



Shopper Pre Store survey

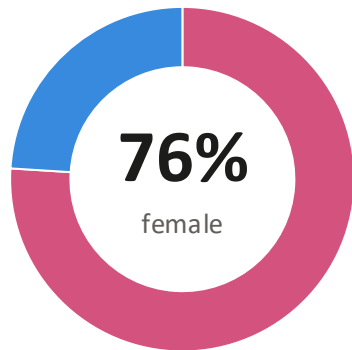
Traditional & non-traditional soft drinks

OBJECTIVE

Understand consumer interaction with the traditional & non-traditional soft drinks category and how it has changed compared with the 2024 benchmarking study.

Demographics

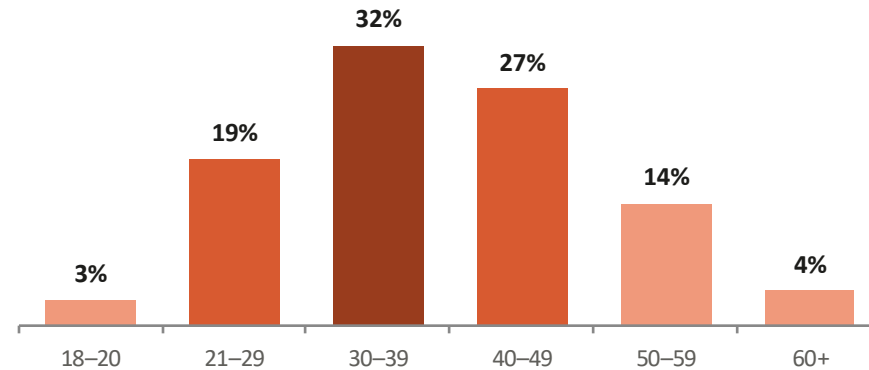
GENDER SPLIT



Female
Male

76%
24%

AGE RANGE



Core 30-49: **59%**








Median band: 30-39



n = 750

Shopper are looking for more Healthy **traditional** soft drinks

Purchase drivers — 2024 vs 2026

Purchase driver	2024	2026	Δ
 Healthy	19%	30%	+11
 Low / no sugar	48%	58%	+10
 Low / no sweetener	23%	31%	+8
 Natural	10%	23%	+13
 Functional benefits	13%	24%	+11
 Agree soft drinks are "not healthy"	6.9/10	7.4/10	+0.5
 Prefer natural sugars to artificial	6.3/10	7.1/10	+0.8

Key insights

TREND

Health is no longer a niche consideration — it's becoming a dominant purchase driver.

DEMAND





Shoppers are increasingly looking for low/no sugar & sweeteners, with natural ingredients that provide functional benefits.

TRUST

Consumers are increasingly sceptical of what's in their drinks and actively looking for an alternative they can trust.



Attitudes to **non-traditional** soft drinks (category growth 11%)

Purchase drivers — non-traditional

Purchase driver	2024	2026	Δ
 Healthy	36%	49%	+13
 Low / no sugar	30%	41%	+11
 Natural	26%	37%	+11
 Functional benefits	10%	37%	+27

In-store experience

KEY BARRIER

6.5/10	Ease of finding the product	
6.0/10	Ease of understanding benefits	

In-store SWOT

S STRENGTHS

Weekly consumption has risen from 55% to 66% since 2024.

Health-related drivers have become significantly more important, and shoppers are sceptical of traditional soft drinks.

O OPPORTUNITIES

With 81% of decisions made at the fixture, fixing in-store weaknesses will accelerate category development and shift share away from traditional brands.

W WEAKNESSES

In-store the category is underserving customers.

Labels are difficult to read, benefits are not effectively communicated, and shelf placement is inconsistent.

T THREATS

Failing to address in-store weaknesses will slow adoption of non-traditional drinks and maintain the dominance of traditional soft drinks brands.

In-store research will give you the competitive advantage

Five questions only in-store research can answer — where **81% of Shoppers** choose what to buy ...

01

Is your product findable?

Audit shelf placement, signage, and adjacency across store formats — and measure the gap between intended and actual location.

02

Is your label doing the work?

Test how clearly benefits land in 3 seconds at the shelf. Identify which claims convert and which read as health-wash.

03

Where should it live?

Validate the right home for functional, energy, and meal-replacement SKUs — main aisle, chilled, food-to-go, or sports nutrition.

04

What's blocking conversion?

Capture the moment of hesitation, comparison, and rejection — data sales receipts cannot show you.

05

How are you ranging vs competitors?

Benchmark facings, out-of-stocks, and promotional execution against Trip, Coke, Pepsi, and emerging functional brands.

Would you like to take part in our in-store research programme?