Children’s Consumption of Soft Drinks
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Executive Summary

The debate about the diet and lifestyle of the nation’s children is becoming ever more prominent. As a contribution to that debate, the British Soft Drinks Association commissioned independent market analyst, TNS, to undertake research into children’s consumption of soft drinks in the UK.

This survey draws upon two sets of data to understand the drinking habits of children between 0-16 years old and looks at consumption trends from 1993 to 2007. Over 22,500 individuals including 3,500 children per annum are surveyed to provide comprehensive information on what children are drinking, trends in consumption and how children are making their drinks choices.

The key objective of this research was to provide an accurate picture of children’s drinking habits in the UK. BSDA also wanted to determine how children’s repertoires in terms of soft drinks have changed over time and to identify the major drivers of these changes. The research also looked at the impact of self selection on a child’s choice of drink along with the relationship between food and drink and what proportion of a child’s drink intake is partnered with one or more food items.

Key findings from the research show:

- Fruit juice, juice drinks, bottled water and milk are now chosen twice as often as in 1993
- Squash remains the most popular soft drink amongst children – but children are now more likely to choose from a wider range of drinks
- 55 per cent of soft drinks consumed by children now contain no added sugar compared to 46 per cent in 2004 – children are now 20 per cent more likely to consume a drink with no added sugar than they were in 2004
- Squash is the most popular soft drink in children’s school lunchboxes. Bottled water has also become increasingly popular
- 97 per cent of drinks consumed in school hours are obtained at school or brought in the lunchbox from home, and only 3 per cent are obtained elsewhere
- Over 86 per cent of soft drinks (and 93 per cent of fruit juice) are consumed with food

This study provides an accurate picture of the different beverages that children are drinking and how different circumstances affect their drinks choices. Importantly, it also shows that children now have a wide range of soft drinks to choose from and this choice is resulting in children choosing and enjoying a wide variety of soft drinks. Parents understand the important role they have in encouraging their children to maintain a balanced diet and active lifestyle and the correlation between drinks chosen by parents and those chosen by children is positive.
Consumer Research: Children’s Consumption of Soft Drinks

Introduction

The British Soft Drinks Association asked market analyst, TNS to undertake research into children’s consumption of soft drinks in the UK. The key objective of this research is to provide an accurate picture of children’s drinking habits in the UK.

BSDA also wanted to determine how children’s choice of soft drinks has changed over time and to identify the major drivers of these changes. The research also looked at the impact of self selection on a child’s choice of drink along with the relationship between food and drink and what proportion of a child’s drink intake is partnered with one or more food items.

This research also provides a snapshot of general soft drinks consumption habits for both adults and children and includes a regional breakdown of children’s consumption of soft drinks within the appendix.

Methodology

Independent market analyst, TNS, was chosen as a partner for this research project because of its knowledge of the food and drink sector and its expertise in its comprehensive and rigorous collection and analysis of consumer data. TNS is respected as a reliable source of valuable information, working with many food and drink companies over many years.

This study is based on data from two TNS sources: the National Drinks Survey and from Worldpanel Usage.

The National Drinks Survey reports on trends over the last 10 years measured by face to face questionnaires with 11,520 randomly selected individuals. These representatives were each interviewed once and asked ‘what did you drink yesterday?’. Interviews take place throughout the year. The interviews covered total consumption in and out of home. Consumption is measured in ‘drinks units’ and the children surveyed were those aged up to and including 15 years old.

The Worldpanel Usage data has been collected over the past four years from self completion diaries. 11,000 individuals completed a diary for a period of two weeks, twice a year and this is undertaken on a continuous basis throughout the year. The diary covers total consumption in and out of home. Consumption is measured in ‘drinks units’ and the children surveyed were those aged up to and including 16 years old.

Both of these studies are cross-sectional, and the data is captured either through completion of a diary by the child (in the case of Worldpanel Usage), or through a face-to-face interview (in the case of the National Drinks Survey). In all cases, questions are asked with the consent and under the supervision of an adult (according to Market Research Society guidelines).

