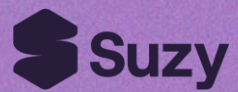




# A New Era In Conversational Research





**Katy Emerson**  
EVP, Customer Success, Suzy





# Meet Suzy

The most comprehensive **end-to-end consumer insights platform** that solves industry pain points in a single solution.

## Quality

Premium, proprietary on-demand audiences for reliable and high-quality insights.

## Connectivity

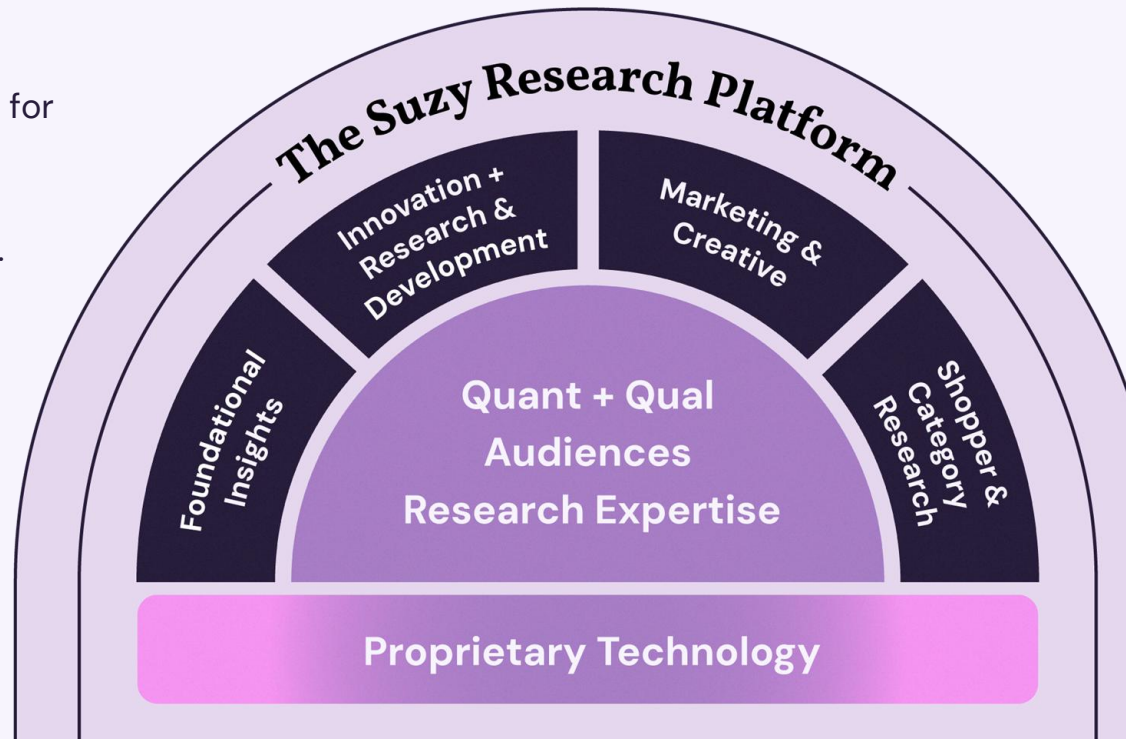
Quant & qual integrated on a single platform.

## Efficiency

Advanced technology for rapid, cost-effective solutions.

## Expertise

Cutting-edge AI tech + rigorous analysis from our Center of Excellence team.






# What Is Suzy Speaks?

- **A New Kind of Conversation:** Suzy Speaks is an **AI-moderated** interview tool that lets you **talk** to **lots** of **consumers** at once.
- **Real Answers, Fast:** It's like having **in-depth chats** with real people—only quicker and at a bigger scale than traditional qual research.
- **Why It's Different:** Unlike surveys that can be boring or rigid, Suzy Speaks **feels like a friendly conversation**, helping people share their honest thoughts.





February 2025

**Modern Sodas:**  
Consumer Adoption, Purchase Drivers & Competitive Opportunities





Prepared for Suzy Marketing

**Suzy Speaks Research Approach**

Suzy Speaks combines the scalability of quantitative research with the depth and authenticity of qualitative insights through AI-moderated voice conversations. This innovative approach enables respondents to share their thoughts in a natural, conversational format while allowing researchers to gather rich, nuanced feedback at scale.

