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CURION INTELLIGENCE REPORTS

2025

UNDERSTANDING CONSUMER EXPECTATIONS OF ‘BETTER FOR YOU’ PRODUCTS

FUNCTIONAL SODA







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OVERVIEW

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Background

PRODUCT PERFORMANCE

When research teams are testing for product performance, there is often a desire to know if a product is "good enough" based on acceptability scores.

While this is very category-dependent, there is a hypothesis that better-for-you (BFY) products score lower.

Companies often think these lower scores are less concerning and assume consumers are willing to trade-off liking for the health benefits.

What if this assumption is not true, and consumers still expect a similar product experience? How would that change how we approach product testing?

The functional soda category is one of the fastest growing market segments with a projected 8.2% CAGR 2024-2030[1] and is an ideal product to investigate these questions.



Objectives

01 Understand reasons for category entry and/or barriers to entry as well as key purchase drivers

02 Determine how in-store shopping experience for functional soda impacts adoption of the functional soda category

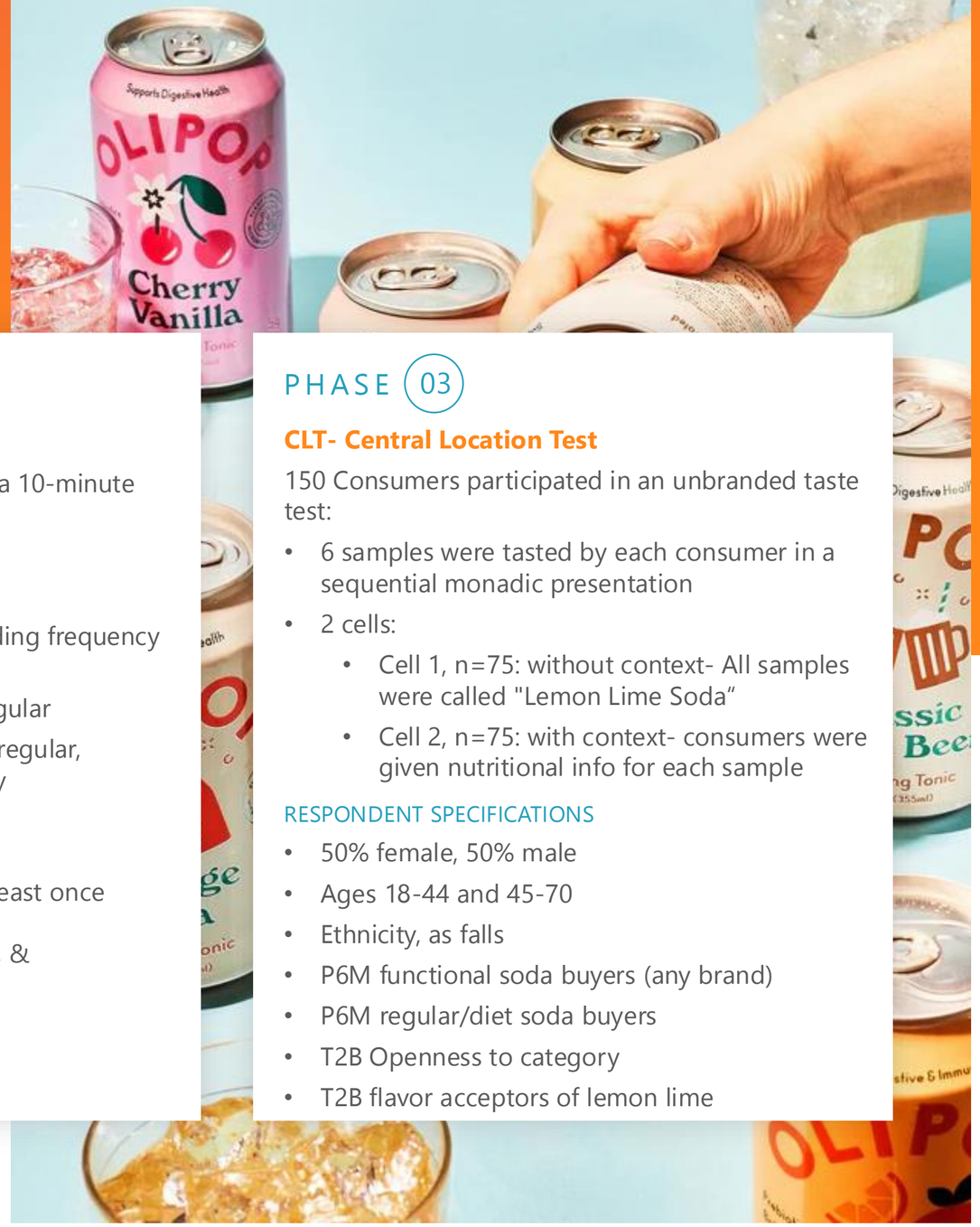
03 Understand consumer expectations for functional sodas

04 Understand how Curion Score changes with and without context for BFY products

05 Understand how efficacy is perceived across functional sodas



Methodology



PHASE 01

IN-STORE SHOPPING EXPERIENCE MOBILE MISSION (QUAL)

- N=24 consumers visited a grocery store to shop for functional sodas within a three-day period.
- Using an online board, consumers documented their experience while shopping for a functional soda.
- Consumers were assigned a grocery store at which they don't normally shop (Whole Foods, a big-box store, or a local grocery store in their area). This allowed for an assessment of their perceptions and behaviors in a new shopping environment.
- The shopping journey took ~60 min, including responses on the online board platform.

RESPONDENT SPECIFICATIONS

- U.S. consumers, ages 18-65
- Low to Non-Users of Functional soda
  - Low-Users consume once every 4-6 months or less
- At least joint shopping responsibility

PHASE 02

ONLINE SURVEY

304 U.S. consumers participated in a 10-minute questionnaire focusing on:

- Stated reason for category entry
- Top purchase drivers
- Functional Soda use details including frequency of use, occasions, who drinks, etc.
- Perceptions of healthy soda vs regular
- Expectations for healthy soda vs. regular, including expectations for efficacy

RESPONDENT SPECIFICATIONS

- U.S. consumers, ages 18-65
- Current functional soda users (at least once a week)
- Click-in balancing on: age, gender, & region

PHASE 03

CLT- Central Location Test

150 Consumers participated in an unbranded taste test:

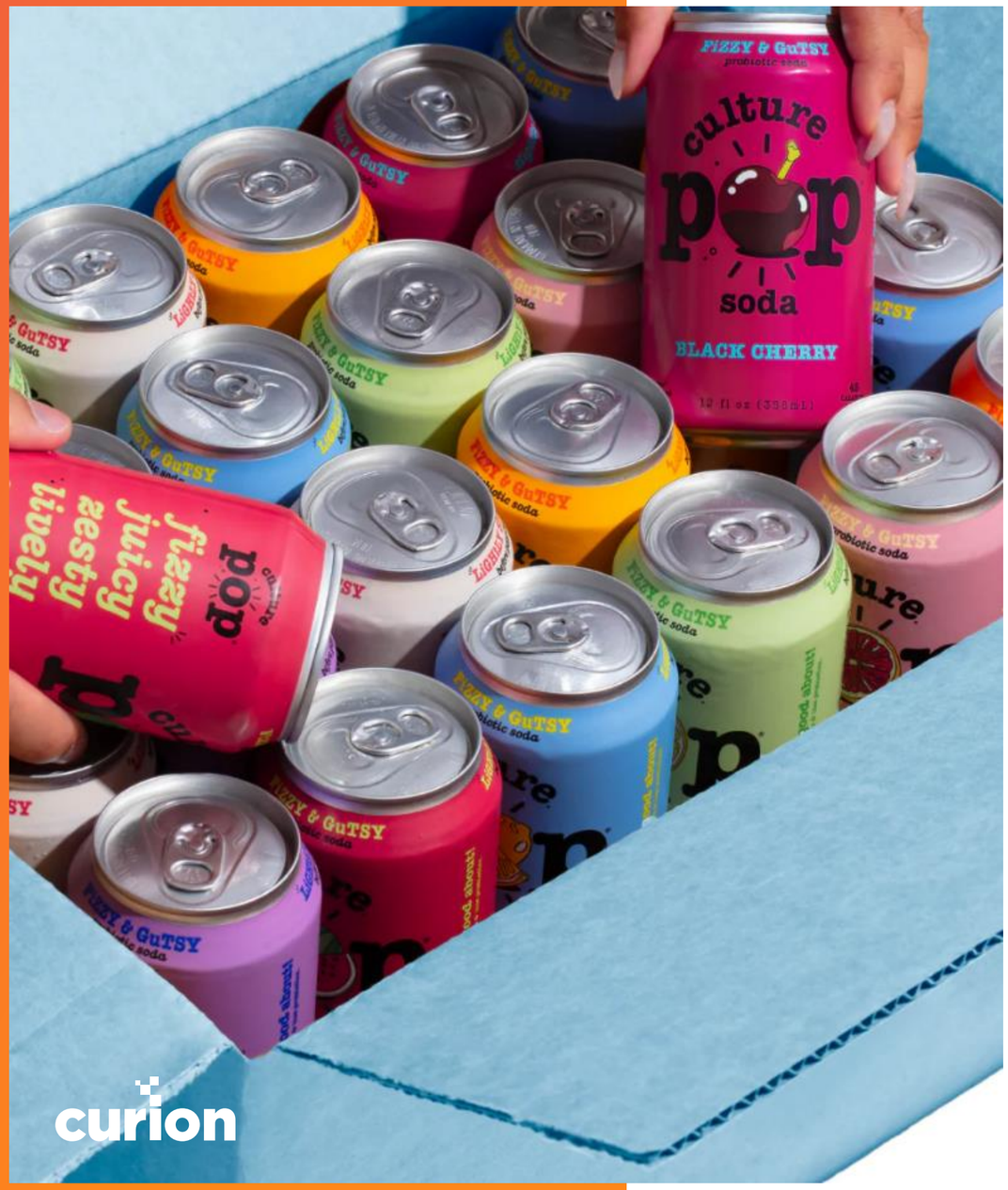
- 6 samples were tasted by each consumer in a sequential monadic presentation
- 2 cells:
  - Cell 1, n=75: without context- All samples were called "Lemon Lime Soda"
  - Cell 2, n=75: with context- consumers were given nutritional info for each sample

RESPONDENT SPECIFICATIONS

- 50% female, 50% male
- Ages 18-44 and 45-70
- Ethnicity, as falls
- P6M functional soda buyers (any brand)
- P6M regular/diet soda buyers
- T2B Openness to category
- T2B flavor acceptors of lemon lime

EXECUTIVE SUMMARY

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Key Themes

Health Benefits Must Be Clear & Credible

Specific benefits are poorly communicated, hurting awareness and understanding

Taste Is a Barrier & Opportunity

Consumers don’t expect functional sodas to taste good, but expectations are exceeded once tried

Price & Availability Are Consistent Barriers

Functional sodas are seen as expensive and hard to find

Awareness & Understanding Are Low

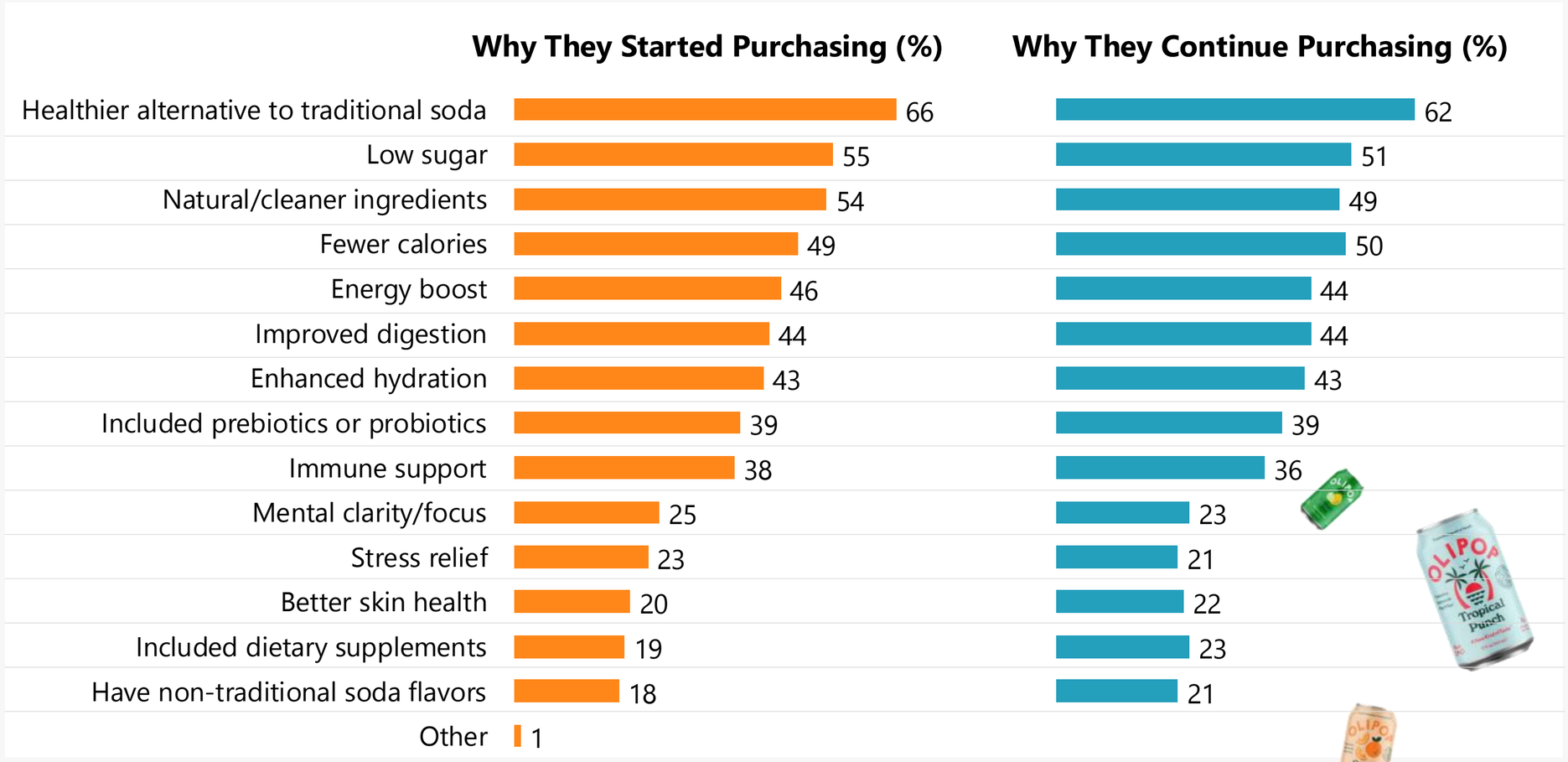
Many are unaware of functional sodas or don’t understand the category

Context & Communication Boost Appeal

Purchase Intent grows when nutritional benefits are made clear

Health Benefits Must Be Clear & Credible

- **Health benefits are the key appeal** of functional sodas—but often poorly communicated.
- Consumers, especially non-users, are unsure of what specific benefits these drinks offer (e.g., digestive health, low sugar).
- Clear labeling (e.g., "supports gut health") helps convey value and trust.





Taste Is a Barrier & Opportunity

- There's a **perception that healthy won't taste great**, but once people try functional sodas, they're pleasantly surprised.
- Functional soda users are generally **satisfied with the taste** and many even believe they taste as good as traditional sodas.

EXPECTED TASTING EXPERIENCE

Consumers expect functional sodas to provide a bubbly, fizzy, and sweet drinking experience like regular soda, but with a slightly different taste.

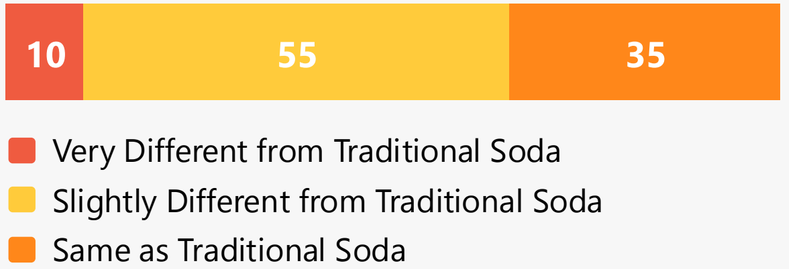
- Less sweet than other soft drinks / sodas
- Have "herby" notes
- Have a lingering aftertaste
- Chalky (from added vitamins and minerals)
- Contain an artificial sweetener essence
- Have a medicinal taste
- Contain natural flavors, such as botanicals, fruit juices, or other flavors that occur naturally
- Refreshing and thirst quenching

"I imagine it would be bubbly and fizzy like a regular soda but maybe taste a bit different. It might taste like it has a little more juice or a hint of herbs, kind of like medicine, but not that bad."

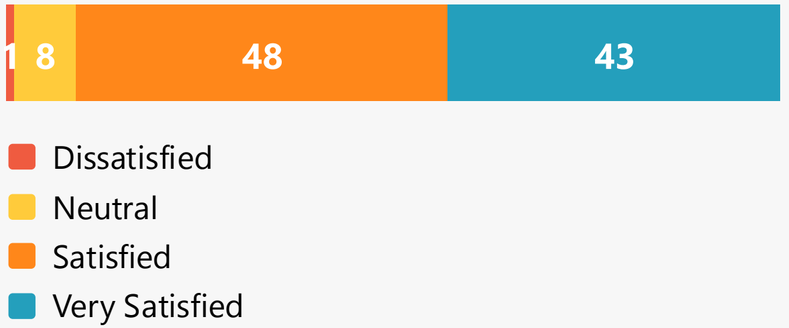
"[I'd expect it to] taste odd or have a lingering fake sugar/diet soda like flavor. I don't want to feel like I'm drinking a health food. My first impression of a functional soda, is that it may have the same "off" taste."

Functional soda users expect them to taste the same or slightly different than traditional sodas. Overall, they are satisfied with the taste.

Taste Expectations (%)



Functional Soda Taste Satisfaction (%)



Taste Is a Barrier & Opportunity

Slight taste differences between functional sodas and traditional sodas are acceptable—but big deviations hurt purchase intent.

"It was better than I was expecting in terms of tasting 'too healthy'."

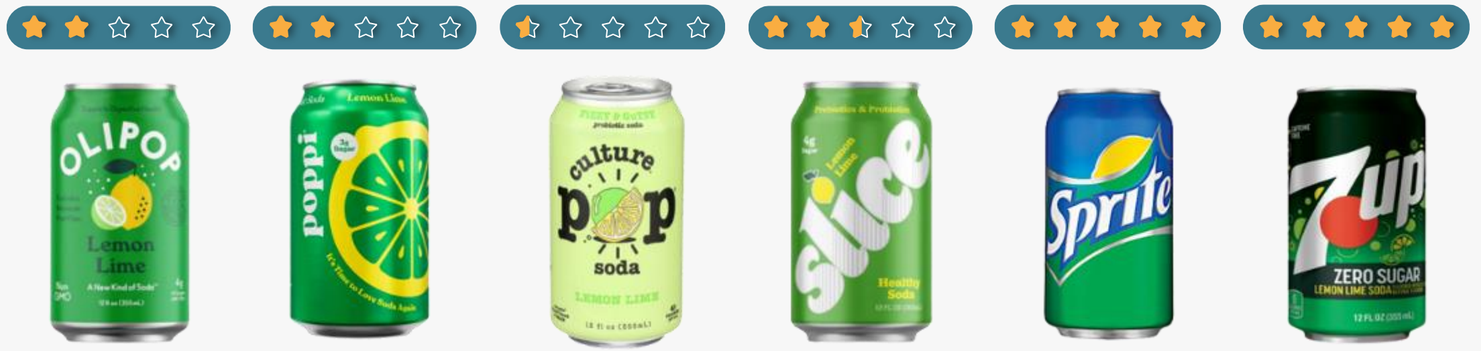
"Well, it definitely exceeded my expectations, I wasn't expecting it to taste as same as a regular soda would."

