An investigation into key influences on soft drinks consumption across different age groups in relation to the Irish soft drinks market

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Abstract

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By Kieran Forde

Abstract:

This research report investigates how and why the Irish soft drinks market has been in decline during the past seven years, by examining the differences in consumption habits across different age groups – with a main focus on consumers aged over fifty five. It takes into account the effects of the domestic recession and also the fact that Ireland has an ageing population. The complexities involved in identifying and addressing key motivating factors of personal soft drinks consumption are considered through the lens of brand loyalty, brand repertoire and the underlying influence of personal health on soft drink purchasing decisions.

Quantitative data was gathered through a structured survey using online questionnaires. The sample was made up of Irish people, aged 18 to 74 years old, with 210 respondents completing the survey in full.

The report demonstrates that there are differences in consumption patterns by age, which remain an important variable in overall consumption trends. In the light of the evidence gathered, results support existing studies which show out of home consumption of soft drinks declines with age, however older consumers still represent an important group of consumers for in-home consumption. This concurrent approach to investigating consumption location was an advancement of reviewed research data and literature.

The study also supports existing theory which suggests older consumers are as likely as younger consumers to be promiscuous in their brand choices and that they have a repertoire of brands as wide as the younger cohort. An important finding is that health concerns around soft drinks are a prevalent worry across all age groups. As these are shown to be having a negative impact on stated consumption habits, strategies for addressing this issue are suggested. The report concludes that there is scope for soft drinks brands to create an upturn in current market trends by strategically targeting older consumers and suggests ways in which this may be done.

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Table of Contents

List of Tables

List of Figures

List of Appendices

List of Abbreviations

Name	Abbreviation
One way analysis of variance	ANOVA
Central Statistics Office	CSO
Fast Moving Consumer Goods	FMCG
Hypothesis	H
Litres	L
Number	N=
Significant Difference Value	p=

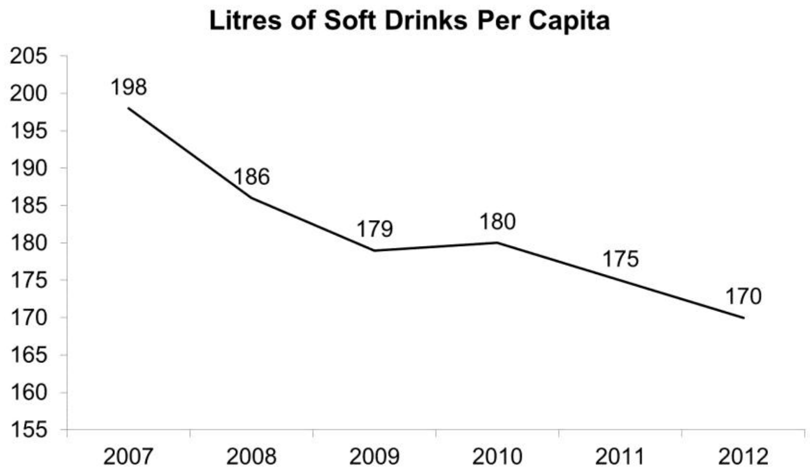
1. Introduction

This dissertation investigates the current downward consumption trend of the soft drinks market in Ireland and the possible role both consumer age and issues around health have to play in the declining sales. By looking at the key motivations of consumption habits across three main age banded groups, it considers the impact of brand loyalty and brand repertoire of consumers and the underlying impact of health. In the light of its findings, it goes on to examine ways in which the market could be successfully regenerated and how this might be best facilitated by focusing on consumers aged over-55s in particular.

In Ireland, the soft drinks market has experienced a downward consumption trend over the last seven years. The litres (L) of soft drinks consumed per capita fell by 14%, from 198L in 2007 to 170L in 2012 (Britvic Ireland Market Estimates 2013). This has meant that the value of the soft drinks market has declined by €500m since 2007, with negative value growth forecast up to and including 2016. Soft drinks manufacturers surmise that the downward consumption and market value trends are as a result of three main factors. Firstly, the recent global and Irish recession, which resulted in a substantial economic downturn. This downturn directly impacted on consumer spending levels in the retail grocery channel, with the average annual household spend on groceries reducing from a high of €6,134 in 2008 to €5,460 in 2013, a decrease of -11% (Kantar Worldpanel 2013). Secondly, the declining young adult (18-24) population in Ireland, which research shows, are the highest consumers of soft drinks at a total level (Britvic Ireland Project Breakthrough 2012). This is combined with an ageing Irish population, which has had a further impact on soft drinks consumption as the same research study shows that as people get older they start to consume fewer soft drinks. In the light of these two factors, this research study aims to establish whether this pattern still holds true and to offer a more in-depth understanding of the key motivating factors of soft drink consumption differences by age. The third factor examines the on-going focus by the media around the alleged health implications associated with excessive consumption of soft drinks with high sugar content and artificial sweeteners which are used in some diet drinks. The area of life-stage (Bogomolova and Grudinina 2001) and the recognition of personal health (Jacobs and Whittaker 2012) will be used as an underlying factor in this study to understand differences in consumption by age.

Soft drinks consumption decline in Ireland is illustrated in the chart below:

Figure 1.1 - Litres of Soft Drinks Consumed Per Capita in Ireland



Source: Britvic Ireland Market Estimates (2013)

Research by Britvic Ireland (2012) identifies that consumption of soft drinks, especially carbonated soft drinks, decreases as people get older – with the highest consumption rates of soft drinks amongst 18-24 year olds. Due to population structure changes within Ireland, the decline in soft drinks consumption with age raises business concerns for the soft drinks industry. Population trends highlighted in Census data from the Central Statistics Office (CSO) show that the numbers of people aged over-50 has increased from 34% (2006) to 37% (2012). The CSO forecast that by 2016, almost 40% of the Irish population will be over fifty and this figure will continue to rise (CSO 2013). This growth in older people is primarily due to increased life expectancy, as a consequence of improved healthcare, living conditions and increased personal wealth compared to that of previous generations. Also, within Ireland, the number of 18-24 years olds has declined from 15% (2006) to 11% 2012 which has been attributed to emigration. This emigration trend is a direct consequence of the economic recession, with 18-24 year olds impacted by the rise in unemployment and lack of job opportunities, meaning many have left Ireland in seek of work (Central Statistics Office 2013). This change in Irish population structure has imparted a substantial side-effect on the soft drinks industry, which is demonstrated in the decline in per capita consumption rates previously highlighted.

Therefore, with the older consumer base growing significantly in Ireland, in the context of this study, it is important to obtain a more in-depth understanding of the key reasons why soft drinks consumption differs with age, by investigating the impacts of brand loyalty, brand repertoire and the underlying importance of personal health and how this affects consumption. To achieve these objectives, a thorough and considered review of the literature was undertaken in order to further investigate the key areas which are highlighted as having an impact on the consumption of soft drinks.

Leading academic literature (Dycthwald 1997, Carrigan and Szmigin 2001, Ahmad 2002, Lambert-Pandraud and Laurent 2010, Solomon et al, 2010) highlights that the over-50s population are often over-looked in current marketing practice and misrepresented as a homogenous, inactive, low-spending consumer group. However, the reality is that older consumers represent a diverse and lucrative cohort, who require in-depth segmentation and understanding. It was proposed that segmentation should be based on an older person's cognitive age – how old they feel mentally (Szmigin and Carrigan 2001) and alongside socio-economic factors as personal health, time, wealth and life-stage (Bartos 1980) rather than simply by chronological age (Dycthwald 1997), which as an approach seems more thorough and will offer deeper understanding of older consumers.

Further analysis of the literature identifies other misconceptions relating to the older-aged consumer. It has been argued by Cole et al (2008) that older consumers are more brand loyal than younger consumers and that habitual brand buying of long-established brand options is more favoured by older consumers, suggesting that targeting this age cohort would be fruitless. However, studies have shown that new brand loyalties can be formed at any age (Lambert-Pandraud and Laurent 2010) and that it is an exaggeration to suggest older consumers are unwilling to try new brands or that their loyalties are as engrained as people assume (Moschis 1992, Anderson and Sharp 2010), which contradicts the reasons they have been neglected in the past.

The impact of brand loyalty can also affect brand repertoire. Again studies show that older consumers can have a repertoire that is just as wide as younger consumers (Uncles and Ehrenberg 1990). What affects brand repertoire are 'consumer-driven triggers', which over time, cause re-evaluation of past choices and consideration of new alternatives as people pass through different life stages (Bogomolova and Grudinina 2011). Despite the findings that older consumers are just as likely to try new brands, that their loyalties are not as entrenched as once assumed and that they can have a wide repertoire of brands from which they purchase from, the literature shows there is a resistance in marketing practice to actively target older consumers for mainstream consumption. This results in marketing and advertising activity which does not appeal to or have relevance to the older age cohort (Szmigin and Carrigan 2001, Ahmad 2002). Consequently, this may have an effect on the likelihood of older consumers purchasing or consuming products which they feel are not targeted at them.

By taking these findings from the literature into consideration, this study aims to demonstrate if the differences in consumption of soft drinks with age are consistent with other research studies and, most importantly, to understand the key drivers influencing these differences, by focussing on the impacts of brand loyalty, brand repertoire and how older consumers are marketed to. In turn, this will help soft drinks manufacturers understand in detail why consumption of soft drinks differs with age, which will enable them to assess if targeting the growing fifty plus age cohort is a sound business strategy in order to drive up revenue growth and increase overall market share. It is also important to understand why consumers stop purchasing soft drinks as they get older, to the point where consumption decreases significantly amongst over-65s.

To achieve this, a main research question and a series of sub-objectives will be used as the framework of the research methodology design and subsequent data collection instrument (Saunders, Lewis and Thornhill 2009, Pg. 43).

1.1 Research Question and Objectives

In order to develop the main research question and subsequent research objectives, the key independent variable is age difference, with the four main dependent variables or measures being; personal consumption levels, brand loyalty, brand repertoire and health.

Therefore, in the context of the soft drinks market, one overall research question is proposed:

> *What are the key influences on soft drinks consumption across different age groups within Ireland?*

To develop this question further, five sub-objectives are to be investigated.

> *Identify if personal consumption levels of soft drinks amongst Irish consumers differ as people get older, specifically looking at over-55s compared to under-35s.*
>
> *Determine the degree to which in-home and out of home consumption of soft drinks differs with age.*
>
> *Investigate if loyalty to specific soft drinks brands and categories exists amongst over-55s and compare this to loyalty amongst under-35s.*
>
> *Discover if over-55s have a narrower brand repertoire of soft drinks compared to consumers aged under-35.*
>
> *Outline if alleged health concerns around soft drinks impact on the consumption of soft drinks across all age groups.*

The methodology used to answer the proposed research question and sub-objectives will be deductive in its approach. The study will investigate the general theory that soft drinks consumption differs with age and the reasons behind this. To achieve this the main data collection instrument is a structured quantitative online survey targeting over 200 Irish supermarket and convenience store shoppers, across three core age ranges; 18-34, 35-55 and 55-74. The rationale for this approach is explained in detail within the methodology section. The analysis and findings will be used to answer the main research objectives and hypotheses and make practical recommendations for understanding older consumers in the context of soft drinks in order to improve sales.

1.2 Thesis Outline

Chapter 2

Chapter two begins with an overview of the Irish soft drinks market, followed by an in-depth literature review. The main areas covered include; (1) The Importance of the Older Consumer (2) Brand Loyalty and Brand Repertoire and (3) Marketing To Older Consumers.

Chapter 3

Chapter three outlines in more detail the research aims, objectives and hypotheses of the study. This part outlines the main research question and subsequent objectives and hypotheses which are to be investigated.

Chapter 4

Chapter four covers the research methodology section and includes an overview of the sample, the research design and the instrument used. It outlines and justifies the chosen approach to answering the posed research question and subsequent research objectives.

Chapter 5

Chapter five presents an analysis of the data and the results. The findings are broken down into five sections, each one relating to an outlined research objective.

Chapter 6

Chapter six provides a discussion of the findings which are related back to the literature and theory identified, in addition to recommendations and conclusions based on the research. It also includes practical recommendations for the Irish soft drinks industry, developed from the analysis of the data. Finally limitations of the study are highlighted, plus recommendations for potential further research are suggested.

To demonstrate why the thesis areas are worthy of research and to ensure the dissertation is grounded firmly in past work, the whole study is underpinned by a detailed literature review. Through the critical analysis of relevant studies and theory it will be possible to show the proposed study will move the main research topics forward (Heath & Tynan 2010, Pg.151).

2. Literature Review

A comprehensive range of academic texts and data sources have been examined to provide a critical overview of key findings relevant to the research undertaken. The literature review is divided up into four sections. Firstly, a short overview of the Irish soft drinks market and consumption trends provides context to the study. The remaining three sections focus on investigating theory related to the main research objectives; brand loyalty, brand repertoire and the underlying impact of health as a motivating factor

2.1 Irish Soft Drinks Market Overview

The total island of Ireland soft drinks market in 2013 was estimated to be worth €1.515 billion, which equates to 765 million litres (Britvic Ireland Market Data 2014). Soft drinks are sold across a number of channels, the largest of which is the retail grocery channel – commanding 52% of all soft drinks sales. The retail grocery channel is made up of supermarkets, convenience stores and forecourts. The second largest channel is the on-trade (pubs) this equates to 29% of all value sales. The third largest channel is the restaurant / café and hotel channel which contributes towards 14% of all sales. Between these three channels they make up 95% of all soft drinks sales (Britvic Ireland Market Data 2014). For the purpose of this study the focus is solely on soft drinks purchased in the retail grocery channel, for both personal in home and out of home consumption, as this represents the largest and most important channel to soft drinks manufacturers.

In the Irish grocery channel the market is dominated by three main manufacturers; Coca-Cola Hellenic have a 35.0% volume share and are the market leader in Ireland, key brands include; Coca Cola, Diet Coke, Coke Zero, Dr Pepper, Fanta, Sprite, Powerade, Oasis and Deep River Rock. Britvic Ireland is the second largest manufacturer, with a 24.4% volume share. Key brands include; 7UP, Pepsi, Pepsi Max Club, TK, MiWadi, Robinsons, Robinsons Fruit Shoot, Mountain Dew and Ballygowan. The third main manufacturer is Lucozade Ribena Suntory, who holds an 11.3% volume share. Key brands include; Lucozade Energy, Lucozade Sport and

Ribena. These three manufacturers command over 70% of the current Irish soft drinks market (AC Nielsen Scantrack 2014).

Table 1.1 - Top 20 soft drinks master brands in Ireland based on litres sold (2012)

Rank	Top 20 Soft Drinks Master Brands in Ireland	Million Litres Sold 2012
1	Coca Cola	151.2
2	Miwadi	62.2
3	7UP	52.4
4	Lucozade	25.9
5	Ballygowan	25.5
6	Robinsons	24.0
7	Club	23.8
8	Deep River Rock	22.3
9	Fanta	18.5
10	Pepsi	16.0
11	Ribena	12.9
12	Volvic	12.8
13	Kia-Ora	12.3
14	Tipperary	12.1
15	Fruice	12.0
16	Sprite	11.6
17	Crystal Spring	10.5
18	Country Spring	9.0
19	Tropicana	7.9
20	Squeez	6.7

Source: Canadean Soft Drinks Market Insights – Republic of Ireland (2013)

The Irish retail grocery soft drinks market has been under increasing pressure in recent years, with value sales decreasing by -11.8% and volume sales decreasing by -5.3% between 2010 and 2013 (Britvic Ireland Market Data 2014). This can be attributed to a number of factors, including the Irish economic downturn which saw the country enter a recessionary period from 2007, with the effects still being felt in the present day. Average annual household spending on groceries decreased by -11% between 2008 and 2013 (Kantar Worldpanel 2013), which in turn had a negative impact on overall soft drinks consumption. The litres of soft drinks consumed per capita reduced by -14% between 2007 and 2012.

Another by-product of the recession is many young people have emigrated from Ireland in seek of employment, with Central Statistics Office (CSO) figures showing the number of 18-24 year olds reducing from 15% of the total population in 2006 to 11% in 2012. An inverse of this trend shows there are now larger quantities of older people residing in Ireland, with the number of people aged over-50 increasing from 34% in 2006 to 37% in 2012 (Central Statistics Office 2013). This shift in population structure has implications for soft drinks manufacturers in Ireland, which will now be outlined.

2.1.1 Soft Drinks Consumption Trends

In 2012, Britvic Ireland conducted a research study, titled Project Breakthrough, to identify trends and understand shopper behaviour, specifically around consumers living their lives 'on the go'. On the go was described as a person being out of the home or workplace carrying out activities and tasks (Britvic Ireland 2012). A key objective was to understand the role of soft drinks (including hot drinks) in peoples' on the go lives and to determine usage occasions and consumption levels amongst different demographic groups.

For the purpose of the research study soft drinks were categorised as; bottled water, carbonated soft drinks, still flavoured drinks, juices, smoothies / dairy drinks, and hot drinks (Britvic Ireland 2012).

A major finding shows how consumption of 'impulse' soft drinks (for individual, immediate consumption) differs with age, and how the purchasing of soft drinks 'on the go' declines as consumers get older.

This is outlined in the table below. The data highlights how the frequency of purchasing of 'any soft drink' declines with age, with an even greater reduction in 'carbonated soft drinks'. It also identifies how the purchasing of 'hot drinks' increases amongst over-25s. Finally, it shows how the percentage of people not purchasing any type of drink, hot or cold, increases significantly as people get older (Britvic Ireland Project Breakthrough 2012).

The question asked was; 'Which, if any, of the following types of drinks do you buy on-the-go nowadays?'

Table 1.2 – Out of home soft drinks consumption by age

		Age				
Type of Drink	Total Population	16-24	25-34	35-49	50-64	65+
Any Soft Drink	60%	92%	74%	63%	41%	25%
Bottled Water	40%	49%	48%	46%	32%	21%
Any Hot Drink	33%	22%	40%	28%	36%	20%
Carbonated Soft Drink	25%	55%	29%	24%	11%	7%
Still Flavoured Drink	8%	19%	9%	8%	2%	2%
Juices	8%	12%	11%	8%	3%	3%
Smoothies / Dairy Drinks	4%	11%	6%	3%	3%	0%
None of these	29%	5%	15%	25%	40%	64%

Source: Project Breakthrough – October 2012 (Sample Size = 1,008 Adults aged 16+, Republic of Ireland)

As the research shows, the 18-24 age group are the highest consumers of soft drinks on the go. The same study also shows how the consumption of soft drinks on the go decreases with age, therefore with fewer younger people and greater numbers of older people living in Ireland, this population shift is clearly having an effect on overall consumption levels of soft drinks.

As previously stated, this dissertation study aims to establish whether this cross-age consumption pattern still holds true and to investigate the differences for in-home consumption as well as out of home (on the go). This is in order to gain a more in-depth understanding of the key motivators of soft drink consumption and to investigate and establish the impacts of brand loyalty and brand repertoire.

It also looks at how health issues affect consumer consumption habits across different age groups, as the recent downward trend in the soft drinks industry appears to coincide with the on-going focus by the media around the alleged health implications associated with excessive consumption of soft drinks with high sugar content and artificial sweeteners used in some products. This leads into the next section which focuses on the importance of the older consumer and investigates why they should not be ignored as a target group. It compares the differences and similarities between the over-55s and the under-35s, from a segmentation or understanding point of view.

2.2 The Importance of the Older Consumer

A widely cited paper on older consumers was published by Szmigin and Carrigan (2001). The paper examines how and why marketing has largely ignored the older consumer and concentrated on younger targets. It identifies why modern marketing practice must recognise the demographic change towards an ageing population and the shift in balance away from youth towards older age groups (Szmigin and Carrigan 2001, Pg. 22). Research by Ahmad (2002) shows that companies do not have specific marketing programmes to attract and maintain older consumers and that segmenting consumers by demographic factors, such as age, is becoming less effective due to a generalist approach. Consumers are identifying more with people who lead similar lifestyles to themselves regardless of age as noted by Kotler, Keller, Brady, Goodman & Hansen (2012). Bartos (1980) suggests that the socio-economic conditions which influence and shape a person’s life are far more differentiating than age alone. However, according to Szmigin and Carrigan (2001, Pg. 25) there has been little research directly focusing on ‘older consumers and their reaction to advertising, the media and the products are services available to them’. From a macro perspective, it is recognised that older consumers are growing in numbers and importance however, it appears many brands seem unwilling to consider them as a valuable target group – unless a product or service is specifically aimed at meeting their needs. Overall this increasing focus on older consumers gives important credence to the objectives of this study.

A major factor relating to the importance of older consumers is their spending power. In America the 'Baby Boomer' generation – people born between 1946 and 1964 (Solomon, Bamossy, Askegaard and Hogg 2010, Pg. 441) hold over 50% of discretionary income and are major buyers of a range of premium products (Szmigin and Carrigan 2001, Pg. 25). Over-55s own 77% of all their financial assets, therefore disposable income can improve with age – consumer marketing aimed at the mature market will be the growth industry (Dycthwald, 1997) but it appears that this prediction did not necessarily materialise. In Ireland, 42% of 55-59 year olds feel they are 'financially secure' and are able to 'afford day to day living easily' and report being able to 'treat myself or my family from time to time' with 14% saying that they are 'doing well and can afford most things I want' and 'still able to save some money' (Advertisers Association of Ireland – Grey Expectations, 2014). These figures in the same study rise to 46% and 22% respectively for those aged 60-64. This would indicate that older consumers represent an influential, lucrative and potentially untapped resource when it comes to the purchase of brands, products or services. The question for companies is whether it is a worthwhile strategy for them to adapt to meet the needs of older consumers, independently or inclusively of younger consumers?