Prompted questions include:

• Type of drink consumed
• Was the drink a brand name or own label product
• Flavour of the drink
• Type of container the drink was purchased in
• Reason for consumption

Each individual is recorded by their age, sex and demographics, and whether visitors are present.

The term “drinks units” relates to a serving of a product, regardless of the amount consumed. For example, a cup of tea or a glass of milk would equate to one unit each, regardless of whether 175ml of tea was consumed versus 330ml of milk.

The drinks surveyed included: alcohol, smoothies, milkshakes, plain milk, tap water, bottled water, squash, pure juice, fruit drinks, carbonates, malted drinks, hot chocolate, tea and coffee. Where the term “soft drinks” is used in this report, it includes smoothies, bottled water, squash, pure juice, fruit drinks, and carbonates.

Where no added sugar drinks are referred to, this covers the following beverages: plain bottled water; low and zero calorie carbonates, dilutables and still & juice drinks (using an intense sweetener); 100% pure juice, containing natural fruit sugars but no added (refined) sugar.
Section 1. UK beverage consumption

Before investigating the drinking habits of children, BSDA looked at overall consumption habits of the UK population as a whole (including both adults and children).

What is the nation drinking?

The traditional picture of the British as a nation of tea drinkers remains true. Tea is the largest single drink choice (35 per cent) and drunk each day by 59 per cent of people. Hot drinks overall made up 55 per cent of drinks consumed each day. Soft drinks account for 27 per cent of the nation’s beverage choices.

In the context of the need to remain properly hydrated, any of the drinks listed in fig 1 and fig 2, (with the exception of alcohol) might be consumed in order to reach this target. (Advice from the Food Standards Agency is that people should consume approximately 1.2 litres of fluid a day from drinks, on top of fluid obtained from foods.)
...What is the nation drinking?

There is a big variation in the type of beverage consumed according to age, with more cold drinks consumed by children and a transition to hot drinks as our age increases. This is noticeable in both men and women.

The research looked at consumption of carbonated beverages and how it relates to a person’s Body Mass Index (BMI). Diet carbonates are consumed more by persons with a higher BMI. This may indicate a choice which is conducive with calorie restriction.
...What is the nation drinking?

The popularity of fruit juice and smoothies has been growing - a glass of fruit juice or a smoothie can count towards the recommended five portions of fruit and vegetables a day, yet research shows that most people still aren’t reaching this daily target.
2. Children’s beverage consumption

Having looked at the general picture for the UK population as a whole, the research then turned to children’s soft drinks consumption in particular. What are the emerging trends? What patterns can be identified?

What are British children drinking?

As shown earlier, cold drinks make up a bigger proportion of children’s diets than they do for adults, and this pattern has not changed significantly over the last ten years. The main changes that we now see occurring are the choices children are making within the range of cold drinks available. Children (and adults) now have a wide range of soft drinks to choose from and have a more balanced drinks repertoire than ten years ago.

For all ages, squash remains a very popular, low-cost beverage choice. Alongside squash, there is an increasing range of other cold drinks being consumed, while the largest decline overall can be seen in the consumption of tea and coffee. (Look back to figure 3 to see that it is only in adulthood that tea and coffee take up their major role in the diet.)
...What are British children drinking?

Amongst the youngest children surveyed (0-4 years old) there has been a steady growth in the consumption of milk, juice and juice drinks over the last 14 years. Squash and milk account for over two thirds of all drinks choices, with squash accounting for 35 per cent of drinks consumed and milk 34 per cent. Carbonates consumption has however, decreased from 11 per cent of drinks in 1993 to 3 per cent in 2007.

For 5-9 year olds, juice and juice drinks are increasing in popularity, having risen from 13 per cent of drinks consumed in 2003 to 23 per cent in 2007. Carbonates consumption has decreased from 21 per cent of drinks in 1993 to 11 per cent in 2007.
...What are British children drinking?

For 10-12 year olds, squash, juice and juice drinks are the most popular, with squash accounting for 29 per cent of drinks chosen and juice and juice drinks 19 per cent. Carbonates remain popular, representing 17 per cent of drinks consumed by this age group; this is however a decline from 2000 when carbonates accounted for 30 per cent.