"I figured it'd taste like medicine because of the ingredients, but it was smooth, and the aftertaste was awesome."

CELL 2: WITH CONTEXT

	OLIPOP (A)	poppi (B)	culture pop soda (C)	slice (D)	Sprite (E)	7UP ZERO SUGAR LEMON LIME SODA (F)
Overall Liking (9 pt. mean)	5.5 C	5.3 C	4.0	5.9 C	7.0 ABCD	6.5 ABC
Would Purchase (5 pt. T2B%)	40 C	36 C	11	46 C	55 BC	51 BC
Better Than Expected (5 pt. T2B%)	37 C	30 C	13	40 C	43 C	49 BC

CURION SCORE



Price & Availability Are Consistent Barriers

- Functional sodas are seen as **too expensive** for many consumers, limiting trial and repeat purchases.
- **Placement in-store and poor signage** make them hard to find, especially for new users.

About 2/3 of functional soda users say there are barriers to buying more – high prices and availability/findability in the store are the biggest barriers.



OBSTACLES IN FINDING

Placement
Unconventional placement, away from the soda section, make finding functional sodas difficult.

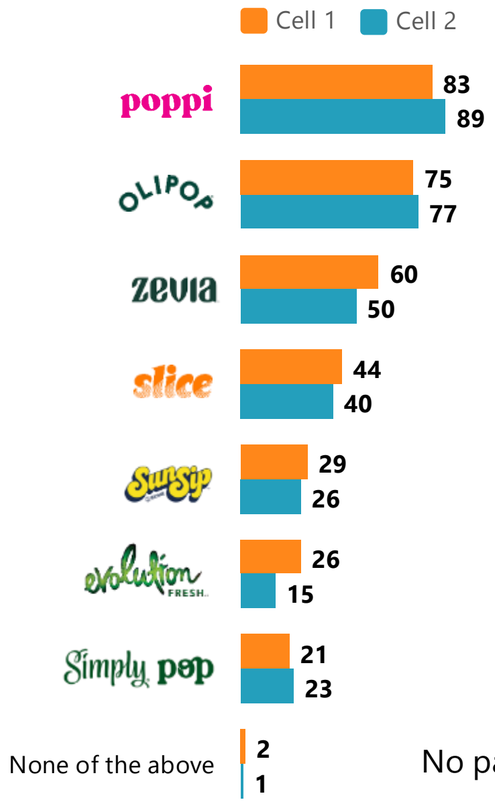
Inconsistent signage
Some stores have clear signage, while others lack it altogether.

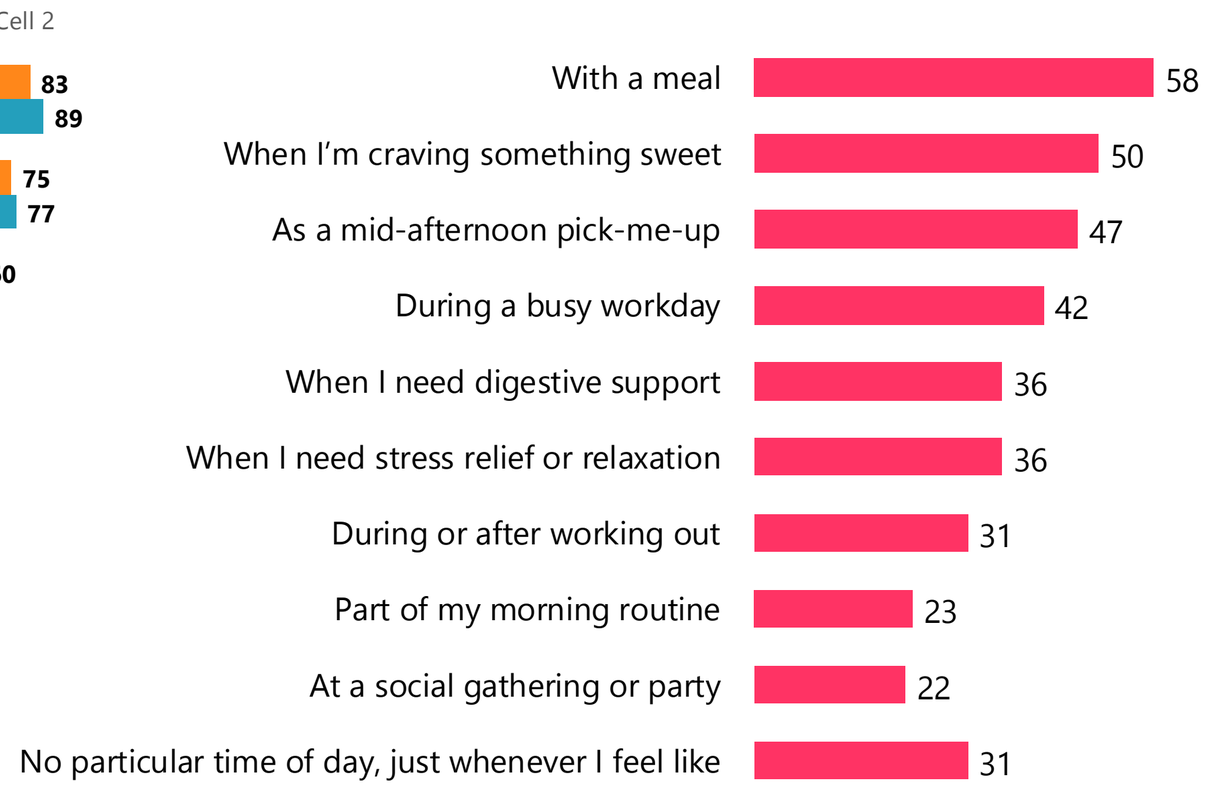
"The actual section with the functional sodas was difficult to find, at least with regard to the regular sodas… it was closer to the sparkling waters."

"I went down the soft drink aisle first… Now I am two aisles over, which is juice and drink mixes, not where I would have expected to find it."

Awareness & Understanding Are Low

- Non-users often aren't aware of the category or don't know what makes a soda "functional."
- Even among the aware, **brand recognition is low**, and there's confusion about when to drink them (meals? post-workout?).





"I've especially heard of the brands Poppi and Olipop. I feel like I see a lot about it on social media, like influencers are just like normal people talking about how much they love these drinks."

"[I don't know much] overall info about the brands or reviews. I haven't seen many ads or people talking about any certain brands."

Context & Communication Boost Appeal

- When consumers are given context (nutrition, ingredients), they're more open to buying functional sodas.
- Context levels the playing field with traditional soda in terms of **purchase intent**.

The benefits of Olipop, Poppi, Slice and 7UP Zero are delighters for more than half the consumers, while "nutrition" in Sprite is a large detractor in purchase, with 60% of consumers saying they are less likely to purchase.

Purchase intent of Culture Pop remains low and context has a minimal effect.

Effect of nutritional information on Purchase Intent (%)	CELL 2: WITH CONTEXT (N=84)					
	OLIPOP	poppi	culture pop soda	slice	Sprite	7UP ZERO SUGAR LEMON LIME SODA
	(A)	**(B)**	**(C)**	**(D)**	**(E)**	**(F)**
Yes, I am **less** likely to purchase it now	11	11	14	17	60 ABCDF	14
Yes, I am **more** likely to purchase it now	56 CE	52 CE	29	55 CE	21	58 CE
It had **no effect**	33 E	37 E	57 ABDEF	29	19	27













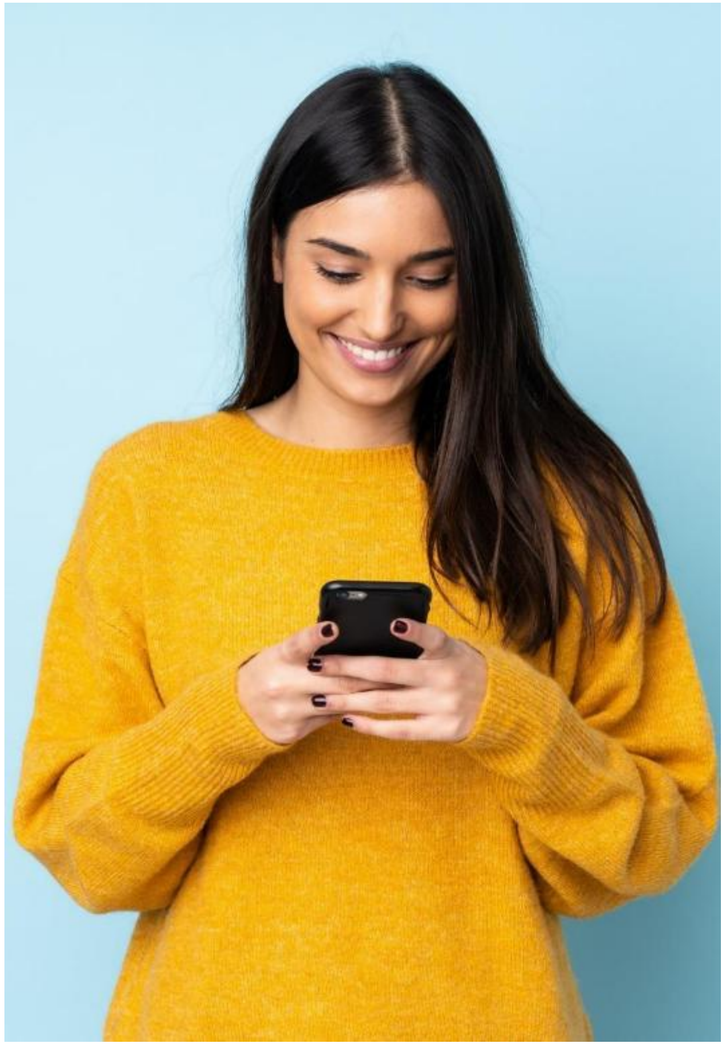
THE DETAILS

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In-store Shopping Experience
Mobile Mission (Qualitative)



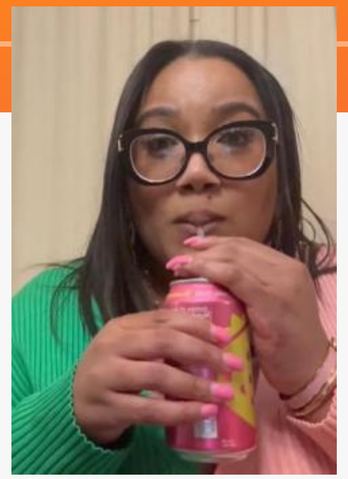
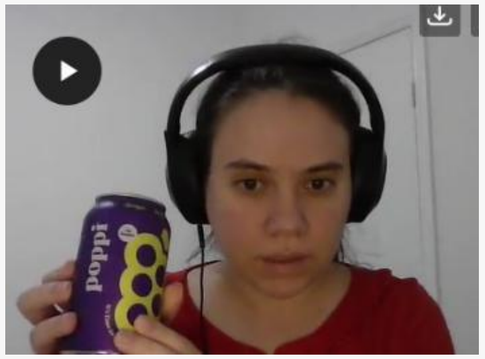


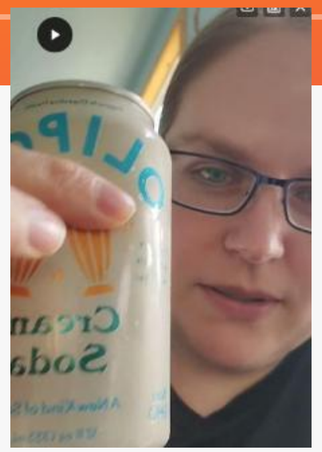






Meet Our Respondents

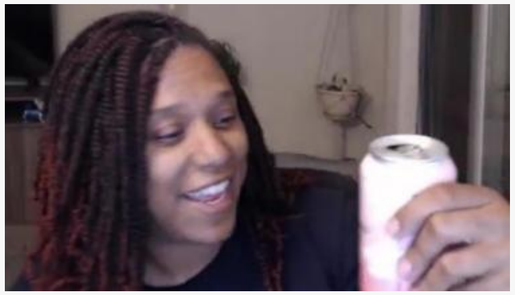












Consumer Journey

1 DISCOVERY OR TRIGGERS

DRIVERS
- Recommendation from others
- In-store placement (near items consumers are shopping for)
- Marketing exposure

BARRIERS
- Lack of familiarity with the category

2 IN-STORE NAVIGATION

DRIVERS
- Clear signage
- Prominent shelf-space
- Distinct / descriptive packaging
- In-store promotion
- Placement near traditional sodas

BARRIERS
- Confusing in-store placement (e.g., near produce)
- No / low availability
- No signage

3 PRODUCT CONSIDERATION

DRIVERS
- An affordable price
- Colorful packaging
- Clear health claims
- Recognizable / recommended brand
- Traditional soda flavors
- Non-traditional flavors

BARRIERS
- A high price
- Overly scientific language
- Skepticism of health claims
- Lack of differentiation among brands
- Taste concerns
- High sugar content

4 TASTING EXPERIENCE

DRIVERS
- Traditional soda flavors that taste the same as regular soda
- Just as sweet as traditional soda
- Carbonation level is like a regular soda
- Balanced flavors
- Refreshing
- Fulfills a craving

BARRIERS
- A less “intense” flavor
- Artificial sweetener taste
- Mismatch to taste of regular soda
- Too sweet
- Not sweet enough
- Unlikable aftertaste

5 FUTURE INTEREST

DRIVERS
- Healthier alternative to soda
- Single serve / multipack options
- A wide variety of flavors
- A wide variety of brands
- Applicable health benefits

BARRIERS
- A high price
- Skepticism of health benefits
- Unenjoyable taste
- Preference for taste of traditional soda











Current Perceptions & Behaviors

Limited familiarity with the category leaves the benefits and ideal use of functional sodas unclear.

- Knowledge of what a functional soda is or does is limited - even among those aware of the category.
- A notable portion of consumers aren't aware of functional sodas.
- Among those that are familiar with functional sodas, they recognize they include added benefits but are unsure of the specifics of what makes them functional, often making assumptions.



PERCEIVED BENEFITS

- Probiotics
- Prebiotics
- Vitamins and minerals
- Improved gut health
- Improved immunity
- Weight management
- Increased energy levels
- Less sugar than traditional sodas
- Mental clarity
- Sleep support
- Hydration

"I would assume that functional sodas provide some sort of added health benefit (in comparison to normal soda)... This may be supporting gut health or providing daily vitamins and minerals."

"A functional soda is a healthier soda that adds some benefits like probiotics for gut health or brain health."



USAGE OCCASIONS

- A midday pick-me-up
- Before / after physical activities
- A replacement for regular soda
- As a post-dinner treat
- Between meals
- Hydration throughout the day
- With a meal

While Poppi and Olipop lead in familiarity, overall brand awareness is low.

BRAND FAMILIARITY

- Consumers are most familiar with Poppi, while Olipop is a close second.
- Culture Pop is rarely mentioned, while Slice is only mentioned once.
- Some consumers mistake other low / no-sugar beverages as functional sodas.
- Some consumers note they are not familiar with any functional soda brands.

"I've especially heard of the brands Poppi and Olipop. I feel like I see a lot about it on social media, like influencers are just like normal people talking about how much they love these drinks."

"[I don't know much] overall info about the brands or reviews. I haven't seen many ads or people talking about any certain brands."









Consumers expect functional sodas to be fizzy and refreshing but worry the health benefits may affect taste. They expect them to be sold alongside traditional sodas.

EXPECTED TASTING EXPERIENCE

Consumers expect functional sodas to provide a bubbly, fizzy, and sweet drinking experience like regular soda, but with a slightly different taste.

- Less sweet than other soft drinks / sodas
- Have “herby” notes
- Have a lingering aftertaste
- Chalky (from added vitamins and minerals)
- Contain an artificial sweetener essence
- Have a medicinal taste
- Contain natural flavors, such as botanicals, fruit juices, or other flavors that occur naturally
- Refreshing and thirst quenching

“I imagine it would be bubbly and fizzy like a regular soda but maybe taste a bit different. It might taste like it has a little more juice or a hint of herbs, kind of like medicine, but not that bad.”

“[I’d expect it to] taste odd or have a lingering fake sugar/diet soda like flavor. I don't want to feel like I'm drinking a health food. My first impression of a functional soda, is that it may have the same "off" taste.”



EXPECTED IN-STORE LOCATION

- The soda aisle (most common)
- Produce section near kombucha
- Beverage aisle near sparkling water
- Supplement aisle
- Energy drink section
- At the checkout counter
- A specialized health aisle



The main barriers to entry include in-store placement, taste, price, uncertainty about use, and skepticism of benefits.

01 **IN-STORE PLACEMENT**
Many consumers haven't yet encountered the products in store. Those that have, have found them in unexpected locations instead of near the traditional soda.

02 **TASTE CONCERNS**
Many consumers worry that functional sodas may lack an appealing taste, believing health benefits may compromise flavor.

03 **PRICING CONCERNS**
Some consumers note that a higher price compared to regular sodas has deterred them from trying these products more often.

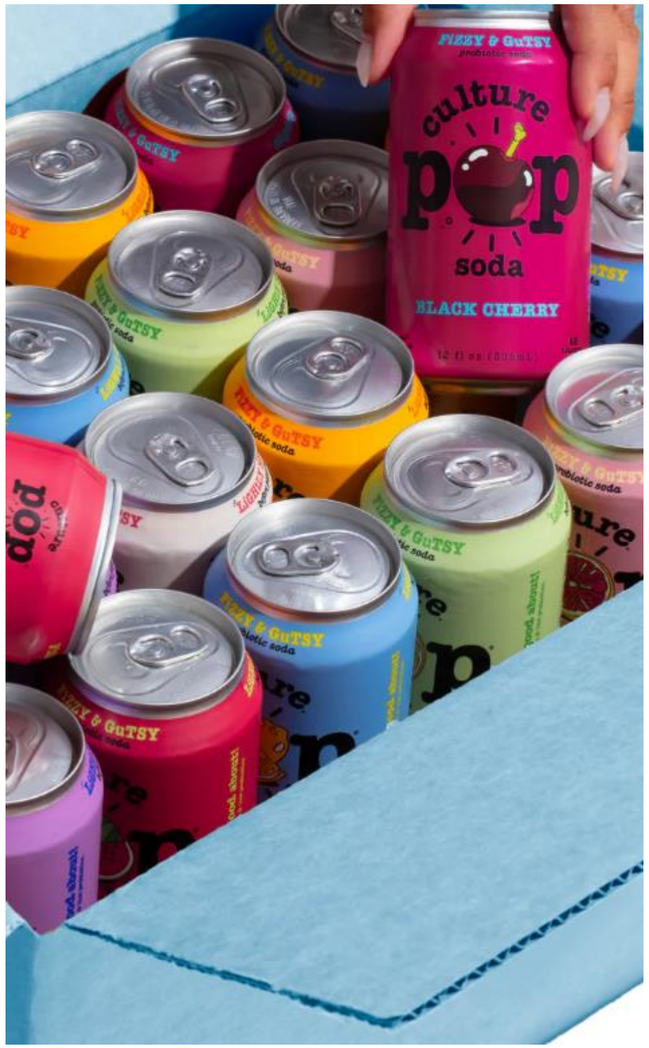
04 **UNCERTAINTY ABOUT INTENDED USE**
Consumers mention that they aren't sure when or how they should be using them.