2.2.1 Segmentation Approaches

In order to answer this strategic question, segmentation plays a critical part in understanding groups with similar needs, wants and behaviours and how they differ from that of other groups (Solomon et al 2010, Pg. 8). Age is often used as delineation for segmentation, as individuals who are in the same age group, often share a set of common values and cultural experiences (Solomon et al, 2010, Pg. 9). However, historically, older people (50 plus) have been segmented outside of mainstream consumption (Szmigin and Carrigan 2001, Pg. 26). This gives the impression that they are niche, specialist or even an unimportant target group, as they are seen as being ‘inactive and spend too little’ (Solomon et al, 2010. Pg, 447). They are often lumped together and treated as a homogenous group, spanning approximately 40 years (mid-40s to mid-80s). We accept the huge life changes a person goes through from 20 to 50, so why not assume the same for a 50 to 80 year old? (Szmigin and Carrigan 2001, Pg. 31). Ahmad (2002) proposes that middle age is not the beginning of old age, but the start of a thirty-year period of personal enjoyment and ‘self-indulgence’. These consumers generate demand for products and services that fit their new lifestyles (Ahmad 2002, Pg. 343), which is by no means the behaviour of an inferior consumer.

Within psychological literature, Erikson’s (1963) classical theory of life stage development proposes the view that as people move from infancy to old age, they pass through eight stages of ego development, based on a psychoanalytic framework. The theory outlines how one’s personality growth is continuous and not limited by physical maturity and follows a sequential process up until old age. Domino and Hannah (1989) contend that the process is determined upon encounters between the individual and their environment, which affects the movement from one stage into the next. It could therefore be argued that development of self is a hugely personal journey, influenced and affected by numerous factors, which adds weight to the theory that older consumers are just as heterogeneous as younger consumers due to the on-going development of one’s self into middle and old age. As a brand, the strategic decision to be made is whether or not to target older consumers for mainstream consumption and to include them within the overall marketing mix along with younger consumers or whether to develop products and services which specifically address the changing needs and wants of older consumer as they pass through fundamental life changes. Focusing on people aged 49 and over, Bartos (1980) inferred that a person’s needs as a consumer will change as they pass through ‘watershed events’ such as children leaving home, retirement, loss of a spouse and personal health or illness. The potential adjustment to these seminal events for a person aged over 49 is ‘dependent on a multifaceted balance of time, money and health’ (Bartos 1980, Pg. 40). Therefore, as a minimum, this older cohort need to be segmented into separate groups based upon life stage due to the fundamental life changes a person goes through which will, in turn, impact on their needs for brands, products and services.

A simplistic segmentation approach was offered by Dycthwald (1997) who suggests three groupings for the 50-plus market based on chronological age; 50-64 'Middle Adulthood', 65-79 'Late Adulthood' and 80 plus 'Old'. These first two segments are seen as lucrative based upon the fact children have grown up and left home, they own financial assets (houses, cars etc…), therefore disposable income levels are higher than other age groups and as consumers they are eager to spend money on themselves and other family members.

That said, it could be argued that segmenting by chronological age is too simplistic and inflexible as it does not take into consideration cognitive age (Szmigin and Carrigan 2001, Pg. 24). This is how old a person actually feels on the inside, based on their physical health or upon their feelings within their heart and mind – over-50s can perceive themselves to be up to 20 years younger than their actual chronological age (Lewis 2012, Pg. 344). Ahmad (2002) suggests it is much harder to segregate older consumers in terms of preferences and buying behaviour, and that consumption behaviours do not necessarily correspond to a particular chronological age band. This would lead to segmentation based upon age sub-cultures which focus on older people as consumers, their self-concepts and perceived ages, which tend to be more youthful than their actual chronological age (Solomon et al, 2010. Pg, 447). One segmentation approach which took all these factors into consideration was offered by Bartos (1980) who outlines six segments for the over 49 'invisible market' in the United States, which were defined and sized using census data from the time. Those segments include three groups which would be of little interest or importance to marketers; 'the disadvantaged' (those living below the poverty line), 'those in poor health' and 'others' (people for who there was little or no demographic data available). These groups equated to 24% of the population. The three main segments Bartos focuses on are; 'active affluents' (those still in full-time work, in good health, have significant disposable income which allows them to lead active and fulfilling lifestyles), 'active retireds' (those who no longer work but live above the poverty line, are still in relatively good health and who now have the time to enjoy leisure activities and interests) and 'homemakers' (those above the poverty line who are full-time homemakers). The three lucrative groups accounted for 76% of the population. Although now somewhat dated, what is positive about Bartos' approach is that fact that it takes into consideration the critical variables of time, money and health to segment consumers aged over 49 into more detailed and accurate cohorts rather than simply by age, which actually says nothing meaningful about a person and their lifestyles.

Ultimately, from an importance and segmentation perspective, it is clear that the older consumer represents both a challenge in terms of understanding them as heterogeneous group with differing tastes, spending power and buying behaviour, however, they also offer brands a huge opportunity as a potential source of revenue growth. If marketing practice can understand the differences that exist across the older consumer age range and develop and adapt products to suit, then 'investment in this direction could produce very positive results' (Szmigin and Carrigan 2001, Pg. 31). Within the soft drinks industry the common practice is not to actively target older consumers, as part of the mainstream marketing mix or through tailored marketing activity, including new product development specifically aimed at seniors. The oldest age group soft drinks brands target to increase purchase frequency or drive brand loyalty is 'mum' or the 'household gatekeeper', who are often responsible for making shopping decisions for the rest of the family. There is very little in the way of marketing activity directly aimed at increasing individual consumption or loyalty amongst the over-55 shopper.

This leads onto the third part of the literature review, which focuses on marketing and advertising to older consumers, which is relevant to both brand choice and the formation of loyalty.

2.3 Marketing to Older Consumers

As previously identified, older consumers are often excluded from mainstream consumption, with 'most advertising targeted at the under-35s' (Ahmad 2002, Pg. 244). There is the mantra that younger people are the future of a brand (Szmigin and Carrigan 2001, Pg. 29) and there is almost an obsession with the youth market, even though the older market is growing in size and importance, largely due to levels of disposable income (Carrigan and Szmigin 2000, Pg. 42). One of the main implications is the use (or lack thereof) of older models in advertising messages, with the view that only certain product categories are appropriate for older people to advertise (Szmigin and Carrigan 2001, Pg. 25). A study by Moschis and Mathur (2006) shows that a third of the over-55 age group have boycotted products and retailers because of improper age stereotyping in advertisements. In an Irish context older consumers describe advertising aimed specifically at them as 'functional' and 'patronising' (Advertisers Association of Ireland – Grey Expectations, 2014). The advertising industry in the UK has been accused of 'ageism' by not presenting images that accurately reflect older consumers in today's society (Ahmad, 2002).

In 1990, Wolfe identified a key set of values to be used within marketing strategies that are relevant to older consumers. These include; Autonomy - active lives and self-sufficient, Connectedness - bonds with family and friends, Altruism - giving something back to the world, and Personal Growth - trying new experiences (Solomon et al, 2010. Pg, 445). This is in contrast to younger consumers, (those aged 18-29), who are identified as being more influential compared to older consumers and whose values and tastes significantly impact fashion, popular culture, politics and marketing. Therefore, as a cohort, marketing strategies are often developed with them in mind as they are seen as being more sophisticated about evaluating advertising and products and of higher importance compared to older consumers (Solomon et al, 2010. Pg, 440). This would raise the question do younger and older consumers require a different marketing mix for the same product? In the context of soft drinks, if consumption rates decline with age, can advertising targeted at consumers across different age groups help to maintain consumption or re-ignite lapsed purchase behaviour? Could this help expand the evoked set of soft drinks for older consumers, especially in new categories which are relevant for consideration?

Current soft drinks advertising (see figure 1.2 below) displayed on Irish media shows that soft drinks brands do not use models to portray an older consumer group, all models would reflect an under-35 age cohort. As a result, it could be argued that current advertising campaigns are seen as irrelevant or not for them by older consumers and therefore do not encourage purchase of the products. Even if a soft drinks brand felt it appropriate to include older models, it has been suggested to target consumers aged 55 and over, to use models that look 10 to 15 years younger, to take into consideration the effect of cognitive age which was previously discussed (Stephens 1991). This would mean that for a soft drinks brand to include models in the 35 to 45 age group within an advert, it could potentially widen the appeal to target consumers aged 45 to 60 and beyond.

Figure 1.2 – Examples of current soft drinks advertisements used on Irish media

Source: Property of Coca-Cola Ireland / Britvic Ireland / Lucozade Suntory Ribena (2014). All rights reserved.

The final point is around new product development and whether new ranges of soft drinks products specifically aimed at the older end of the market would resonate with these consumers. By developing soft drinks with a functional or health-related benefit that would appeal to the increasingly health-conscious consumer, could be a wise strategic move for soft drinks manufacturers. All these questions are considered during the research development phase.

If brands do not actively target older consumers through marketing activity such as advertising or new product development, then this raises the question how can brands create or maintain brand loyalty amongst older consumers? Subsequently this leads on to the fourth section, which investigates brand loyalty and brand repertoire amongst over-55s and compares this to under-35s.

2.4 Brand Loyalty and Brand Repertoire

Many other previous studies exist around brand loyalty – and investigate the reasons why consumers tend to purchase one brand over another. In relation to this study, the purpose is not to review and evaluate the academic literature around the origins and development of brand loyalty (Tucker, 1964) or debate what loyalty means from a behavioural and attitudinal perspective and how the two interlink (Jacoby, 1971). The main focus is to evaluate if older consumers have a lesser or greater propensity to be loyal to a single brand or range of brands within a product category compared to younger consumers and if older consumers have a narrower or wider brand repertoire again compared to the younger cohort.

2.4.1 Brand Loyalty

To give context, loyalty is defined as a ‘commitment to rebuy or re-patronise a preferred product or service’ (Kotler et al 2012, Pg. 972). Loyalty is a key issue for marketing managers and is often a measure of the health of an organisation. (Bennett and Rundle-Thiele 2005, Pg. 250). It is therefore of great relevance to soft drinks companies, because in a market with an ever increasing choice of products with low levels of differentiation, how do consumers become loyal to brands be it old or new. Also, why do consumers switch out of brands for a different alternative or withdraw from a category entirely?

It is argued that loyalty towards a brand is formed out of the process of habitually buying a product. This repeat purchase over time sees the consumer develop loyalty to the brand due to unique attributes identified during frequent purchases (Mise et al 2013, Pg. 707). Over time this habit becomes an unconscious buying behaviour, whereby the consumer reduces the need for deliberate thought to act in this way (Cole et al, 2008. Pg, 361). The same study by Cole et al (2008) suggests that consumers mainly develop preferences during a 'critical period' between 15 and 30 years old and then keep these preferences for life. A habit mechanism, as proposed by Cole et al (2008) demonstrates how habits become stronger with age, therefore older adults may be more likely to prefer long-established brand options. In contrast, Lambert-Pandraud & Laurent (2010, Pg, 105) identify that consumers can develop a long-term attachment to a brand at any age, not just in their formative years and because older consumers tend to remain attached for a longer period, so that converting them to become brand loyalists can be lucrative. New attachments can be created with long-established brands too and not just ones that are new to a market.

There is also the view that older consumers are more brand-loyal than younger consumers (Lambert-Pandraud et al. 2005). Younger consumers, as a virtue of their youth, are perceived by marketers as being less loyal towards brands due to their fickle nature. The hunt for 'new experiences also makes them more promiscuous in their brand buying' (Anderson & Sharp 2010, Pg. 438). However, the study by Anderson & Sharp (2010) reveals the notion that older consumers are unwilling to try new brands to be an exaggeration, they found that older consumers do purchase new brands and their brand loyalties are not completely entrenched. In support of this view, a study by Moschis (1992), which analysed shopper panel data shows that 20% of people aged over 50 have tried a new brand of soft drink – this shows older people are not averse to trying new products. This somewhat dispels the myth that older consumers are an irrelevant group to target for mainstream consumption. If their brand loyalties are not as fixed as once perceived and they do develop long-term attachments to old and new brands at any stage in their life, then marketers should caution against targeting younger consumers exclusively. This again highlights the importance of older consumers as relevant and valuable sub-groups.

2.4.2 Brand Repertoire

The question of brand loyalty also factors in the idea of the repertoire of brands a person buys from. A buyer would routinely purchase from a selection of brands within a product category and there is not necessarily a conscious decision to 'switch' or 'reject' one brand over another (Dawes 2008, Pg. 200). This repertoire is also known as an 'evoked set' (Solomon et al 2010, Pg. 334). A recent study by Bogomolova and Grudinina (2011) describes how a person's brand repertoire will change over time due to a number of 'consumer-driven triggers' which cause re-evaluation of past choices, the consideration of new alternatives and a break from old purchasing routines. The study shows how these triggers are linked to life stages, which often impact on what consumers chose to buy. As people passed through the various life stages, along came new and different needs and therefore new brands are required to fulfil them. An example of this, and one which is relevant to soft drinks, is as people get older physiologically their tastes often change. A conjoint study by Britvic GB and PepsiCo GB (2013) shows preference for taste can vary massively over time due to a number of factors. Key diet and lifestyle changes can have effects on taste likes, dislikes and sensitivities. This can be linked to the fact that the physical number of taste buds in a person's mouth decreases with age and the remaining taste buds lose mass with age. Sensitivity to the four main tastes decreases from around 60 years of age - usually salty and sweet are lost first. Also one's mouth begins to produce less saliva with age, causing a dry mouth which can affect taste and smell will also decline with age, particularly from the age of 70 (Britvic and PepsiCo 2013). These physiological changes mean consumers could begin to reject brands they once selected or they become open to brands they once ruled out based on the physiological impact of changes in taste, especially in the case of sweet-tasting soft drinks.

Therefore, a key research objective of this study is to understand the reasons why consumption patterns of soft drinks changes over time by answering questions such as; do people 'grow out' of certain types of soft drinks and do soft drinks brands become irrelevant to them over time and therefore their repertoire narrows? Do their tastes change and they begin to prefer other beverage alternatives such as tea, coffee or alcohol?

Also does health become a priority as people get older and they seek to change their diet or lifestyle choices? On the area of health, there has been widespread negative media coverage surrounding sugar-sweetened drinks, which can have links to obesity, diabetes and other health related issues (Irish Independent 2013). There is evidence that when people reach their forties, they start 'preparing themselves' for the rest of their lives. They feel it is 'not too late' to make changes to their lifestyles and to lead a healthier life once the 'immortality' of youth has gone (Jacobs and Whittaker 2012, Pg. 356). Overall, awareness and personal importance of health, how consumers view soft drinks from a health perspective and how those views impact behaviour will be explored in the study, with focus on the differences between age groups.

2.4.3 Brand Purchasing Frequency

Another area of interest is whether older consumers spread their purchases of frequently-bought packaged goods among fewer brands than younger consumers do. A widely referenced study by Uncles and Ehrenberg (1990) shows that older consumers were as likely to purchase a repertoire of branded packaged-goods that was as wide as younger consumers – and per capita rates of buying by older consumers was actually higher. In the soft drinks category, the results of this study also show that older households (housewives aged 55 and over) bought six different 'take home' soft drinks brands in the previous 12 months, whereas younger households (housewives aged 54 or under) bought eight 'take home' soft drinks brands in the same period, a relatively small difference between the two groups which shows brand choice for soft drinks is not dramatically narrower. Therefore, if older consumers do not necessarily have a narrower repertoire of brands than younger consumers in other categories, could the decrease in consumption of soft drinks with age be impacted by the fact that there were simply less soft drinks products to choose from during the 1950s to 1980s, resulting in a narrower evoked set. In Ireland, the main soft drinks brands during this period were Coca-Cola, 7UP, Club, TK and MiWadi (Britvic Market Data 2014). Nowadays, hundreds of soft drinks brands exist, with new categories such as energy drinks, sports drinks, smoothies and enhanced water available for consumers to buy from. Research shows that customers loyal only to one or two brands buy less often than those who are multi-brand loyal (Bennett and Rundle-Thiele 2005, Pg. 254). Therefore, another objective of the study is to understand if older consumers buy from a narrower evoked set and are loyal to only a small number of soft drinks brands, which may account for the smaller consumption rates compared to younger consumers.

2.4.4 Sales Promotion

One topic which could not be omitted from a literature review, especially in the context of fast moving consumer goods (FMCG) such as soft drinks, is the impact of sales promotions or discounts used within grocery retail on brand loyalty. According to Allender and Richards (2012), estimates indicate that FMCG manufacturers allocate 58% of their marketing expenditure on sales promotion. In an Irish context, sales data shows that some soft drinks categories are sold on promotion between 70-90% of the time within key retailers (Nielsen Price & Promotional Analysis, 2014). A study by Nagar (2009) identifies loyal and non-loyal consumers within a product category and that sales promotions have more influence on brand switchers (non-loyal) compared to the brand loyalists. With this high level of promotional activity, it is important to acknowledge how this affects brand loyalty and if again, this differs by age. In a simplistic way, are older people more responsive to price promotions than younger consumers and are they more likely to switch from a brand they are loyal to, because of a promotion on a competing brand?

2.4.5 In-Home vs Out of Home Consumption

A final area which the current research will investigate is around the place consumption of beverages takes place. Britvic's Project Breakthrough (2012) shows how regular consumption of soft drinks 'on the go' decreases as people get older. On the go equates to consumption outside of the home, while people are commuting, travelling, working, exercising or the likes. The Uncles and Ehrenberg (1990) study shows however that per capita purchasing of 'take home' carbonated soft drinks over a 12 month period – i.e. drinks that are to be consumed in the home – actually was higher for the over-55s compared to the under-54s. Therefore, one of the research objectives of this study is to simultaneously look at both in-home and out of home consumption of soft drinks to see how this differs by age. Project Breakthrough (Britvic Ireland 2012) shows that younger people feel they spend more of their week on the go than older adults. 16-24 year olds spend 57% of their week on the go, rising to 59% amongst 25-34 year olds. Contrast this to 50-64 year olds who only spend 48% of their week on the go, dropping considerably again to 40% for those aged 65 and over. Naturally, as younger people spend more time on the go, they will have more opportunity to consume soft drinks. However, if older people are spending more time at home (due to being retired / semi-retired or in poor health etc…), potentially they are consuming soft drinks for home consumption. Therefore, the level of decline in consumption by age could be less pronounced when you factor this in. There are currently no studies which have looked at consumption in this way, so this has been identified as a gap in the literature which this study aims to fill.

In summary, the literature review highlights the fact that older consumers are a relevant and lucrative group to target. However, they need to be segmented effectively based upon the critical variables of time, money and health and also take into account their perceived cognitive age and not solely their chronological age. Older consumers need to be accurately represented in marketing communication strategies to unlock new growth opportunities for brands. Finally, their loyalty to brands is not as entrenched as first assumed, they have wide brand repertoires and they are as receptive to brand switching as younger consumers.

In order to understand and develop the four key areas and motivating factors highlighted in the literature review concerning personal consumption levels, brand loyalty, brand repertoire and health issues across the differing ages ranges, the next section outlines the proposed research objectives and hypotheses.

3. Research Aims, Objectives & Hypotheses

One overall research question and five sub-objectives have been investigated. Five subsequent hypotheses have also been outlined.

3.1 Research Question

What are the key influences on soft drinks consumption across different age groups within Ireland?

3.2 Research Objectives and Hypotheses

Objective 1 - Identify if personal consumption levels of soft drinks amongst Irish consumers differ as people get older, specifically looking at over-55s compared to under-35s.

Purpose of Objective 1 – to quantify if differences in consumption of soft drinks occur with age and to understand if this study is consistent or in contrast with previous soft drinks studies, such as Britvic Ireland's Project Breakthrough (2012) and Uncles and Ehrenberg (1990). Based on this literature the following the following hypothesis is proposed:

> H1 – Overall consumption of soft drinks will decrease with age, with people under-35 consuming more soft drinks than those aged over-55.

Objective 2 - Determine the degree to which in-home and out of home consumption of soft drinks differs with age.

Purpose – Project Breakthrough (Britvic Ireland 2012) identifies that purchasing of 'on the go (out of home)' soft drinks products declines with age. The objective is to understand if purchasing of 'in-home' soft drinks declines with age as well or is in fact higher, as per the results from the Uncles and Ehrenberg (1990) study. Objective 4 may give rise to the following two hypotheses:

H2 (1) – Out of home consumption will decrease with age, with under-35s consuming more soft drinks out of home than the over-55s.

H2 (2) In-home consumption will follow the same trend and decrease with age, however not to the same extent, with over-55s consuming more soft drinks in-home than out of home.

Objective 3 - Investigate if loyalty to specific soft drinks brands and categories exists amongst over-55s and compare this to loyalty amongst under-35s.

Purpose of Objective 3 – the literature review (Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010) highlighted that older consumers can be just as promiscuous with their brand switching as younger consumers, and their loyalty is not necessarily fixed to a limited number of brands. Therefore the purpose is to understand the level of loyalty shown to soft drinks brands and how this differs by age. Objective 2 gives rise to the following hypothesis:

H3 – Loyalty to soft drinks brands will exist amongst the over-55s, however this will be no different to loyalty amongst the under-35s, making the older cohort as likely to be promiscuous in their brand choices as the younger age group.