Through AI-driven moderation, Suzy Speaks alleviates the barriers of traditional qualitative research—ensuring efficiency, consistency, and enhanced data quality—while addressing common limitations of traditional surveys, such as engagement fatigue, rigid question structures, and fraud risks.

For this study, Suzy Speaks was used to capture consumer insights on *Modern Sodas*, allowing for open-ended responses and thematic categorization.

 <b>Interview Length:</b> 20 minutes	 <b>Sample Size:</b> 102 respondents	 <b>Fieldwork Dates:</b> March 6 – March 7	 <b>Sample Profile:</b> <ul style="list-style-type: none"><li>• Even split Male/Female</li><li>• Age distribution:<ul style="list-style-type: none"><li>• 18-34 35%</li><li>• 35-54 35%</li><li>• 55+ 35%</li></ul></li></ul>
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The insights gathered offer actionable takeaways, reflecting authentic consumer experiences and attitudes in their own words.

**Executive Summary**

<b>Consumer Adoption</b> Curiosity about claims Many consumers report health benefits and strong brand perception, often mentioning "natural" and "real ingredients." Recent purchases are mostly driven by health and wellness goals, reflecting a growing awareness of sugar intake.	<b>Retail Behavior</b> Modern sodas capture consumer attention with sleek packaging and bold branding, often featuring health claims and "real ingredients." Consumers favor convenience and value, often purchasing in bulk for home or office use. Research is quickly shared across social media, influencing purchase decisions and brand perception.	<b>Flavor &amp; Ingredient Preference</b> High consumer demand for "real ingredients" and "natural" flavors, often mentioning "no artificial flavors" and "real sugar." Consumers are open to trying new flavors, especially those that are "refreshing" and "taste like real soda." Authentic ingredients and natural flavors are key drivers of purchase decisions, often leading to repeat purchases.	<b>Competitive Positioning</b> Consumers are looking for brands that offer a "better" alternative to traditional sodas, often mentioning "healthier" and "more natural." Brands that offer a "better" alternative to traditional sodas are often mentioned as "better" options.	<b>Brands</b> Pepsi (37%), Coke (24%), and Sprite (15%) are the top brands mentioned, often with positive sentiment. Consumers are looking for brands that offer a "better" alternative to traditional sodas, often mentioning "healthier" and "more natural." Brands that offer a "better" alternative to traditional sodas are often mentioned as "better" options.
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**I. Consumer Adoption (cont'd)**

**Key Drivers of Trial**

**Health Consciousness**

- 15% identified the primary reason they chose a modern soda was that "I had less sugar and was healthier." This highlights a segment of consumers proactively seeking healthier alternatives to traditional carbonated beverages.
- Consumers often connected their soda choice directly to a specific health or wellness goal, especially sugar reduction.

**Consumers seeking lower-sugar alternatives represent a significant portion of initial trials, driven by health-conscious goals ranging from dietary management (such as diabetes prevention) to general wellness aspirations. For these buyers, clear, believable health credentials are essential to driving initial trial.**

**Health Consciousness**

"I've been trying to cut back on sugar, and this felt like a good choice. I've never had one of these before, and I'm glad I tried it." (M22) This quote represents consumer curiosity and openness to healthier alternatives, providing valuable insights into trial drivers.

"I've been looking for a better alternative to traditional sodas, and this one seems to fit the bill. I'm excited to try it." (F25) Here, we see a consumer directly linking their choice to health management, reflecting a clear consumer need within the category.

"I've noticed about calories and sugar, and this felt like a good choice. I've never had one of these before, and I'm glad I tried it." (M22) This quote represents consumer curiosity and openness to healthier alternatives, providing valuable insights into trial drivers.

"I've been looking for a better alternative to traditional sodas, and this one seems to fit the bill. I'm excited to try it." (F25) Here, we see a consumer directly linking their choice to health management, reflecting a clear consumer need within the category.



