



provoke
insights

Non-Alcoholic Beverage Buyers:
2021 Brand Equity & Trends Research



Background & Objectives

As the United States has approached year two of living through the pandemic, habits and routines have been unrooted. As people stay at home more, there is an accelerated rate of technology adoption. People are still shopping, but how and what they purchase is modified from wearing a mask to buying more online.

In this changing environment, companies now more than ever need to understand their brand equity, consumer purchasing habits, and trends that impact their industry.

Provoke Insights, a full-service market research firm specializing in branding, advertising, and content marketing initiatives, developed the brand equity report to answer these pressing questions.

The goal of the research is to gain a national perspective on the mindset of consumers. The study covers 19 industries, including non-alcoholic beverages.



Methodology

Provoke Insights conducted a 15-minute survey among 3,000 Americans between the ages of 21 and 70. The study was in-field from January 18th to February 3rd, 2021.

A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).¹

Results based on this sample have a maximum margin of sampling error of $\pm 1.78\%$ at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

Overview



Unaided Awareness

The cola drinks lead top-of-mind awareness in the non-alcoholic category. Interestingly, Coke doubles Pepsi's familiarity score.



Brand Equity

Though the brand has low awareness, Bai has the highest brand equity score, followed by Red Bull and Arizona. Overall, large, more prominent brands tend to score lower than smaller brands with a limited range of beverages. Though prominent soda brands top unaided awareness, consumers perceive them as less innovative and worth a higher price.



Purchasing Non-Alcoholic Beverages

Almost half of Americans have purchased a non-alcoholic beverage in the last three months. They are more likely to be female baby boomers with no children in their household. These consumers are very concerned about COVID-19 impacting the economy and tend to stick with familiar brands.

Top Non-Alcoholic Beverage Brands

	Brand	Unaided Awareness	Brand Equity Score
1		32%	7.76
2		15%	7.91
3		5%	8.23
4		4%	5.56
5		4%	7.89
6		3%	7.88
7	GATORADE	1%	7.59
8		1%	7.92
9		1%	7.86
10	Red Bull	1%	9.10
11		1%	8.97
12		1%	9.07
13		1%	8.14
14		1%	6.64
15	bai	1%	9.71