Objective 4 - Discover if over-55s have a narrower brand repertoire of soft drinks compared to consumers aged under-35.

Purpose of Objective 4 – research within the literature review (Uncles and Ehrenberg 1990, Bogomolova and Grudinina 2011) shows that older consumers can have a repertoire of brands which is just as wide as younger consumers and multi-brand loyalty can lead to more frequent purchasing of brands (Dawes 2008). The purpose is to identify if older consumers have narrower brand repertoire of soft drinks and to understand if this impacts on purchasing rates. Hypothesis 3 is proposed as:

H4 – The over-55s will purchase a narrower repertoire of soft drinks brands compared to the under-35s, which will tie into the overall decrease in consumption levels amongst the older age group proposed in H1.

Objective 5 - Outline if alleged health concerns around soft drinks impact on the consumption of soft drinks across all age groups.

Purpose - A person's brand repertoire will change over time due to 'triggers', linked to life stages (Bogomolova and Grudinina 2011), which often impact on what consumers chose to buy. Can the ageing process and the increased recognition of the importance of one's health (Jacobs and Whittaker 2012) impact on the purchasing of soft drinks and does the negative media coverage regarding health concerns around soft drinks play a part in this. Objective 5 may suggest the hypothesis:

H5a – The over-55s will see their long-term health as more important to them than the under-35s and therefore will impact on their consumption of soft drinks.

H5b – The influence of negative media coverage around soft drinks will affect consumption across all age groups, but the over-55s will be more influenced than the under-35s.

In order to answer the stated research questions and proposed hypotheses, an appropriate methodology has been designed in order to achieve the study's key aims.

4. Methodology

4.1 Research Methods Rationale

A key element of any research approach is ‘the selection, adaption and development of an appropriate theoretical framework to underpin research design (Malhotra and Birks 2007, Pg.8). As this study is investigating the difference in consumption of soft drinks by different age groups, with a particular focus on the older consumer, surveying a wide breadth of people was of paramount importance. It was therefore decided that a questionnaire was the most effective way of sampling opinions and eliciting sufficient primary data to validate the enquiry findings and to acquire the understanding and insights being sought.

A sample group of between 200 and 250 Irish people, across a wide age range, which also reflected both gender and employment status was targeted. It was hoped the quantitative data gathered using this ‘mono method’ approach and the conclusions drawn from it would help soft drinks manufacturers to understand consumption differences by age, and in turn, to help plan strategically for the future.

The chosen research technique follows the ‘deductive’ approach – one of two methods suggested by Saunders et al (2007). More scientific in its nature, it ‘involves the development of a theory that is then subject to test through a series of propositions’. It can also ‘explain causal relationships between concepts and variables’ (Saunders et al, 2007 Pg.145). The deductive approach allows for testing and adaptation of existing hypotheses or theories and uses quantitative measurements such as experiments and surveys. This is opposed to the alternative ‘inductive’ method which uses a wide variety of ethnographic techniques to collect data such as; in-depth face to face interviews and case studies. The deductive approach also offers consistency as each respondent is asked the same set of questions in a consistent order, ‘whereby providing an efficient way to collect responses from a large sample’ (Saunders et al 2007, Pg.417).

Using this approach, differences in soft drinks consumption in Ireland by age can be quantified and tested against existing theories and studies, which show how consumers start drinking fewer soft drinks as they get older. Both for this study, and in turn, for soft drinks manufacturers, it would clearly be beneficial to find out why this is, especially at a time when the population of over-50s is increasing both in Ireland and globally.

There is a clear rationale here for understanding how and why consumption levels differ by age and for the purpose of this study, by looking at the following main variables across three age bands which are; 18-34, 35-54 and 55-74:

- Consumption habits
- Brand loyalty
- Brand repertoire
- Advertising
- Health

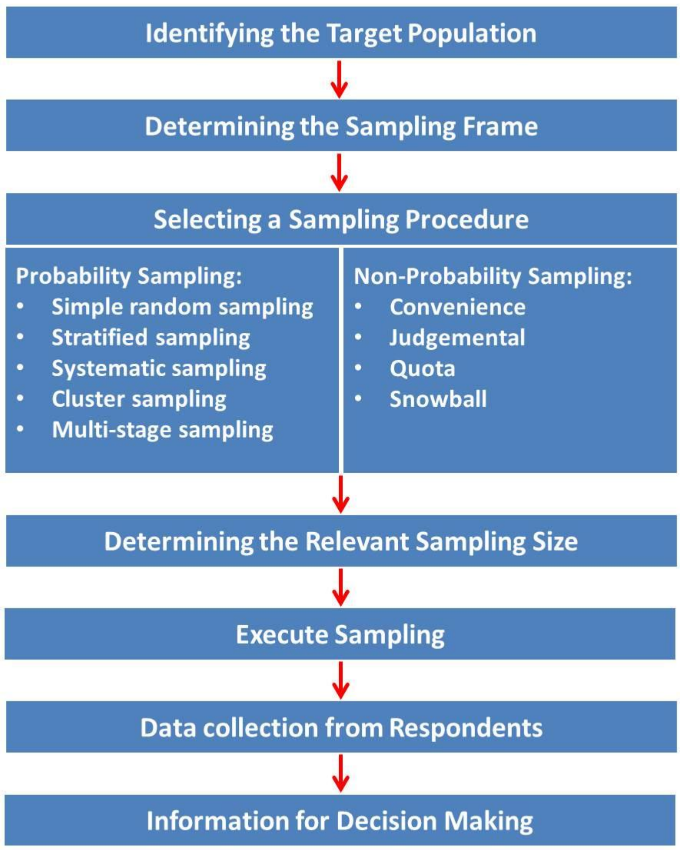
Using the deductive method, large quantities of numerical data can be collected in a standard way, and then analysed and compared to examine relationships between key variables as outlined by Saunders et al 2007 (Pg.162). Having established the appropriate method, the participants targeted to complete the survey are now outlined.

4.2 Participants

When conducting various forms of primary research the main objective is to gather information about the characteristics and parameters of a population of people, which comprise the universe for the purpose of answering a particular research question (Malhotra and Birks 2007, Pg. 405). In order to achieve this, two methods could be applied – a census and a sample. Saunders et al (2007) describe a census as where data is collected and analysed from every possible person within a population – this however can be impracticable, costly and take a long time to complete. A sample is where data is gathered to generalise statistically about all the cases from which the sample has been selected. A sample is effectively a sub-group of the total population which are selected to take part in the study. Due to the nature of this study and its limitations, sampling was chosen.

Aaker et al (2007) suggest the following sampling process as a guide to follow when determining the target population:

Figure 4.1 – The Sampling Process



Source: Aaker et al 2007, Pg. 380

By following this process, the sampling method for this study is described.

Identifying the Target Population

As this study investigates the differences in consumption of soft drinks by age group in the Ireland, the target population for this survey was:

- Males / Females
- Aged 18 to 74 – ages were broken down into three sub-groups
    - 18-34 (to represent the 'young' age group)
    - 35-54 (to represent the 'middle' age group)
    - 55-74 (to represent the 'old' age group)

N.B. – the sampling 'units' were individuals living in the Republic of Ireland in 2014. These ages reflect the age bands used on a continued basis within the Irish Central Statistics Office when they report census data and the Britvic Ireland Project Breakthrough study. As the questionnaire was to be self-completed online it was decided not to survey people over-74. This online approach could potentially have been a barrier for completion due to 3% internet usage rates amongst this older (75-plus) section of the population (Department of Communications, Energy and Natural Resources 2013).

Determining the Sample Frame

Due to time and budget constraints, this study used a non-probability rather than a probability sample method (see next section) so no sample frame was used.

Selecting a Sample Procedure

A non-probability sampling approach was selected in order to control which elements were included in the sample and due to a relatively homogenous population (Malhotra and Birks 2007, Pg. 410). An element of quota sampling was used to ensure an even split both between the number of males and females surveyed and the distribution of respondents amongst the three age groups (18-34 / 35-54 / 55-74). The online survey tool, Qualtrics, allowed the researcher to monitor response levels of each quota group once the survey was live.

In order to build the sample, the volunteer sampling approach was adopted (Saunders et al, 2007. Pg, 289). The first technique used was 'snowball sampling', where participants were volunteered to take part in the study. The researcher contacted personal contacts, friends and family and sent the hyperlink to the survey via email asking for people to take part. They were also asked to send the link onto their own personal contacts for completion. The researcher used the same technique with work colleagues. However, they were asked not to complete the survey themselves (to reduce bias) but to send the survey link directly onto their personal contacts for self-completion. The second technique used was 'self-selection sampling' in two shopping centres in the Greater Dublin area. Two different socio-economic areas (a high-income area and a low-income area) were chosen and sampling was carried out at different times and days of the week, in order to capture the most random samples and to reduce bias. Shoppers were approached, the nature of the study explained and if they agreed to take part in the survey, their email address was captured and the questionnaire sent to them later that day for completion. The self-selection technique generated 80 email addresses of participants who volunteered to take part.

Determining the Relevant Sample Size

The targeted sample total was between 200 – 250 completed responses, ensuring a minimum of 50 – 80 consumers in each of the three defined age groups, with an equal split of males and females, to safeguard statistical reliability. (See response results of sampling techniques in the Findings section).

The next step was to develop the research design.

4.3 Research Design

Saunders et al (2007) describe the research strategy or design as a 'plan of how a researcher will go about answering their main research question'. As the research design is to be quantitative in its approach, the chosen strategy was to conduct a survey via a structured questionnaire (See Appendix 1). Questionnaires are best suited to descriptive research as Malhotra and Birks (2007, Pg. 8) indicate, because they allow for a variety of relevant questions to be asked relating to area such as; demographics, lifestyle, characteristics, behaviour, intentions, attitudes, awareness and motivations.

Questionnaires are economical, authoritative and 'comparatively easy to understand and explain' (Saunders et al 2007, Pg.177). They also offer versatility, can be issued in any setting or to any demographic group (Aaker, Kumar and Day 2007). They can be analysed using descriptive statistics and as the possible reasons for relationships between variables can be interrogated, hypotheses can be tested, conclusions can be drawn and informed suggestions for the soft drinks industry can be made.

Due to the explanatory nature of this study, it aims to explain the relationship between variables. Dillman (2009) identifies three types of variables which can be collected via questionnaires; opinions, behaviours and attributes. Because the focus of the study is primarily to understand consumption differences by age, then the main independent attribute variable was a person's age. This 'cross-sectional' between participants design allows for the possibility to examine differences in age groups at a specific point in time (Saunders et al 2007, Pg.190). Age is the independent variable which accounted for the most significant change on the respondents in the study and was the variable of most interest to the researcher. Data for other variables such as gender and employment status were also collected to provide added depth and context to the study, however, the main focus was on differences across the three age groups. These three main attribute variables (age, gender, employment status) are also known as 'independent variables' as they are the variables which will 'cause changes in other dependent variables' (Saunders et al 2007, Pg. 424). In addition to these independent variables, a correlational design was employed to understand the impact of health as a variable which will act as a positive or negative influence on consumption-related variables, such as the regularity of purchasing soft drinks.

Once the research design approach was decided and the key variables were established, the next step was to physically produce the online questionnaire.

4.4 Questionnaire Design

The biggest challenge when using the survey approach lies in the quality and rigour of the questionnaire design for collecting the primary data. This is in order to achieve a strong response rate and ensure the reliability and validity of the data collected (Saunders et al 2007, Pg. 149). The design of the questionnaire and types of questions asked were governed by the need to:

- Keep the main research objectives at the heart of the design process
- Ensure every question / answer feedbacks into addressing one or more of the research objectives
- Reach a large sample, across a wide age range
- Enable the informal comparison of consumption trends from previous studies to provide consistency

In order to achieve the above, the questionnaire was web-based. Online questionnaires are low / no cost, allow administration and self-completion to achieved at pace, offer clarity, simple functionality and be professional in their appearance. Interviewer bias is also eliminated as the interviewer is not present and, regarding data quality, online platforms have the advantage of in-built logic and validity checks so that data is captured and processed automatically ready for analysis (Malhotra and Birks 2007, Pg.274). Finally, it was prudent for the survey to be a ‘self-completed questionnaire’, as the researcher did not have the time or resource to administer face-to-face or telephone based interviewer-completed questionnaires.

Using an online questionnaire offered consistency with Britvic Ireland's project Breakthrough Study, which also used an online omnibus panel of over 1,000 respondents. This was important, as there needed to be parallels in the methodology between the two studies, so that consumption trends could be informally compared. While certain aspects of the questionnaire design were modelled on Britvic Ireland's Project Breakthrough study, the questionnaire was significantly expanded and different so as to meet the specific research objectives of this study.

Before designing the questionnaire, the Delphi technique (Saunders et al 2007, Pg. 37), was applied in order to obtain input from four colleagues within Britvic Ireland, who worked in the brand management, category management and insight teams. The purpose was to discuss the general direction of the study to ensure suitability and to help identify key themes and trends around soft drinks consumption, which could be investigated further within the study. The Delphi technique provided valuable input to take forward to the next stage of the questionnaire design.

As the main objective of this study was to understand how and why consumption differs with age, the focus was primarily on behaviour, which according to Aaker et al 2007 (Pg, 229), usually involves four related concepts;

> 'what the respondents did or did not do; where the action takes place, the timing, including past, present and future; and the frequency or persistence of behaviour'

Simply, this means posing what, where, when and how often types of questions in order to collect the relevant data.

4.5 Procedure

Before the questionnaire was produced using the online survey tool, it was first scripted in Microsoft Word format. Simple language and wording of the questions was used to avoid respondent confusion or make the questionnaire overly complicated, which can cause low response rates. Care was also taken to avoid using 'leading questions' which could bias the respondents into responding in a particular way.

The survey was split into seven short sections, each one with a specific purpose linking back to a research objective. These were:

- Introduction
- Demographics
- Attitudes
- Consumption
- Brand Purchasing / Repertoire
- Brand Loyalty
- Changing Habits

Each section is explained in detail, giving the rationale for its inclusion and its purpose. Where relevant, the section or question is linked back to existing literature or previous studies to again justify its purpose and also to allow for informal comparisons to be made within the analysis.

Introduction

This included a simple overview stating the intended purpose of the survey, its approximate completion time of 15 minutes and the researcher's email address in case of any unforeseen issues. It reassured the respondent that all data would be kept strictly confidential and only used for academic purposes, in accordance with the Market Research Code of Conduct 2014 (https://www.mrs.org.uk/standards/code_of_conduct).

Demographics

Demographic profiling questions captured a respondent's gender, age, employment status, number of people living in the household and number of children under-18. To ensure rigour the questions were all closed, one answer, 'category' questions, offering independent alternatives. This meant that the relationship between the main three attribute variables in the survey, which were identified earlier, could be measured across respondents. Importantly, the three age bands (18-34, 35-54 and 55-74) were selected to match the groupings used by the Central Statistics Office when they report the Census data. These are also the bands used within the Britvic Ireland Project Breakthrough study.

Attitudes

A number of closed questions in the form of statements provided an understanding of respondent's attitudes towards soft drinks. Respondents rated how much they agreed or disagreed with the statement (from strongly agree to strongly disagree) using a five-point Likert scale.

The statements related to the four main research objectives, which included: personal consumption, brand loyalty, brand repertoire and health. The attitudinal statements were used to support or explore findings in greater detail, in order to answer each of the four research objectives.

Some of the health-related statements were used to measure the impact of health as an overall theme to understand how this differed by age group. This was due to Jacobs and Whittaker (2012) highlighting the aging process and the increased recognition of the importance of one's health, which could have an impact on the purchasing of soft drinks. The health-based attitudinal statements relate directly to answering Objective / Hypothesis 5.

Examples of questions under each objective included:

- Personal Consumption

The types of soft drinks which you can currently buy are appealing to me

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree

- Brand Loyalty

I would say I am loyal to the soft drinks brands which I buy

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree

- Brand Repertoire

I buy a wide range of soft drinks which I purchase on a regular basis

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree

- Health

My long-term health is a concern for me, therefore I actively watch what I eat and drink

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree

Both positive and negative statements ensured the respondent read each one carefully, encouraging them to think about which option to select (Saunders et al 2007, Pg. 436). The attitudes section was positioned immediately after the demographics section, as it was important to ask the opinions of all respondents, regardless of whether they were consumers of soft drinks or not – as non-drinkers would be screened out later in the questionnaire.

Consumption

The Consumption section was one of the most pivotal sections of the questionnaire as this part identified if consumption of drinks did indeed differ with age. This addresses Objectives / Hypotheses 1 and 2.

Respondents were asked to think about when they purchased non-alcoholic drinks for personal consumption across two different occasions; a) to consume at home and b) to consume whilst out of the home (for example when in work, out socialising, commuting, travelling, on the go etc…). By asking respondents to consider both out of home and in-home consumption this helped answer the gap in the current literature, as Britvic Ireland's Project Breakthrough (2012) only investigated out of home consumption of soft drinks, whereas Uncles and Ehrenberg (1990) study only looked at in-home (per capita) consumption of soft drinks.

A series of closed 'list' questions on a matrix, asked respondents which types of non-alcoholic drinks they had bought and drunk across a 'typical month' and 'in the past 7 days' for both in home and out of home consumption – they could choose as many or as few responses as they wished, including none. The types of non-alcoholic drinks were categorised into sub-categories, which are standard groupings used within in other soft drinks research studies. These questions were adapted from the Britvic Ireland Project Breakthrough study to allow informal comparison.

Screen-Out Question

At the end of the Consumption section, respondents were advised that the next section would focus specifically on soft drinks (for clarity, a definition of what constitutes the term 'soft drinks' was included). They were asked if they had not bought or consumed any soft drinks within the past month to select the 'End Survey' option. At which point they were filtered to the end of the survey and thanked for their time and input.

Brand Purchasing / Repertoire

This section established the repertoire of soft drinks brands a person purchased and the frequency at which they purchased them – which addresses Objective / Hypothesis 4.

A number of closed questions were presented on a matrix, which provided a list of the top-selling soft drinks brands (AC Nielsen 2014) in the same soft drinks sub-categories as used in the consumption section. Using a 7-point Likert scale, respondents were asked to state which brands they buy and the frequency at which they buy them, from 'daily' to 'never'.

This showed if older consumers had a narrower brand repertoire of soft drinks and established if this impacted on purchasing rates, which was highlighted as a finding within the literature review (Uncles and Ehrenberg 1990, Dawes 2008, Bogomolova and Grudinina 2011).

Brand Loyalty

This section aimed to understand a respondent's brand loyalty towards soft drinks brands and is used to address Objective / Hypothesis 3.

A series of closed 'category' questions asked respondents what they would do if the soft drinks brand they normally buy, within the specified sub-categories, was not available to purchase – would they purchase another brand instead. A second question, using a 6-point Likert scale, ranging from 'very likely' to 'very unlikely', asked the likelihood of a special offer or promotion impacting on loyalty shown towards a brand they would normally buy. The responses offered were designed to identify how loyal a respondent is to soft drinks brands. The purpose was to understand if older consumers were more or less loyal to the brands they buy compared to younger consumers, as the literature highlighted that older people can be just as promiscuous in their brand switching (Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010).

Changing Habits

The last section looked at how respondent's drinks consumption habits had changed across a recent period.

This section was designed to offer depth to the overall study, however was not directly linked to a research objective.

Close of Questionnaire

Respondents were thanked for taking the time to complete the survey.

With the questionnaire scripted, the next step was to build it using the online survey tool.

4.5.1 Building the Questionnaire

Initially the researcher used Surveymonkey.com, however, this free software proved too simplistic due to restrictions around filtering questions. Qualtrics – also free – proved suitable, was professional looking and had the functionality to build the survey in the required way. The Qualtrics survey templates allowed the questionnaire questions to be built in such a way that a response was forced, which prevented gaps appearing in the data and responses could be randomised to eliminate bias. The software allowed each question to appear on screen individually – giving respondents the opportunity to focus on one question at a time and not feel over-loaded. The Qualtrics tool enabled the questionnaire to be built, administered and coded in such way that gave the researcher full confidence in the results. The next step was to pilot test the questionnaire to ensure its validity.

4.5.2 Pilot Test

According to Malhotra and Birks (2007), pilot testing refers to testing the questionnaire on a small sample of respondents to identify and eliminate potential problems. A two-stage approach to the pilot testing phase was undertaken, as it would be imprudent to send a survey into field without some form of advance pre-testing. This reduces issues around recording data and to safe-guard against respondents having problems answering the questions (Saunders et al, 2007. Pg, 451). The first stage pre-tested the questionnaire with the same four colleagues who took part in the Delphi technique. Using the online tool, they provided feedback on the representativeness and suitability of the questions. The researcher observed one expert completing the questionnaire online in order to see how it flowed and to highlight any problematic areas. Once the feedback from the expert group was implemented, the overall questionnaire design and functionality was finalised.

During the second stage, it was trialled by six ‘typical’ respondents, with a wide range of ages including; a male aged 20, female aged 25, female aged 37, male aged 43, male aged 54, female aged 67. The group were sent an email with a hyperlink to the test-survey and asked to record their feedback to questions such as:

- Length of time it took to complete
- Did the questions make sense? Were any confusing or ambiguous?
- Were the instructions clear?
- Was the layout user-friendly and appealing?
- Any other comments?