For 13-15 year olds, we see a very balanced drinks repertoire with squash, juice and juice drinks and carbonates all proving popular. Carbonates account for 24 per cent of drinks chosen, juice and juice drinks 18 per cent and squash 22 per cent.
Consumption of no added sugar drinks has also increased over the last five years. In 2004, 46 per cent of drinks consumed were no added sugar beverages, this rose to 55 per cent in 2007. This is consistent among children across age and genders, with the exception of teenage girls who consume more no added sugar soft drinks than teenage boys.

The research suggests that the choice of added or no added sugar drinks is comparable across the range of BMIs.
Parental attitudes to children’s consumption of soft drinks

The research found that parents want to play an active role in ensuring their children have a balanced diet and want to set a good example so their children understand the need to maintain a healthy active lifestyle. The research indicates that parents do understand the effective role they can play and the importance of eating together as a family.
What are children drinking at home?

When they are the only ones having a drink, children are opting for squash as a first choice. Juice, juice drinks and milk are also popular choices among all ages. In the upper age group (11-16s) we see an increased proportion of children opting for more adult-orientated drinks such as carbonates, 21 per cent of 11-16 year olds opted for carbonates in comparison to 13 per cent of 6-10s. Squash remains the most popular soft drink type and is chosen 22 per cent of the time. When with their parents, children are making very similar drinks choices. The most noticeable difference when the children are with adults is that for children between the ages of 6 -16 years old, tea is three or four times more likely to be consumed. For 11-16 year olds 23 per cent of drinks choices are tea when with parents, as opposed to 8 per cent if adults are not present. For 6-10 year olds, tea accounts for 12 per cent of drinks choices when with their parents and only 3 per cent when they are not.

![Repertoires By Gathering (in home only, consumed by children)](image)
What are children drinking at school?

New regulations have been brought in to restrict the range of drinks that may be served in schools. What is the background against which those new regulations have been introduced?

The data was collected during a time period when the new rules applied only to lunches provided at school but not to other parts of the school day. These rules have now been extended to cover the whole day.

The vast majority (71 per cent) of drinks consumed in schools are brought there in children’s lunchboxes: 26 per cent are obtained in schools themselves and a small proportion – 3 per cent – are obtained by children elsewhere. Squash is the main drink provided by parents, and milk and tap water make up over 50 per cent of drinks consumed in school. When obtained elsewhere, bottled water is the most popular choice, accounting for 21 per cent of drinks choices, carbonates make up 18 per cent of drinks obtained elsewhere and fruit drinks 16 per cent.
...What are children drinking at school?

In terms of drinks being consumed within schools, there has been a steady rise in bottled water in recent years.
When consuming drinks out of home, (aside from at school) carbonates are the most popular choice, accounting for 21 per cent of drinks choices. Squash accounts for 12 per cent of drinks choices, as does milk, tap water accounts for 13 per cent and fruit drinks 11 per cent.

Dentists often advise that soft drinks should be consumed with meals in order to minimise any adverse effect on dental health. The research found that this advice is largely being followed: 86 per cent of soft drinks are consumed with food and 93 per cent of fruit juice consumption is with meals.
Conclusion

This study provides an accurate picture of the different beverages that children are drinking and how different circumstances affect their drink choices. Importantly, it also shows how children are choosing from a wider variety of soft drinks. Parents understand the important role they have in encouraging their children to maintain a balanced diet and active lifestyle and the correlation between drinks chosen by parents and those chosen by children is positive.

Having conducted this research it is clear that we can delve deeper into the drinking habits of both children and adults and there are more questions that can be asked. We would therefore, appreciate feedback on the research and views on areas that should be explored further and additional questions that could be asked.

If you have specific feedback on this report please email: lbastone@britishsoftdrinks.com.

About the British Soft Drinks Association

The British Soft Drinks Association (BDSA) is the national trade association representing the interests of UK producers of soft drinks including carbonated drinks, still and dilutable drinks, fruit juices and bottled waters. Members are responsible for the vast majority of products on the British soft drinks market.

BDSA provides a range of services to its members.

