

**8.2%
CAGR**
projected
through 2030

Fizz Wars

In Functional Soda Function vs. Flavor

A Curion Exclusive Study

Functional sodas are bubbling up fast, but consumer expectations may not be what brands assume. We tested and spoke to non-users, regular users, and in-the-moment shoppers to understand what drives (and blocks) adoption in this growing category.

1 Health Benefits Must Be Clear & Credible

Health benefits are the primary appeal of functional sodas, but poor communication on benefits (i.e. gut health, immunity, low sugar) leaves many consumers unsure of their value.

Products with clear labeling (e.g., “supports digestion”) drive higher trust and interest.

Top Purchase Driver

66% (out of 15):
of consumers purchase

because it's a healthier alternative to traditional soda.



LOW
SUGAR

2 Taste Is A Barrier & An Opportunity

Many expect healthy drinks to taste bad, but functional soda users are **often surprised by how good they taste**, though big flavor differences from traditional sodas still hurt purchase intent.

Consumer Feedback

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



3 Price & Availability Still Block Trial

High prices and poor in-store visibility limit trial and repeat purchases of functional sodas, with **more than 1/3 of consumers saying that price is a barrier** to buying more functional soda.



4 Awareness & Understanding Are Low

Brand awareness is low, and many non-users **don't know what makes them “functional.”** Even current users often struggle with confusion about when or why to drink them.

We identified and ranked 10 consumption occasions in this report.



5 Context Changes Everything

When consumers are given context like **nutrition and ingredients**, they become more open to functional sodas, making them as appealing as traditional sodas in purchase intent.



Want the full 67-page report?

Our report includes in-store mobile mission insights, survey results, and full testing data to draw conclusions that fit your specific needs.

Get In Touch!

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