All six respondents completed the test (100% response rate) in the four days provided to accomplish and report feedback. A small number of concerns were raised around ambiguous wording of questions, clarity around certain instructions and the filtering of some questions. However, overall feedback was positive and changes were minimal, so the survey was administered.

4.5.3 Administering the Survey

The Qualtrics online survey tool generated a hyperlink which gave web-access to the questionnaire. This allowed the survey to be distributed via a personal email using the snowballing technique. The email to potential participants explained the nature of the survey and ensured anonymity and confidentiality of personal data (See Appendix 3.1).

For the participants generated through self-selection technique, an email was sent directly from the Qualtrics software as open-rates and completion rates could be monitored. Again the cover email reiterated the nature of the survey and ensured anonymity and confidentiality of personal data (See Appendix 3.2). For any participants who had not completed the survey after 7 days, a reminder email was sent encouraging them to complete.

The questionnaire was live for a total period of three weeks. Throughout the whole period response rates were monitored closely and the totals by the different age groups assessed, so any sample boosts could be generated if the balance of responses was becoming out of kilter.

4.5.4 Research Ethics

In accordance with the Market Research Code of Conduct 2014, the study conformed to appropriate ethical behaviour in relation to the rights of the participants, the collection, storage and use of data. The researcher also ensured that the findings were used in a moral and responsible way.

Online survey participants were fully informed about the nature of the study and the subsequent use of the data. Participation was voluntary and informed consent was given through the supply of an email address (for those respondents who signed-up to take part). Emails were kept securely in a password protected file, only accessible by the author. Respondents remained anonymous, with data reported as total numbers or percentages and not as individual responses. Respondents had the right to withdraw from the study at any stage and a copy of the final report will be provided to any respondent who willingly took part.

The next section of the dissertation will report the findings which the applied methodology generated for analysis.

5. Research Findings

To analyse and present the significant findings from the online questionnaire, the analysis has been divided into five sections. The first part gives an overview of the descriptive statistics and provides a summary of the response levels and the demographic profile of respondents. The subsequent four sections each relate to one of the main research objectives and the findings are used to answer the proposed hypotheses. These four objectives include; soft drinks consumption habits, brand loyalty, brand repertoire and health. As this study focuses on the differences in consumption of soft drinks by age, age was the main demographic variable being statistically analysed. Results are analysed across three age bands; 18-34, 35-54 and 55-74. In order to explore the impact of health as a motivational factor, correlational analysis was conducted to examine the relationship between health and consumption variables.

The data was analysed using SPSS Statistics and the reporting functionality available within Qualtrics. Throughout the results a series of one way analysis of variance (ANOVA) tests, T-tests and coefficient correlation tests were conducted to determine if there were any significant differences in consumption of soft drinks across the three age bands. A combination of data tables and bar charts are used in order to present the findings in a constructive way.

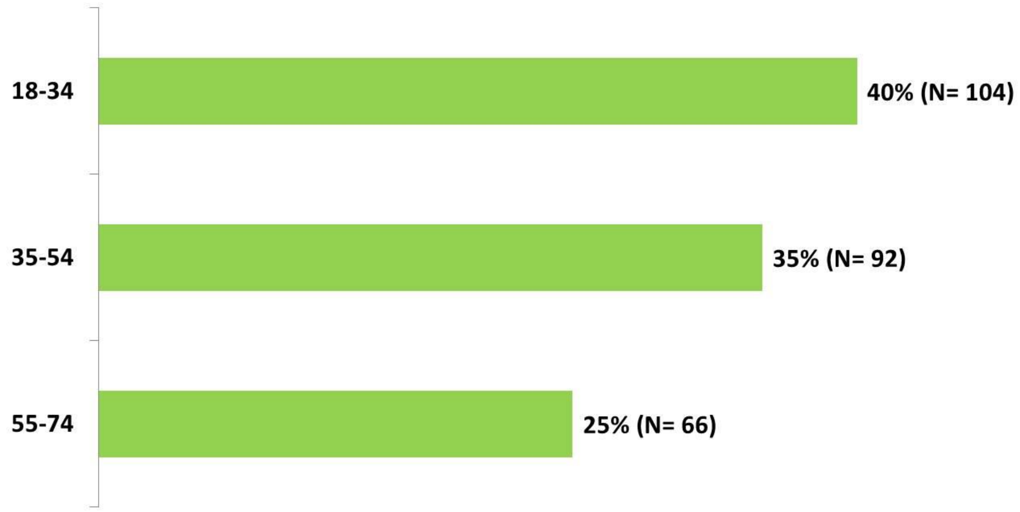
5.1 Descriptive Statistics

Of the 265 respondents who started the survey, 202 respondents fully completed the online survey, giving a 76% response rate. According the Saunders et al (2007, Pg. 421), a likely response rate for online surveys is between 30-50%, so the response rate achieved here survey was very positive. The targeted sample size of between 200 – 250 responses was also successfully achieved.

As the key objective of the study was to look at differences in consumption of soft drinks by age, it was of paramount importance to have an adequate number of respondents, from each of the three age bands, in order to achieve statistical reliability and to allow age to be used as the main demographic variable. The breakdown of respondents by age band was; 18-34 = 40%, 35-54 = 35% and 55-74 = 25% (See Figure 5.1).

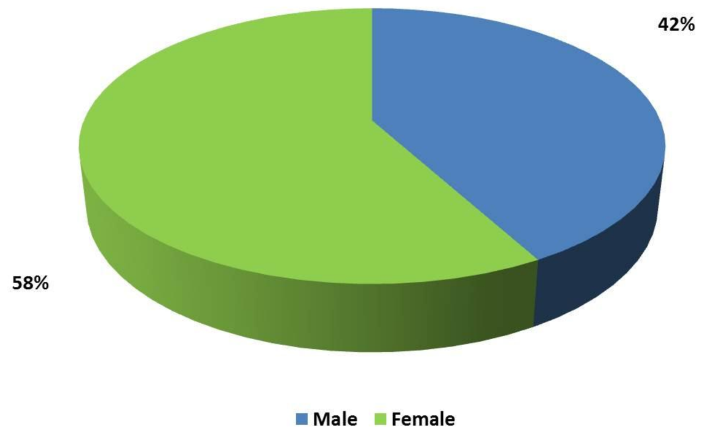
The targeted sample was a minimum of between 60-80 respondents in each of the three age bands, so again this quota was met.

Figure 5.1 – Age breakdown of respondents by age band



The second main demographic variable was gender. As illustrated in Figure 5.2, the gender split of respondents was 58% female and 42% male. The target was to achieve an equal 50/50 split between males and females and although the final numbers show a slight female bias, the total number of responses in each gender group is over 100, which ensures reliability.

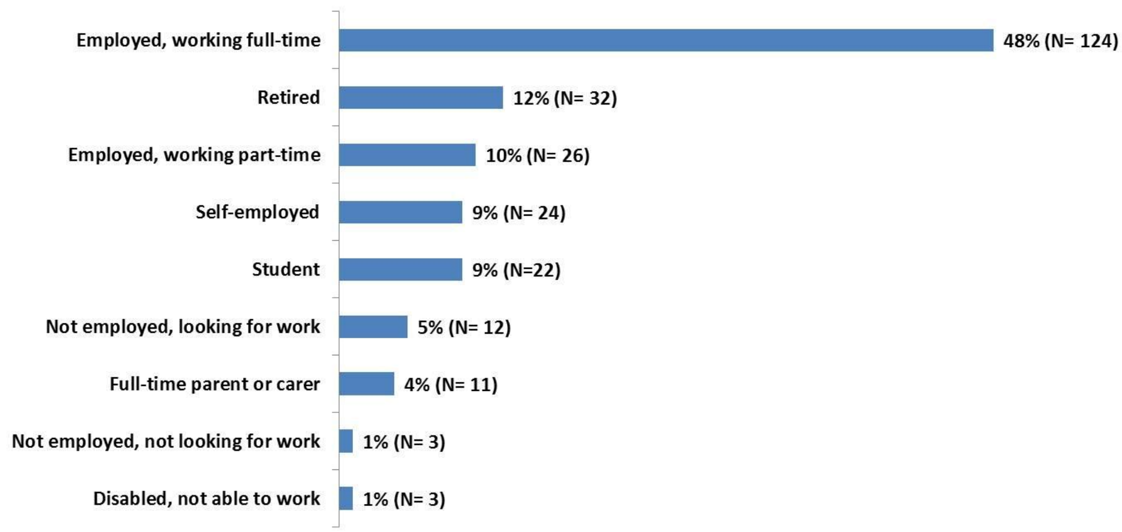
Figure 5.2 – Gender breakdown of respondents



Total number of respondents (N=262)

The third main demographic variable was employment status. No quotas were defined for specific groups, nor were there any limitations on self-completion based on a respondent's current employment status. The majority of respondents were 'employed, working full-time' = 48%, followed by 'retired' = 12% and 'employed, working part-time' = 10%. Those people 'self-employed' = 9% and 'students' = 9%. The full breakdown of employment status is outlined in Figure 5.3.

Figure 5.3 – Breakdown of respondents by their current employment status



Total number of respondents (N=262)

Although gender and employment were used as demographic variables, the results section focuses on age as the main variable in personal soft drinks consumption differences, in order to stay in line with the research limit.

In the lead up to focusing on differences by age, a macro perspective shows the total levels of in-home and out of home consumption of soft drinks within the past month.

Analysis of soft drinks for in-home use showed a total of 87.6% of respondents had bought 'any type of drink' (hot or cold), with 83.7% having bought 'any type of soft drink'. When this was broken down by drinks sub-category, the most widely bought beverage for in-home consumption were hot drinks (72.1%), followed by bottled water (47.9%), dairy drinks (45.7%) and carbonated / fizzy drinks (42.6%). The full breakdown of consumption by sub-category for in-home use is outlined below.

Table 5.1 – Soft drinks bought for 'in-home' consumption in the past month

Drink Category	In-Home Consumption %
Any drink	87.6%
Any soft drink	83.7%
Hot drinks	72.1%
Bottled Water	47.9%
Dairy drinks	45.7%
Carbonated / Fizzy drinks	42.6%
Dilutes / Squash	41.5%
Still flavoured drinks	16.6%
Juices / Smoothies	13.6%
Energy / Sports drinks	12.5%
Protein drinks	1.7%

Total number of respondents (N=265)

In comparison, soft drinks bought for out of home usage, showed a total of 83.8% of respondents had bought 'any type of drink' (hot or cold), with 76.6% having bought 'any type of soft drink' for personal consumption, which shows that a slightly higher percentage of drinks are bought for in-home use, compared to out of home use.

The most widely bought sub-categories of drinks for out of home use are bottled water (61.5%), hot drinks (54.7%), carbonated / fizzy drinks (43.8%) and juices / smoothies (24.2%).

Table 5.2 – Soft drinks bought for 'out of home' consumption in the past month

Drink Category	Out of Home Consumption %
Any drink	83.8%
Any soft drink	76.6%
Bottled Water	61.5%
Hot drinks	54.7%
Carbonated / Fizzy drinks	43.8%
Juices / Smoothies	24.2%
Energy / Sports drinks	18.9%
Still flavoured drinks	15.5%
Dairy drinks	9.4%
Dilutes / Squash	5.7%
Protein drinks	4.5%

Total number of respondents (N=265)

Both tables show that at a total level, a high percentage of soft drinks are bought for personal consumption, both in-home and out of home, across a typical month. This provides a solid foundation to investigate how consumptions levels differ by age, which relates directly to the first and second Research Objectives.

5.2 Soft Drinks Consumption Differences

5.2.1 Total Consumption

Research Objective 1 examines whether or not personal consumption levels of soft drinks amongst Irish consumers change as people get older, specifically looking at over-55s compared to under-35s. The aim was to quantify if differences in consumption of soft drinks by age occur and to establish whether or not this study is consistent with two previous major soft drinks studies. Firstly, Britvic Ireland's

Project Breakthrough (2012), which shows out of home consumption declines with age, with 18-34 year olds the highest consumers of soft drinks on the go. Secondly, the Uncles and Ehrenberg (1990) study which shows in-home per capita consumption of carbonated soft drinks is higher amongst the over-55s compared to the under-54s. This dissertation provides added value to these two studies, and this research area in general, as it looks concurrently at both in and out of home consumption.

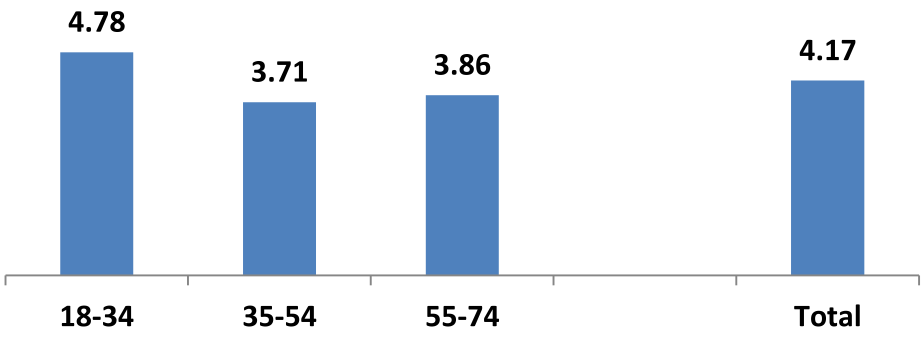
In this respect, it was deemed important to first establish also at a total level, whether or not there was a difference in personal consumption levels between the three age bands; 18-34, 35-54 and 55-74 when in and out of home consumption was combined.

To achieve this, all the drinks categories were combined to create three sub-groups; 'any drink bought in the last month', 'any hot drink bought in the last month' and 'any soft drink bought in the last month'. When testing for statistical differences between three or more groups, Saunders et al (2007), proposed using a one-way analysis of variance (ANOVA), with any significant difference reported as being below .05, where p= the significant value (p= .05). This would be used as the primary test to measure differences in consumption levels.

An ANOVA test was conducted to determine if there were any age differences in consumption levels of 'any drink bought in the last month'. This was not significant, $F (2, 259) = 2.970$; $p = .053$. The result however was relatively close to the .05 threshold and highlighted that deeper analysis could reveal statistical consumption differences. The same ANOVA test was run for 'any hot drink bought in the last month', again with no significant difference recorded, $F (2, 259) = .205$; $p = .815$.

When the ANOVA test was run to look at 'any soft drink bought in the last month', a significant difference was identified, $F (2, 259) = 3.962$; $p = .020$. Post-hoc analysis using Scheffe comparisons revealed the significant difference in soft drinks bought in the past month was between 18-34 and 35-54 age groups ($p= .033$), with no significant difference between the 18-34 and 55-74 ($p= .127$) and 35-54 and 55-74 (p= .943). The difference is highlighted when the mean values of soft drinks bought for monthly consumption are analysed below in Figure 5.4. This reveals the number of soft drinks categories bought does decline with age, however there is a greater difference between 18-34 and 35-44 years olds (-1.07), compared to the 18-34 and 54-74 age groups (-0.92).

Figure 5.4 – Mean number of soft drinks categories bought for personal consumption in the past month



Total number of respondents (N=262)

Hypotheses Findings

The first Research Objective identified if personal consumption levels of soft drinks amongst Irish consumers change as people get older, specifically looking at over-55s compared to under-35s. The first hypothesis proposed:

> H1 – Overall consumption of soft drinks will decrease with age, with people under-35 consuming more soft drinks than those aged over-55.

At a total level, ANOVA tests reveal that personal consumption of soft drinks does decline with age and therefore partially supports H1. However, the significant difference is identified between the 18-34 and 35-54 age groups, with no significant difference shown between the 18-34 and 55-74 age bands, which is contrary to the proposed hypothesis. This trend is reflected in the mean number of soft drinks categories bought in a month. The highest number consumed is amongst the 18-34 age band (4.78), followed by the 55-74 age group (3.86), with the fewest in the 35-54 age band (3.71). This suggests that older consumers are still active purchasers of soft drinks and have not completely withdrawn from the category, making them an important marketing sub-group for soft drinks brands. The next step was to analyse where participants consume soft drinks.

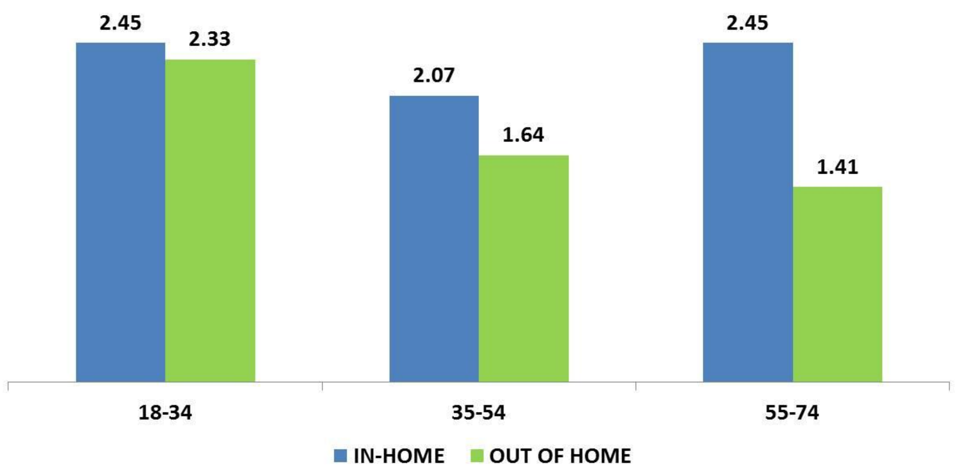
5.2.2 In and Out of Home Consumption

The second Research Objective compared its findings against Project Breakthrough (Britvic 2012) and the Uncles and Ehrenberg (1990) study. Britvic Ireland showed that the purchasing of out of home soft drinks products declines with age and Uncles and Ehrenberg showed in-home purchasing is higher amongst over-55s. Unlike those studies, this study also provides added value by comparing *both* in home and out of home consumption thereby helping to fill a gap in current literature.

To do this, a paired-samples T-test was conducted. All soft drinks categories were combined and the two variables tested for in-home consumption and out of home consumption across the three age bands. The results of the T-test show that for 18-34 year olds, there is no significant difference between in and out of home consumption, the result was; $t\ (103) = .709$, $p = .480$.

However, for 35-54 and 55-74 year olds, there is a significant difference between in and out of home consumption. The T-test for 35-54 year olds reveals; $t\ (91) = 2.713$, $p = .008$ and for the 55-74 age group the significant difference was even greater; $t\ (65) = 4.526$, $p = .000$. To understand where the difference lies, a comparison of the standard mean for in-home and out of home soft drink consumption in a month was analysed and is shown in Figure 5.5.

Figure 5.5 – Standard mean number of soft drinks categories bought for in-home and out of home personal consumption in a month



Total number of respondents (N=262)

The T-test is supported by standard mean analysis, which indicates that there is no significant difference amongst 18-34 year olds between consumption of soft drinks in-home (2.45 per month) and out of home (2.33 per month). Amongst the second age band, there is a significant difference, with 35-54 year olds consuming more soft drinks in the home (2.07 per month) than out of home (1.64). This trend is even more pronounced amongst the older age group, with 55-74 years olds consuming the lowest number of soft drinks out of the home (1.41 per month). The interesting finding however, is the discovery that the oldest age band (55-74) consumes the same amount of soft drinks categories in a monthly period in-home (2.45 per month), as the 18-34 age group do.

Hypotheses Findings

Research Objective 2 determined the degree to which in-home and out of home consumption of soft drinks differs with age. This was to be tested via two hypotheses. The first hypothesis proposed:

> H2 (1) – Out of home consumption will decrease with age, with under-35s consuming more soft drinks out of home than the over-55s.

Hypothesis 1 is supported and it is consistent with Britvic Ireland's Project Breakthrough (2012). Both studies have identified that out of home consumption of soft drinks does indeed decline with age, with a significant difference recorded in this study between 18-34 year olds and both the older age groups (35-54 and 55-74). This result is unsurprising and can be explained in-part due to the greater amount of physical time during the week that younger consumers spend 'on the go' versus older consumers, meaning they have greater opportunity to consume soft drinks out of home (Britvic Ireland 2012).

Hypothesis 2 within Objective 2, which relates to in-home consumption of soft drinks proposed:

> H2 (2) – In-home consumption will follow the same trend and decrease with age, however to a lesser extent, with over-55s consuming more soft drinks at home than out of home.

Hypothesis 2 is only partly supported. The in-home consumption T-test reveals no significant difference for in-home consumption by age, with the 55-74 age group consuming the same number of soft drinks categories per month as the 18-34 year olds. In certain cases the oldest age cohort (55-74) actually consumes more soft drink sub-categories per month in-home, than the younger two age groups (18-34 and 35-54). In the example of carbonated / fizzy drinks (see Table 5.3 below), the data suggests over-55s are consuming more fizzy drinks per month than the under-54s, supporting the findings from the Uncles and Ehrenberg (1990) study, which shows per capita consumption of carbonated soft drinks is also higher amongst over-55s.