05 **SKEPTICISM ABOUT BENEFITS**
For some, there is uncertainty about the specific benefits and whether they will experience these benefits. Some others are unaware that they offer benefits at all.



"I've tried them in the past. I don't drink them more often because the taste isn't quite as good as regular soda."

"The drawbacks would be that it might not taste as good as a regular soda would or that it might be more expensive considering that it's a healthier alternative than a regular soda."









Shopping Experience

Consumers often struggle to find the functional soda section, requiring more effort than expected to locate it.

LOCATING FUNCTIONAL SODAS

Consumers typically find the functional soda section on their own, though it requires searching in unexpected locations.

Consumers most commonly go to the traditional soda aisle first.

Consumers mainly rely on branding, on-package language, and brand familiarity to identify the functional soda section and less on in-store signage.

As a last resort, some will ask a store associate to help them find the functional soda section.

Hover over image for video



OBSTACLES IN FINDING

Placement
Unconventional placement, away from the soda section, make finding functional sodas difficult.

Inconsistent signage
Some stores have clear signage, while others lack it altogether.

"The actual section with the functional sodas was difficult to find, at least with regard to the regular sodas… it was closer to the sparkling waters."

"I went down the soft drink aisle first… Now I am two aisles over, which is juice and drink mixes, not where I would have expected to find it."

In-Store Shopping Review (%)

Overall, how was your experience finding the functional soda section and making your selection?

(n=24**)



Poppi and Olipop occupy prime shelf space, while other brands are less consistently available or harder to find.



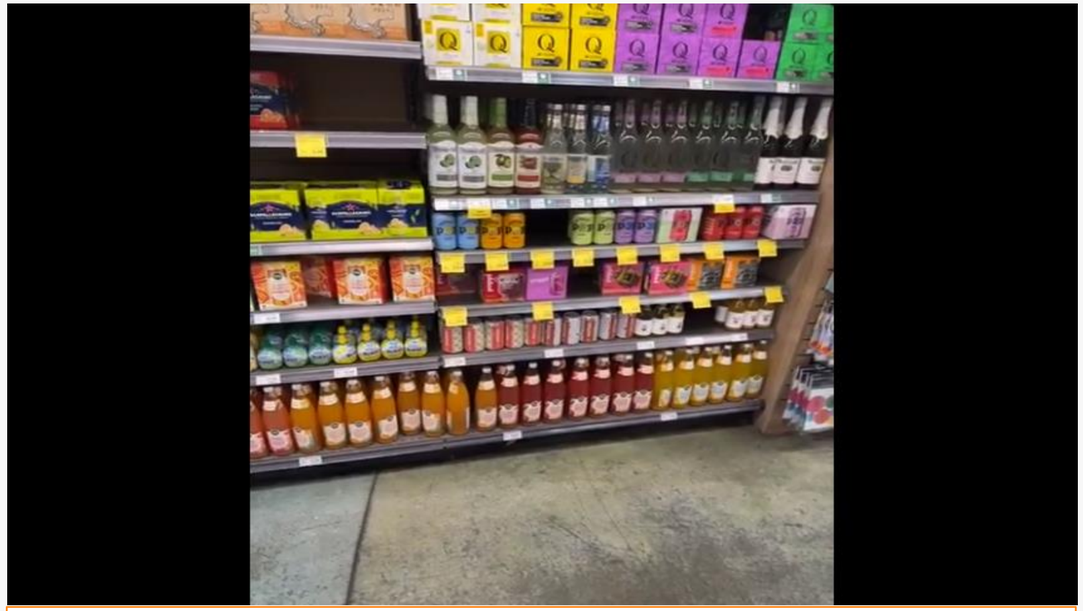
IN-STORE LOCATION

There are a few general locations of functional sodas:

- Near water / sparkling water.
- Next to other shelf-stable, specialty carbonated beverages.
- An endcap near the cash register (especially at Target).
- Near refrigerated healthier drinks like kombucha and natural juices (especially in health-focused stores like Whole Foods and Sprouts).
- On rare occasion, they are placed by diet sodas.

Notably, consumers find functional sodas spread throughout Whole Foods (near cash registers, produce section, near sparkling water) rather than in one section.

Hover over image for video



AVAILABILITY & PLACEMENT

Poppi and **Olipop** are almost always available. These two brands generally have the front and center shelf space at eye level. Both brands have a wide variety of flavors.

Culture Pop is available at select stores. It is generally placed up-high or down-low on the shelf. Culture Pop's flavor variety is limited.

Zevia is another beverage that consumers often notice. It offers a wide range of flavors, although they are limited to traditional soda flavor options.

One consumer mentions **Cove** Probiotic soda.

Of note, no consumers find **Slice** in their search.

Poppi and Olipop are generally available at all grocery stores. Whole Foods tends to have the largest selection available – Poppi, Olipop, Culture Pop, Zevia and sometimes Cove.

Poppi and Olipop lead in consumers' purchasing decisions: Poppi excels in branding, while Olipop offers clear health benefits.

PURCHASING CONSIDERATIONS

01 **Flavor**
Taste is crucial in selection, with both traditional flavors and unique combinations driving interest.

02 **Packaging Design**
Eye-catching packaging with bright colors and clear branding appeals to consumers. Overly busy packaging with an abundance of text feels overwhelming.

03 **Health Benefits**
Clear, simple explanations of health benefits resonate most with consumers, as overly scientific terms get confusing. Low sugar content is something consumers frequently look for.

STANDOUT BRANDS

poppi

- Bright packaging.
- A mix of traditional and non-traditional flavors.
- Prebiotic claims – though unclear for many. This suggests "healthy."
- Simple and "clean" branding.

OLIPOP

- Clear health benefits. "Digestive health" prominently displayed on the front of the can is a draw.
- A mix of traditional and non-traditional flavors.
- Eye catching and fun imagery.

MOST PURCHASED

poppi

- Packaging that stands out on the shelf.
- Appealing flavors.
- Brand recognition.

OLIPOP

- Health benefits that are clearly displayed and easy to understand.
- Appealing design, though more subdued colors.
- Appealing flavors.

Hover over image for video



Based on shopping experience, consumers agree functional sodas offer benefits but come with trade-offs: some worry about taste, others about the higher price.

PACKAGING & FLAVOR OPTIONS

After seeing the packaging and flavor options of functional sodas, consumers are more likely to believe they will taste good but still expect them to be less enjoyable than traditional soda.

Consumers are divided on whether benefits are immediate or gradual. Health benefits can be grouped into two categories: short and long-term.

TASTE EXPECTATIONS

(based on packaging)

- Subtle fruit essence / light taste
- Sweet (but mild or artificial)
- Minerally / chalky
- Tangy
- Lingering aftertaste
- Natural flavors
- Fruity
- Refreshing

EXPECTED BENEFITS

Short-term

- Energy
- Better digestion
- Mental clarity

Long-term

- Immunity support
- Weight management

"[Functional sodas are] an alternative to traditional sodas. To me functional sodas provide a boost of energy, and they help with gut health."

"If I tried a functional soda, I would expect it to maybe give me some energy or help my stomach feel better. But a drawback could be that it might not taste as good as regular soda, or it might be more expensive."

"One factor is cost. I'm a grad student, so I have to be budget conscious when I shop. I don't buy too much soda anyway for that reason, but the times I've considered a functional soda, a single can has cost $3 or so, and I have a hard time justifying that in my budget."



Due to limited familiarity with functional sodas, the shopping experience differs from most consumers' expectations.

CONSUMER EXPECTATIONS

DIFFERENCES

- Functional sodas are separate from regular sodas. Generally, with no clear signage.
- They're often placed on high or low shelves, or at aisle ends.
- They are more expensive than regular sodas.
- There are more flavors than expected.
- They lack clear information on benefits.
- At Whole Foods, functional sodas are located in multiple areas of the store.

SIMILARITIES

- Some expect functional sodas to be near sparkling water.
- They come in both single cans and multipacks.
- They are placed near other carbonated beverages (not soda).



"The process was very easy - it was easy to find in the store, and it was easy to buy a single can to try."

"[I was surprised to see] how many products there are. Initially I thought there was only 1 option but after seeing the new variety of flavors, I would consider [buying it more]."

After shopping, consumers aren't fully convinced, but a better understanding of the products makes them slightly more open to future purchases.

Key Shopping Insights that Affect Consumer Interest

BOOST INTEREST

- When looking for a healthier alternative to soda.
- Added health benefits.
- Healthier than other options.
- A single can may be purchased at a time.
- The variety of flavors.
- Caffeine-free options.

DIMINISH INTEREST

- Skepticism of health benefits.
- A high price point.
- Can be difficult to find.

"[I would purchase again because] they include probiotics and appear to be much healthier than the sparkling waters I currently drink."

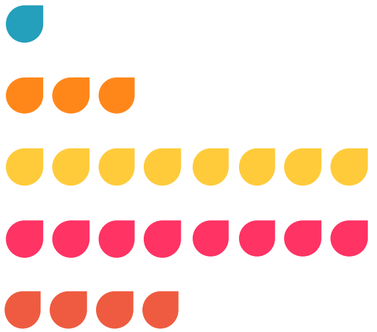
"I still don't fully understand the benefits of these products. $2 for a 12oz can is fairly expensive. I'm not going to pay a premium for a product if there is no noticeable benefit for a cheaper option (traditional soda)."



Purchase Intent (%)

Based on your experience shopping, how likely are you to buy functional sodas in the future after today's experience?

(n=24**)











Tasting Experience

Because of low expectations regarding taste, most consumers find the flavor to be better than they expect.

Consumers anticipate the functional sodas may taste “too healthy” due to their low sugar content and health ingredients.

In general, consumers appreciate the “regular soda” taste, for its refreshing, light flavor and sweetness. They also like that it feels less carbonated than regular sodas.

For some, functional sodas have a less intense flavor profile that feels muted and undesirable. They also experience a heavy artificial sweetener flavor.

“It was better than I was expecting in terms of tasting ‘too healthy’.”

“Well, it definitely exceeded my expectations, I wasn't expecting it to taste as same as a regular soda would.”

“I figured it'd taste like medicine because of the ingredients, but it was smooth, and the aftertaste was awesome.”

Hover over image for video



LIKES



DISLIKES



Most consumers will make a repeat purchase of functional soda based solely on taste.

Factors that Influence Purchasing Functional Sodas

DRIVERS

1. Flavors available
2. Health benefits / nutritional content
3. Natural ingredients
4. Tasting the same as a regular soda
5. Inclusion of cane sugar over sweeteners

BARRIERS

1. Higher price point
2. Not having energy / caffeine benefits
3. Wanting a more intense flavor
4. Wanting a sugar-free option

"I would try different flavors to see which I like the most and would want to drink regularly."

"What really would influence the overall choice would be the taste and the nutritional benefits they offer compared to regular sodas."

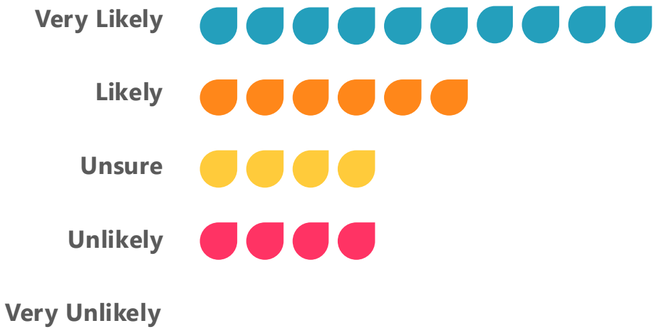
"The fact that it tastes just the same as a regular soda."



Tasting Review (%)

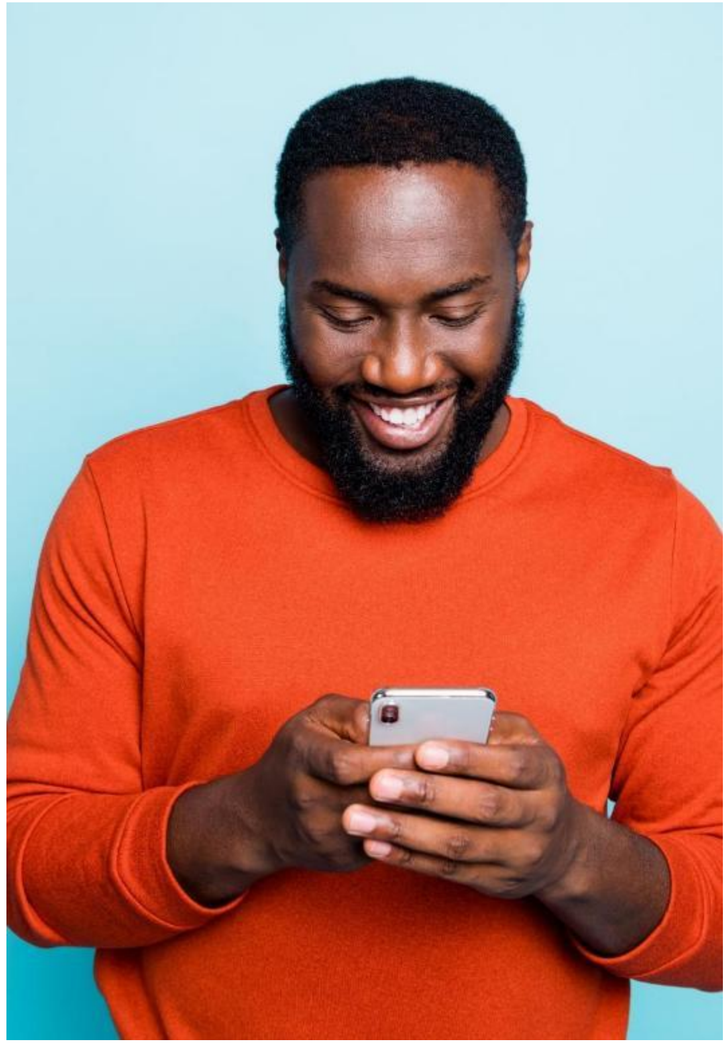
Based on the taste, how likely are you to try functional sodas again in the future?

(n=24**)

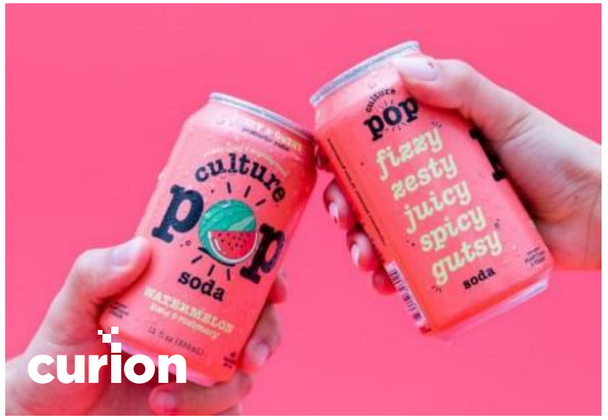


Online Survey



















Efficacy & Expectations

Clearly communicating health benefits and delicious flavors is key to overcome price barriers.

Functional sodas attract consumers primarily due to their **healthier profile**, offering low sugar content, fewer calories, cleaner ingredients, and added benefits like vitamins, minerals, and probiotics.

THE TOP REASONS FOR STARTING TO PURCHASE ARE:

Healthier alternative to traditional soda
62%

Low sugar
55%

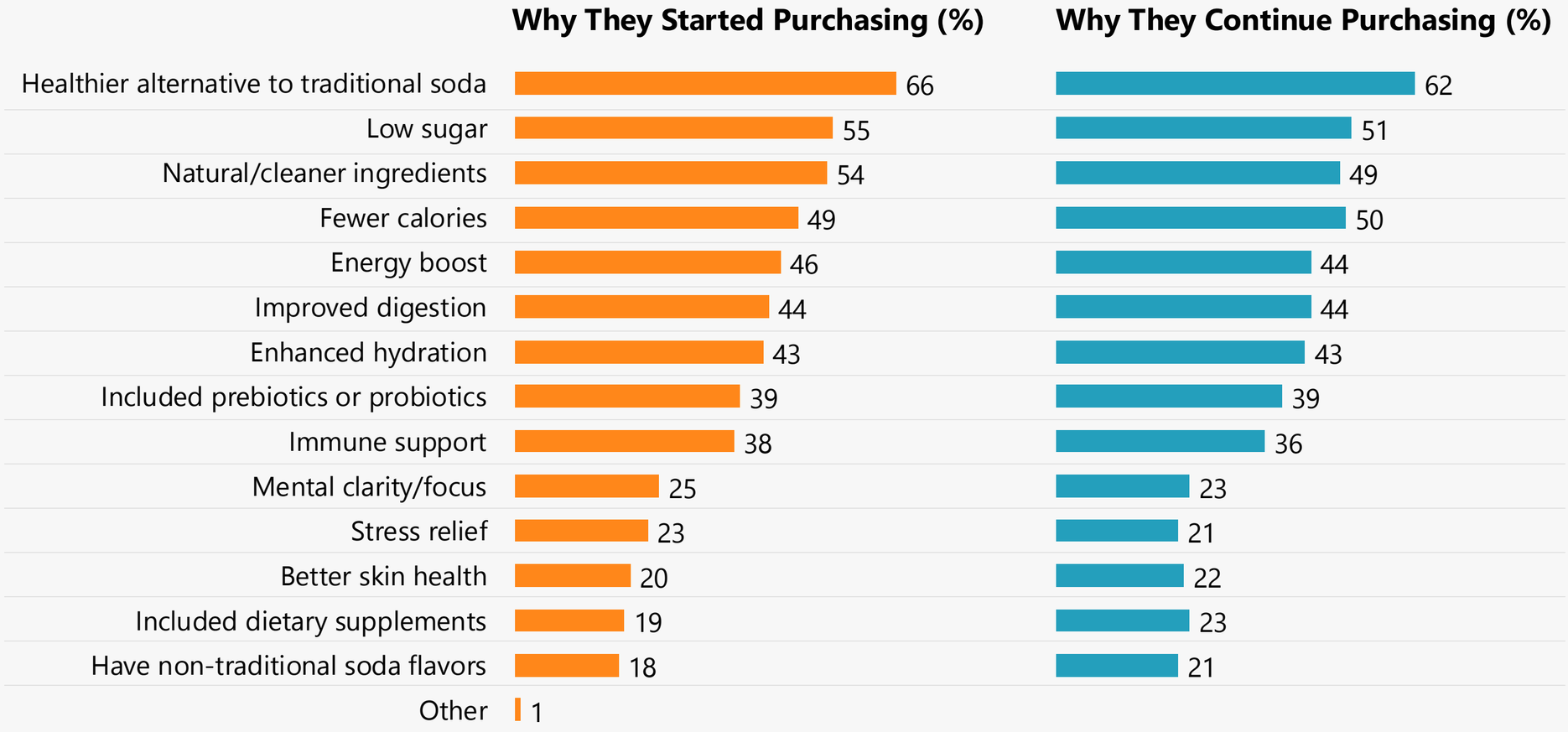
Natural/cleaner ingredients
54%



Fruit flavors, along with lemon lime and lemonade, are the most popular choices. Consumers believe functional sodas can taste as good as traditional sodas and are generally satisfied with their taste (**44% Very Satisfied, 91% T2B**).