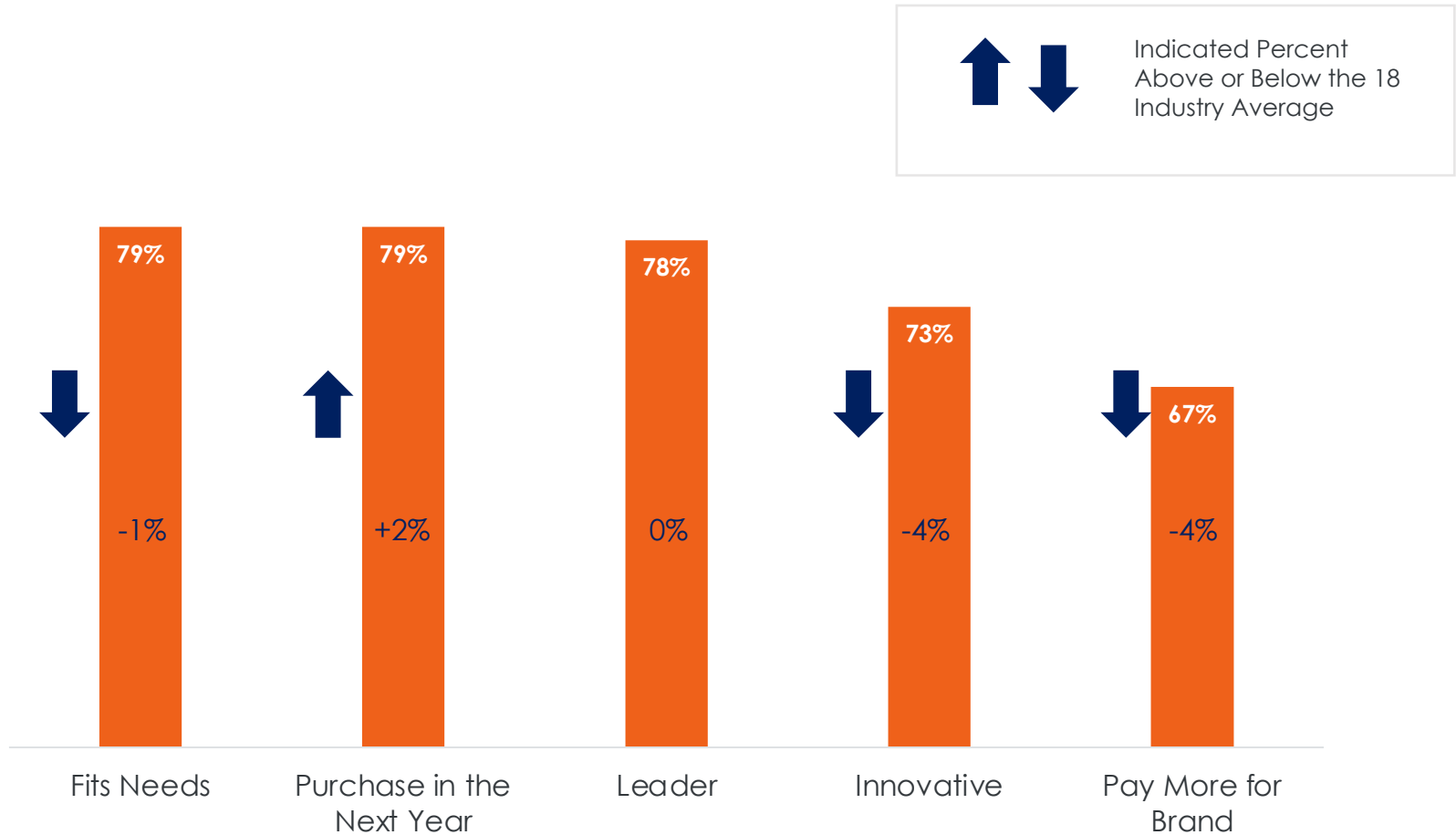
Coca-Cola has the highest unaided awareness in the non-alcoholic beverages' category, followed by Pepsi. Bai has the highest brand equity score.

How to Read This Chart

There are two scores. The first score is unaided brand awareness.

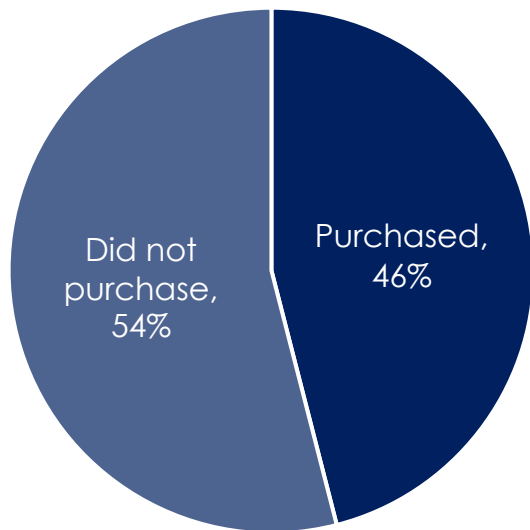
The brand equity scores are calculated by averaging the ratings for leadership, innovation, fits needs, pay more, and likelihood to purchase in the next year. The attributes are rated on a ten point agree scale, where 1 is strongly disagree and 10 is strongly agree.