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**Sample size:**  
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**Fieldwork dates:**  
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**Sample Profile:**  
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Age distribution:  
**15-34:** 33%  
**35-54:** 33%  
**55+:** 33%

*The insights gathered offer actionable takeaways, reflecting authentic consumer experiences and attitudes in their own words.*



# Why Modern Soda?

CPG PLAYBOOK // MARCH 28, 2025

## How Liquid Death is tackling the soda wars

By Gabriela Barkho



## Revolutionizing soda: The emergence of a new Modern Soda category

By Rachel Arthur

05-Dec-2024 Last updated on 05-Dec-2024 at 09:37 GMT



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## Pepsi will pay \$1.7 billion for a soft-drink company that got its start on 'Shark Tank'

Pepsi boosts healthy offerings with Poppi, a maker of probiotic drinks

By [Steve Gelsi](#) [Follow](#)

Last Updated: March 17, 2025 at 7:23 p.m. ET

First Published: March 17, 2025 at 9:38 a.m. ET



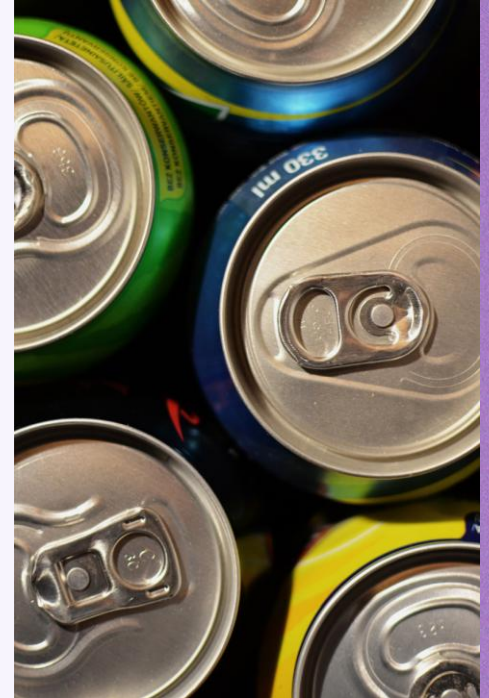
# Background

## Suzy Context

- This research was conducted to understand consumer perceptions and behaviors around modern sodas—health-oriented, innovative beverages that are increasingly competing with traditional sodas.

## Rationale

- With growing consumer interest in functional ingredients, lower sugar content, and better-for-you positioning, the modern soda category is poised for growth. Understanding adoption patterns, competitive pressures, and brand choices can guide strategic decisions.





# Research Goals

## Consumer Adoption

Identify the key factors driving trial and repeat purchases of modern sodas.

## Retail Behavior

Examine how shoppers navigate the modern soda section and what messaging or packaging elements capture their attention.

## Flavor & Ingredient Preferences

Explore which functional claims (e.g., prebiotics, antioxidants) are most influential and how they shape buying decisions.

## Competitive Positioning

Determine what might persuade a traditional soda drinker to switch to modern soda alternatives.

## Brands

Understand which brands consumers are selecting and the underlying reasons for those choices.



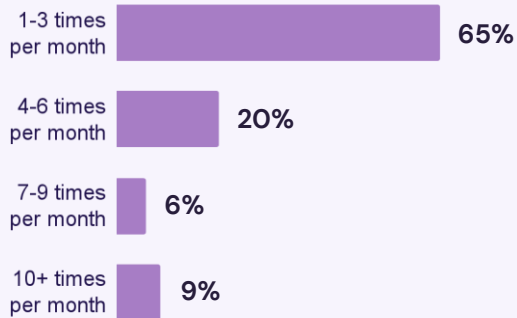


# Consumer Adoption

## Purchase Frequency

65%

of respondents **buy carbonated beverages 1–3 times per month**, indicating moderate consumption habits.