Consuming these sodas at meals, to satisfy a craving, or provide a quick pick-me-up, consumers see them as **healthier alternatives to traditional soda**, without sacrificing enjoyment. However, price and availability still impact consumers' frequency of consumption, preventing them from consuming more often – more than half only consume 1-3 times per week.

Entry into functional sodas is typically because they are healthier alternatives to traditional soda, specifically low sugar and cleaner ingredients.



INSIGHTS

Over time, reasons for use don't change and consumers are still looking for healthy alternatives.

While prebiotics and probiotics are messaged on most functional soda cans, they are not the top driver for entry, rather general health reasons are.

Females are more likely than males to reference healthier alternatives, low sugar, and fewer calories as reasons for purchase.

Q200. What reason(s) did you first decide to try health-inspired sodas?
Q205. Why do you continue to purchase health-inspired sodas?
BASE: Total Sample (n=304)

About 2/3 of functional soda users say there are barriers to buying more – high prices and availability/findability in the store are the biggest barriers.



INSIGHTS

Flavor represents another opportunity as approximately 1 in 4 consumers say they either have concerns about the taste/flavor or think there are a lack of flavors or options.

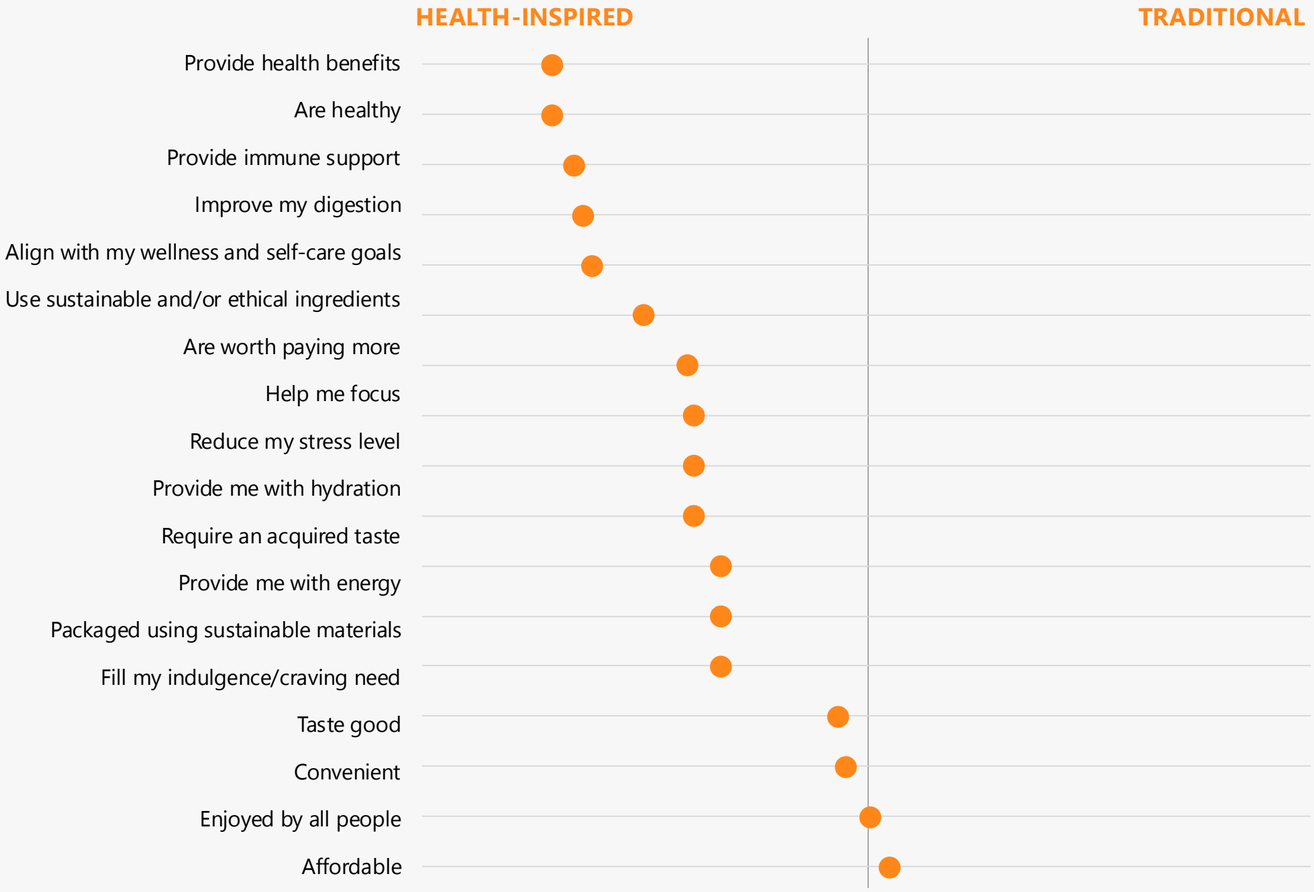
Consumers who drink functional sodas less often (1-3 times per week) are more likely to say the price is too high.



Q210. What factors, if any, prevent you from purchasing more health-inspired soda?
BASE: Total Sample (n=304)

Functional sodas are more associated with health benefits/goals. Traditional soda is seen as more affordable and enjoyed by all people.

Traditional vs. Functional Perceptions (%)



Q215. For each of the following, please select which you believe does it best.
BASE: Total Sample (n=304)
Q226. What are some reasons you say health-inspired soda is NOT healthier than regular soda?
BASE: Health-Inspired Soda is Not Healthier (n=52)
Q227. What are some reasons you say health-inspired soda is healthier than regular soda?
BASE: Health-Inspired Soda is Healthier Sample (n=268)

INSIGHTS

Filling a craving is seen as equal between functional sodas and traditional sodas, however those who drink functional sodas 4+ times per week are likely to say functional sodas do it better than traditional.

WHY HEALTHIER

Functional soda users appreciate the reduced sugar and health-centric characteristics. They talk about the fact that they have fewer calories and sugar, are made with clean ingredients, and have additional benefits like vitamins, minerals, and probiotics.

"It has less sugar and calories as well as added health benefits such as probiotics"

"They come with additional vitamins and minerals and usually contain much less sugar."

"It contains much healthier and cleaner ingredients than regular soda."

WHY NOT HEALTHIER

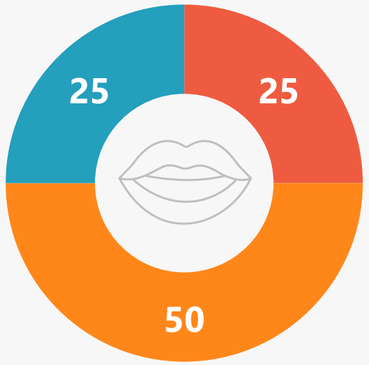
Those who say functional sodas are not healthier are still concerned with the amount of sugar and additives.

"Worried if some of the artificial flavors and ingredients they used can actually be more dangerous in the long run."

"Because you can get caffeine and sugar free regular soda."

Even though functional sodas are seen to be healthier, consumers believe they can taste just as good as traditional sodas.

Tastes Good (%)



- Traditional soda tastes better
- Both are equal
- Functional soda tastes better

Expected Taste (%)



- I would be concerned health-inspired sodas were not doing what they say they do if they tasted as good or better than traditional sodas
- I might be concerned if health-inspired sodas tasted as good or better than traditional sodas
- I would have no concerns if health-inspired sodas tasted as good or better than traditional sodas

INSIGHTS

Half of functional soda users say functional sodas and traditional sodas perform equally on tasting good.

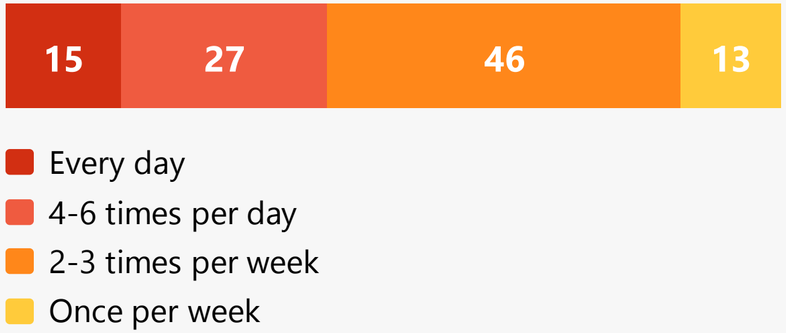
Among those who say traditional sodas taste better, only 21% say they would be concerned with a functional soda's efficacy if it tasted as good or better than traditional sodas (this equates to only 6% of functional soda users).



Q215. For each of the following, please select which you believe does it best. (Taste good)
BASE: Total Sample (n=304)
Q232. Earlier you said traditional sodas taste better than health-inspired sodas. Would you be concerned about if they were really delivering on the promised health benefits they tasted as good as traditional sodas?
BASE: Total Sample (n=84)

Functional sodas tend to be consumed 3 times per week or less often. Most common consumption occasions are with a meal or to fulfill cravings or pick-me-up needs.

Consumption Frequency (%)

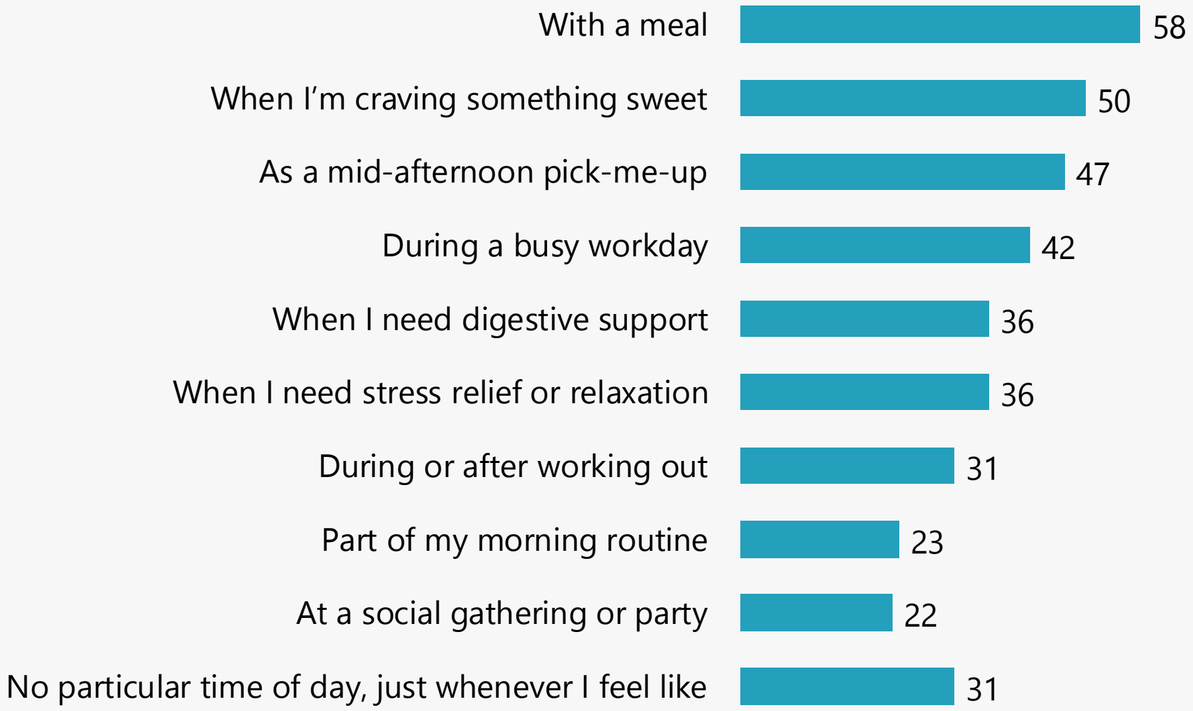


INSIGHTS

Those who drink functional sodas 4+ times a week are most likely to say they drink them with meals (68%) or that they are part of their morning routine (34%).

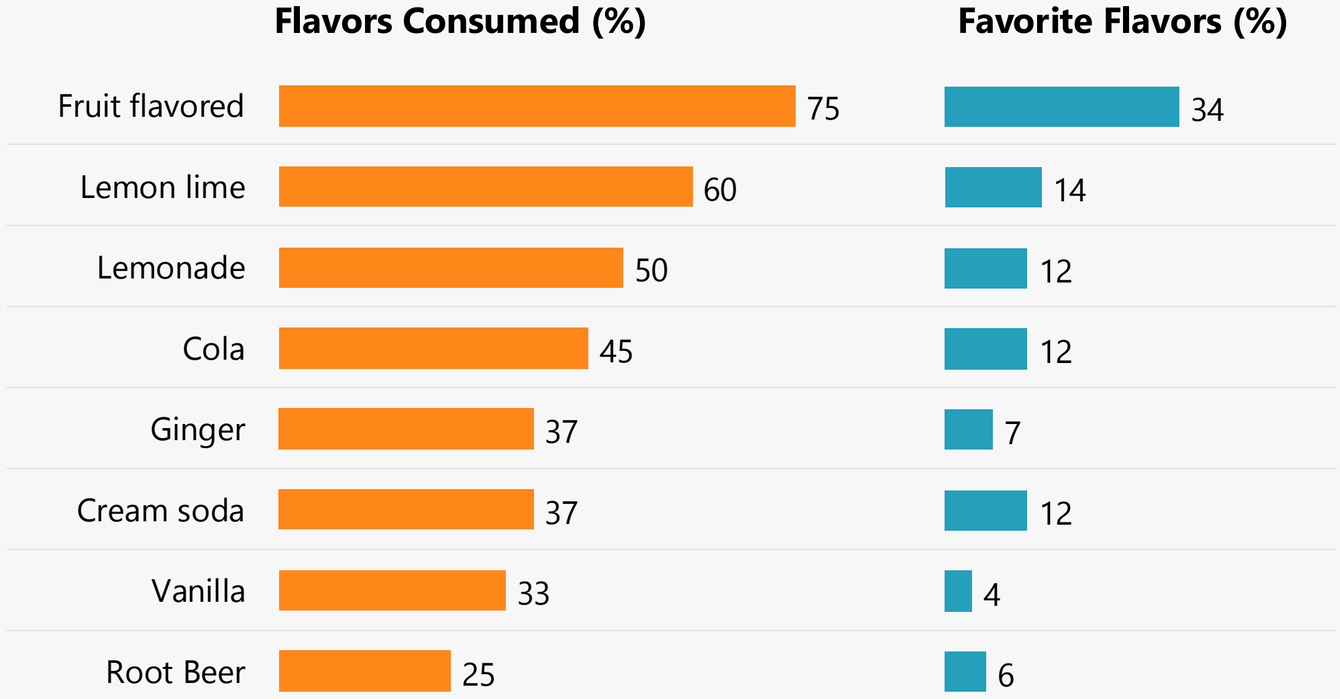
Gen Z consumers are also most likely to say with a meal (77%).

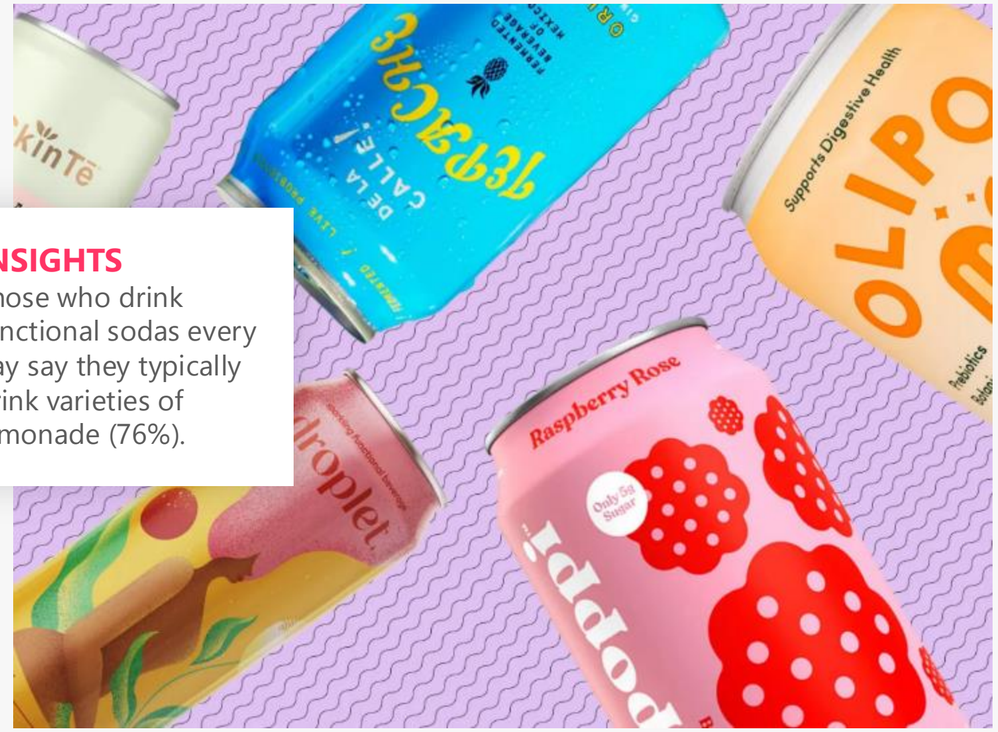
Consumption Occasions (%)



Q150. Thinking about the past month, how often, on average, did you drink the following health-inspired sodas?
Q240. When do you typically drink health-inspired soda?
BASE: Total Sample (n=304)

Fruit flavors tend to be the favorite, with many consumers also consuming lemon lime and lemonade flavors.





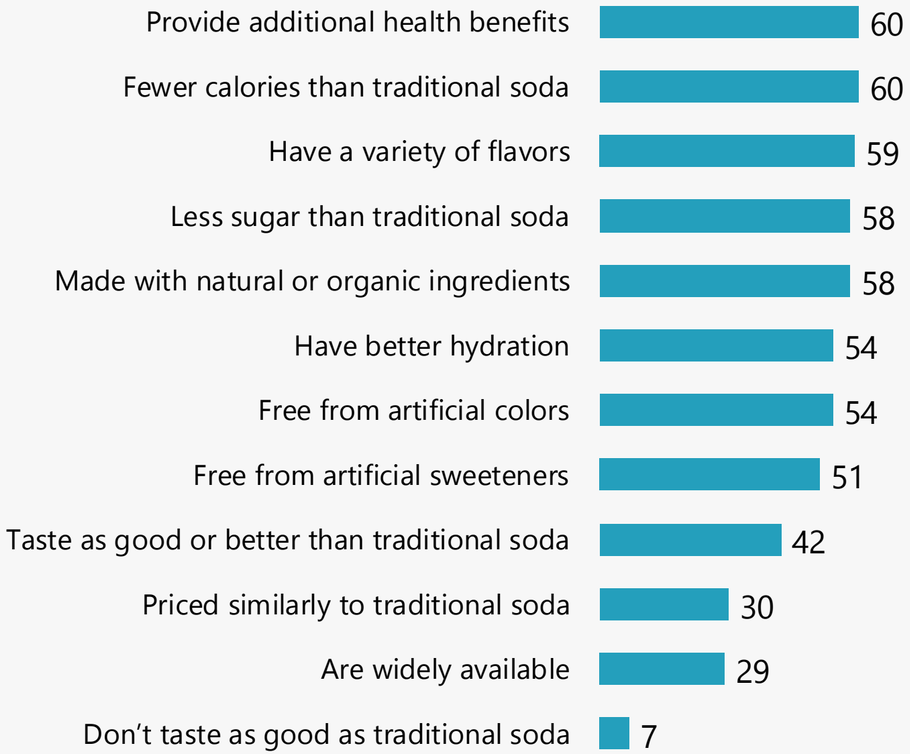
INSIGHTS

Those who drink functional sodas every day say they typically drink varieties of lemonade (76%).

