Social Analytics White Paper

Establishing a Framework for identifying and analyzing Global Trends within the Beverage Industry on Social Media.

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Social Standards' Consumer Analytics and Influencer Analytics platforms empower brands with deep, contextualized analysis of their market and consumers. Detailed data is organized into actionable comparative insights available through custom reports or self-service tools for in-house analysts.

For a copy of the full white paper report, or if you have any questions, please contact us!

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Project Overview

GOAL

The purpose of our research is to develop a framework for assessing trends within the beverage industry as well as a framework for analyzing the effectiveness of category leaders and challengers in aligning themselves with relevant trends in order to stimulate growth.

METHODOLOGY

In order to develop these frameworks, we compared the consumer conversations around the top beverage firm within a given category to those of its closest and newest competitors, with the goal of understanding how consumer perception and trend alignment affect a brand's ability to grow or maintain social conversation share of its respective category.

DATA

The underlying data in this report is sourced from Instagram—our reason for choosing this particular data source is because the content of Instagram posts is generally focused on the point of consumption (i.e. a person posts about drinking a Coca-Cola with their burger). By contrast, Twitter data for example is more focused on news and PR (i.e. a person posts their thoughts about company A getting in trouble for lying about the ingredients in their product). We found that the former is a better indicator of consumer sentiment around a company's products specifically rather than the company's overall optics.

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Successful micro trends are aligned with a larger macro trend, and due to this fact, share in the growth of the macro trend.

All the fastest growing topics in the categories we tracked invariably lined up with at least one of two macro trends–health and wellness (established), and sustainability (emerging).
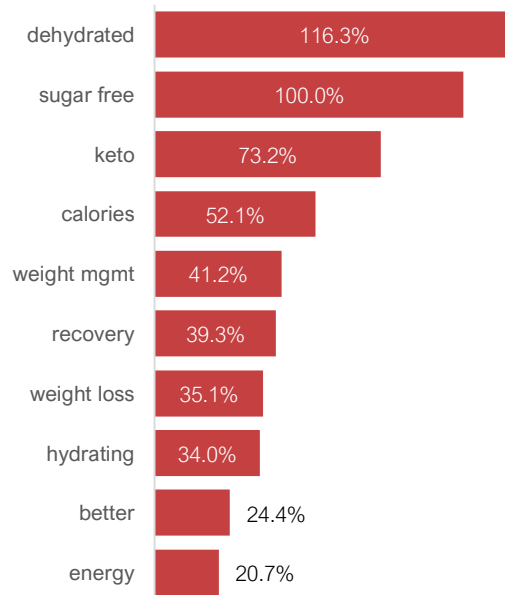
Health & Wellness (+45.7% 2-Yrs against Food & Beverage)	Sustainability (+36.9% YoY vs. Food & Beverage)

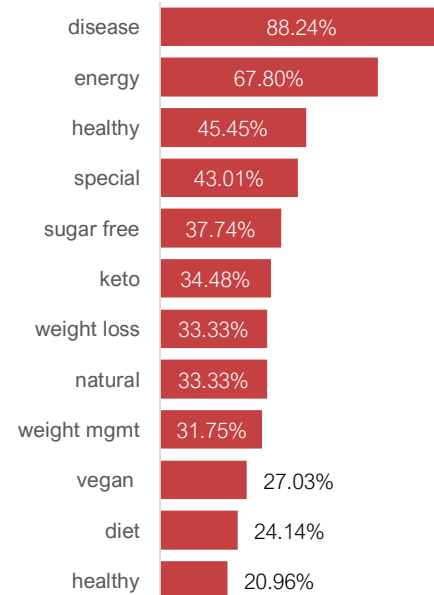**Note:** H&W growth was flat YoY.