Brand Equity Drivers: Non-Alcoholic Beverages



Base: Consumers who received the question (n=476)

Current Non-Alcoholic Beverage Purchasing:



46%

of U.S. Consumers
have purchased non-
alcoholic beverages
in the last three
months

Non-alcoholic beverages are
more likely to be:

% that Purchase Non-
alcoholic Beverages



Female: 49%



No children: 49%



Baby Boomers: 52%



Optimistic: 51%



Non-Alcoholic Beverages Buyers vs. Non-buyers

46% of the Population
152 million Americans

Personality Traits



71%

vs. 75% of non-alcoholic
beverages buyers are optimistic
about the future

(Top 2 of 4: Moderately/Very optimistic)

They are not as concerned about
COVID-19 impacting:



The economy (82%) vs. 76%



In-person events (71%) vs. 67%

(Top 2 of 4: Moderately/Extremely concerned)

Self described
personality



26% Good Hearted
vs. 21%



16% Intelligent
vs. 13%



23% Open-minded
vs. 22%

Shopping Habits

Top 2 of 7: Strongly Agree/Agree



35%

Stick with brands
they are familiar with
(41% Non-buyers)



27%

Prefer to shop online
than in-store
(32% Non-buyers)



10%

Are looking for the
cheapest option
(21% Non-buyers)



21%

Pay more for items
that are sustainably
sourced
(28% Non-buyers)

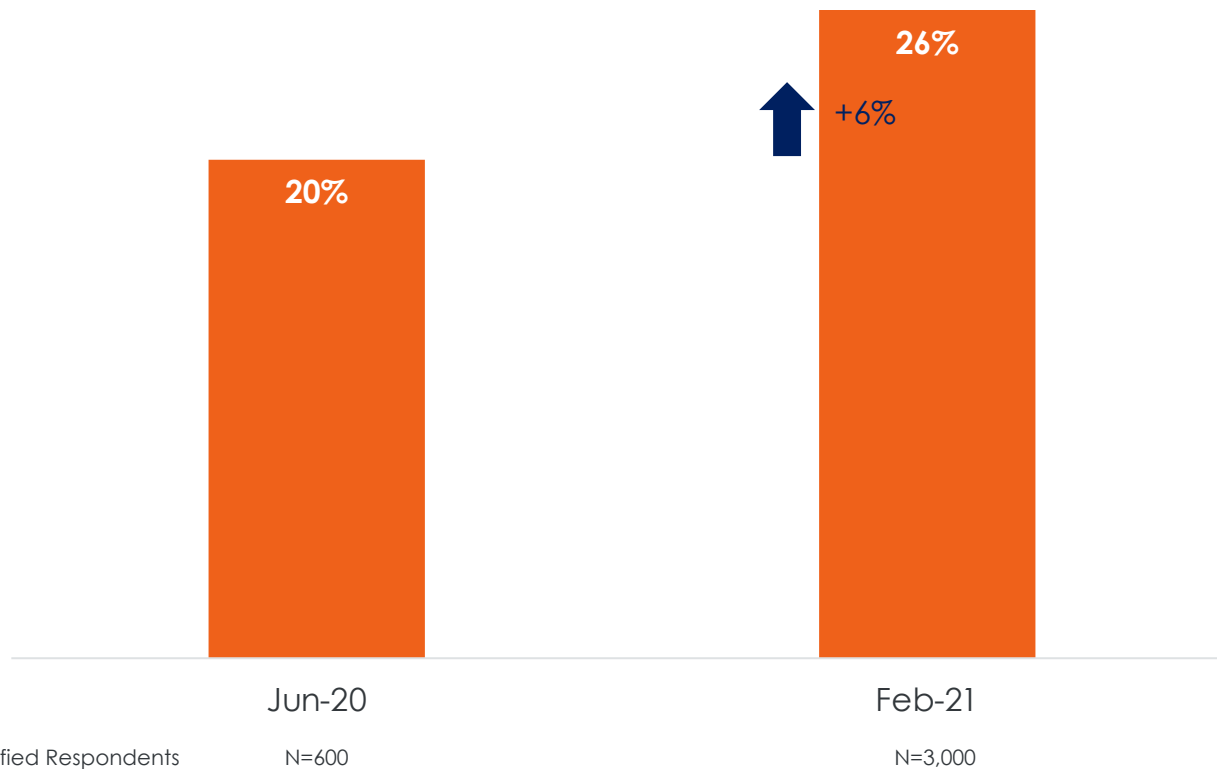


Quality and price are most
important for non-alcoholic
beverages purchasers when
buying products.