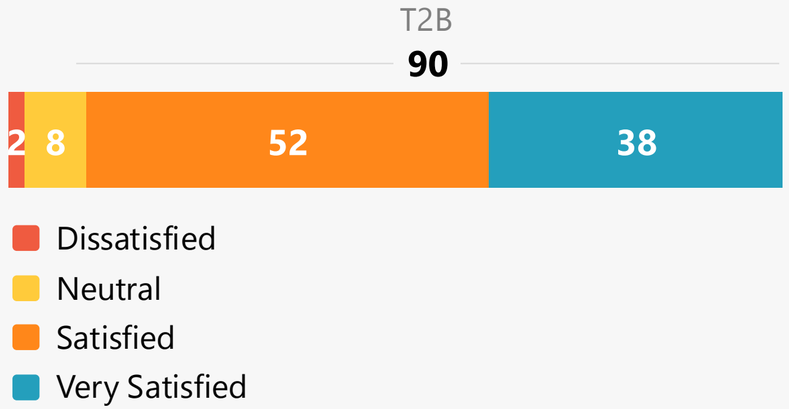
Q237. Which of the following flavors of health-inspired soda do you typically drink?
Q238. Which one of the following flavor types of health-inspired soda is your favorite?
BASE: Total Sample (n=304)

Users of functional sodas expect them to provide health benefits, contain fewer calories and less sugar, and be made with natural or organic ingredients.

Expectations of Functional Soda (%)



Satisfaction with Current Flavors (%)



INSIGHTS

Females are more likely than males to expect less sugar. Millennials and Boomers are also likely to have this expectation.

Expectations for a variety of flavors and to be made with natural or organic ingredients is highest with users in the West.

They also expect functional sodas to have a variety of flavors, which currently they are delivering on; most consumers are satisfied with current flavors.

Consumers who drink functional sodas 4+ times per week are the most satisfied, with 53% Very Satisfied.

Q220. What are your expectations of health-inspired soda?
Q235. How satisfied are you with the current flavors of health-inspired soda?
BASE: Total Sample (n=304)

Functional soda users expect them to taste the same or slightly different than traditional sodas. Overall, they are satisfied with the taste.

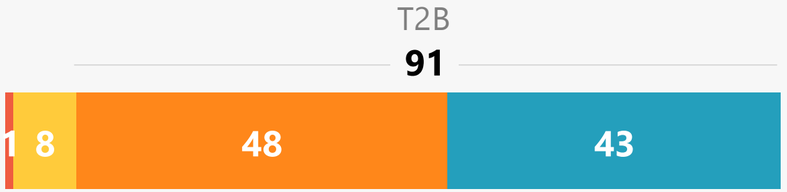
Taste Expectations (%)



- Very Different from Traditional Soda
- Slightly Different from Traditional Soda
- Same as Traditional Soda

INSIGHTS
Consumers who drink functional sodas 4+ times per week are more likely to say they expect them to taste very different (44%).

Functional Soda Taste Satisfaction (%)



- Dissatisfied
- Neutral
- Satisfied
- Very Satisfied

INSIGHTS
Consumers who drink functional sodas 4+ times per week are the most satisfied, with 54% Very Satisfied.

Q230. How satisfied are you with the taste of health-inspired soda?
Q231. How do you expect health-inspired sodas to taste?
BASE: Total Sample (n=304)











Purchase Channel

While availability is a bit of a barrier for not purchasing more often, it does not typically prevent consumers from shopping where they desire.

Purchase Channel (%)

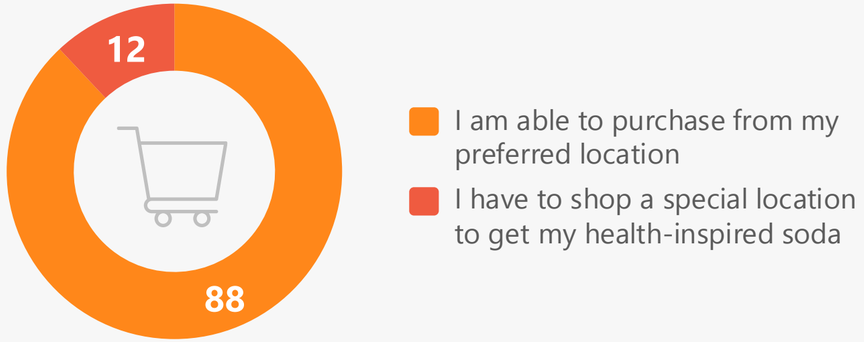


INSIGHTS

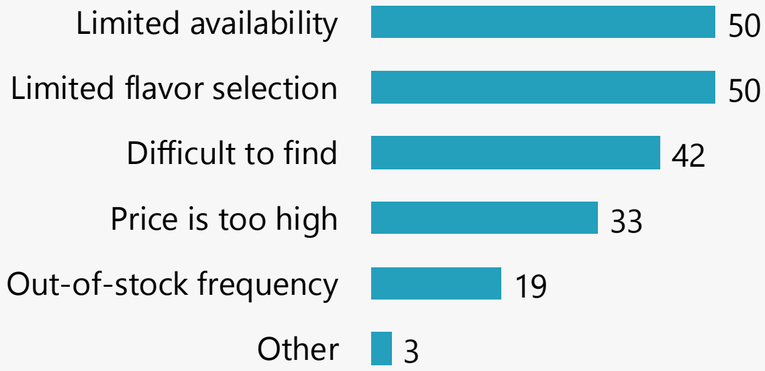
Consumers most often purchase from mass merchandisers like Walmart or Target, online from Amazon, or grocery locations.

Consumers who drink every day are more likely to say they are buying from Amazon (71%) than those who are less frequent.

Preferred Channel (%)



Channel Barriers (%)



Q245. Where do you purchase health-inspired soda?
Q247. Are you able to purchase health-inspired soda from your preferred location, or do you have to shop someplace special?
BASE: Total Sample (n=304)
Q250. What factors have prevented you from purchasing health-inspired soda through your preferred shopping location?
BASE: Not able to purchase through preferred channel (n=36*)

*Indicates small sample size







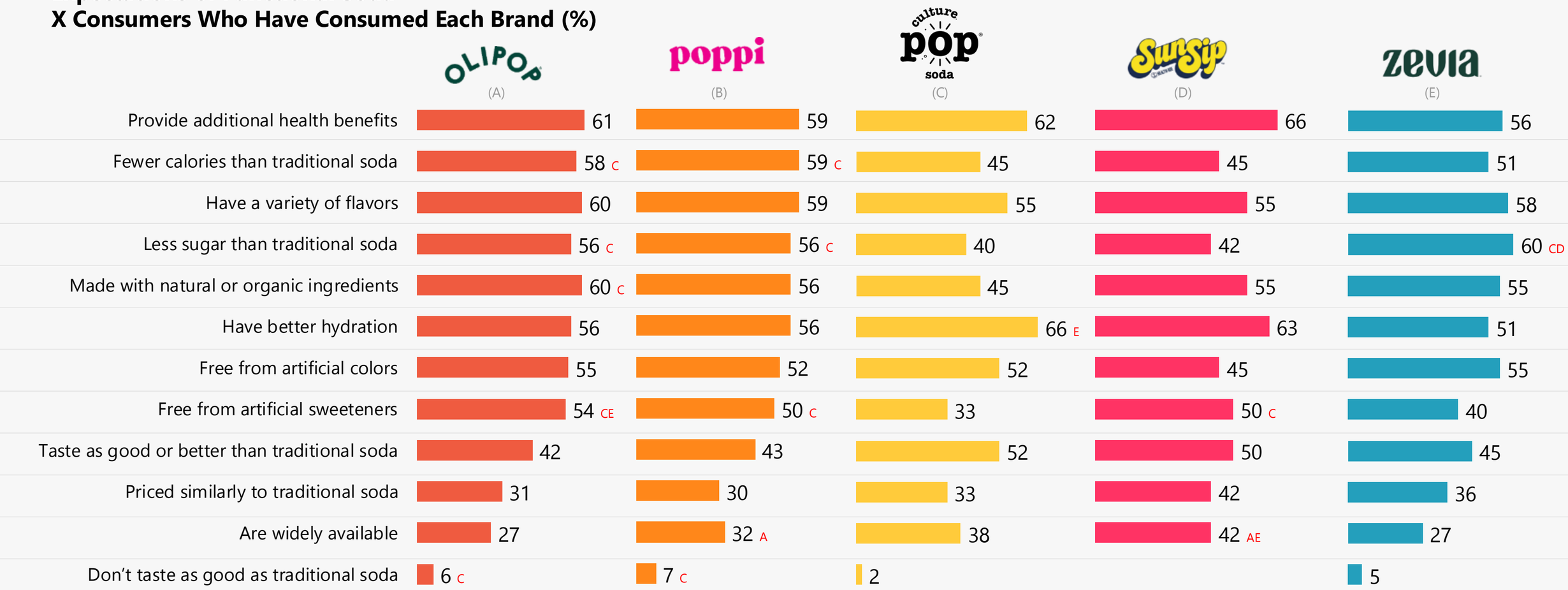




Expectations x Brand Consumption

Expectations for functional sodas are similar across users who have consumed different brands in the past month. Olipop and Poppi tend to have more consistent expectations.

Expectations of Functional Soda X Consumers Who Have Consumed Each Brand (%)

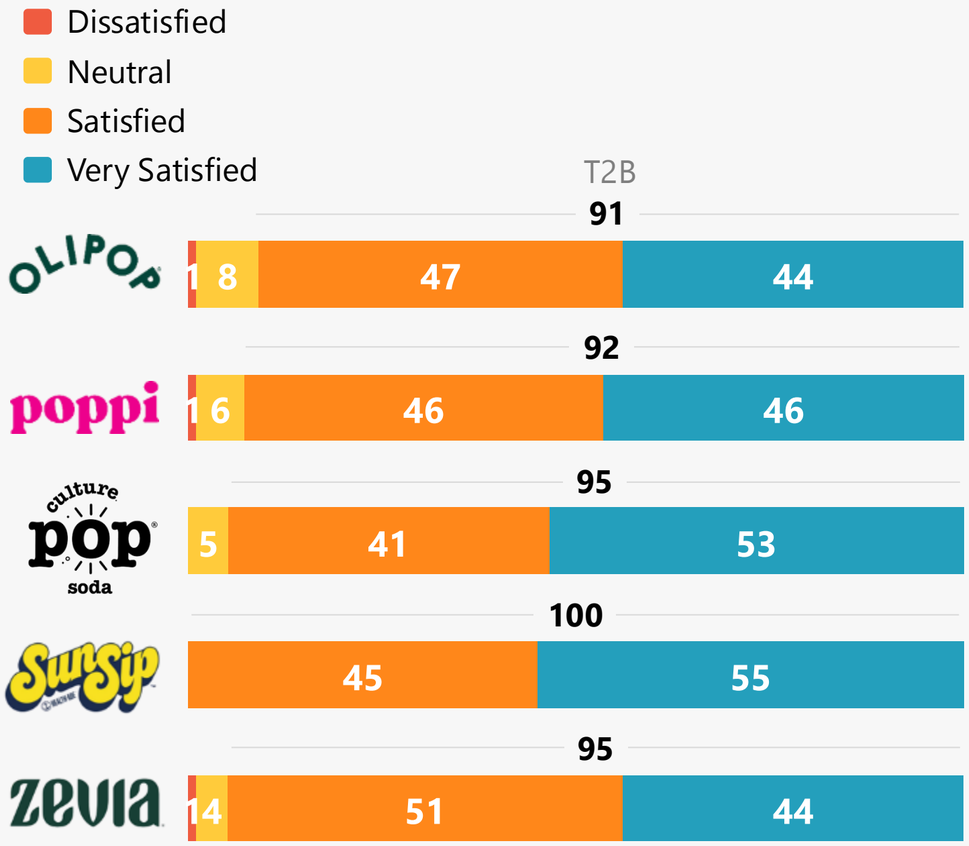


Q220. What are your expectations of health-inspired soda?
BASE: Consumed brand in last month; Olipop (n=225), Poppi (n=239), Zevia (n=73*), Culture Pop (n=58*), Sun Sip (n=38*)

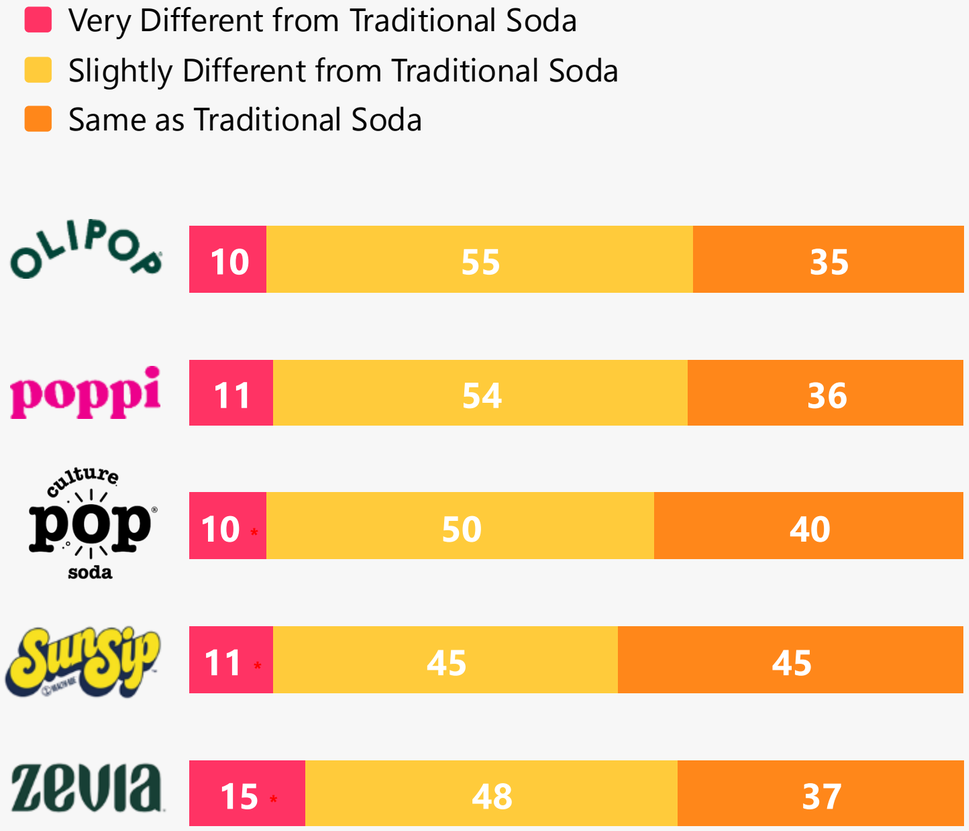
A/B/C --. Indicates significance.
*Indicates small sample size
Significance is tested at a 95% confidence level.

Satisfaction and expectations for functional sodas is about the same regardless of which brands consumers have had.

Functional Soda Satisfaction X Consumers Who Have Consumed Each Brand (%)



Taste Expectations X Consumers Who Have Consumed Each Brand (%)



INSIGHTS

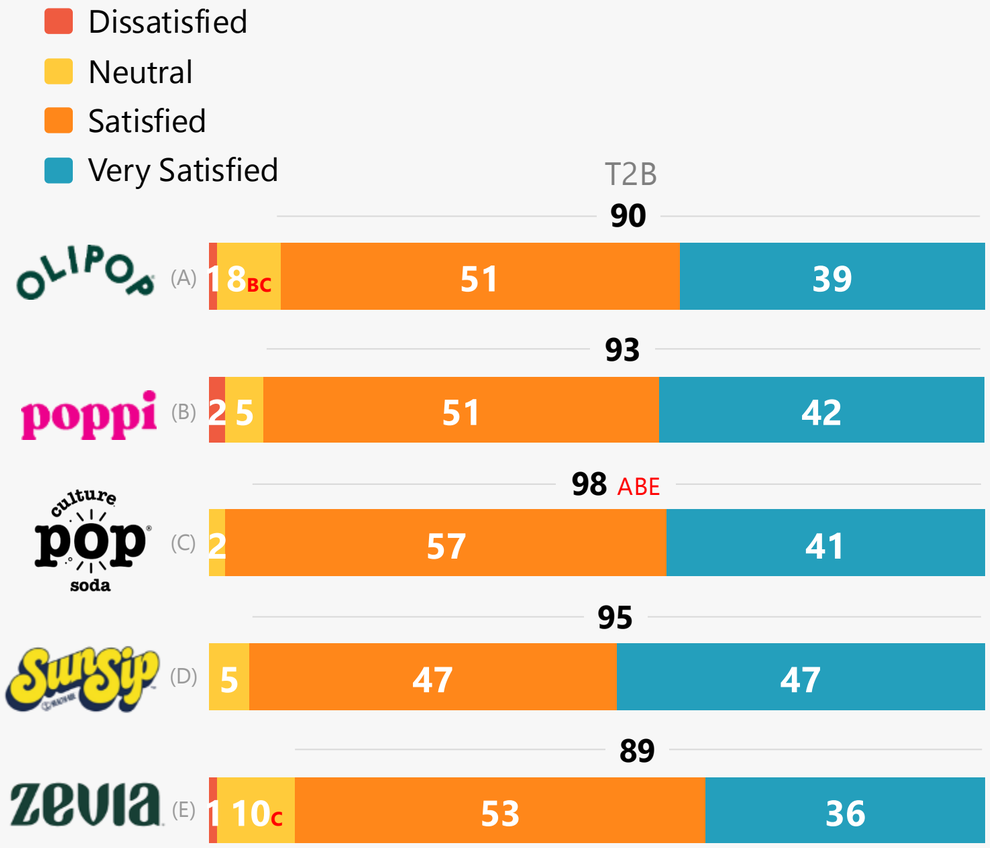
Those who have had SunSip have higher satisfactionfor functional sodas overall. It is unclear if consumers are more satisfied with SunSip or if those who have had SunSip just are more satisfied overall. Consumers who have had SunSip are also likely to have had other brands.

Q230. How satisfied are you with the taste of health-inspired soda?
Q231. How do you expect health-inspired sodas to taste?
BASE: Consumed brand in last month; Olipop (n=225), Poppi (n=239), Zevia (n=73*), Culture Pop (n=58*), Sun Sip (n=38*)

A/B/C --. Indicates significance.
*Indicates small sample size
Significance is tested at a 95% confidence level.

Overall, consumers are satisfied with current flavors of functional sodas.

Satisfaction with Current Flavors X Consumers Who Have Consumed Each Brand (%)



INSIGHTS

Those who have had Culture Pop have higher satisfaction with current flavors. Again, it is unclear if consumers are more satisfied with Culture Pop or if those who have had Culture Pop are just more satisfied with flavors in the category. Consumers who have had Culture Pop are also likely to have had other brands.