## Modern Soda Trial

49%

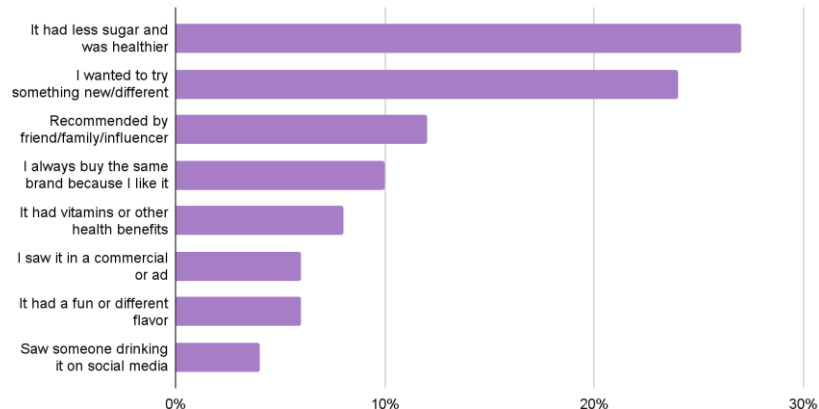
**have tried modern soda brands**, suggesting a near-even split between adopters and non-adopters.

Consumers enter the modern soda category for various reasons, primarily driven by curiosity about flavor innovations and a desire for healthier drink options. Once they try these beverages, consistent quality and real functional benefits often determine whether they become loyal repeat buyers.

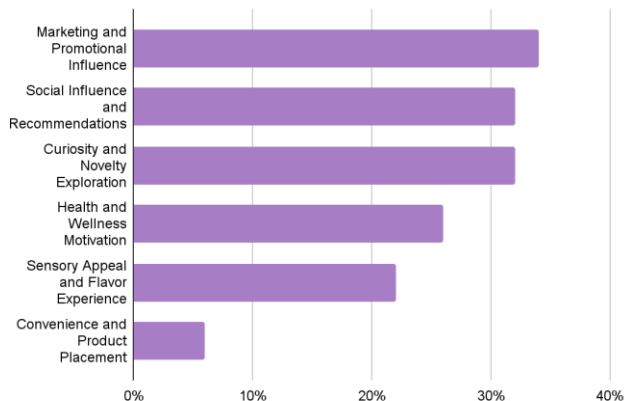


# Consumer Adoption

**Primary Reason for Trying a Modern Soda**  
(Multiple Choice Question)



**All Reasons for Trying a Modern Soda**  
(Transcript-wide Synthesis)



The structured multiple-choice responses (left side) provided clear but limited insight into consumer motivations—primarily highlighting health-related aspects ("less sugar/healthier" at 27%) and novelty ("trying something new" at 24%). However, the transcript-wide synthesis (right side) reveals richer and more nuanced reasons that were not captured by the structured question.



# Consumer Adoption: Key Drivers of Trial

34%

## Marketing and Promotional Influence:

A dominant factor that wasn't explicitly captured by the multiple-choice question. This indicates that consumers themselves often mention marketing, promotional offers, or advertisements organically, underscoring the power of these tactics.

32%

## Social Influence and Recommendations:

Significantly more texture emerges around social factors (friend recommendations, influencer mentions, and general peer influence). While the structured question did partially capture this ("Recommended by friend/family/influencer" at 12%), the transcript-wide synthesis suggests social factors have an even broader impact when people talk freely.

32%

## Curiosity and Novelty Exploration:

This aligns well with the structured option "wanted to try something new/different" (24%), confirming that curiosity is indeed a core driver—but again, the synthesis suggests it's more widespread and varied than the structured format alone reveals.

26%

## Health and Wellness Motivation:

Corresponds strongly to the structured options around "healthier" and "vitamins," affirming that health remains central to consumer choice.

22%

## Sensory Appeal and Flavor Experience:

This insight adds important context missing from the structured responses. Consumers talk about flavors and sensory enjoyment far more broadly when they aren't constrained by pre-set options.

6%

## Convenience and Product Placement:

While smaller, this highlights another driver missing entirely from the structured list.



# Consumer Adoption: Key Drivers of Trial

## Curiosity and Novelty Exploration

32%

were driven by the desire to try something “**new or different**,” indicating a strong consumer appetite for **flavor innovation and novelty** within the soda category.



