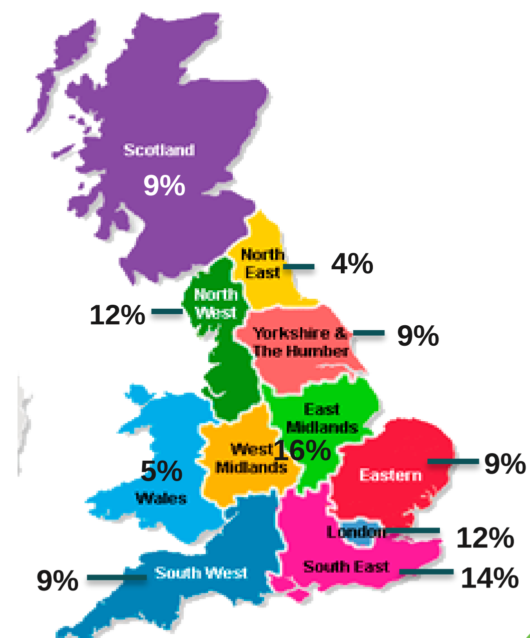
Age



Social Grade



Region



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