Table 5.3 – Soft drinks sub-categories purchased monthly for personal in-home consumption by age group

Drink Category	In-Home Consumption %		
	18-34	35-54	55-74
Hot drinks	66%	72%	85%
Bottled Water	50%	46%	50%
Dairy drinks	50%	40%	48%
Carbonated / Fizzy drinks	45%	38%	47%
Dilutes / Squash	43%	46%	35%
Still flavoured drinks	20%	11%	20%
Energy / Sports drinks	16%	3%	20%
Juices / Smoothies	12%	14%	17%
Protein drinks	9%	9%	9%

The second statement within the hypothesis however is supported, as older people do consume more soft drinks at home than out of home. The T-test reveals the 55-74 year old age group, consume on average 2.45 soft drinks per month in- home, compared to 1.41 out of home. This finding again highlights the importance of over-55s as active and regular consumers of soft drinks.

The next section focuses on brand loyalty and brand repertoire in order to answer the third and fourth research objectives.

5.3 Brand Loyalty and Brand Repertoire

5.3.1 Brand Loyalty

Research Objective 3 investigated whether loyalty to specific soft drinks brands and categories exists amongst over-55s and compared this to loyalty amongst under-35s. The Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010 studies all show older consumers can be just as promiscuous with their brand switching as younger consumers, and their loyalty is not necessarily fixed to a limited number of brands.

In order to understand the level of loyalty shown to soft drinks brands and how this differs by age, the survey measured an attitudinal statement of brand loyalty. Respondents were asked to rank, on a 5-point Likert scale, how much they agreed (1= strongly agree to 5= strongly disagree), with the following statement:

“I would say I am loyal to the soft drinks brands which I buy”

An ANOVA test was conducted on the statement and a significant difference was identified, F (2, 245) = 4.050; p = .019. Post-hoc analysis using Scheffe comparisons revealed the significant difference in the ‘loyalty towards brands bought’ statement was between 18-34 and 55-74 age groups (p= .030), with no significant difference between the 18-34 and 35-54 (p= .973) and 35-54 and 55-74 (p= .063). Analysis of the mean percentage scores, reveal it is the younger age group who proclaim to be most loyal to the soft drinks brands which they buy, with 51.6% of them agreeing (‘strongly agree’ or ‘agree’) with this statement. The mean agree percentage for the 35-54 age group was 48.9% and only 36.9% for the 55-74 age band. These findings contradict current literature which suggests younger consumers are less brand loyal and older consumers more brand loyal (Lambert-Pandraud et al 2005, Anderson and Sharp 2010).

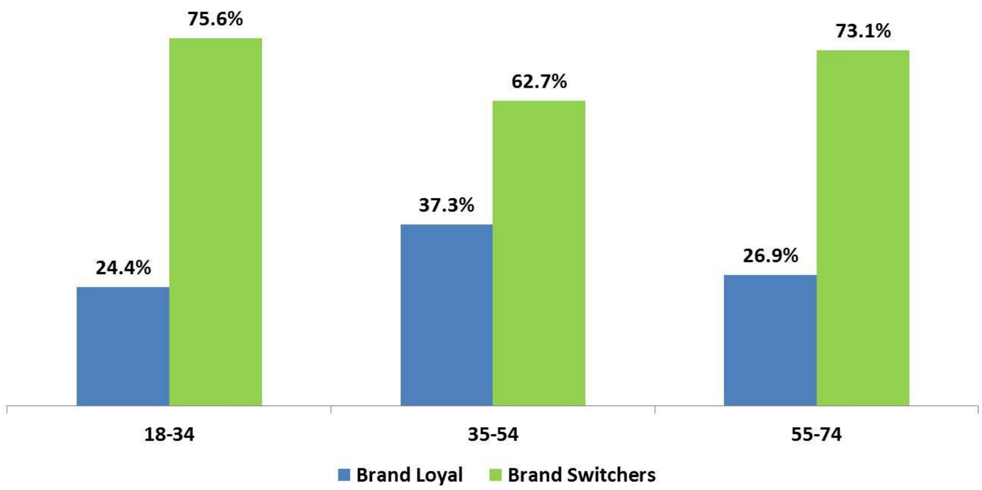
However, as this ANOVA test only measured perceived loyalty, a second test was used to measure loyalty based on actual purchasing decisions. Should their normal soft drinks brand be unavailable for purchase, respondents were asked say what they would do by choosing between the five following options:

- Do nothing (Code 1)
- Buy a similar brand in the same soft drinks sub-category (Code 2)
- Buy shop’s own brand within the same category (Code 3)
- Buy a favourite brand in a different soft drink sub-category (Code 4)
- I don’t know / I don’t buy (Code 5)

Code 1 respondents were seen as remaining ‘brand loyal’ to the brand they normally buy. Answers to Codes 2 to 4 were combined to define those respondents as ‘brand switchers’ and so willing to purchase a brand they would not normally buy. Code 5 respondents were removed, so the results only scrutinised people who actively made a choice. The results were analysed and compared across the three sub-groups; 18-34, 35-54 and 55-74 as highlighted below in Figure 5.6 to 5.9.

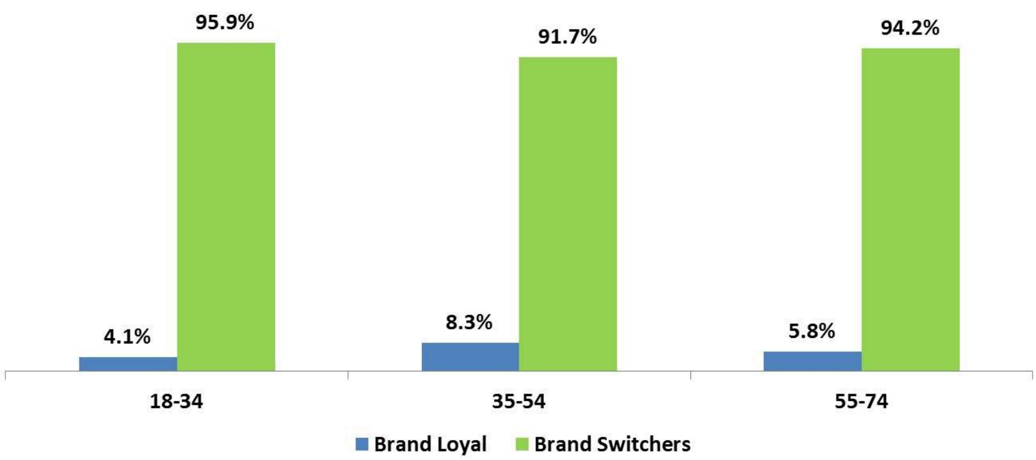
Four main soft drinks sub-categories were compared, as these represent the categories which command the largest value share within the soft drinks market – totalling 89.8% (AC Nielsen 2014). These categories and their market value shares included; carbonated / fizzy drinks (44.7%), bottled water (19.9%), energy / sports drinks (20.4%) and dilutes / squash (4.8%).

Figure 5.6 – Brand loyalty stated towards carbonated / fizzy drinks by age group



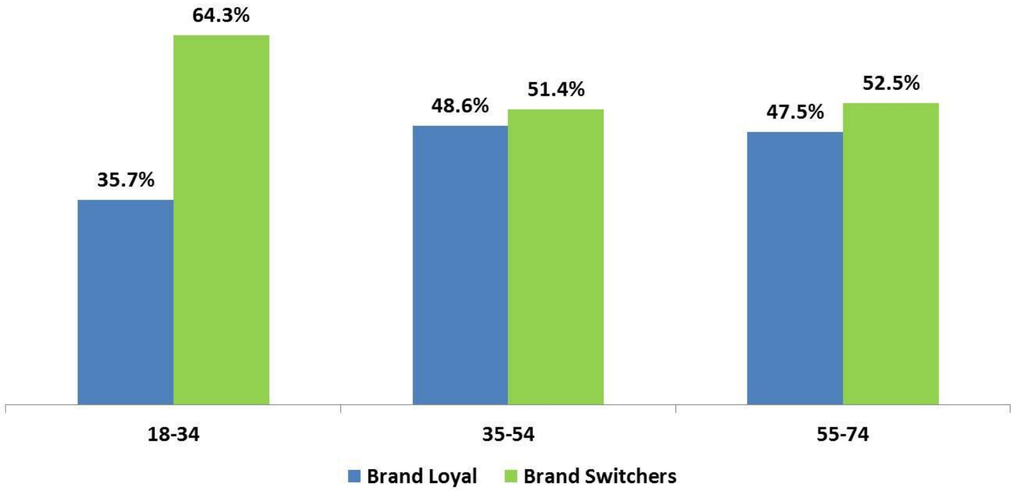
	Number of responses (N=)	Number who Don't know / Don't buy (N=)
18-34	N=78	N=1
35-54	N=59	N=4
55-74	N=52	N=9

Figure 5.7 – Brand loyalty stated towards bottled water drinks by age group



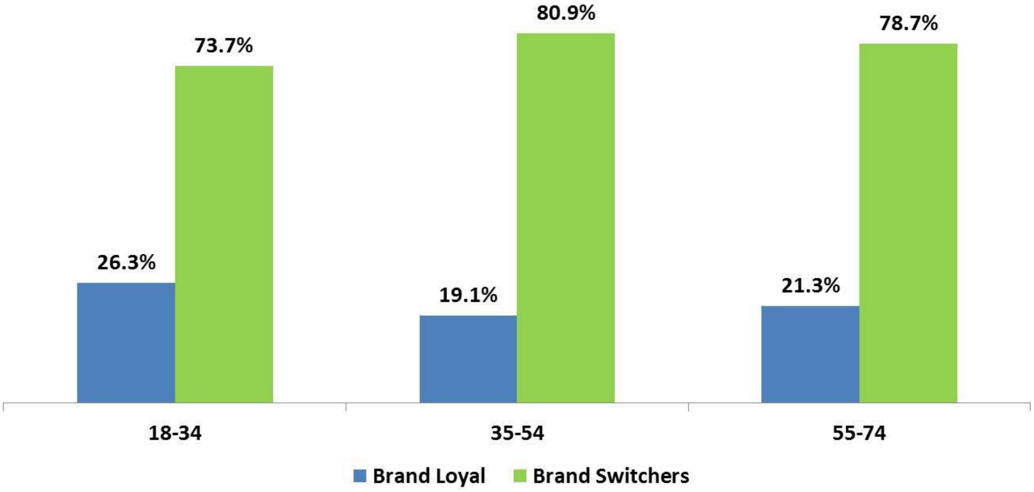
	Number of responses (N=)	Number who Don't know / Don't buy (N=)
18-34	N=73	N=6
35-54	N=60	N=3
55-74	N=52	N=9

Figure 5.8 – Brand loyalty stated towards energy / sports drinks by age group



	Number of responses (N=)	Number who Don't know / Don't buy (N=)
18-34	N=56	N=23
35-54	N=37	N=26
55-74	N=40	N=21

Figure 5.9 – Brand loyalty stated towards dilutes / squash drinks by age group



	Number of responses (N=)	Number who Don't know / Don't buy (N=)
18-34	N=37	N=21
35-54	N=47	N=16
55-74	N=47	N=14

Results indicate that brand loyalty for the chosen soft drinks categories does exist across all age groups, however, the likelihood of switching brands is considerably higher for all soft drinks categories, compared to the option of remaining loyal. There were no discernable differences between all three age bands in the likelihood to remain loyal versus the likelihood to switch brands, which supports the viewpoint that older consumers are as likely as younger consumers to switch brands.

An ANOVA was run to see if there was any statistical significant difference in stated brand loyalty across the three age bands, based on the likelihood of purchasing a substitute brand but this came back as insignificant for all soft drinks categories.

Hypotheses Findings

Research Objective 3 investigated if loyalty to specific soft drinks brands and categories exists amongst over-55s and compared this to loyalty amongst under-35s. To examine this objective the following hypothesis was proposed:

> H3 – Loyalty to soft drinks brands will exist amongst the over-55s, however this will be no different to loyalty in the under-35s, making the older cohort as likely to be promiscuous in their brand choices as the younger age group.

The findings from the two tests investigating brand loyalty indicate that loyalty does exist amongst the over-55s. This was highlighted in the mean percentage scores for those who claimed to be 'brand loyal' when asked to give their stated intentions regarding rejecting or choosing a substitute brand for the brand they would normally purchase. However, the results were in-line with the mean scores recorded amongst the 18-34 and 35-54 year olds, therefore indicating the older age cohort (55-74) have no lesser or greater intention to be loyal to the brands they would normally purchase.

The ANOVA test demonstrated no significant difference between age groups in relation to stated brand loyalty, therefore this supports the third hypothesis which proposed the older cohort are as likely to be promiscuous in their brand choices as the younger age group.

These findings are in line with the existing literature (Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010), who all drew the same conclusions. In contrast, (Lambert-Pandraud et al 2005, Anderson and Sharp 2010) suggest younger consumers are less brand loyal than older consumers, which is directly at odds with this study which shows statistically it is the younger age cohort who perceive themselves to be the most brand loyal group. This was suggested through the ANOVA test of the attitudinal statement relating to brand loyalty. The implications of these findings will be discussed in the Recommendations and Conclusions chapter.

Leading on from this, Research Objective 4 investigated the differences in brand repertoire between the three age groups.

5.3.2 Brand Repertoire

Research Objective 4 looked at whether or not over-55s have a narrower brand repertoire of soft drinks compared to consumers aged under-35. Research within the literature review (Uncles and Ehrenberg 1990, Bogomolova and Grudinina 2011) has shown that older consumers can have a repertoire of brands which is just as wide as younger consumers and that multi-brand loyalty can lead to more frequent purchasing of brands (Dawes 2008). To investigate brand repertoire the first step was to measure an attitudinal statement. Respondents were asked to rank, on a 5-point Likert scale, how much they agreed (1= strongly agree to 5 = strongly disagree), with the following statement:

"I buy a wide range of soft drinks which I purchase on a regular basis"

An ANOVA test was conducted and no significant difference between the three age bands was identified, $F (2, 255) = 2.414$; $p = .091$. The next step was to measure brand repertoire based on the actual number of brands purchased per month within a sub-category (See Table 5.4).

Within each of the four main soft drinks sub-categories, the results show that the average number of brands purchased within each sub-category is statistically the same across the three age groups. With the exception of the bottled water category where the average number of brands purchased in a month was less than one, the results show that within the other categories all three age groups purchased more than one brand a month. This suggests all consumer age groups show some level of loyalty to more than one brand, which is described as multi-brand loyalty (Dawes 2008).

Table 5.4 – Average number of soft drinks brands purchased in a month by sub-category

Drink Category	Average number of brands purchased in a month		
	18-34	35-54	55-74
Carbonated / Fizzy drinks	1.72	1.69	1.82
Bottled Water	0.32	0.27	0.26
Energy / Sports drinks	1.31	1.25	1.33
Dilutes / Squash	1.50	1.55	1.53

To explore these brand repertoire findings in more detail, an ANOVA test was carried out to measure any significant difference for each of the four soft drinks sub-categories, but no significant differences were found across the three age groups.

To summarise, these tests show that the older, over-55 age group, purchase a similar number of soft drinks brands compared to the 18-34 year olds. In the case of carbonates / fizzy drinks, energy / sports drinks and dilutes / squash drinks, the older consumers actually purchase a marginally higher number of brands in a month than the 18-34 age group. Also, with the exception of bottled water, the over-55s purchase more than one brand per category, therefore showing levels of multi-brand loyalty.

Hypotheses Findings

Research Objective 4 looked at whether or not over-55s have a narrower brand repertoire of soft drinks compared to consumers aged under-35. The following research hypothesis was proposed:

> H4 – The over-55s will purchase a narrower repertoire of soft drinks brands compared to the under-35s, which will tie into the overall decrease in consumption levels amongst the older age group proposed in H1.

Based on the tests conducted, this hypothesis was unsupported as the older consumers purchased a similar or even higher number of brands compared to the youngest age group. The ANOVA test reported no significant difference in the average number of brands purchased by age groups across the four soft drinks sub-categories. This shows that there is no informal correlation between the brand repertoire of consumers and the decline in consumption with age as identified in H1. The similarities in average number of brands purchased by age group supports the findings from the literature (Uncles and Ehrenberg 1990, Bogomolova and Grudinina 2011) which stated that older consumers can have a repertoire of brands which is just as wide as younger consumers. Again these implications will be discussed in the Recommendations and Conclusions chapter.

The final section of the chapter investigates health as a motivating factor for consumption.

5.4 Health as a Motivating Factor

Research Objective 5 focused on potential health concerns around soft drinks and whether they have an impact on the consumption of soft drinks across all age groups. Current literature shows that a person's brand repertoire can change over time due to 'triggers', linked to life stages (Bogomolova and Grudinina 2011) and that the ageing process and increased recognition of the importance of one's health (Jacobs and Whittaker 2012) can impact on what consumers buy. Negative media coverage regarding health concerns around soft drinks may also affect choices.

Two attitudinal statements were asked relating to health, in the context of soft drinks. Respondents were asked to rank, on a 5-point Likert scale, how much they agreed with the following statements:

"My long-term health is a concern for me, therefore I actively watch what I eat and drink"

"The coverage I see and read in the media around sugar and sugar-sweetened drinks discourages me from buying soft drinks"

An ANOVA test was conducted on the first statement and a significant difference was identified, F (2, 252) = 3.157; p = .044. Post-hoc analysis using Scheffe comparisons revealed the significant difference in the 'long-term health concerns' statement was between 18-34 and 55-74 age groups (p= .073), with no significant difference between the 18-34 and 35-54 (p= .170) and 35-54 and 55-74 (p= .865). Analysis of the mean scores reveal that 80.3% of the 54-74 year old age band agree ('strongly agree' or 'agree') with this statement, followed by 77.0% of the 35-54 age group and 63.7% of the 18-34 age band. This indicates that it is the oldest age group who are most influenced by their long term health concerns which will in turn impact on what they eat and drink. However, positive agreement scores for all groups are high, indicating a concern across all age groups.

Respondents also gave their opinion on the negative media coverage around sugar and sugar-sweetened soft drinks. The ANOVA test reveals no significant difference between the age bands, F (2, 253) = 1.570; p = .210. However, analysis of the mean percentage scores show 65.1% of 55-74 years olds agree that the coverage they see and read in the media around sugar and sugar-sweetened drinks discourages them from buying soft drinks, followed by 63.6% of 35-54 year olds and 52.0% of those aged 18-34. Again this indicates that the oldest age group are most influenced by the negative media coverage, however positive agreement scores for all groups are high, reveal all age groups are potentially influenced.

To understand the influence of both these statements on soft drinks purchasing habits and to examine the positive and negative relationships between two variables across the three age groups, a deeper analysis was carried out using Pearson's correlation coefficient (Saunders et al 2007, Pg. 521). This was to understand if there is a significant positive or negative relationship between two variables across the three age groups. For the purpose of this test, the two statements relating to health, were analysed against a third attitudinal statement, which was; 'I buy a wide range of soft drinks which I purchase on a regular basis' as a measure of purchase intent. Any scores less than 0.05, again reveal a significant difference (p= 0.05).

Table 5.5 – Pearson's Correlation analysis of health related attitudes on soft drinks consumption

Attitudinal Statement	I buy a wide range of soft drinks which I purchase on a regular basis		
	18-34	35-54	55-74
My long-term health is a concern for me, therefore I actively watch what I eat and drink	Pearson Correlation -.080 Sig. (2-tailed) = .422	Pearson Correlation -.168 Sig. (2-tailed) = .199	Pearson Correlation -.167 Sig. (2-tailed) = .181
The coverage I see and read in the media around sugar and sugar-sweetened drinks discourages me from buying soft drinks	Pearson Correlation -.321** Sig. (2-tailed) = .001	Pearson Correlation -.238* Sig. (2-tailed) = .025	Pearson Correlation -.263* Sig. (2-tailed) = .033

** Correlation is significant at the 0.01 level (2-tailed)
* Correlation is significant at the 0.05 level (2-tailed)

Total number of respondents (N=262)

In relation to the first statement, which looked at long-term health concerns, no significant relationship was identified between this and the purchase intent statement, as all the significant difference scores for the three age groups were greater than 0.5 (p= > 0.5).

The results for the second statement suggest that there is a significant negative relationship between the impact of coverage in the media around sugar and sugar-sweetened drinks and respondents stating that they buy a wide range of soft drinks across all age groups; 18-34 (p= .001), 35-54 (p= .025) and 55-74 (p= .033). Based on the values of the correlation coefficient, the strength of the negative relationship however would be classified as 'weak negative' for all age bands, as the Pearson Correlation score fell between the -0.2 and -0.35.

However, this does indicate that it is the youngest age group (18-34) who are the most negatively affected by the media coverage when it comes to the purchasing of soft drinks. This also suggests that perceptually older consumers agree the negative media coverage discourages them from buying soft drinks, based on the mean scores from the attitudinal statement, however it affects their actual purchasing behaviours less based on the correlation coefficient result.

Hypotheses Findings

Research Objective 5 considered the impact potential health concerns may have on soft drinks consumption across all age groups and the following two hypotheses were proposed:

> H5a – The over-55s will see their long-term health as more important to them than the under-35s and therefore will impact on their consumption of soft drinks.

The ANOVA test conducted found this statement to be true and hence H5a is supported. There is a significant difference between 18-34 and 55-74 years olds, with a higher percentage of the older age group agreeing positively with the statement compared to the younger age group. This supports the view offered by Jacobs and Whittaker (2012) which identifies the increased recognition of the importance of one's health as people age. However, the coefficient correlation analysis identifies that there is no significant positive or negative relationship between the perception of long-term health concerns and actual buying behaviour.