## Curiosity and Novelty Exploration

Respondents shared experiences of choosing modern sodas purely out of curiosity or as an exciting change from routine beverage choices:

*“I saw a watermelon–lime flavor, and **that sounded fun**—so I bought a can on **impulse**.” (#28)*

This highlights how intriguing flavor combinations can spontaneously motivate consumers to buy.

*“I’m always looking for **new twists** on my usual fizzy drink routine.” (#47)*

Here, we see consumers actively looking to break from traditional soda flavors, underscoring a desire for variety and innovation.

*“I noticed a pineapple–ginger flavor **on the shelf** and thought **it sounded interesting enough** to give it a try.” (#16)*

This respondent confirms packaging and clear, novel flavor descriptors can be sufficient motivators for initial purchase.



# Consumer Adoption: Key Drivers of Trial

## Health and Wellness Motivation

27%

indicated the primary reason they chose a modern soda was that ***“it had less sugar and was healthier.”*** This highlights a segment of consumers **proactively seeking healthier alternatives** to traditional beverages.



## Health Consciousness

Consumers often connected their soda choice directly to a specific health or wellness goal—especially sugar reduction:

*“I’ve been trying to **cut back on sugar**, so I grabbed a can of Poppi just to see if it’d **taste as good.**” (#22)*

This quote emphasizes consumers' curiosity and openness to healthier alternatives, provided taste expectations are met.

*“I’m **pre-diabetic**, so any **lower-sugar option** is worth a try.” (#71)*

Here, we see a consumer directly linking their choice to health management, reflecting a clear consumer need within the category.

*“I’m careful about calories and sugar, and this felt like a **guilt-free treat.**” (#35)*

This respondent highlights the broader lifestyle aspect of choosing lower-calorie, lower-sugar options as a personal reward.



# Consumer Adoption: Key Drivers of Trial

## Sensory Appeal and Flavor Experience:

Sensory appeal and flavor experience played a significant, albeit less dominant than marketing, role in prompting participants to try modern soda brands.

Several participants mentioned being drawn to unique or interesting flavors. The "crisp" and "refreshing" qualities of the drinks were also highlighted as appealing aspects. Specific flavor profiles such as berry, citrus, and unique fruit combinations were frequently mentioned as enticing.



## Sensory Appeal and Flavor Experience

*"Oh, I love exotic fruits. Anything **spicy or fruity** I will buy. I think those **stand out to me** very much."*

*"I'm a big drinker of Poppi in particular, I've had Olipop as well, and I personally like Poppi for its **citrus flavors**, such as **cherry limeade**, while **still being low in sugar**, 5 grams or under, and having functional health benefits, such as **prebiotics and probiotics**, and getting a pretty decent dosage of **fiber** as well."*

*"It had a **fun or different flavor**"*



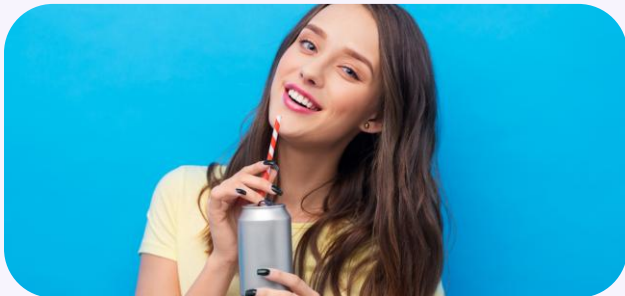
# Consumer Adoption: Key Drivers of Trial

## Consistent Quality:

Taste and mouthfeel consistency are essential for driving ongoing consumer loyalty and trust. Consumers rely on brands that consistently deliver the expected flavor experience.

## Genuine Benefits:

Some consumers experience tangible wellness improvements—such as reduced bloating or fewer sugar-related energy crashes—which strongly reinforces repeat purchase behavior.