The main membership benefits include:

- Advice on all aspects of the industry, including technical standards, best practice and legislation
- Advice and assistance on incident management
- Inclusion in BSDA’s online listing of soft drinks industry manufacturers and suppliers
- Free access to the members’ e-newsletter Drinks Focus, and a range of sector specific publications
- A range of training courses to suit industry needs with a substantial discount for members
- Opportunity to attend BSDA’s annual Industry Lunch and network with key figures from government, industry bodies and associations, as well as members from the industry

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About TNS

TNS is one of the world’s leading market research groups. It provides Industry Sector Insight, and Innovative Research Solutions to many of the world’s leading companies. Delivering innovative market research thinking and excellent service across a network of 80 countries, TNS works in partnership with clients, providing high-quality information, analysis and insight that improves understanding of consumer behaviour.

TNS Worldpanel is the world’s leading provider of syndicated continuous research solutions. Worldpanel measures consumer grocery purchasing and consumption behaviour for brand owners, retailers and manufacturers in the global FMCG (CPG) industry and their advertising and media agencies. With over 300 manufacturing and retailer clients in the UK alone, Worldpanel delivers vital insights that help its clients’ businesses grow.
Anglia

The most popular choice of soft drink for children in Anglia is squash – this makes up nearly 40 per cent of their soft drinks intake and is double the number of fruit juice and juice drinks consumed and nearly three times more than the amount of carbonates consumed. Children in the Anglia region are 24 per cent more likely than the national average to choose squash.

Lancashire

Squash is still the drink of choice for children in Lancashire but is less popular than in most other parts of the country aside from London. Children in Lancashire also only drink a small percentage of carbonates, yet juice and juice drinks and milk all remain extremely popular. Children in Lancashire are 15 per cent more likely than the national average to choose milk.
Fruit juice and juice drinks are the most popular beverages amongst children in London, squash and bottled water are also popular and carbonates are less popular. Children in London are twice as likely to choose bottled water and 25 per cent more likely than the national average to choose fruit juices or juice drinks.

Squash is the most popular soft drink amongst children in the Midlands by far – it is three times more popular than carbonates and over the course of a year is consumed 15 per cent more, when compared to juice or juice drinks. Consumption of carbonates has also seen a significant decline in popularity between 2001 and 2007 in the Midlands. Children in the Midlands are 17 per cent more likely than the national average to choose squash.
Scotland

Children in Scotland once again choose squash over other beverages. Fruit juice consumption amongst Scottish children is on a par with most other UK regions and milk consumption is slightly lower than in other regions. Carbonates remain popular making up 17 per cent of drinks choices. This has however, halved since 1997 when carbonates made up 36 per cent of drinks choices. Fruit juice, juice drinks and squash have nearly doubled in their place.

Southern

Once again squash tops the charts as the most popular soft drink amongst children that live in the Southern region and it is more popular in this part of the UK than in any other region. Bottled water is much less popular than in London and Tyne Tees and carbonates are three times less popular than squash. Milk is the second most popular drink with fruit juice and juice drinks coming third. Children in the Southern region are 28 per cent more likely than the national average to choose squash.
Tyne Tees

The split amongst the types of drinks chosen by children in Tyne Tees is much more even than in other regions. Milk is the most popular drink with squash coming a close second. Fruit juice and juice drinks are also popular and bottled water accounts for 10 per cent of all drinks choices. The amount of carbonates drunk accounts for 15 per cent of drinks choices. Children in the Tyne Tees region are 67 per cent more likely than the national average to choose bottled water and 20 per cent more likely to choose milk.

Wales and West

Children in Wales and the West are most likely to choose squash over other soft drinks, with milk as their second choice. Fruit juice and juice drinks are popular but are chosen half as often as squash. Carbonates are consumed 50 per cent less often than they were ten years ago in Wales and the West. Children in the Wales and the West are 21 per cent more likely than the national average to choose squash.
How does children’s consumption of soft drinks vary regionally?

Yorkshire

Children in Yorkshire drink squash most frequently when compared to other soft drinks. Fruit juice and juice drinks are the second most frequently consumed beverages and milk is third. Carbonates have halved in popularity since 1999, falling from 32 per cent to 16 per cent. Squash and milk have each grown by a third in the same time period.