Q235. How satisfied are you with the current flavors of health-inspired soda?
BASE: Consumed brand in last month; Olipop (n=225), Poppi (n=239), Zevia (n=73*), Culture Pop (n=58*), Sun Sip (n=38*)

A/B/C --. Indicates significance.
*Indicates small sample size
Significance is tested at a 95% confidence level.

CLT


Supports Digestive Health


SunSip
CHERRY COLA


Slice
LEMON & LIME
ALL NATURAL SODA WITH NO ADDED SUGAR
LEMON & LIME
All Natural Great Taste
NO ADDED SUGAR
Naturally Sweetened
NO! ARTIFICIAL COLORS, PRESERVATIVES OR CAFFEINE
Real Fruit


poppi
curion

Products Tested

CELL 1

No Context

All samples were "Lemon Lime Soda"

FUNCTIONAL SODA



TRADITIONAL SODA



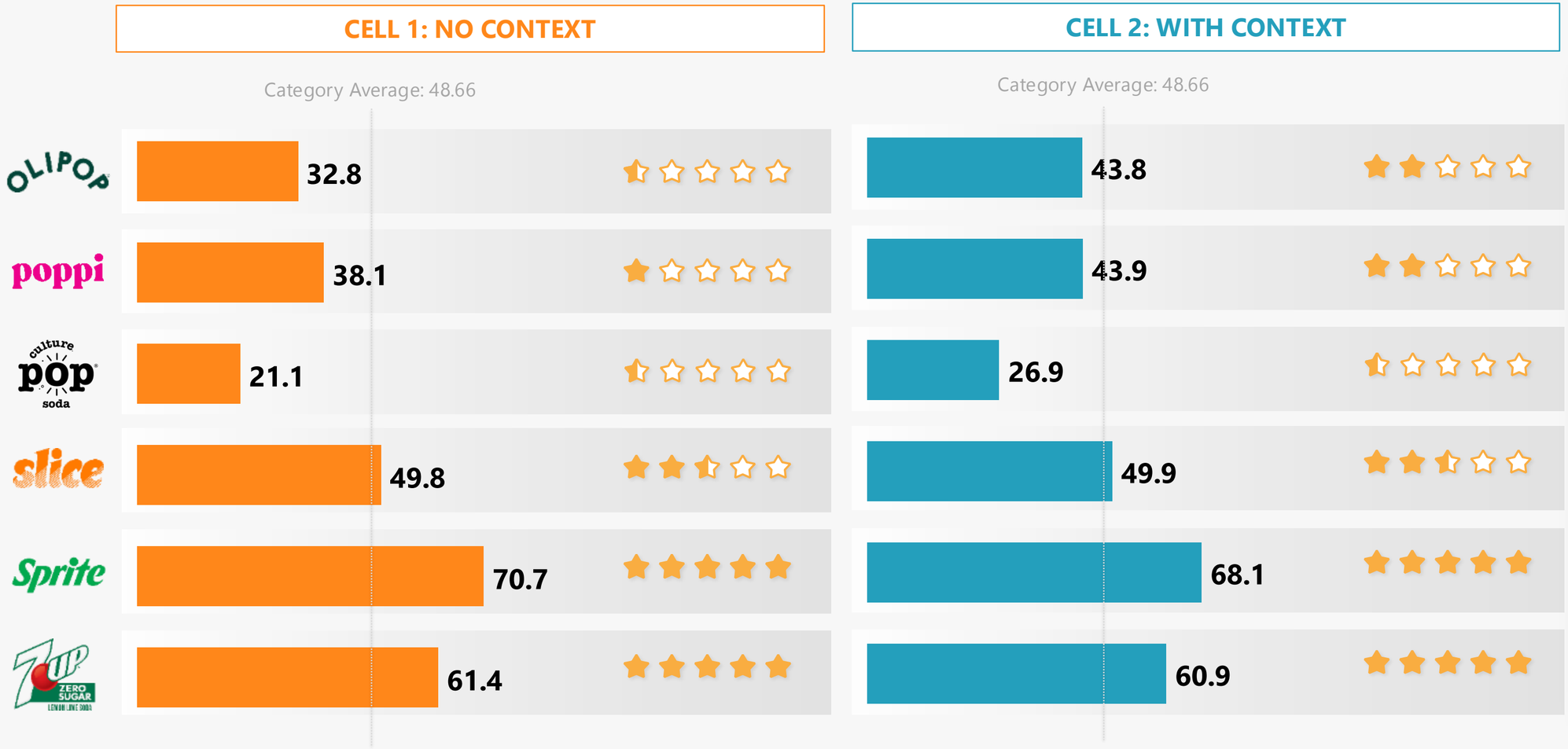
CELL 2

With Context (brand was not shown, but context varied by brand)

Functional Soda	OLIPOP	50 calories, 4g sugar, 5g fiber, plus prebiotics, no artificial sweeteners or flavors in a 12oz can
	poppi	25 calories, 5g sugar, 2g fiber, plus prebiotics, no artificial sweeteners or flavors in a 12oz can
	culture pop soda	45 calories, 8g sugar, plus probiotics, vitamins and minerals, no artificial sweeteners or flavors in a 12oz can
	slice	35 calories, 4g sugar, prebiotics and postbiotics, no artificial sweeteners or flavors in a 12oz can
Traditional Soda	Sprite	140 calories, 38g sugar in a 12oz can
	7UP ZERO SUGAR	0 calories, 0g sugar, artificially sweetened in a 12oz can

CURION SCORE

Carbonated Soft Drinks Category Comparison



There is some movement in the Curion Score between cells.

Traditional sodas exceed the Curion Score average and receive 5 stars in both cells.

Slice's star rating remains consistent and performs the best among the functional sodas.

Olipop and Poppi improve performance when given context, while Culture Pop's lower taste performance is consistent between cells.

Traditional sodas perform best across cells in Overall Liking, Purchase Intent, Expectations and Curion Score.

When given **product context, standard KPIs increase for functionals sodas and decrease for traditional soda.**

The Curion Score remains the same, regardless of context, for the traditional sodas and Slice (the most liked samples) and Culture Pop (the least liked sample).

For Olipop and Poppi, the Curion Score increases with context, indicating that the **additional information improves consumer perception beyond taste.**

Total Data KPI's

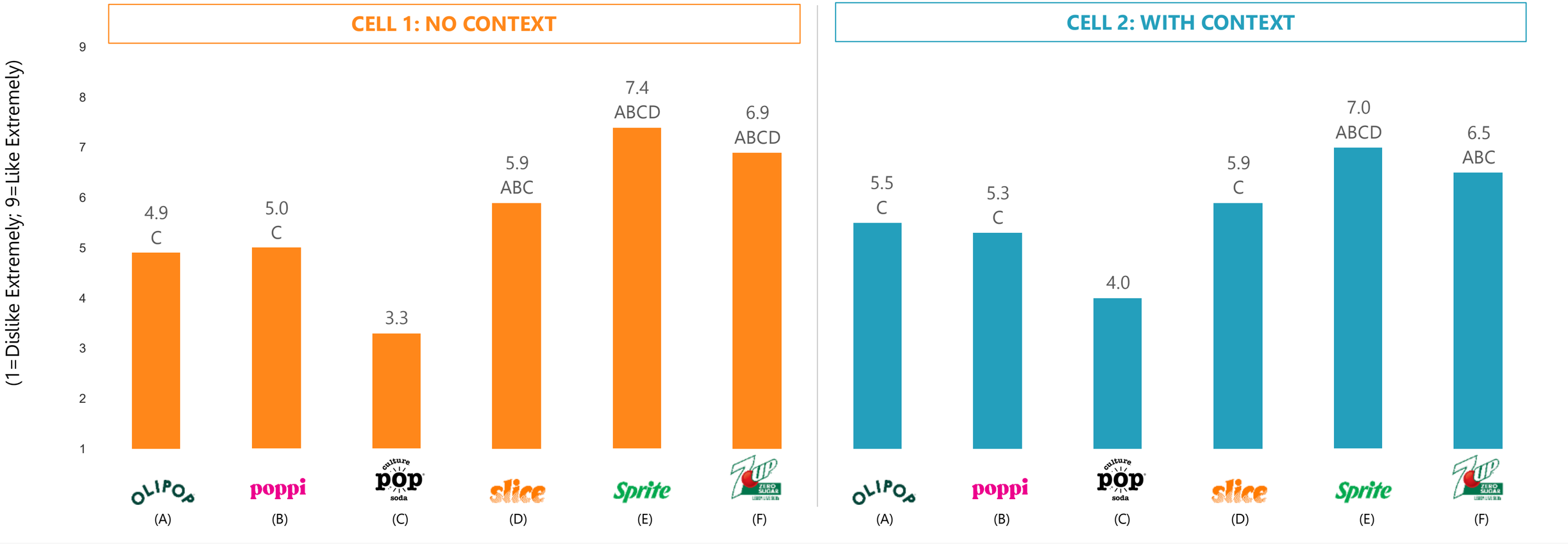
	CELL 1: NO CONTEXT						CELL 2: WITH CONTEXT					
	Olipop (A)	poppi (B)	Culture Pop soda (C)	slice (D)	Sprite (E)	7UP Zero Sugar (F)	Olipop (A)	poppi (B)	Culture Pop soda (C)	slice (D)	Sprite (E)	7UP Zero Sugar (F)
Overall Liking (9 pt. mean)	4.9 C	5.0 C	3.3	5.9 ABC	7.4 ABCD	6.9 ABCD	5.5 C ↑	5.3 C ↑	4.0 ↑	5.9 C ↑	7.0 ABCD ↓	6.5 ABC ↓
Would Purchase (5 pt. T2B%)	22 C	18	10%	45 ABC	80 ABCDF	66 ABCD	40 C ↑	36 C ↑	11 ↑	46 C ↑	55 BC ↓	51 BC ↓
Better Than Expected (5 pt. T2B%)	21 C	15	8%	38 ABC	57 ABCD	52 ABCD	37 C ↑	30 C ↑	13 ↑	40 C ↑	43 C ↓	49 BC ↓
Curion Score	1 star	1 star	1 star	2 stars	5 stars	5 stars	2 stars	2 stars	1 star	2 stars	5 stars	5 stars

n=89/84
Significant Differences at 95% CL = Uppercase

↑ ↓ Indicate direction of scores compared to Cell 1

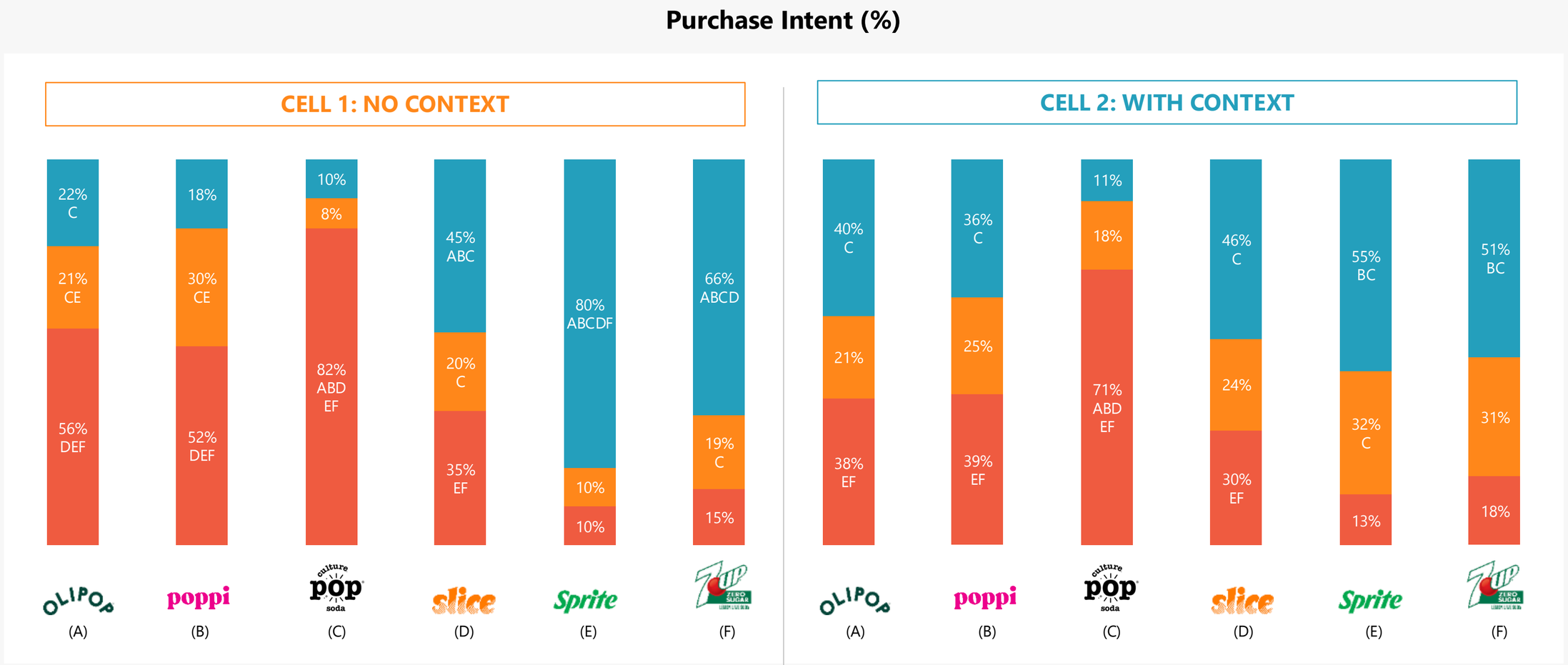
Traditional soda receives the highest liking scores across both cells. Functional soda liking increases with context, while traditional soda liking decreases with context.

Overall Liking



n=89/84
Significant Differences at 95% CL = Uppercase

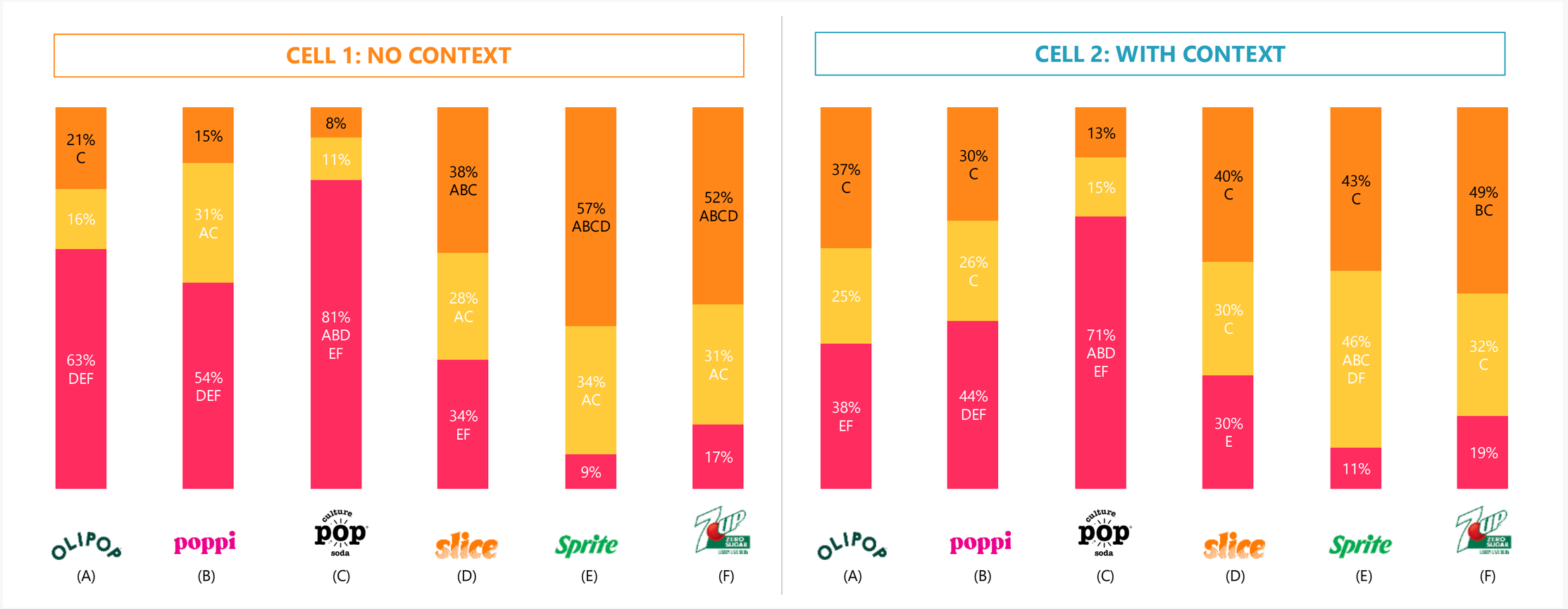
When given context, purchase intent increases for functional soda and decreases for traditional soda. However, 'would not purchase' continues to be significantly higher for functional sodas.



n=89/84
Significant Differences at 95% CL = Uppercase

When provided context, consumer expectations for functional soda increase, though remain significantly worse than expected compared to traditional soda.

Expectations (%)



n=89/84
Significant Differences at 95% CL = Uppercase

The "nutrition" in Sprite is a large detractor in purchase, with 60% of consumers saying they are less likely to purchase. However, the benefits of Olipop, Poppi, Slice and 7UP Zero are delighters for more than half the consumers.

Purchase intent of Culture Pop remains low and context has a minimal effect.

	CELL 2: WITH CONTEXT (N=84)					
Effect of nutritional information on Purchase Intent (%)	**(A)**	**(B)**	**(C)**	**(D)**	**(E)**	**(F)**
Yes, I am **less** likely to purchase it now	11	11	14	17	60 ABCDF	14
Yes, I am **more** likely to purchase it now	56 CE	52 CE	29	55 CE	21	58 CE
It had **no effect**	33 E	37 E	57 ABDEF	29	19	27

Q: Did the fact that this is a (INSERT DESCRIPTION 1) with (INSERT DESCRIPTION 2) have any effect on your purchase intent?