## Consistent Quality:

*"If it tastes good every time, I **trust the brand more**."*

*"I stick with a brand once I'm sure it **won't switch up** the formula...I tried the same flavor a few times, and every can **tasted exactly how I expected**—no weird aftertaste or variation." (#45)*

## Genuine Benefits:

*"I feel **lighter and less bloated**, so I keep buying."*

*"Honestly, I **stopped having that sugar crash** in the middle of the day, which is why I keep restocking it."*



# Consumer Adoption: Implications for Brands and Retailers

## **Amplify Marketing & Social Influence:**

Leverage a strategic mix of digital advertising, in-store promotions, and influencer partnerships to drive awareness and initial trial among curious but hesitant consumers.

## **Highlight Novelty & Flavor Innovations:**

Showcase distinct flavor profiles prominently on packaging and marketing communications, emphasizing unique combinations and sensory appeal to spur impulse buys.

## **Reinforce Health & Wellness Credentials:**

Clearly and consistently communicate health-focused attributes (e.g., reduced sugar, probiotics) on packaging, especially targeting consumers with specific health motivations (e.g., lower-sugar diets, wellness goals).

## **Ensure Consistency & Authenticity:**

Deliver consistent taste and tangible wellness benefits, building trust and repeat purchases by aligning consumer experience with brand promises.

By showcasing distinct flavor profiles and health-forward credentials—while ensuring that the taste experience remains consistent—modern soda brands can effectively attract new customers and convert them into returning buyers.



# Retail Behavior: Store Navigation and Discovery

## Dedicated Shelves:

25%

of respondents stated they **regularly browse health-focused or specialty aisles** for new products and modern sodas.

## Visual Appeal & Placement:

Shoppers note packaging design as a top reason for picking up a can. Product packaging needs to stand out in order to capture shopper attention, especially for those who aren't searching with a brand in mind.



## Dedicated Shelves

"I like checking out the **'healthy drinks'** aisle to **see what's new.**"

This underscores the importance of clear signage and category grouping.

"I always start in the organic section. If the soda is somewhere else, I **might not even see it.**"

Ensuring consistent product placement in these sections is key to reaching target consumers.

## Visual Appeal and Placement

"**Bright, crisp packaging** catches my eye, especially if I'm just wandering the aisle without a specific brand in mind."

"I noticed a brand because of its **bold color palette** and ended up buying it on impulse."

Attractive, on-brand graphics and colors can result in higher impulse purchases.

"I'm a sucker for **cool designs**—especially if I wasn't planning to buy soda at all."



# Retail Behavior: Implications for Brands and Retailers

## **Secure Prime Placement and Grouping:**

Ensure modern sodas occupy prominent spots in health-focused or specialty beverage sections so that consumers know where to look and can easily compare options.

## **Use Bold, Standout Packaging:**

Use bold, eye-catching designs that quickly communicate key attributes and encourage shoppers to grab the product off the shelf.

## **Highlight Functional Benefits and Simple Flavors:**

Prominently feature compelling health claims (e.g., “probiotics,” “natural sweeteners”) and keep flavor names concise yet distinctive to appeal to curiosity while reassuring consumers about taste.



By prioritizing shelf visibility, appealing packaging, and clear messaging around both health benefits and flavor, brands and retailers can drive stronger in-store discovery and ultimately boost sales.



# Flavor and Ingredient Preferences

Consumers want to quickly understand why a product is “healthier” or more beneficial and what it might taste like. Straightforward descriptors (e.g., “pineapple-ginger” or “probiotic-infused”) create immediate interest and reduce uncertainty.

## Sugar Alternatives:

45%

of respondents said they’d **pay more for soda** if it uses sugar alternatives that still taste good.

## Taste and Consistency:

Despite the focus on health, taste is the ultimate driver. Brands must strike a delicate balance between functional/health claims and flavor performance to retain consumers.



## Sugar Alternatives:

*“Some alternatives have an aftertaste; I need to try it first before I commit.” (#66)*

*I don’t mind stevia, but I hate the aftertaste if it’s too strong.” (#66)*

*“If I trust the ingredients and like the taste, I’ll pay a premium.” (#21)*

## Taste and Consistency:

*“If it tastes weird, it doesn’t matter how healthy it is—I’m not buying it.” (#34)*

*“I need the fizz and flavor to be on point or I’ll revert to regular soda.” (#59)*



# Flavor and Ingredient Preferences: Implications for Brands and Retailers

## **Promote Health Benefits:**

Make “less sugar,” “added probiotics,” or other health-support claims visible (on packaging to catch the eye of wellness-minded shoppers), but substantiate them with credible claims or simple explanation.

