2024

HEALTHY BEVERAGE SURVEY REPORT

TRUE QUALITATIVE AT QUANTITATIVE SCALE

Over 5000 Open-Ended Voice Responses Coded with Artificial Intelligence

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(617) 930-3740 kevin@intuify.com www.intuify.com

GOALS AND CHALLENGES

RESEARCH OBJECTIVES

Understand how consumers really think of sugar-free drinks, diet drinks, and zero-sugar drinks, as well as how they perceive and talk about each one in a natural conversation at a quantitative scale.

Identify the type of person that would consume each type of beverage based on consumers' beliefs, as well as determine if consumers themselves would drink healthy beverages.

Learn about current consumer behaviors regarding food and drinks, as well as attitudes regarding personal health.

CHALLENGES

Differentation

With many new healthy beverages on the market overlapping in terms of characteristics and categorization, it is crucial to understand how consumers define each type of drink and how they perceive them differently.

Concerns and Skepticism

While many special soft drinks claim to be a healthy alternative to their standard counterparts, many believe these to contain additives and chemicals that are worse for a person's health.

Who Healthy Drinks Are Targeted To

Although healthy beverages are commonly perceived to be targeted to a broad audience, many consumers believe they don't fit in that group for one reason or another.

HEALTHY BEVERAGES TESTED

To address these challenges**, we sampled over 1000 soft drink consumers spanning a diverse set of subgroups across age, gender, ethnicity, and more**. Using our advanced survey technology, we let users record by voice **to answer story-format questions** regarding their attitudes and perceptions on one of the three randomly assigned healthy beverage categories:

SUGAR-FREE DRINKS

DIET DRINKS

ZERO-CALORIE DRINKS

UNIQUE METHODOLOGY

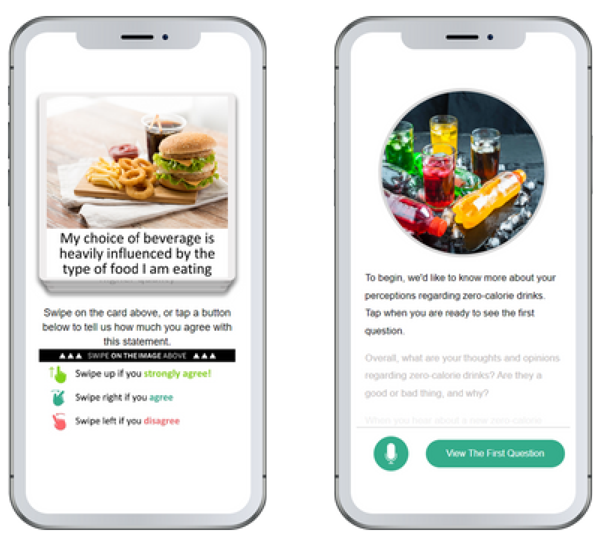
Over 1000 category users answered detailed voice questions regarding sugar-free, diet and zero-calorie drinks.

Engaging and intuitive interactions to maintain attention and provide authentic responses

AI-coded voice questions yielding up to 800% more content on open-ends

Faster interaction on quantitative questions to minimize fatigue

Sample Survey Interfaces



KEY FINDINGS AT A GLANCE

CONSUMER BEHAVIORS AND ATTITUDES

From our quantitative questions, nearly half of consumers in this study have tried at least one form of healthy beverage in the past three months, with the majority having consumed a sugar-free drink. When it comes to attitudinal statements, however, consumers tend to agree more about preferring real sugar than only sticking with healthier alternatives.

% of Healthy Beverage Category Who Drink Each Beverage Type

66%

agreed that they "prefer real sugar when consuming soft drinks and flavored beverages"

37%

agreed that they would "only drink flavored beverages or soft drinks if it's a zero-sugar, low-calorie, or diet option"

OVERALL PERCEPTIONS OF HEALTHY BEVERAGES

From our open-ends, sugar-free drinks yielded the highest overall positive perception among the three categories with taste as the most frequently mentioned topic. Other topics discussed include health concerns, calorie and sugar reduction, and more.

Sentiment of Overall Perception	Positive	Neutral	Negative	#1 Topic Mentioned
Sugar-Free Drink	44.34%	24.27%	31.39%	**Taste (35%)** Perceived as sacrificing taste
Diet Drink	37.03%	21.84%	41.14%	**Low Calories and Sugars (35%)** For people looking to lose weight
Zero-Calorie Drink	41.46%	21.2%	37.34%	**Health Perceptions (53%)** A generally healthier way to consume flavored beverages

WHO HEALTHY BEVERAGES ARE FOR

In this study, we asked respondents to describe in their own words the type of person who would consume healthy beverages. We then followed up asking if the healthy beverage they saw is for someone like themselves. This is one of several areas where we discovered major differences in perception.

Diet drinks are for everyone . . . but not for me.