This topic would be a worthwhile area for further research in order to understand the impact of long-term health concerns on purchasing decisions.

The second part of the hypothesis for Research Objective 5 proposed:

> H5b – The influence of negative media coverage around soft drinks will affect consumption across all age groups, but the over-55s will be more influenced than the under-35s.

This proposal was only partially supported. The ANOVA test revealed that there was no significant difference between the three age bands in relation the effect of negative media coverage, however the mean positive agreement percentages were high for each age group; 18-34 = 52.0%, 35-54 = 63.6% and 55-74 = 65.1%. This indicates that all age groups claim to be affected by the negative media coverage when it comes to consumption of soft drinks, which supports the first part of H5b. However, the results do not support the part of the hypothesis which suggests over-55s will be more influenced than under-35s. The correlation coefficient results show that it was the 18-34 year old age group, who are most impacted by the negative media coverage and the negative relationship this subsequently exerted on their purchasing behaviour of soft drinks, which has potentially damaging consequences for soft drinks manufacturers which will be later discussed.

The next chapter discusses the conclusions and recommendations from the study, primarily in the context of how the findings relate back to current literature, the implications the results may have for Irish soft drinks manufacturers, the successes and limitations of the study and suggestions for future research to develop existing findings and theory.

6. Conclusions and Recommendations

The next chapter presents a summary and discussion of the main findings in relation to both the overall research question proposed ‘What are the key influences on soft drinks consumption across different age groups within Ireland’ and to the study’s 4 Research Objectives. Conclusions are drawn and recommendations made from findings.

6.1 Study Overview

In line with the 4 main Research Objectives, the study concludes:

Consumer age, brand loyalty, brand repertoire and issues around health all will have a vital role to play in future consumption trends of the Irish soft drinks market.

The study highlights:

i) the variation in key purchasing motivation factors of brand loyalty, brand repertoire and the underlying impact of health on soft drink consumption habits across three main age groups (18-34, 35-54 and 55-74)

ii) differences in current consumption patterns across the three different age groups which reveal some very significant and potentially impactive changes in relation to previous data, research, literature review findings and the soft drinks industry

iii) the importance of acquiring a deeper understanding of the key consumption influencers by age and health, in order to make informed recommendations and suggestions to the soft drinks industry and how this could be achieved through future research in this area of study

iv) gaps in research especially concerning in-home / on the go consumption (which it attempts to fill)

The recent global and domestic recession has clearly had a major impact on consumer spending, with total Irish annual grocery spend per household decreasing by -11% between 2008 and 2013 (Kantar Worldpanel 2013) which in turn, affects soft drinks sales. In addition, census data shows the changing structure of the Irish population, with the number of 18-24 year olds declining by -4% between 2006 and 2012 and the number of people aged over-50 increasing by 3% across the same period (CSO 2013).

This population trend has serious implications for soft drinks manufacturers. According to the Britvic Ireland (2012) study, 18-24 year olds are the highest consumers of soft drinks, with people consuming fewer soft drinks as they get older. Additionally, the on-going media focus around alleged health concerns associated with excessive consumption of high sugar soft drinks and artificial sweeteners used in some diet drinks places the industry in a vulnerable position.

In order to address some of these issues, a deductive, quantitative method was chosen for this study, using a structured online survey. This measured the opinions and attitudes of Irish people aged from 18 to 74 years old, on a range of topics related to soft drinks purchasing behaviour, recruited using both a snowball and self-section technique. It was completed by a sample of 210 people, achieving a 76% response rate – large enough to ensure reliability in the data.

6.2 Discussion

This section discusses each research objective in turn, draws conclusions from findings and makes links to reviewed literature.

6.2.1 Soft Drinks Consumption Differences

Research Objective 1 examined whether or not personal consumption levels of soft drinks amongst Irish consumers differ as people get older, specifically looking at over-55s compared to under-35s. Previous studies identified revealing, yet contrasting findings. Britvic Ireland (2012), showed how out of home consumption declined significantly with age, identifying 18-34 year olds as the highest consumers of soft drinks on the go. In contrast, Uncles and Ehrenberg (1990) showed that in the case of carbonated soft drinks, in-home per capita consumption amongst housewives aged over-55 was higher than those aged under-54.

By comparing both in and out of home consumption, this study fills a current gap in the literature and adds value to these two major studies. Total personal consumption levels of soft drinks were quantified across the sample of Irish consumers and conclusions drawn against these two previous studies. Overall results showed consumption of soft drinks does decrease by age, with the under-35s consuming more soft drinks than those aged over-55, whereby supporting Research Objective 1.

ANOVA tests also revealed that the significant difference in soft drinks consumed across a month was between 18-34 and 35-54 year olds and not between the 18-34 and 55-74 year olds as initially assumed at the outset of the study. This indicates that the over-55s represent an active and important sub-group of soft drinks consumers who should not be over-looked from a wider marketing and promotional activity perspective by soft drinks brands especially in these challenging economic times.

Research Objective 2 analysed consumption habits in more detail, looking specifically at out of home and in-home consumption. Part one of Research Objective 2 focused on out of home consumption of soft drinks, which was predicted to decline with age. This study supported the second research objective and backed up the findings from (Britvic Ireland 2012). The findings were expected and unsurprising and compatible with the Britvic study (2012) which shows 16-24 year olds spend 57% of the week ‘on the go’, rising to 59% amongst 25-34 year olds. Contrast this to 48% for 50-64 year olds and only 40% for those aged over-65. An innovative avenue for soft drinks product development may be to provide younger consumers with a functional or nutritional boost to help them meet the needs of leading a busy life ‘on the go’, whereas targeting older consumers for out of home consumption would, therefore, be largely unnecessary and a misuse of marketing spend.

The second part of Research Objective 2 looked at in-home consumption – predicted to decline with age but not to the same extent as out of home consumption. This part of the objective was unsupported, with T-tests identifying no significant difference across the age groups. Results showed that the 55-74 year old age group consume the same number of soft drinks categories in-home per month as 18-34 year olds, which was a surprising and significant finding. In the case of certain soft drinks categories, such as carbonated drinks, a higher percentage of older consumers purchased carbonated drinks per month than the younger two age groups. Therefore, this informally supported the Uncles and Ehrenberg (1990) study, which showed in-home per capita consumption of carbonated soft drinks was higher amongst over-55s compared to those under-54.

The final part of the objective, which suggested that over-55s consume more soft drinks in-home than out of home, was supported. The T-test revealed that on average, over-55s consume 2.45 soft drinks categories per month for in-home consumption, compared to 1.41 for out of home consumption.

Research objective 2 again highlights the importance of the older consumer to soft drinks brands, primarily from an in-home consumption perspective. With consumption levels shown to be on a par with the younger age group, this proved an unexpected and revealing finding and one worthy of capitalising on through further research to achieve revenue growth. A clearer picture of how the over 55's shop, what influences their decision making, what advertising and promotional channels they are most receptive to and also what soft drinks products best fit their needs, especially in-home would facilitate this.

6.2.2 Brand Loyalty

Research Objective 3 investigated brand loyalty amongst over-55s and compared this to loyalty amongst under-35s. Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010) all show that older cohorts can be as promiscuous in the brand switching as younger consumer and that their loyalty is not fixed to a limited number of brands. Results show that loyalty to soft drinks brands does exist amongst the over-55s, however there was no significant difference in stated brand loyalty between the three age groups. Across all three age groups, the percentage of those people likely to switch brands due to a preferred product being unavailable or through a better price or promotion on a competing brand was significantly higher than the percentage of those who intended to remain loyal to their preferred brand. Firstly, this suggests that loyalty to soft drinks brands and categories is relatively low and secondly that older consumers are as likely to be promiscuous in their brand choices as younger consumers – thus supporting the hypothesis in Research Objective 3. Findings are in line with existing literature (Uncles and Ehrenberg 1990, Bennett and Rundle-Thiele 2005, Anderson and Sharp 2010, Lambert-Pandraud and Laurent 2010).

The major finding from this section of the study identified that 18-34 years olds proclaim to be the most loyal to the soft drinks brands they normally buy. The ANOVA test on the attitudinal statement on 'loyalty to brands bought' showed the significant difference was between the 18-34 and 55-74 years old age groups, with 51.6% of 18-34 years olds agreeing with the statement compared to only 36.9% of 55-74 year olds. This result is in direct contrast with existing literature (Lambert-Pandraud et al 2005, Anderson and Sharp 2010) which suggests younger consumers are less brand loyal than older consumers.

On reflection, it makes sense that younger consumers claim to be more brand loyal than older consumers. Today's society is hugely image focused and people, particularly younger people, use brands as a way of portraying an image to the outside world of who they are and what they stand for. Peer pressure also influences younger consumers in eating, wearing, drinking, doing the 'right' things, with trends often influenced by the sports stars and celebrities younger consumers aspire to be like. In contrast, older people may be at a stage in life when more important factors such as health, well-being and self-fulfilment dictate the brand choices they make. The area of brand loyalty for soft drinks manufacturers and how this impacts on purchase intentions and purchase frequency is a topic that would warrant further research.

6.2.3 Brand Repertoire

Research Objective 4 investigated whether or not over-55s have a narrower brand repertoire of soft drinks compared to consumers aged under-35. Uncles and Ehrenberg (1990), Bogomolova and Grudinina (2011) show how older consumers can have a brand repertoire just as wide as younger consumers and that multi-brand loyalty can lead to more frequent purchasing of brands (Dawes 2008). Results from the ANOVA test showed there was no significant difference between the three age groups, based on the attitudinal statement around the range of brands a person buys and the average number of brands respondents bought within a specific soft drinks category were statistically the same, with over-55s purchasing a similar number of soft drinks brands compared to 18-34 year olds. In the case of three soft drinks categories, the older age group purchased a marginally higher number of brands in a month compared to 18-34 year olds.

The hypothesis for Research Objective 4 was therefore unsupported and did not tie into the overall decrease in consumption levels. No informal correlation between brand repertoire and the decline in consumption with age was made. However, findings support (Uncles and Ehrenberg 1990, Bogomolova and Grudinina 2011) who state older consumers can have a repertoire of brands just as wide as younger consumers.

These brand loyalty and repertoire findings serve to further highlight and justify the value of older consumers within the soft drinks market. They as likely to be brand loyal or to brand switch the same as younger consumers and can be influenced to try alternative brands or swayed by promotions. Their purchasing repertoire of soft drinks brands is as wide, if not wider, than younger consumers, which was a significant finding in itself. In the literature review it was shown how the older consumer is largely over-looked and often ignored for mainstream consumption (Szmigin and Carrigan 2001) yet these findings suggest that it is of significant interest for soft drinks brands to target older consumers as part of the overall marketing mix, due to their positive purchasing behaviour.

6.2.4 Health as a Motivating Factor

Research Objective 5 focused on potential health concerns around soft drinks their impact soft drinks consumption across all age groups. Current literature shows that a person's brand repertoire can change over time due to 'triggers', linked to life stages (Bogomolova and Grudinina 2011) and that the ageing process and increased recognition of the importance of one's health (Jacobs and Whittaker 2012) can impact on what consumers buy.

ANOVA tests on the first health-related attitudinal statement demonstrated a significant difference between 18-34 and 55-74 year olds in the recognition of personal long-term health, which in turn impacts on food and drinks choices. 80.3% of 55-74 year olds agree that long-term health is a concern, hence they actively watch what they eat and drink, compared to 63.7% of 18-34 year olds. This supports the viewpoint proposed by Jacobs and Whittaker (2012), that as people get older they become more self-aware of personal health. Although the high percentages across all age groups indicate that long-term health concerns are an important factor regardless of age, the proposed hypothesis is supported as over-55s still see their long-term health as more important than the under-35s.

An ANOVA test on a second health-focused attitudinal statement, relating to the impact of negative media coverage around sugar and sugar-sweetened drinks, showed no significant differences, although again, the overall agreement score was high across each age group, which suggests all groups' consumption habits are affected. The correlation coefficient analysis surprisingly revealed , that it is the younger age group who are most impacted by the media coverage and the negative relationship this subsequently exerted on their purchasing behaviour of soft drinks. Therefore, the findings supported the first part of the hypothesis, which outlined that all age groups claim to be affected by the negative media coverage when it comes to consumption of soft drinks but did not support the next part of the hypothesis which suggested over-55s were more influenced than under-35s. From these findings, health concerns are clearly a critical area of development for the future of the soft drinks industry and will be discussed more fully later.

6.3 Implications and Recommendations for the Irish Soft Drinks Industry

To use the prominent findings from the study in a constructive way, the implications and recommendations for the Irish soft drinks industry have been divided into three brief sections;

- Strategy to target older consumers
- Marketing and product development
- Addressing health concerns

6.3.1 Strategy to Target Older Consumers

The main findings relating to overall consumption levels amongst people aged over-55 suggest they represent an important and active sub-group of consumers to target for mainstream consumption – especially home consumption. They are likely to switch and try brands outside of their normal repertoire and their repertoire is as wide as younger consumers, which is telling, as studies have shown that consumers who are multi-brand loyal (Dawes 2008) are often more frequent purchasers.

As previously suggested, this requires a more qualitative, ethnographic type of research which really examines and understands how this older cohort thinks, acts and behaves when it comes to shopping and purchasing behaviours. This links back to the literature which illustrates the need to understand consumers from a cognitive perspective based on life-stage not simply chronological age (Bartos 1980, Szmigin and Carrigan 2001). It also includes understanding their responsiveness to different advertising channels and promotional activity and would establish how best to target them – as part of the mainstream marketing mix or within their own bespoke marketing strategy? Ultimately, by targeting this growing segment of the market, revenue growth for soft drinks manufacturers could be expanded.

6.3.2 Marketing and Product Development

Three telling insights from the study, which fell outside of the four main research objectives, were around current marketing activity and the existing portfolio of soft drinks on the market. Firstly, only 18.2% of 55-74 year olds agreed that 'marketing and advertising carried out by soft drinks brands appeals to them' (this was 36.6% amongst 18-34s). This dovetails with the literature around marketing to older consumers (Szmigin and Carrigan 2001, Ahmad 2002) which highlighted how older consumers are either ignored or misrepresented in current marketing practice. This would suggest that, although older consumers are active consumers of soft drinks, they do not feel that current communication by soft drinks brands resonates or has relevance to them. There would be the argument to consider older consumers in the planning and execution of marketing campaigns to drive sales but alto to create a sense of inclusion which seems to be lacking.

The second and third insights are product-related. Only 33.3% of 55-74 year olds agree that the types of soft drinks which they can currently buy appeal to them (compared to 61.0% for 18-34 year olds). Also, an overwhelming 87.9% of them agree that they dislike the sweetness of some soft drinks (in contrast to 51.9% of 18-34 year olds). This again shows that although older consumers do buy and consume soft drinks, one could argue that their needs are not currently being met or products are not being developed with the needs of older consumers specifically in mind. This finding links back to the study by Britvic and PepsiCo (2013) which discussed how a person's tastes change physiologically over time. The recommendation to soft drinks manufacturers would be, as part of the wider strategy, to develop a range of products to actively meet the needs and wants of older consumers, by taking into consideration their physiological differences and health concerns.

6.3.3 Addressing Health Concerns

The negative health coverage and continued scrutiny of high-sugar content soft drinks and the use of certain artificial sweeteners is the biggest threat to soft drinks industry. At the time of writing, Coca-Cola, the world's largest soft drinks brand has just launched a new product called 'Coke Life' which is a lower calorie, naturally sweetened with Stevia cola drink 'aimed at 35 to 55 year old consumers who are looking for a lower calorie cola with sweetness from natural sources' (Marketing Week, 2014). The results from this study show that personal health-related concerns and the negative media coverage is adversely influencing people's soft drinks consumption habits. Soft drinks manufacturers are only too aware of the threat this poses, so this calls for true innovation to occur, to create ranges of soft drinks products which give people the choice to purchase soft drinks that either offer an added health-related benefit or products that are made from ingredients that are natural, harmless and yet importantly still deliver on taste. By working with health organisations and dieticians, manufacturers could consider creating drinks that would be medically-approved and even endorsed by such groups. Ultimately, the development of products to offer healthy choice, alongside existing products and clear and open communication to educate consumers on the positive and negative health benefits of soft drinks is a step the industry will need to take.

6.4 Successes and Limitations of the Study

6.4.1 Successes

a) meeting the research objectives
b) developing existing theory around soft drinks consumption by looking at both in and out of home consumption concurrently within one study.
c) establishing the fact that older consumers represent an important sub-group to target
d) the support and triangulation of many findings within leading literature , data and other relevant areas of the study and data provided reassurance and accuracy of the findings.
e) the study has posed interesting questions and created strategic decisions to be made by the soft drinks industry, in relation to future targeting of older consumers and in tackling health issues
f) made recommendations based on findings

6.4.2 Limitations

Due to time, resources and financial restrictions, some limitations dictated the research methodology:

a) the quota sampling was not nationally representative, meaning data could not be weighted-up to the overall population of Ireland to offer a national perspective.
b) the sample size was relatively small for the online survey. The study did produce 210 fully completed surveys ensuring valid survey results. However, when analysing specific question data sets, within a sub-group, numbers were small which made the findings less robust than in a larger sample
c) the overall questionnaire length was too long which created a vast amount of data to process and analyse and although this did not appear to be the case, respondent fatigue could affect completion rates and accuracy.

6.5 Recommendations for Further Research

To complement the quantitative findings of this study, a wide range of areas could be explored and developed to extend thinking and theory particularly around the older consumer and soft drinks consumption using a qualitative approach. For example, a study involving a series of focus groups with each of the three age groups, would allow key themes and topics around consumption, loyalty, repertoire and health to be explored in an inductive ethnographic way adding richness and depth to any potential study.

It would also be suggested that the area of health concerns and how this directly impacts on purchasing frequency would be crucial study for soft drinks manufacturers to undertake.

6.6 Conclusion

In conclusion, any investigation into the future development of the Irish soft drinks industry is a complex affair as this study shows. The logical starting point is a radically new outlook on modern consumption patterns, based on well-planned and methodologically sound quantitative and qualitative research. This would ensure any product developments or changes would acknowledge customer value systems – especially in this case around health – and firmly place the consumer, including older consumers, at the heart of the strategy.

Appendices

Appendix 1 – Online Questionnaire in Microsoft Word format

Soft Drinks Consumption - Dissertation

Thank you in advance for taking the time to complete this survey. The purpose is to understand your consumption and purchasing habits around different types of drinks and your attitudes towards them. The survey should take no longer than 15 minutes to complete. NB - if you want to move back to a previous question to amend a response, please use the back button underneath the question, not the back button within your web browser. If you have any issues, please contact kieranmforde@gmail.com

Q1 Are you Male or Female?
- ❍ Male (1)
- ❍ Female (2)

Q2 What is your age?
- ❍ Under 18 (1)
- ❍ 18-24 (2)
- ❍ 25-34 (3)
- ❍ 35-44 (4)
- ❍ 45-54 (5)
- ❍ 55-64 (6)
- ❍ 65-74 (7)
- ❍ 75+ (8)

Q3 Do you have responsibility as either a parent or legal guardian to any children under the age of 18 in your household?
- ❍ Yes (1)
- ❍ No (2)

Q4 How many people, including you, currently live in the household in which you live?
- ❍ 1 (1)
- ❍ 2 (2)
- ❍ 3 (3)
- ❍ 4 (4)
- ❍ 5 (5)
- ❍ 6 (6)
- ❍ 7 (7)
- ❍ 8 (8)
- ❍ 9 (9)
- ❍ 10+ (10)

Q5 What is your current employment status?
- ❍ Employed, working full-time (1)
- ❍ Employed, working part-time (2)
- ❍ Self-employed (3)
- ❍ Not employed, looking for work (4)
- ❍ Not employed, NOT looking for work (5)
- ❍ Student (6)
- ❍ Retired (7)
- ❍ Disabled, not able to work (8)
- ❍ Full time parent or carer (9)

The next section looks at your attitudes towards soft drinks. A number of questions will be asked, please state how much you agree or disagree with the question.