## **Focus on Aftertaste and Mouthfeel:**

Test multiple sweetener blends to ensure minimal off-notes, as taste dissatisfaction will sabotage repeat business.

## **Position Added Value Strategically:**

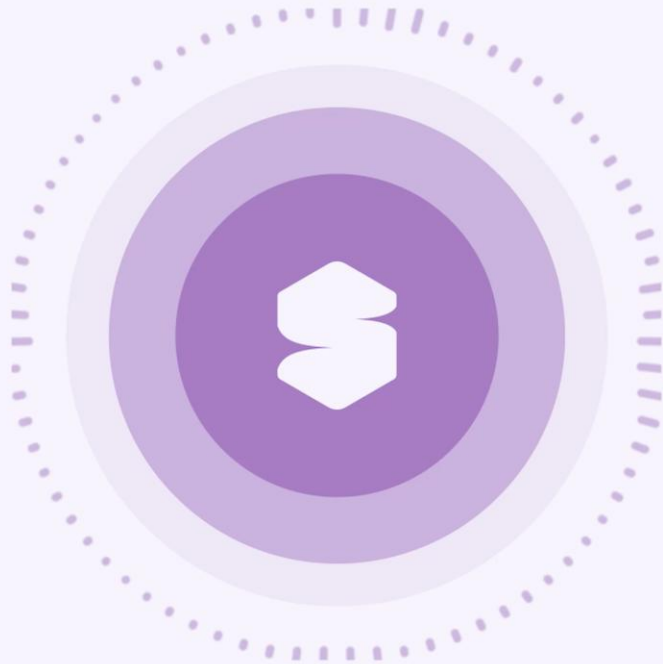
Consumers are often willing to pay a premium if they believe the product’s health benefits are legitimate and the taste meets or exceeds expectations.

Educate consumers by briefly explaining what ingredients like probiotics or antioxidants do to help justify a premium.



**By transparently communicating functional benefits and delivering a satisfying flavor experience, modern soda brands can stand out in a crowded marketplace and justify higher price points.**





Soda Consumption Habits



# Why We Used Suzy Speaks



## Emotional Capture

*"It helps my acid reflux when nothing else worked."*



## Personal Context

*"I'm diabetic, so I choose low sugar options for safety."*



## Social Influence

*"I saw it on TikTok and had to try it immediately."*





# Advantages of Voice-Driven Methodology

## Nuance Detection

Captures emotional context and sentiment that text surveys miss.

## Speed Advantage

Delivers insights faster without transcription delays.

## Consumer-Led Narrative

Allows respondents to direct conversation to what matters most.

## Authentic Connection

Creates more human relationship between researchers and participants.



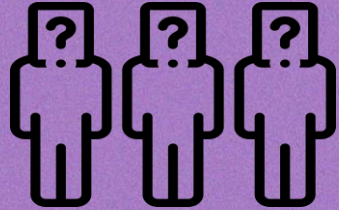
# Why Suzy Speaks Matters

## For Researchers

- **Quick, Real Insights:** Get trustworthy feedback to guide decisions.
- **No Guesswork:** Hear the “why” behind consumer opinions.
- **Scale + Depth:** Combine the reach of quantitative with the richness of qualitative.
- **Save Time & Money:** AI does the heavy lifting, so you can focus on what matters.

## For Respondents:

- **Comfort & Ease:** Talk naturally, without feeling judged or bored by long surveys.
- **Authentic Sharing:** A friendly AI moderator encourages open, honest responses.





# What This Means for You

## From Claims Validation

- Testing if statements are believable
- Measuring recall of benefits
- Tracking attribute associations
- Comparing competitive positioning

## To Meaning Validation

- Understanding emotional drivers
- Capturing situational context
- Uncovering behavior triggers
- Mapping decision journeys

**The shift from what people say to why they say it creates more actionable insights.**



# Q&A



# Thank you!

Come chat with us at Booth #300!