A disconnect appears in the diet drink category. While the majority of the audience believes any type of person can drink diet beverages, only 35% of respondents indicated it's a drink for them. A potential explanation could be that no one wants to judge people who consume diet drinks but would feel **judged if they consumed diet drinks themselves.**

Sugar-free and zero-cal are for me

In contrast to diet drinks, zero-calorie and sugar-free drinks have **more respondents indicating that the drink is for them than those believing they're for everyone.** This could mean that those interested in sugar-free and zero-calorie drinks believe that these drinks are **more of a healthy life choice that doesn't carry the diet stigma.**

AI-Coded Open-Ended Voice Responses: Who is Each Drink Type For?

Sugar-Free Drink

For Those Managing Diabetes	38%
For Those Managing Their Weight	31%
For Everyone	29%
For Those Focused on Healthier Dietary Choices	26%
For Those Who Are Health Consciousness	21%

53% of respondents believe sugar-free drinks are for them.

+24% Difference from "For Everyone"

Diet Drink

For Everyone	69%
For Those Managing Their Weight	42%
For Those Who Are Health Consciousness	37%
For Those Managing Diabetes	33%
For Those Wanting To Avoid Sugar	31%

35% of respondents believe diet drinks are for them.

-34% Difference from "For Everyone"

Zero-Calorie Drink

For Everyone	41%
For Those Wanting To Avoid Sugar	36%
For Those Managing Their Weight	35%
For Those Focused on Healthier Dietary Choices	31%
For Those Who Are Health Consciousness	22%

55% of respondents believe zero-calorie drinks are for them.

+14% Difference from "For Everyone"

CONTACT US TO GET THE FULL REPORT WITH UNIQUE INISIGHTS.

Despite several respondents struggling to differentiate these types of healthy beverages, our AI-coded voice-at-scale methodology discovered several more key differences between sugar-free, diet, and zero-calorie drinks.

TASTE PERCEPTIONS

Perceptions are split when it comes to taste. One of these three beverage types strongly outperforms the other two in terms of positive sentiment around taste perceptions.

Which one is perceived to taste better?

HEALTHIER IN DIFFERENT WAYS

One healthy beverage type is perceived to be healthier in terms of helping with specific medical conditions such as diabetes, whereas the other two have higher percentages of people believing it's for those who are looking to make generally healthier decisions.

How does each beverage contribute to better health?

CONFUSION AND SKEPTICISM

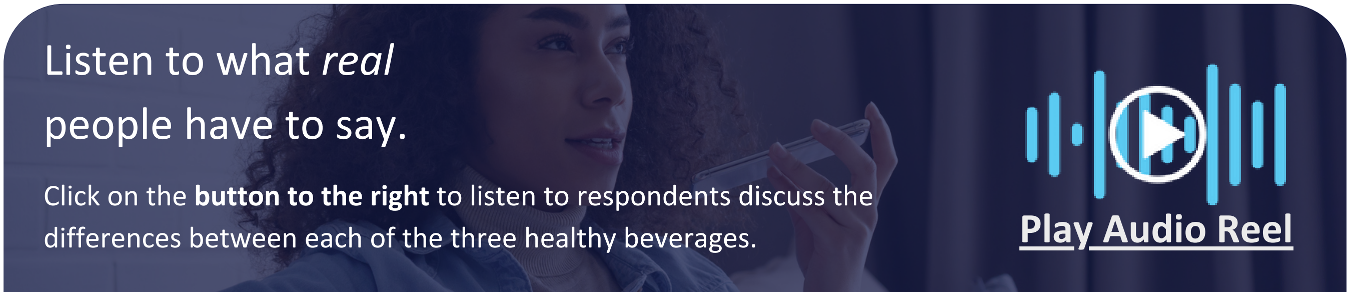
Among the three healthy beverages, one yields a significantly higher level of skepticism, with respondents indicating that it contains far more harmful chemicals and additives especially when compared to its counterparts.

Which healthy beverage are consumers most concerned about?

SUGAR AND CALORIC CONTENT

Two out of the three healthy beverages stand out in terms of what they contain, affecting overall perceptions and drink preferences.

What does that mean for your drink portfolio?



Listen to what *real* people have to say.

Click on the **button to the right** to listen to respondents discuss the differences between each of the three healthy beverages.

Play Audio Reel

STUDY SAMPLE

1000
targeted sample

1313
raw completes

-295
cheaters removed

1018
quality sample

As the market research industry struggles with high and rising cheater rates, Intuify uses a combination of Voice Validation, Pattern Detection, and Completion Time to ensure the highest quality data available anywhere. Our interfaces and voice requirements deter many cheaters from even trying to cheat, while our filters exclude those who do.

In exchange, Intuify believes in paying a premium for quality panelists – customers who share real stories deserve to be rewarded.

SUBGROUPS

Male	550	**Younger Than 25 Years Old**	264
Female	457	**25 to 44 Years Old**	366
Poor/Average Health	349	**45 to 64 Years Old**	209
Good Health	387	**65 Years Old or Older**	179
Great/Excellent Health	282		

Loving this and want even more cool insights? Our full report goes **deeper into consumer sentiment** regarding healthy beverages, revealing more discussed topics, consumer drinking behaviors, and much more!

To get it, just reach out to Matt Seltzer at mseltzer@intuify.com or 702-494-8936.