Q6 I buy a wide range of soft drinks which I purchase on a regular basis
- ❍ Strongly Agree (1)
- ❍ Agree (2)
- ❍ Neither Agree nor Disagree (3)
- ❍ Disagree (4)
- ❍ Strongly Disagree (5)

Q7 I prefer other types of drinks, such as hot drinks or alcohol to soft drinks
- ❍ Strongly Agree (1)
- ❍ Agree (2)
- ❍ Neither Agree nor Disagree (3)
- ❍ Disagree (4)
- ❍ Strongly Disagree (5)

Q8 I dislike the sweetness of some soft drinks
- ❍ Strongly Agree (1)
- ❍ Agree (2)
- ❍ Neither Agree nor Disagree (3)
- ❍ Disagree (4)
- ❍ Strongly Disagree (5)

Q9 The coverage I see and read in the media around sugar and sugar-sweetened drinks discourages me from buying soft drinks
- ❍ Strongly Agree (1)
- ❍ Agree (2)
- ❍ Neither Agree nor Disagree (3)
- ❍ Disagree (4)
- ❍ Strongly Disagree (5)

Q10 Drunk in moderation, soft drinks are harmless
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q11 My long-term health is a concern for me, therefore I actively watch what I eat and drink
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q12 Advertising and marketing carried out by soft drinks brands appeals to me
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q13 The types of soft drinks which you can currently buy are appealing to me
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q14 Soft drinks which offer a health-related benefit are appealing to me
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q15 I would say I am loyal to the soft drinks brands which I buy
- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q16 I like to drink soft drinks from time to time as a treat
- ❍ Strongly Agree (1)
- ❍ Agree (2)
- ❍ Neither Agree nor Disagree (3)
- ❍ Disagree (4)
- ❍ Strongly Disagree (5)

Next, think about when you purchase non-alcoholic drinks for personal consumption... a) to consume at home and b) to consume whilst out of the home for example; when in work, out socialising, commuting, travelling, on the go etc…

Q18 Which, if any, of the following types of drinks do you BUY in a TYPICAL MONTH? MARK ALL THAT APPLY

	For in home consumption (1)	For out of home consumption (1)
Hot drinks (tea, coffee, hot chocolate) (1)	❑	❑
Bottled Water (still, sparkling, flavoured) (2)	❑	❑
Carbonated / fizzy drinks (3)	❑	❑
Energy / sports drinks (4)	❑	❑
Still flavoured drinks (5)	❑	❑
Dilutes / Squash (6)	❑	❑
Smoothies (7)	❑	❑
Dairy drinks (milk, flavoured milk) (8)	❑	❑
Protein drinks (9)	❑	❑
None of these (10)	❑	❑

Q19 Which, if any, of the following types of drinks do you DRINK in a TYPICAL MONTH? MARK ALL THAT APPLY

	For in home consumption (1)	For out of home consumption (1)
Hot drinks (tea, coffee, hot chocolate) (1)	❑	❑
Bottled Water (still, sparkling, flavoured) (2)	❑	❑
Carbonated / fizzy drinks (3)	❑	❑
Energy / sports drinks (4)	❑	❑
Still flavoured drinks (5)	❑	❑
Dilutes / Squash (6)	❑	❑
Smoothies (7)	❑	❑
Dairy drinks (milk, flavoured milk) (8)	❑	❑
Protein drinks (9)	❑	❑
None of these (10)	❑	❑

Q20 Thinking of the PAST 7 DAYS, which of the following types of drinks, if any, have you actually bought? MARK ALL THAT APPLY

	For in home consumption (1)	For out of home consumption (1)
Hot drinks (tea, coffee, hot chocolate) (1)	❑	❑
Bottled Water (still, sparkling, flavoured) (2)	❑	❑
Carbonated / fizzy drinks (3)	❑	❑
Energy / sports drinks (4)	❑	❑
Still flavoured drinks (5)	❑	❑
Dilutes / Squash (6)	❑	❑
Smoothies (7)	❑	❑
Dairy drinks (milk, flavoured milk) (8)	❑	❑
Protein drinks (9)	❑	❑
None of these (10)	❑	❑

Next the focus is going to be specifically on soft drinks – soft drinks are categorised as bottled water, carbonated / fizzy drinks, still flavoured drinks, fruit juices, smoothies, dilutes / squash, protein and dairy drinks. If you do not BUY or DRINK ANY TYPE of soft drink within a typical month, then please select the 'End Survey' option now. If you do, please select the Continue Survey option.

- ❍ End Survey (1)
- ❍ Continue Survey (2)

If End Survey Is Selected, Then Skip To End of Survey

In the following section lists of well-known soft drinks brands will be shown within different drinks categories. Please answer which you buy and how often.

Q21 Which of the following BOTTLED WATER BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Ballygowan (1)	❍	❍	❍	❍	❍	❍	❍
Deep River Rock (2)	❍	❍	❍	❍	❍	❍	❍
Evian (3)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (4)	❍	❍	❍	❍	❍	❍	❍
Volvic (5)	❍	❍	❍	❍	❍	❍	❍
Other brand (6)	❍	❍	❍	❍	❍	❍	❍

Q22 Which of the following CARBONATED / FIZZY DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
7UP (1)	❍	❍	❍	❍	❍	❍	❍
7UP Free (2)	❍	❍	❍	❍	❍	❍	❍
Club (3)	❍	❍	❍	❍	❍	❍	❍
Coca Cola (4)	❍	❍	❍	❍	❍	❍	❍
Coke Zero (5)	❍	❍	❍	❍	❍	❍	❍
Diet Coke (6)	❍	❍	❍	❍	❍	❍	❍
Fanta (7)	❍	❍	❍	❍	❍	❍	❍
Finches (8)	❍	❍	❍	❍	❍	❍	❍
Pepsi (9)	❍	❍	❍	❍	❍	❍	❍
Pepsi Max (10)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (11)	❍	❍	❍	❍	❍	❍	❍
Sprite (12)	❍	❍	❍	❍	❍	❍	❍
Other (13)	❍	❍	❍	❍	❍	❍	❍

Q23 Which of the following ENERGY / SPORTS DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Energise Sport (1)	❍	❍	❍	❍	❍	❍	❍
Gatorade (2)	❍	❍	❍	❍	❍	❍	❍
Lucozade Energy (3)	❍	❍	❍	❍	❍	❍	❍
Lucozade Sport (4)	❍	❍	❍	❍	❍	❍	❍
Mountain Dew (5)	❍	❍	❍	❍	❍	❍	❍
Powerade (6)	❍	❍	❍	❍	❍	❍	❍
Red Bull (7)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (8)	❍	❍	❍	❍	❍	❍	❍
Other (9)	❍	❍	❍	❍	❍	❍	❍

Q24 Which of the following STILL FLAVOURED DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Capri Sun (1)	❍	❍	❍	❍	❍	❍	❍
Juicy Drench (2)	❍	❍	❍	❍	❍	❍	❍
Oasis (3)	❍	❍	❍	❍	❍	❍	❍
Ribena (4)	❍	❍	❍	❍	❍	❍	❍
Robinsons Fruit Shoot (5)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (6)	❍	❍	❍	❍	❍	❍	❍
Other (7)	❍	❍	❍	❍	❍	❍	❍

Q25 Which of the following FRUIT JUICE / SMOOTHIE DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Copella (1)	❍	❍	❍	❍	❍	❍	❍
Innocent Juices (2)	❍	❍	❍	❍	❍	❍	❍
Innocent Smoothies (3)	❍	❍	❍	❍	❍	❍	❍
Naked Smoothies (4)	❍	❍	❍	❍	❍	❍	❍
Tropicana (5)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (6)	❍	❍	❍	❍	❍	❍	❍
Other (7)	❍	❍	❍	❍	❍	❍	❍

Q26 Which of the following DILUTES / SQUASH DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Kia Ora (1)	❍	❍	❍	❍	❍	❍	❍
MiWadi (2)	❍	❍	❍	❍	❍	❍	❍
Ribena (3)	❍	❍	❍	❍	❍	❍	❍
Robinsons (4)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (5)	❍	❍	❍	❍	❍	❍	❍
Other (6)	❍	❍	❍	❍	❍	❍	❍

Q27 Which of the following DAIRY DRINKS BRANDS do you buy and how often? MARK ALL THAT APPLY

	Never (1)	Less than Once a Month (2)	Once a Month (3)	2-3 Times a Month (4)	Once a Week (5)	2-3 Times a Week (6)	Daily (7)
Actimel (1)	❍	❍	❍	❍	❍	❍	❍
Avonmore Milk (2)	❍	❍	❍	❍	❍	❍	❍
Benecol yogurt drink (3)	❍	❍	❍	❍	❍	❍	❍
Muller Vitality (4)	❍	❍	❍	❍	❍	❍	❍
Yakult (5)	❍	❍	❍	❍	❍	❍	❍
Yoplait (6)	❍	❍	❍	❍	❍	❍	❍
Shop's Own Brand (7)	❍	❍	❍	❍	❍	❍	❍
Other (8)	❍	❍	❍	❍	❍	❍	❍

Next think about when you are actually buying soft drinks in a supermarket, convenience store or other type of shop and again think about the different soft drinks brands you buy, in the different types of categories.

Q28 If the BOTTLED WATER brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Bottled water brands (1)	❍	❍	❍	❍	❍

Q29 If the CARBONATED / FIZZY DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Carbonated / fizzy drinks brands (1)	❍	❍	❍	❍	❍

Q30 If the ENERGY / SPORTS DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Energy / Sports drinks brands (1)	❍	❍	❍	❍	❍

Q31 If the STILL FLAVOURED DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Still flavoured drinks brands (1)	❍	❍	❍	❍	❍

Q32 If the FRUIT JUICE brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Fruit juice brands (1)	❍	❍	❍	❍	❍

Q33 If the DILUTES / SQUASH brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Dilutes / Squash brands (1)	❍	❍	❍	❍	❍

Q34 If the SMOOTHIE brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Smoothie brands (1)	❍	❍	❍	❍	❍

Q35 If the DAIRY DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing (1)	A similar brand in the same category (2)	Shop's own brand within the same category (3)	A favourite brand in a different soft drink category (4)	I don't know / I don't buy them (5)
Dairy drinks brands (1)	❍	❍	❍	❍	❍

Q36 If an alternative BOTTLED WATER brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Bottled water brands (1)	❍	❍	❍	❍	❍	❍

Q37 If an alternative CARBONATED / FIZZY DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Carbonated / fizzy drinks brands (1)	❍	❍	❍	❍	❍	❍

Q38 If an alternative ENERGY / SPORTS DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Energy / sports drinks brands (1)	❍	❍	❍	❍	❍	❍

Q39 If an alternative STILL FLAVOURED DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Still flavoured drinks brands (1)	❍	❍	❍	❍	❍	❍

Q40 If an alternative FRUIT JUICE brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Fruit juice brands (1)	❍	❍	❍	❍	❍	❍

Q41 If an alternative DILUTES / SQUASH brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Dilutes / Squash brands (1)	❍	❍	❍	❍	❍	❍

Q42 If an alternative SMOOTHIE brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Smoothie brands (1)	❍	❍	❍	❍	❍	❍

Q43 If an alternative DAIRY DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely (1)	Likely (2)	Undecided (3)	Unlikely (4)	Very Unlikely (5)	I don't know / I don't buy them (6)
Dairy drinks brands (1)	❍	❍	❍	❍	❍	❍

Q44 Thinking about the LAST 7 DAYS, roughly HOW MANY SOFT DRINKS HAVE YOU PURCHASED for your own consumption or for family / friends?

	For Myself (1)	For Family / Friends (1)
0 (1)	❍	❍
1 - 3 (2)	❍	❍
4 - 6 (3)	❍	❍
6 - 9 (4)	❍	❍
10 or more (5)	❍	❍
I don't know (6)	❍	❍

This is the last section... Finally, can you think about how your drinking habits have changed over time.

Q45 Generally, would you say you buy more or less of these different drinks categories than you did two years ago?

	I don't buy them (1)	I buy less (2)	I buy about the same (3)	I buy more (4)
Carbonated / fizzy drinks (1)	❍	❍	❍	❍
Bottled Water (still, sparkling, flavoured) (2)	❍	❍	❍	❍
Fruit juices / smoothies (3)	❍	❍	❍	❍
Dilutes / Squash (4)	❍	❍	❍	❍
Hot drinks (5)	❍	❍	❍	❍
Alcoholic drinks (6)	❍	❍	❍	❍

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago
Carbonated / fizzy drinks - I buy less Is Selected

Q46 What are the main reasons you are BUYING LESS CARBONATED / FIZZY DRINKS than two years ago? MARK ALL THAT APPLY
- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in some carbonated / fizzy drinks (5)
- ❑ The sugar substitutes used in diet / zero sugar drinks (6)
- ❑ The fizzy drinks you can currently buy don't appeal to me (7)
- ❑ I just drink less overall (8)
- ❑ Other (please specify) (9) ____________________
- ❑ Don't know (10)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Carbonated / fizzy drinks - I buy more Is Selected

Q47 What are the main reasons you are BUYING MORE CARBONATED / FIZZY DRINKS than two years ago? MARK ALL THAT APPLY
- ❑ I am buying for more people in my household (1)
- ❑ Better special offers and promotions in the shops nowadays (2)
- ❑ I just like drinking them (3)
- ❑ Lower prices (4)
- ❑ More choice and variety available (5)
- ❑ Better diet / zero sugar options (6)
- ❑ Shops own brand available (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)
- ❑ They are an affordable treat (13)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Carbonated / fizzy drinks - I don't buy them Is Selected

Q48 What are the main reasons you DON'T BUY CARBONATED / FIZZY DRINKS? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in carbonated / fizzy drinks (5)
- ❑ The sugar substitutes used in diet / zero sugar drinks (6)
- ❑ The fizzy drinks you can currently buy don't appeal to me (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)
- ❑ I just don't like them (13)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Bottled Water (still, sparkling, flavoured) - I buy less Is Selected

Q49 What are the main reasons you are BUYING LESS BOTTLED WATER than two years ago? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ I drink more tap water (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ The water drinks you can currently buy don't appeal to me (4)
- ❑ I just drink less overall (5)
- ❑ Other (please specify) (6) ____________________
- ❑ Don't know (7)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Bottled Water (still, sparkling, flavoured) - I buy more Is Selected

Q50 What are the main reasons you are BUYING MORE BOTTLED WATER than two years ago? MARK ALL THAT APPLY

- ❑ I am buying for more people in my household (1)
- ❑ Better special offers and promotions in the shops nowadays (2)
- ❑ Health reasons (3)
- ❑ I just like drinking them (4)
- ❑ Lower prices (5)
- ❑ More choice and variety available (6)
- ❑ Bigger packs available (7)
- ❑ Shops own brands are available (8)
- ❑ Other (please specify) (9) ____________________
- ❑ Don't know (10)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Bottled Water (still, sparkling, flavoured) - I don't buy them Is Selected

Q51 What are the main reasons you DON'T BUY BOTTLED WATER? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ I drink more tap water (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ The water drinks you can currently buy don't appeal to me (4)
- ❑ I just don't like them (5)
- ❑ Other (please specify) (6) ____________________
- ❑ Don't know (7)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago
Fruit juices / smoothies - I buy less Is Selected

Q52 What are the main reasons you are BUYING LESS JUICE DRINKS / SMOOTHIES than two years ago? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in these types of drinks (5)
- ❑ The juice drinks / smoothies you can currently buy don't appeal to me (6)
- ❑ I just drink less overall (7)
- ❑ They are too expensive (8)
- ❑ Other (please specify) (9) ____________________
- ❑ Don't know (10)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago
Fruit juices / smoothies - I buy more Is Selected

Q53 What are the main reasons you are BUYING MORE JUICE DRINKS / SMOOTHIES than two years ago? MARK ALL THAT APPLY

- ❑ I am buying for more people in my household (1)
- ❑ Better special offers and promotions in the shops nowadays (2)
- ❑ I just like drinking them (3)
- ❑ Lower prices (4)
- ❑ More choice and variety available (5)
- ❑ Shops own brands are available (6)
- ❑ They are a healthier option compared to other soft drinks (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)
- ❑ They are an affordable treat (13)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Fruit juices / smoothies - I don't buy them Is Selected

Q54 What are the main reasons you DON'T BUY JUICE DRINKS / SMOOTHIES? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in these types of drinks (5)
- ❑ The juice drinks / smoothies you can currently buy don't appeal to me (6)
- ❑ I just don't like them (7)
- ❑ They are too expensive (8)
- ❑ Other (please specify) (9) ____________________
- ❑ Don't know (10)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Dilutes / Squash - I buy less Is Selected

Q55 What are the main reasons you are BUYING LESS DILUTES / SQUASH DRINKS than two years ago? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in these drinks (5)
- ❑ The dilutes / squash drinks you can currently buy don't appeal to me (6)
- ❑ I just drink less overall (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Dilutes / Squash - I buy more Is Selected

Q56 What are the main reasons you are BUYING MORE DILUTES / SQUASH DRINKS than two years ago? MARK ALL THAT APPLY

- ❑ I am buying for more people in my household (1)
- ❑ Better special offers and promotions in the shops nowadays (2)
- ❑ I just like drinking them (3)
- ❑ Lower prices (4)
- ❑ More choice and variety available (5)
- ❑ Better low sugar options (6)
- ❑ Shops own brands are available (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)
- ❑ They are an affordable treat (10)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Dilutes / Squash - I don't buy them Is Selected

Q57 What are the main reasons you DON'T BUY DILUTES / SQUASH DRINKS? MARK ALL THAT APPLY

- ❑ To save money on household shopping bills (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, hot drinks) (3)
- ❑ Health reasons (4)
- ❑ Sugar content in these drinks (5)
- ❑ The dilutes / squash drinks you can currently buy don't appeal to me (6)
- ❑ I just don't like them (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Hot drinks - I buy less Is Selected

Q58 What are the main reasons you are BUYING LESS HOT DRINKS than two years ago? MARK ALL THAT APPLY

- ❑ To save money (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, soft drinks) (3)
- ❑ Health reasons (4)
- ❑ The hot drinks you can currently buy don't appeal to me (5)
- ❑ I just drink less overall (6)
- ❑ Other (please specify) (7) ____________________
- ❑ Don't know (8)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Hot drinks - I buy more Is Selected

Q59 What are the main reasons you are BUYING MORE HOT DRINKS than two years ago? MARK ALL THAT APPLY

- ❑ I am buying for more people in my household (10)
- ❑ Better special offers and promotions in the shops nowadays (11)
- ❑ They are an affordable treat (12)
- ❑ I just like drinking them (13)
- ❑ More choice and variety available (14)
- ❑ Lower prices (15)
- ❑ They help me get through the day (16)
- ❑ Other (please specify) (5) ____________________
- ❑ Don't know (6)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Hot drinks - I don't buy them Is Selected

Q60 What are the main reasons you DON'T BUY HOT DRINKS? MARK ALL THAT APPLY

- ❑ To save money (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (alcohol, soft drinks) (3)
- ❑ Health reasons (4)
- ❑ The hot drinks you can currently buy don't appeal to me (5)
- ❑ I just don't like them (6)
- ❑ Other (please specify) (7) ____________________
- ❑ Don't know (8)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Alcoholic drinks - I buy less Is Selected

Q61 What are the main reasons you are BUYING LESS ALCOHOLIC DRINKS than two years ago? MARK ALL THAT APPLY

- ❑ To save money (1)
- ❑ My tastes have changed (2)
- ❑ I prefer buying other types of drinks now (hot drinks, soft drinks) (3)
- ❑ Health reasons (4)
- ❑ The alcoholic drinks you can currently buy don't appeal to me (5)
- ❑ I just drink less overall (6)
- ❑ Other (please specify) (7) ____________________
- ❑ Don't know (8)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Alcoholic drinks - I buy more Is Selected

Q62 What are the main reasons you are BUYING MORE ALCOHOLIC DRINKS than two years ago? MARK ALL THAT APPLY
- ❑ I am buying for more people in my household (1)
- ❑ Better special offers and promotions in the shops nowadays (2)
- ❑ They are an affordable treat (3)
- ❑ I just like drinking them (4)
- ❑ More choice and variety available (5)
- ❑ Lower prices (6)
- ❑ They help me get through the day (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)

Answer If Generally, would you say you buy more or less of these different drinks categories than you did two years ago?
Alcoholic drinks - I don't buy them Is Selected

Q63 What are the main reasons you DON'T BUY ALCOHOLIC DRINKS? MARK ALL THAT APPLY
- ❑ I don't drink alcohol (1)
- ❑ To save money (2)
- ❑ My tastes have changed (3)
- ❑ I prefer buying other types of drinks now (hot drinks, soft drinks) (4)
- ❑ Health reasons (5)
- ❑ The alcoholic drinks you can currently buy don't appeal to me (6)
- ❑ I just don't like them (7)
- ❑ Other (please specify) (8) ____________________
- ❑ Don't know (9)

Thank you for taking the time to complete the survey, your time and input is greatly appreciated.

Appendix 2 – Online Questionnaire in Qualtrics Design Mode

Demographics

Block Options

Q1

*

Are you Male or Female?

- Male
- Female

Q2

*

What is your age?

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+

Q3

*

Do you have responsibility as either a parent or legal guardian to any children under the age of 18 in your household?

- Yes
- No

Q4

*

How many people, including you, currently live in the household in which you live?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10+

Q5

*

What is your current employment status?

- Employed, working full-time
- Employed, working part-time
- Self-employed
- Not employed, looking for work
- Not employed, NOT looking for work
- Student
- Retired
- Disabled, not able to work
- Full time parent or carer

Q6

The next section looks at your attitudes towards soft drinks. A number of questions will be asked, please state how much you agree or disagree with the question.