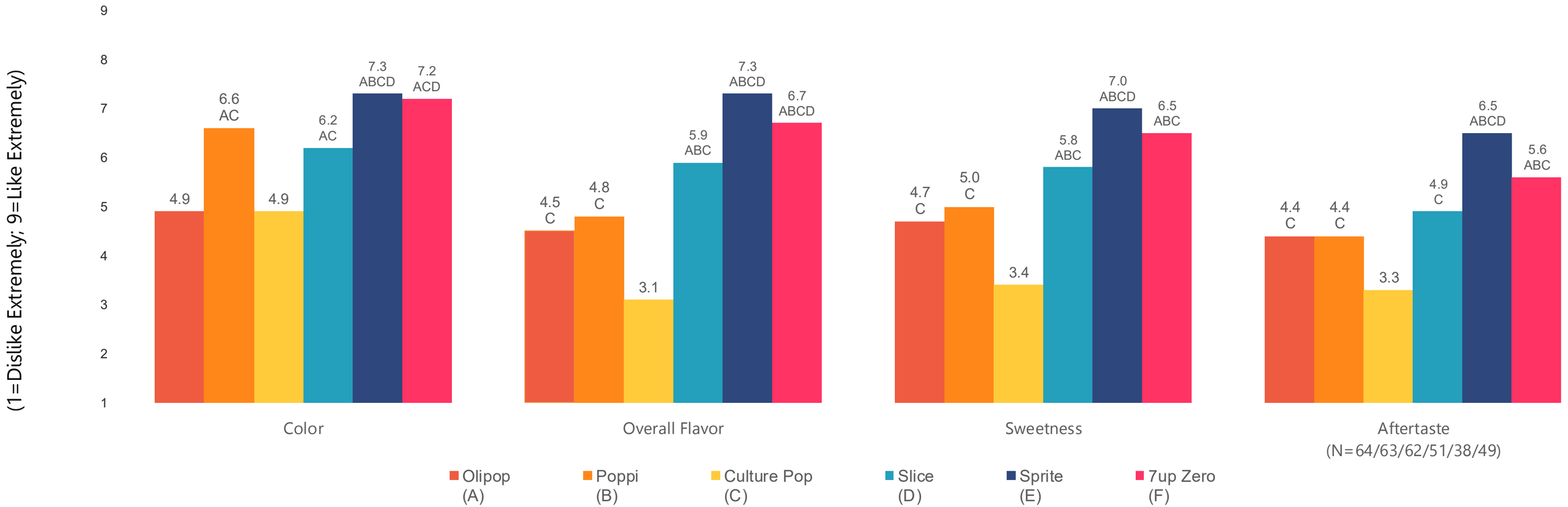
Product	Description 1	Description 2
Olipop	Functional/Healthy Soda	50 calories, 4g sugar, 5g fiber, plus prebiotics, no artificial sweeteners or flavors in a 12oz can
Poppi		25 calories, 5g sugar, 2g fiber, plus prebiotics. no artificial sweeteners or flavors in a 12oz can
Culture Pop		45 calories, 8g sugar, plus probiotics, vitamins and minerals, no artificial sweeteners or flavors in a 12oz can
Slice		35 calories, 4g sugar, prebiotics and postbiotics, no artificial sweeteners or flavors in a 12oz can
Sprite (Regular)	Soda	140 calories, 38g sugar in a 12oz can
7UP Zero Sugar	Soda	0 calories, 0g sugar, artificially sweetened in a 12oz can

n=89/84
Significant Differences at 95% CL = Uppercase

Without context, Sprite continues to outperform on all hedonics, while both Slice and 7UP Zero are more liked than the other functional sodas.

Hedonics

CELL 1: NO CONTEXT

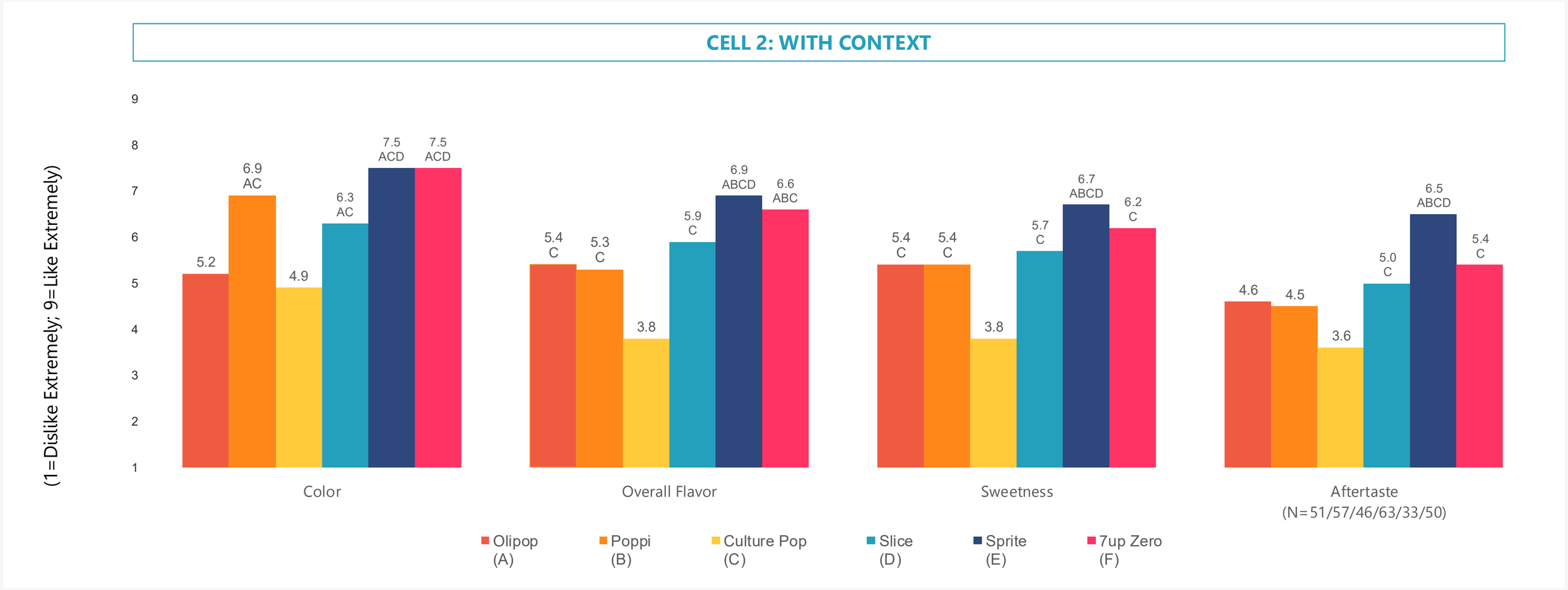


n=89/84
Significant Differences at 95% CL = Uppercase

With context, Sprite continues to lead, however Olipop and Poppi both start to see parity to Slice and 7UP Zero on sweetness and aftertaste.

The perceived health benefits of Olipop and Poppi allow for more taste tolerance and scores for these products increase with this information.

Hedonics

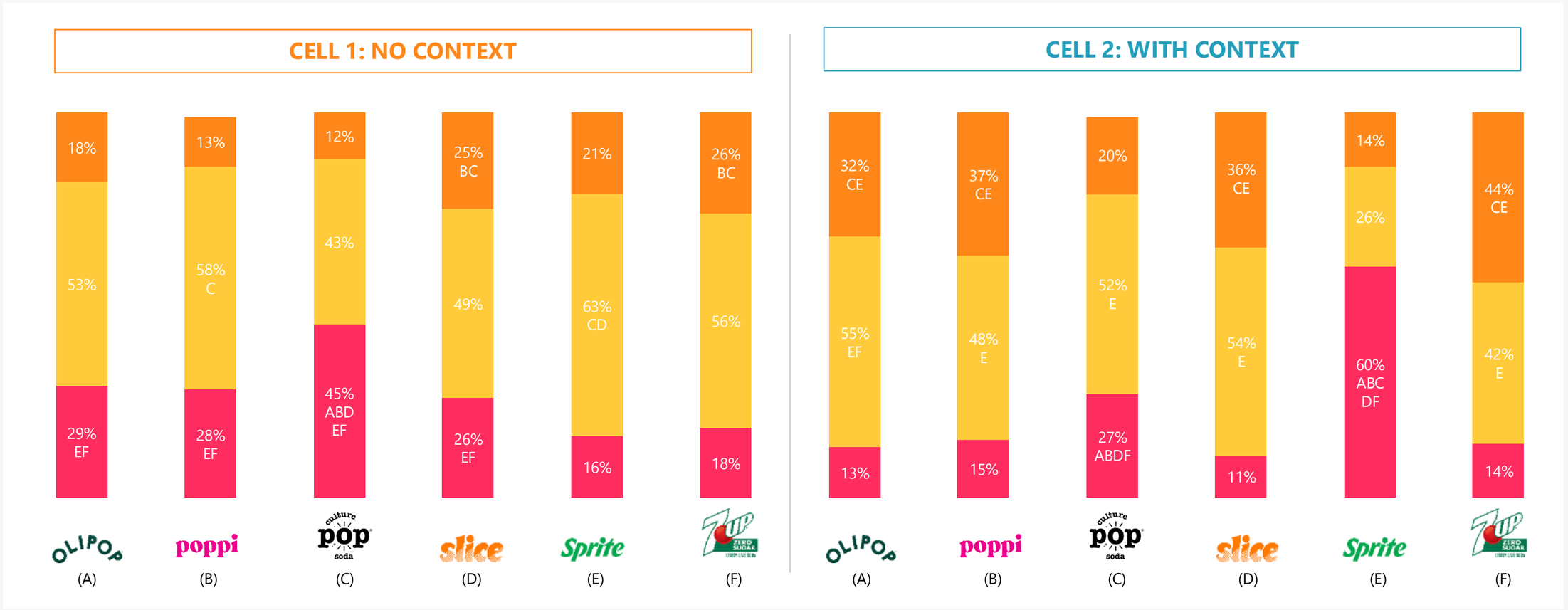


n=89/84
Significant Differences at 95% CL = Uppercase

Without context, none of the samples are perceived to be very effective in supporting health needs. When context is provided, perceived efficacy increases for all sodas except Sprite.

The largest change in perceived efficacy is for Sprite: Not at All Effective ratings increased from 16% to 60%.

Health Efficacy (%)



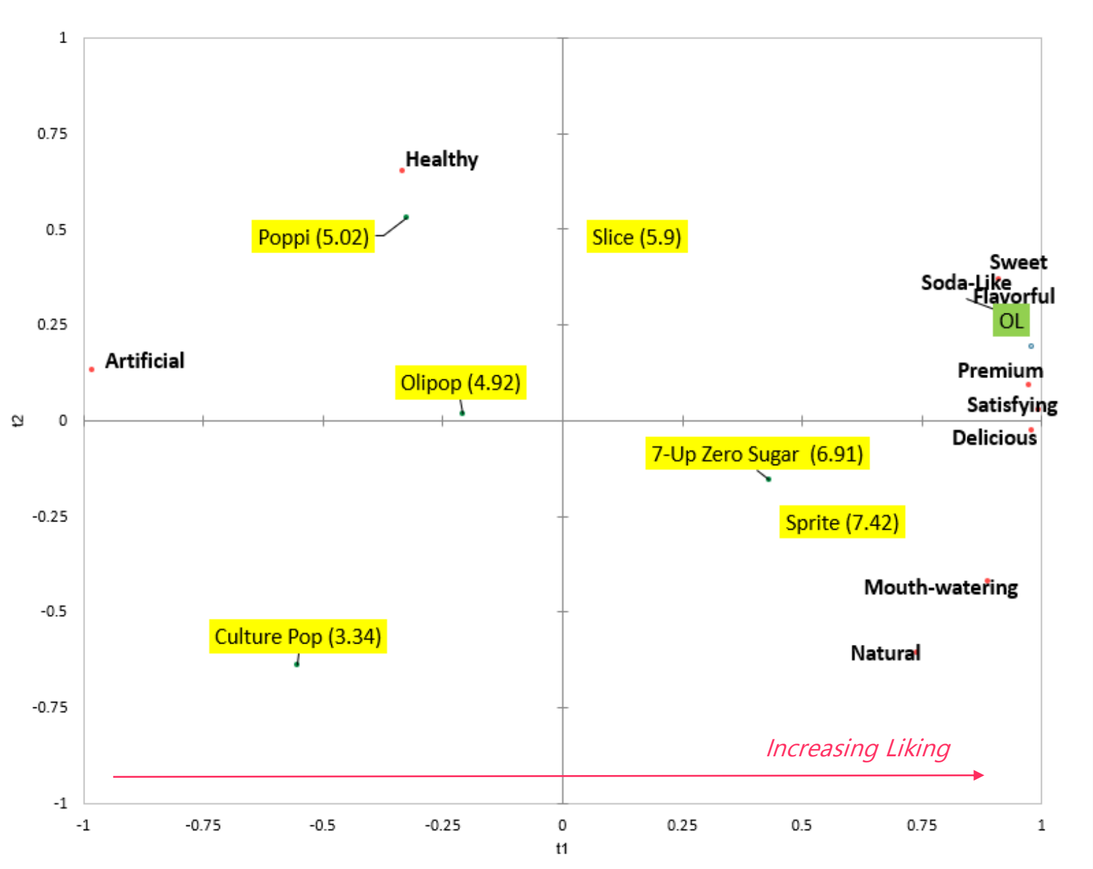
n=89/84
Significant Differences at 95% CL = Uppercase

Q: How effective do you think this (INSERT PRODUCT DESCRIPTION) with (INSERT PRODUCT DESCRIPTION 2) is in supporting your health needs?

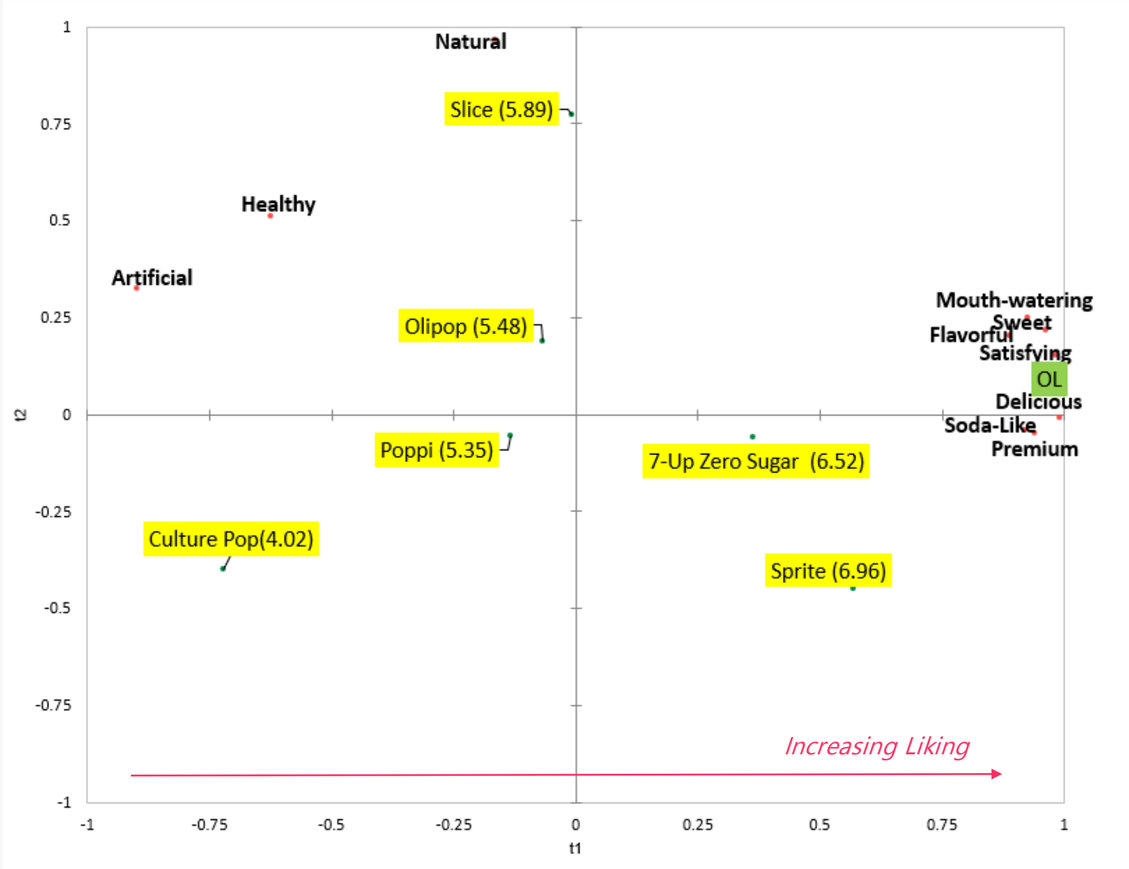
PLS Regression maps demonstrate similar CATA associations between the two cells, with a few small differences. In both cases, traditional sodas are associated with higher liking and terms like Sweet, Flavorful, Satisfying, and Delicious.

When given context, Natural becomes more associated with Functional Sodas, and Healthy loads more highly on this axis. Artificial remains more associated with Functional Sodas, indicating a need to continue to improve flavor.

Cell 1: No Context



Cell 2: With Context



Without context, functional sodas skew too tart and not enough sweetness. Olipop, Poppi and Culture Pop are polarizing in overall flavor intensity.

CELL 1: NO CONTEXT (%)

JAR Diagnostics (%)		Olipop (A)	Poppi (B)	Culture Pop (C)	Slice (D)	Sprite (E)	7UP Zero (F)
Color	Too Dark	69 BCD	11	56 BD	25 B	-	-
	Just About Right	27	72 AC	34	64 AC	81 ACD	85 ABCD
	Too Light	4	17 A	10	11	19 A	15 A
Overall Flavor	Too Strong	42 DEF	35 DEF	34 DEF	18 EF	3	6
	Just About Right	31 C	43 C	19	58 ABC	72 ABC	81 ABCD
	Too Weak	27 F	22	47 ABDEF	24 F	25	13
Sweetness	Too Sweet	30 CE	34 CDE	3	22 C	19 C	24 C
	Just About Right	36 C	36 C	16	54 ABC	72 ABCD	69 ABCD
	Not Sweet Enough	34 EF	30 EF	81 ABDEF	24 EF	9	8
Tartness	Too Tart	34 DEF	43 DEF	63 ABDEF	21 EF	3	2
	Just About Right	35 C	40 C	20	64 ABC	78 ABC	74 ABC
	Not Tart Enough	31 BCDE	17	17	15	19	24
Balance of Flavors	Too Tart; Not Sweet Enough	42 DEF	42 DEF	81 ABDEF	20 EF	8	6
	Just About Right	30 C	31 C	16	60 ABC	69 ABC	65 ABC
	Too Sweet; Not Tart Enough	28 C	27 C	3	20 C	24 C	29 C
Amount of Carbonation	Too Bubbly	6	6	7	15 AB	12	16 ABC
	Just About Right	66	73 C	60	78 AC	80 AC	73
	Not Bubbly Enough	28 DEF	21 DE	34 BDEF	8	8	11

n=89
Significant Differences at 95% CL = Uppercase

≥ .5 concerning weighted penalty, ≤.49 - >.3 moderate penalty, ≤.3 not concerning

With context, most sodas are penalized for having an overly strong flavor, but balance of flavors is not penalized.