Happiness

Americans optimism has improved since the summer of 2020.

Very Optimistic
(Top Box of 4 Point Scale)



Shopping In-Store

Over half of the U.S. population is still concerned about going in-store to shop.

Moderately/Extremely Concerned About Shopping In-Store

56%

of Americans are concerned
about shopping
in-store

(+2% from Summer 2020).

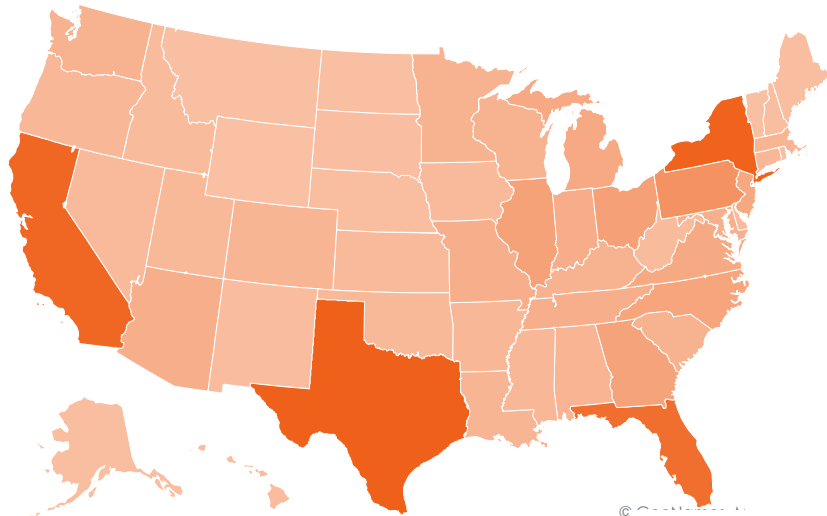
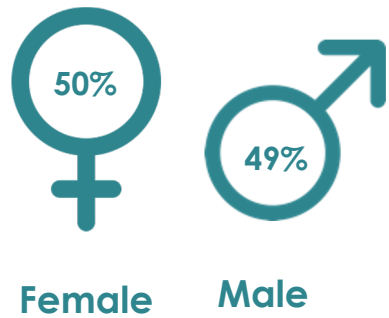


Importance of Attributes When Selecting a Brand

Quality is more important than price when selecting a brand. Trust also plays a critical role in the decision-making process.



Demographics



Generations



10% Gen Z



36% Millennials



32% Gen X

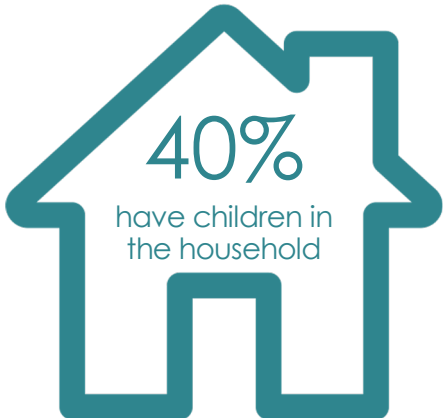


22% Baby Boomers



Employment Status

Employed full-time	53%	Unemployed	7%
Retired	12%	Business owner/Self-employed	5%
Employed part-time	10%	Full-time student	3%
Homemaker	9%	Freelancer	2%



About Provoke Insights



Founded on the premise that research should better align with marketers' needs, Provoke Insights empowers brands to navigate through today's cluttered advertising space. This full-service market research firm solely focuses on research for **branding**, **advertising**, and **content marketing** initiatives.

What makes Provoke Insights unique from other research firms is that you work with a research expert who is also a seasoned brand strategist; this ensures that questions are deeply explored, and insights are cultivated and capitalized. We develop insights from the data to help guide growth for your company's vision.

For more information or press inquiries, reach out to rachael.ryan@provokeinsights.com.