Q9 *

I buy a wide range of soft drinks which I purchase on a regular basis

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q10 *

I prefer other types of drinks, such as hot drinks or alcohol to soft drinks

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q11 *

I dislike the sweetness of some soft drinks

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q12 *

The coverage I see and read in the media around sugar and sugar-sweetened drinks discourages me from buying soft drinks

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q13 *

Drunk in moderation, soft drinks are harmless

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q14 *

My long-term health is a concern for me, therefore I actively watch what I eat and drink

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q15 *

Advertising and marketing carried out by soft drinks brands appeals to me

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q16 *

The types of soft drinks which you can currently buy are appealing to me

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q17 *

Soft drinks which offer a health-related benefit are appealing to me

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q18 *

I would say I am loyal to the soft drinks brands which I buy

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Q19 *

I like to drink soft drinks from time to time as a treat

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
○	○	○	○	○

Consumption

Block Options

Q22

Next, think about when you purchase non-alcoholic drinks for personal consumption...

a) to consume at home

and

b) to consume whilst out of the home for example; when in work, out socialising, commuting, travelling, on the go etc…

Q23

Which, if any, of the following types of drinks do you BUY in a TYPICAL MONTH?
MARK ALL THAT APPLY

	Click to write Column 1	Click to write Column 2
	For in home consumption	For out of home consumption
Hot drinks (tea, coffee, hot chocolate)	☐	☐
Bottled Water (still, sparkling, flavoured)	☐	☐
Carbonated / fizzy drinks	☐	☐
Energy / sports drinks	☐	☐
Still flavoured drinks	☐	☐
Dilutes / Squash	☐	☐
Smoothies	☐	☐
Dairy drinks (milk, flavoured milk)	☐	☐
Protein drinks	☐	☐
None of these	☐	☐

Q24

Which, if any, of the following types of drinks do you DRINK in a TYPICAL MONTH?
MARK ALL THAT APPLY

	Click to write Column 1	Click to write Column 2
	For in home consumption	For out of home consumption
Hot drinks (tea, coffee, hot chocolate)	☐	☐
Bottled Water (still, sparkling, flavoured)	☐	☐
Carbonated / fizzy drinks	☐	☐
Energy / sports drinks	☐	☐
Still flavoured drinks	☐	☐
Dilutes / Squash	☐	☐
Smoothies	☐	☐
Dairy drinks (milk, flavoured milk)	☐	☐
Protein drinks	☐	☐
None of these	☐	☐

Q25

Thinking of the PAST 7 DAYS, which of the following types of drinks, if any, have you actually bought? MARK ALL THAT APPLY

	Click to write Column 1	Click to write Column 2
	For in home consumption	For out of home consumption
Hot drinks (tea, coffee, hot chocolate)	☐	☐
Bottled Water (still, sparkling, flavoured)	☐	☐
Carbonated / fizzy drinks	☐	☐
Energy / sports drinks	☐	☐
Still flavoured drinks	☐	☐
Dilutes / Squash	☐	☐
Smoothies	☐	☐
Dairy drinks (milk, flavoured milk)	☐	☐
Protein drinks	☐	☐
None of these	☐	☐

Q66

*

Next the focus is going to be specifically on soft drinks – soft drinks are categorised as bottled water, carbonated / fizzy drinks, still flavoured drinks, fruit juices, smoothies, dilutes / squash, protein and dairy drinks.

If you do not BUY or DRINK ANY TYPE of soft drink within a typical month, then please select the 'End Survey' option now.

If you do, please select the 'Continue Survey' option.

○ End Survey

○ Continue Survey

If **End Survey** is **Selected**, Then Skip To **End of Block** Skip Logic

Brand Purchasing

Block Options

Q26

In the following section lists of well-known soft drinks brands will be shown within different drinks categories. Please answer which you buy and how often.

Q27

Which of the following BOTTLED WATER BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Ballygowan							
Deep River Rock							
Evian							
Shop's Own Brand							
Volvic							
Other brand							

Q31

Which of the following CARBONATED / FIZZY DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
7UP							
7UP Free							
Club							
Coca Cola							
Coke Zero							
Diet Coke							
Fanta							
Finches							
Pepsi							
Pepsi Max							
Shop's Own Brand							
Sprite							
Other							

Q32

Which of the following ENERGY / SPORTS DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Energise Sport							
Gatorade							
Lucozade Energy							
Lucozade Sport							
Mountain Dew							
Powerade							
Red Bull							
Shop's Own Brand							
Other							

Q33

Which of the following STILL FLAVOURED DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Capri Sun							
Juicy Drench							
Oasis							
Ribena							
Robinsons Fruit Shoot							
Shop's Own Brand							
Other							

Q34

Which of the following FRUIT JUICE / SMOOTHIE DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Copella							
Innocent Juices							
Innocent Smoothies							
Naked Smoothies							
Tropicana							
Shop's Own Brand							
Other							

Q35

Which of the following DILUTES / SQUASH DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Kia Ora	◯	◯	◯	◯	◯	◯	◯
MiWadi	◯	◯	◯	◯	◯	◯	◯
Ribena	◯	◯	◯	◯	◯	◯	◯
Robinsons	◯	◯	◯	◯	◯	◯	◯
Shop's Own Brand	◯	◯	◯	◯	◯	◯	◯
Other	◯	◯	◯	◯	◯	◯	◯

Q36

Which of the following DAIRY DRINKS BRANDS do you buy and how often?
MARK ALL THAT APPLY

	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Actimel	◯	◯	◯	◯	◯	◯	◯
Avonmore Milk	◯	◯	◯	◯	◯	◯	◯
Benecol yogurt drink	◯	◯	◯	◯	◯	◯	◯
Muller Vitality	◯	◯	◯	◯	◯	◯	◯
Yakult	◯	◯	◯	◯	◯	◯	◯
Yoplait	◯	◯	◯	◯	◯	◯	◯
Shop's Own Brand	◯	◯	◯	◯	◯	◯	◯
Other	◯	◯	◯	◯	◯	◯	◯

Loyalty

Block Options

Q39

Next think about when you are actually buying soft drinks in a supermarket, convenience store or other type of shop and again think about the different soft drinks brands you buy, in the different types of categories.

Q40

If the BOTTLED WATER brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Bottled water brands	◯	◯	◯	◯	◯

Q60

If the CARBONATED / FIZZY DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Carbonated / fizzy drinks brands	◯	◯	◯	◯	◯

Q61

If the ENERGY / SPORTS DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Energy / Sports drinks brands	◯	◯	◯	◯	◯

Q62

If the STILL FLAVOURED DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Still flavoured drinks brands	◯	◯	◯	◯	◯

Q63

If the FRUIT JUICE brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Fruit juice brands	◯	◯	◯	◯	◯

Q64

If the DILUTES / SQUASH brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Dilutes / Squash brands					

Q65

If the SMOOTHIE brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Smoothie brands					

Q66

If the DAIRY DRINKS brand or brands you normally buy were not available to purchase, WHAT WOULD YOU BUY INSTEAD?

	Nothing	A similar brand in the same category	Shop's own brand within the same category	A favourite brand in a different soft drink category	I don't know / I don't buy them
Dairy drinks brands					

Q41

If an alternative BOTTLED WATER brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Bottled water brands						

Q68

If an alternative CARBONATED / FIZZY DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Carbonated / fizzy drinks brands						

Q69

If an alternative ENERGY / SPORTS DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Energy / sports drinks brands						

Q70

If an alternative STILL FLAVOURED DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Still flavoured drinks brands						

Q71

If an alternative FRUIT JUICE brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Fruit juice brands						

Q72

If an alternative DILUTES / SQUASH brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Dilutes / Squash brands						

Q73

If an alternative SMOOTHIE brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Smoothie brands						

Q74

If an alternative DAIRY DRINKS brand to the brand or brands you normally buy was ON OFFER FOR A BETTER PRICE OR PROMOTION, how likely would you be to buy it?

	Very Likely	Likely	Undecided	Unlikely	Very Unlikely	× I don't know / I don't buy them
Dairy drinks brands						

Q42

Thinking about the LAST 7 DAYS, roughly HOW MANY SOFT DRINKS HAVE YOU PURCHASED for your own consumption or for family / friends?

	Click to write Column 1 For Myself	Click to write Column 2 For Family / Friends
0	☐	☐
1 - 3	☐	☐
4 - 6	☐	☐
6 - 9	☐	☐
10 or more	☐	☐
I don't know	☐	☐

Changing Habits

Block Options

Q43

This is the last section...

Finally, can you think about how your drinking habits have changed over time.

Q44

Generally, would you say you buy more or less of these different drinks categories than you did two years ago?

	I don't buy them	I buy less	I buy about the same	I buy more
Carbonated / fizzy drinks	○	○	○	○
Bottled Water (still, sparkling, flavoured)	○	○	○	○
Fruit juices / smoothies	○	○	○	○
Dilutes / Squash	○	○	○	○
Hot drinks	○	○	○	○
Alcoholic drinks	○	○	○	○

Q45

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Carbonated / fizzy drinks - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS CARBONATED / FIZZY DRINKS than two years ago? MARK ALL THAT APPLY

- ☐ To save money on household shopping bills
- ☐ My tastes have changed
- ☐ I prefer buying other types of drinks now (alcohol, hot drinks)
- ☐ Health reasons
- ☐ Sugar content in some carbonated / fizzy drinks
- ☐ The sugar substitutes used in diet / zero sugar drinks
- ☐ The fizzy drinks you can currently buy don't appeal to me
- ☐ I just drink less overall
- ☐ Other (please specify)
- ☐ Don't know

Q46

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Carbonated / fizzy drinks - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE CARBONATED / FIZZY DRINKS than two years ago? MARK ALL THAT APPLY

- ☐ I am buying for more people in my household
- ☐ Better special offers and promotions in the shops nowadays
- ☐ I just like drinking them
- ☐ Lower prices
- ☐ More choice and variety available
- ☐ Better diet / zero sugar options
- ☐ Shops own brand available
- ☐ Other (please specify)
- ☐ Don't know
- ☐ They are an affordable treat

Q48

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Carbonated / fizzy drinks - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY CARBONATED / FIZZY DRINKS?
MARK ALL THAT APPLY

- To save money on household shopping bills
- My tastes have changed
- I prefer buying other types of drinks now (alcohol, hot drinks)
- Health reasons
- Sugar content in carbonated / fizzy drinks
- The sugar substitutes used in diet / zero sugar drinks
- The fizzy drinks you can currently buy don't appeal to me
- Other (please specify)
- Don't know
- I just don't like them

Q49

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Bottled Water (still, sparkling, flavoured) - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS BOTTLED WATER than two years ago?
MARK ALL THAT APPLY

- To save money on household shopping bills
- I drink more tap water
- I prefer buying other types of drinks now (alcohol, hot drinks)
- The water drinks you can currently buy don't appeal to me
- I just drink less overall
- Other (please specify)
- Don't know

Q50

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Bottled Water (still, sparkling, flavoured) - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE BOTTLED WATER than two years ago?
MARK ALL THAT APPLY

- I am buying for more people in my household
- Better special offers and promotions in the shops nowadays
- Health reasons
- I just like drinking them
- Lower prices
- More choice and variety available
- Bigger packs available
- Shops own brands are available
- Other (please specify)
- Don't know

Q51

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Bottled Water (still, sparkling, flavoured) - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY BOTTLED WATER?
MARK ALL THAT APPLY

- To save money on household shopping bills
- I drink more tap water
- I prefer buying other types of drinks now (alcohol, hot drinks)
- The water drinks you can currently buy don't appeal to me
- I just don't like them
- Other (please specify)
- Don't know

Q52

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Fruit juices / smoothies - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS JUICE DRINKS / SMOOTHIES than two years ago? MARK ALL THAT APPLY

- To save money on household shopping bills
- My tastes have changed
- I prefer buying other types of drinks now (alcohol, hot drinks)
- Health reasons
- Sugar content in these types of drinks
- The juice drinks / smoothies you can currently buy don't appeal to me
- I just drink less overall
- They are too expensive
- Other (please specify)
- Don't know

Q53

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Fruit juices / smoothies - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE JUICE DRINKS / SMOOTHIES than two years ago? MARK ALL THAT APPLY

- I am buying for more people in my household
- Better special offers and promotions in the shops nowadays
- I just like drinking them
- Lower prices
- More choice and variety available
- Shops own brands are available
- They are a healthier option compared to other soft drinks
- Other (please specify)
- Don't know
- They are an affordable treat

Q54

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Fruit juices / smoothies - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY JUICE DRINKS / SMOOTHIES? MARK ALL THAT APPLY

- To save money on household shopping bills
- My tastes have changed
- I prefer buying other types of drinks now (alcohol, hot drinks)
- Health reasons
- Sugar content in these types of drinks
- The juice drinks / smoothies you can currently buy don't appeal to me
- I just don't like them
- They are too expensive
- Other (please specify)
- Don't know

Q55

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Dilutes / Squash - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS DILUTES / SQUASH DRINKS than two years ago? MARK ALL THAT APPLY

- To save money on household shopping bills
- My tastes have changed
- I prefer buying other types of drinks now (alcohol, hot drinks)
- Health reasons
- Sugar content in these drinks
- The dilutes / squash drinks you can currently buy don't appeal to me
- I just drink less overall
- Other (please specify)
- Don't know

Q56

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Dilutes / Squash - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE DILUTES / SQUASH DRINKS than two years ago? MARK ALL THAT APPLY

- ☐ I am buying for more people in my household
- ☐ Better special offers and promotions in the shops nowadays
- ☐ I just like drinking them
- ☐ Lower prices
- ☐ More choice and variety available
- ☐ Better low sugar options
- ☐ Shops own brands are available
- ☐ Other (please specify)
- ☐ Don't know
- ☐ They are an affordable treat

Q57

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Dilutes / Squash - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY DILUTES / SQUASH DRINKS? MARK ALL THAT APPLY

- ☐ To save money on household shopping bills
- ☐ My tastes have changed
- ☐ I prefer buying other types of drinks now (alcohol, hot drinks)
- ☐ Health reasons
- ☐ Sugar content in these drinks
- ☐ The dilutes / squash drinks you can currently buy don't appeal to me
- ☐ I just don't like them
- ☐ Other (please specify)
- ☐ Don't know

Q58

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Hot drinks - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS HOT DRINKS than two years ago? MARK ALL THAT APPLY

- ☐ To save money
- ☐ My tastes have changed
- ☐ I prefer buying other types of drinks now (alcohol, soft drinks)
- ☐ Health reasons
- ☐ The hot drinks you can currently buy don't appeal to me
- ☐ I just drink less overall
- ☐ Other (please specify)
- ☐ Don't know

Q59

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Hot drinks - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE HOT DRINKS than two years ago? MARK ALL THAT APPLY

- ☐ I am buying for more people in my household
- ☐ Better special offers and promotions in the shops nowadays
- ☐ They are an affordable treat
- ☐ I just like drinking them
- ☐ More choice and variety available
- ☐ Lower prices
- ☐ They help me get through the day
- ☐ Other (please specify)
- ☐ Don't know

Q60

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Hot drinks - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY HOT DRINKS?
MARK ALL THAT APPLY

- To save money
- My tastes have changed
- I prefer buying other types of drinks now (alcohol, soft drinks)
- Health reasons
- The hot drinks you can currently buy don't appeal to me
- I just don't like them
- Other (please specify)
- Don't know

Q61

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Alcoholic drinks - I buy less Is Selected Edit

What are the main reasons you are BUYING LESS ALCOHOLIC DRINKS than two years ago?
MARK ALL THAT APPLY

- To save money
- My tastes have changed
- I prefer buying other types of drinks now (hot drinks, soft drinks)
- Health reasons
- The alcoholic drinks you can currently buy don't appeal to me
- I just drink less overall
- Other (please specify)
- Don't know

Q62

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Alcoholic drinks - I buy more Is Selected Edit

What are the main reasons you are BUYING MORE ALCOHOLIC DRINKS than two years ago?
MARK ALL THAT APPLY

- I am buying for more people in my household
- Better special offers and promotions in the shops nowadays
- They are an affordable treat
- I just like drinking them
- More choice and variety available
- Lower prices
- They help me get through the day
- Other (please specify)
- Don't know

Q63

Display This Question:
If Generally, would you say you buy more or less of these different drinks categories than you did... Alcoholic drinks - I don't buy them Is Selected Edit

What are the main reasons you DON'T BUY ALCOHOLIC DRINKS?
MARK ALL THAT APPLY

- I don't drink alcohol
- To save money
- My tastes have changed
- I prefer buying other types of drinks now (hot drinks, soft drinks)
- Health reasons
- The alcoholic drinks you can currently buy don't appeal to me
- I just don't like them
- Other (please specify)
- Don't know

Thank You

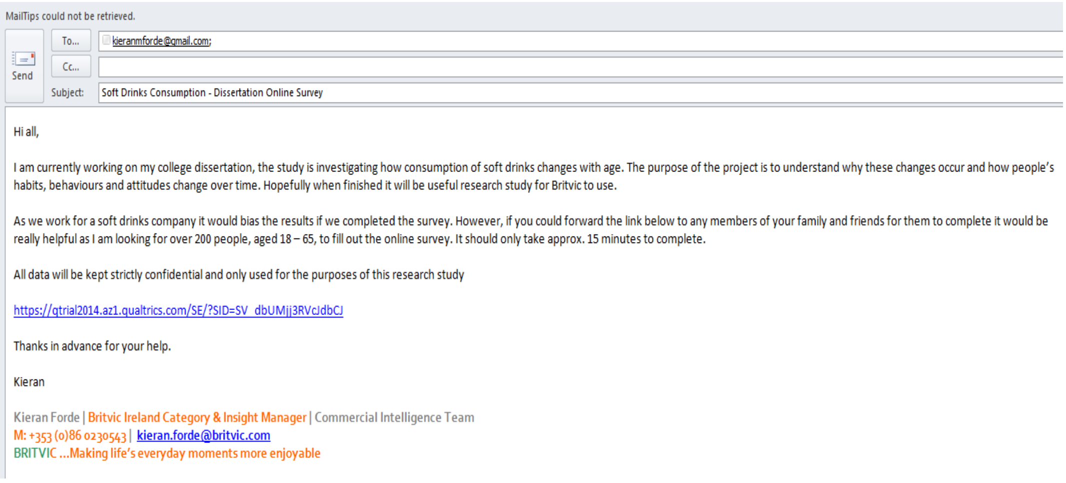
Block Options

Q65

Thank you for taking the time to complete the survey,
your time and input is greatly appreciated.

Appendix 3

Appendix 3.1 – Sample Email to Snowball Sample



MailTips could not be retrieved.

Send

To... kieranmforde@gmail.com;

Cc...

Subject: Soft Drinks Consumption - Dissertation Online Survey

Hi all,

I am currently working on my college dissertation, the study is investigating how consumption of soft drinks changes with age. The purpose of the project is to understand why these changes occur and how people's habits, behaviours and attitudes change over time. Hopefully when finished it will be useful research study for Britvic to use.

As we work for a soft drinks company it would bias the results if we completed the survey. However, if you could forward the link below to any members of your family and friends for them to complete it would be really helpful as I am looking for over 200 people, aged 18 – 65, to fill out the online survey. It should only take approx. 15 minutes to complete.

All data will be kept strictly confidential and only used for the purposes of this research study

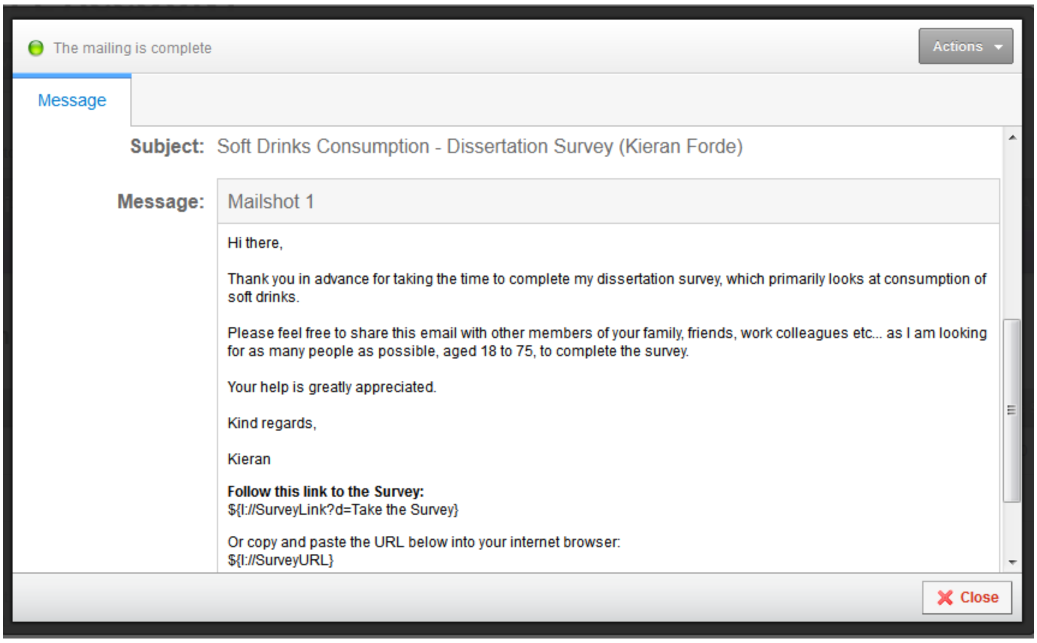
https://qtrial2014.az1.qualtrics.com/SE/?SID=SV_dbUMjj3RVcJdbCJ

Thanks in advance for your help.

Kieran

Kieran Forde | Britvic Ireland Category & Insight Manager | Commercial Intelligence Team
M: +353 (0)86 0230543 | kieran.forde@britvic.com
BRITVIC ...Making life's everyday moments more enjoyable

Appendix 3.2 – Sample Email to Self-Selection Sample



The mailing is complete

Actions

Message

Subject: Soft Drinks Consumption - Dissertation Survey (Kieran Forde)

Message: Mailshot 1

Hi there,

Thank you in advance for taking the time to complete my dissertation survey, which primarily looks at consumption of soft drinks.

Please feel free to share this email with other members of your family, friends, work colleagues etc... as I am looking for as many people as possible, aged 18 to 75, to complete the survey.

Your help is greatly appreciated.

Kind regards,

Kieran

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:
${l://SurveyURL}

Close

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