CELL 2: WITH CONTEXT (%)

JAR Diagnostics (%)		Olipop (A)	Poppi (B)	Culture Pop (C)	Slice (D)	Sprite (E)	7UP Zero (F)
Color	Too Dark	56 BCD	7	40 BD	20 B	-	-
	Just About Right	42	87 ACD	44	75 AC	87 AC	88 ACD
	Too Light	2	6	15 ABD	5	13 ABD	12 A
Overall Flavor	Too Strong	38 DEF	42 DEF	39 DEF	23 E	11	20 E
	Just About Right	49 C	45 C	23	63 ABC	76 ABCD	70 ABC
	Too Weak	13	13	38 ABDEF	14	13	10
Sweetness	Too Sweet	30 C	37 C	5	29 C	31 C	33 C
	Just About Right	48 C	46 C	23	54 C	64 ABC	61 BC
	Not Sweet Enough	23 EF	17 EF	73 ABDEF	18 EF	5	6
Tartness	Too Tart	29 DEF	44 ADEF	46 ADEF	15 E	4	8
	Just About Right	49 C	49 C	35	68 ABC	76 ABC	68 ABC
	Not Tart Enough	23 B	7	19 B	17 B	20 B	24 B
Balance of Flavors	Too Tart; Not Sweet Enough	21 EF	35 DEF	67 ABDEF	20 EF	5	8
	Just About Right	49 C	46 C	23	61 BC	68 ABC	64 BC
	Too Sweet; Not Tart Enough	30 CD	19	11	19	27 C	27 C
Amount of Carbonation	Too Bubbly	8	6	8	20 ABCEF	6	6
	Just About Right	68 C	74 C	51	68 C	79 C	85 ACD
	Not Bubbly Enough	24 DF	20 F	40 ABDEF	12	15	10

n=84
Significant Differences at 95% CL = Uppercase

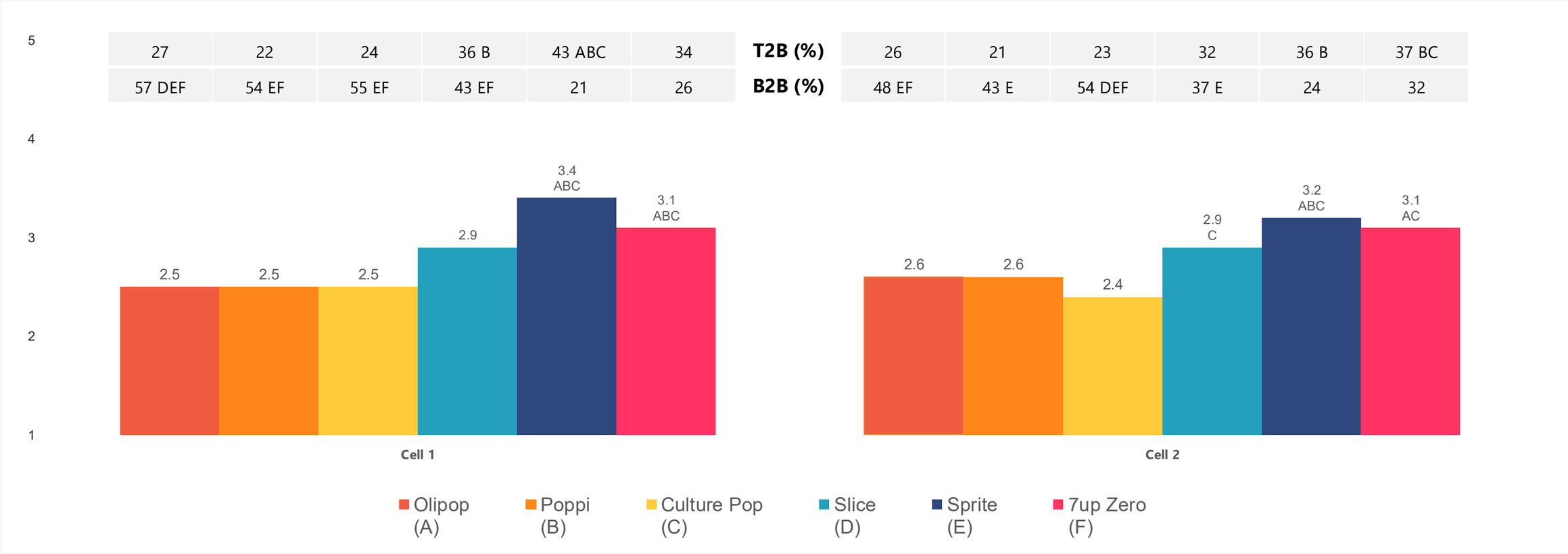
≥ .5 concerning weighted penalty, ≤.49 - >.3 moderate penalty, ≤.3 not concerning

Functional sodas are perceived to be more artificial than natural. Very/somewhat artificial is slightly reduced with context, however, Very/somewhat Natural remains relatively consistent. Consumers shift more toward a neutral perception, rather than natural.

Lemon Lime Artificial-Natural (5pt scale)

	Olipop (A)	Poppi (B)	Culture Pop (C)	Slice (D)	Sprite (E)	7up Zero (F)
T2B (%)	27	22	24	36 B	43 ABC	34
B2B (%)	57 DEF	54 EF	55 EF	43 EF	21	26

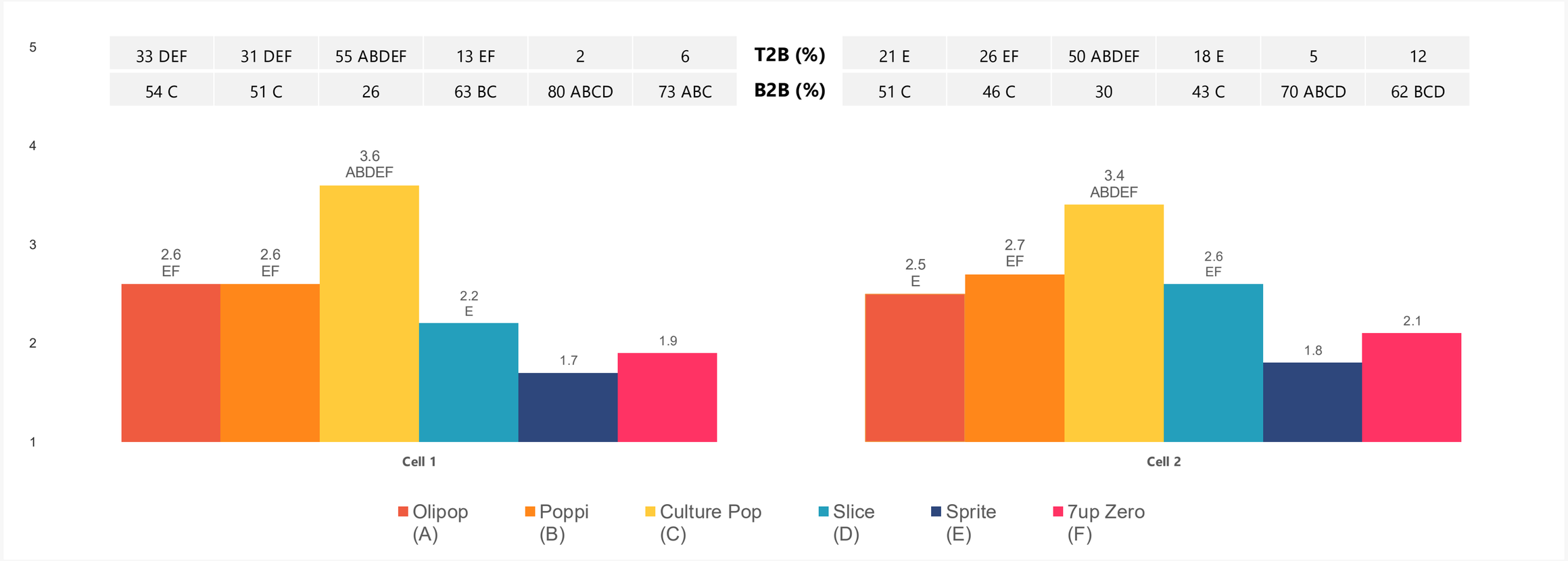
	Olipop (A)	Poppi (B)	Culture Pop (C)	Slice (D)	Sprite (E)	7up Zero (F)
T2B (%)	26	21	23	32	36 B	37 BC
B2B (%)	48 EF	43 E	54 DEF	37 E	24	32



n=89/84
Significant Differences at 95% CL = Uppercase

Culture Pop is perceived to be the most bitter, which may contribute to its low liking scores. Traditional sodas are not perceived to be very bitter.

Bitterness (5pt scale)



n=89/84
Significant Differences at 95% CL = Uppercase

PRODUCTS

PRODUCTS AS SERVED



*Critical penalty for Dark color





*Critical penalty for Dark color

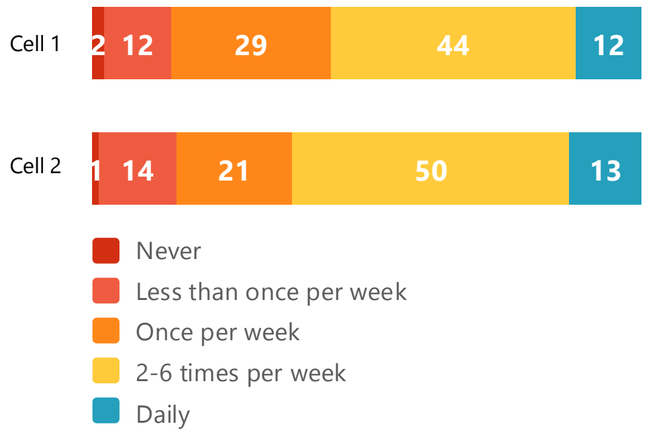




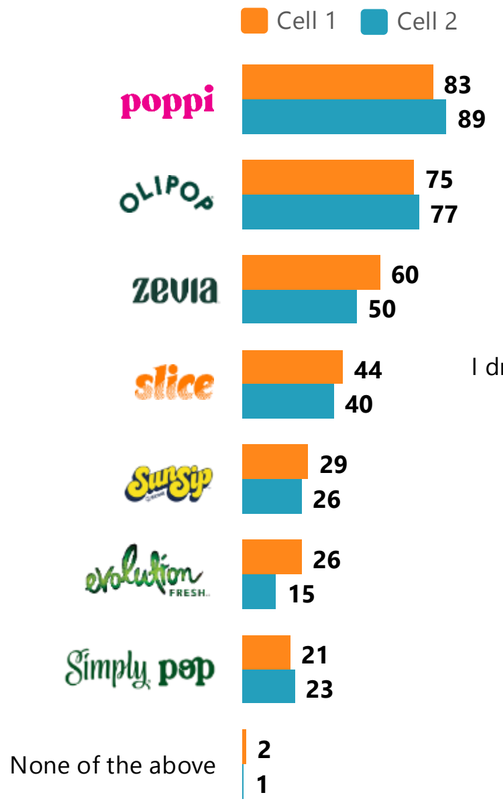


DEMOGRAPHICS

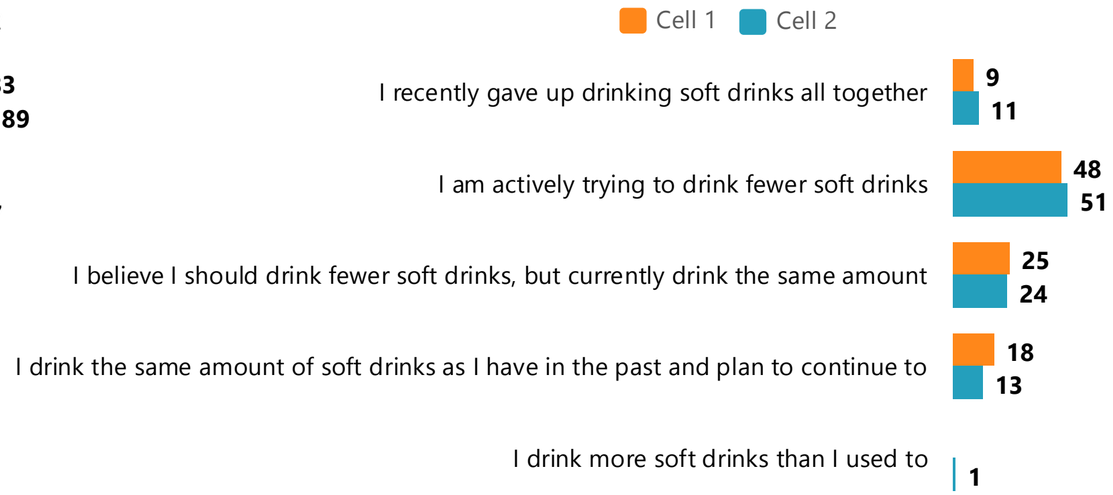
Frequency Purchase & Consume (%)



Awareness (%)



Current Soft Drink Consumption (%)

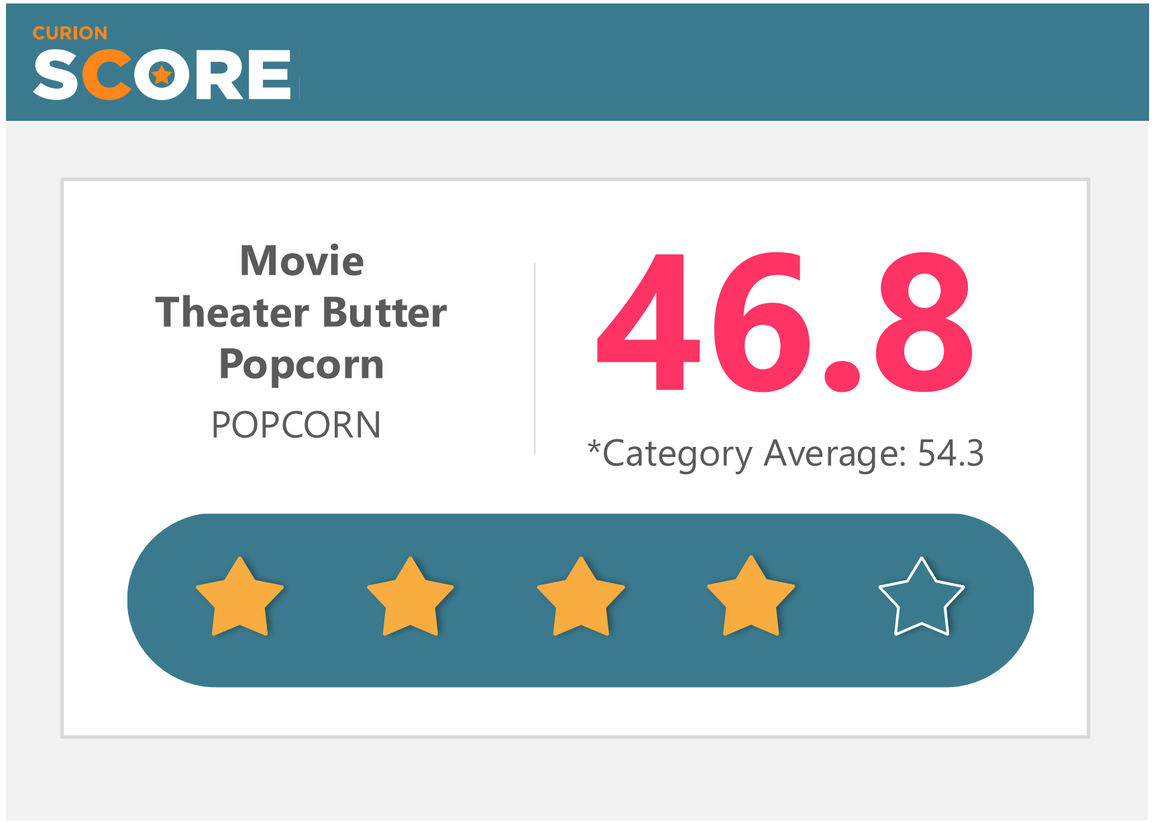


Q: How often do you purchase and consume healthy sodas?
Q: Which of these brands have you ever seen or heard of before today?
Q: Which of the following best represents your current soft drink consumption?
BASE: Cell 1 (n=89*); Cell 2 (n=84*)

The Curion SCORE™

Measuring Product Performance.

Powered by a database of 1.5 billion datapoints, the **Curion Score™** gives you greater confidence, to empower your decision making with full category context.



The Curion SCORE™

How It Works

01. Captures Metrics

Score captures metrics beyond Overall Liking, including, critical hedonic and diagnostic attributes.

02. Normalizes Effects & Biases

Score normalizes for unique context effects and biases.

03. Adjust for Variances

Score adjust for variances in scores from test design differences.

04. Scores Across Studies

Score allows from repeatable scores across studies.

Define

Define the category and key benchmark products to field study.

Score

Employ proprietary technology to distill results – the Curion Score

Benchmark

Benchmark the Curion Score against other tested products.

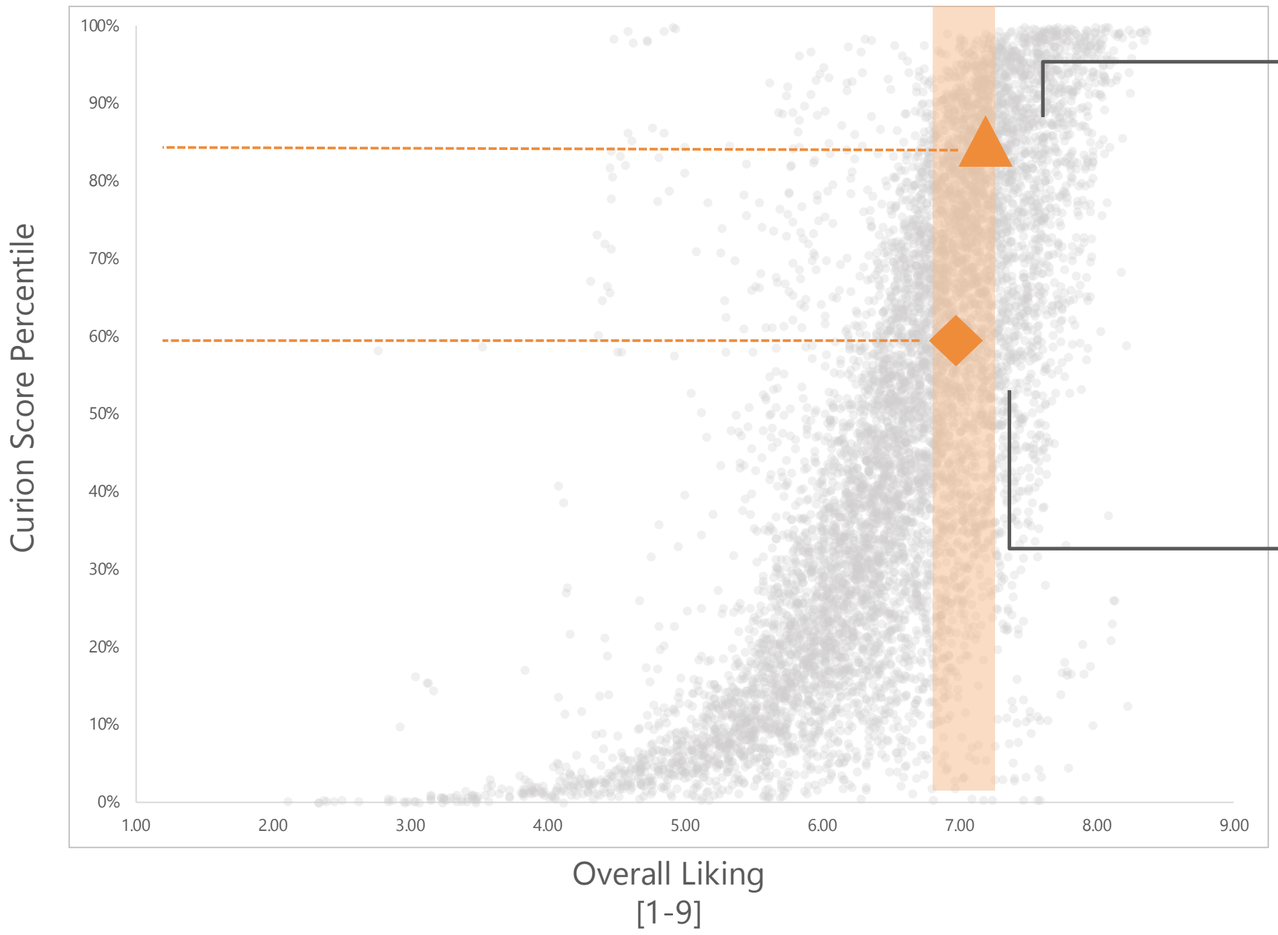
Deliver

Deliver the Curion Score with Category Percentiles and Actionable Insights.



The Curion Score Differentiates Consumer Performance

Curion Score vs OAL



Reese's Big Cup w/ Pret

OAL: 7.3 CS: 62.2

85%

Reese's Crunchy P'nut

OAL: 7.2 CS: 58.4

68%

CONTACT US

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gahlstrom@curioninsights.com