Sports Drink	Soda	RTD Coffee

Sports Drink
Fastest growing benefits & concerns (rel. % chg)

dehydrated	116.3%
sugar free	100.0%
keto	73.2%
calories	52.1%
weight mgmt	41.2%
recovery	39.3%
weight loss	35.1%
hydrating	34.0%
better	24.4%
energy	20.7%

Soda
Fastest growing benefits & concerns (rel. % chg)

disease	88.24%
energy	67.80%
healthy	45.45%
special	43.01%
sugar free	37.74%
keto	34.48%
weight loss	33.33%
natural	33.33%
weight mgmt	31.75%
vegan	27.03%
diet	24.14%
healthy	20.96%

Fastest growing benefits & concerns (rel. % chg)

save the planet	256.20%
biodegradable	205.70%
cruelty	171.90%
pollution	138.00%
environmentally friendly	114.00%
environment	65.00%
eco friendly	54.40%
cruelty free	44.40%
waste	39.00%
animal friendly	33.40%
green living	19.10%

RTD Coffee
Fastest growing benefits & concerns (rel. % chg)
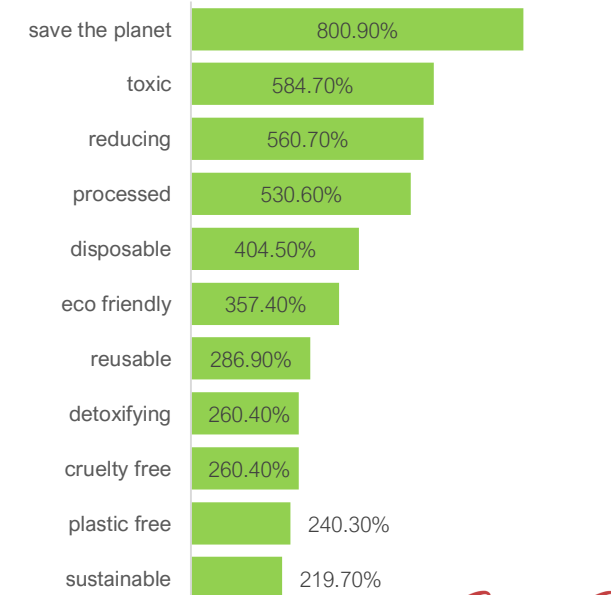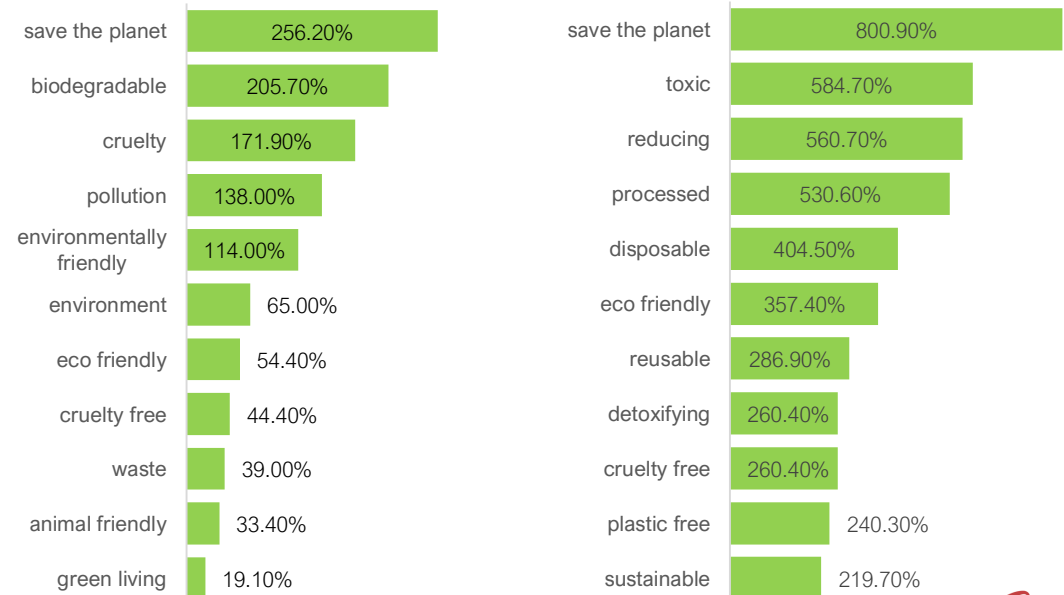
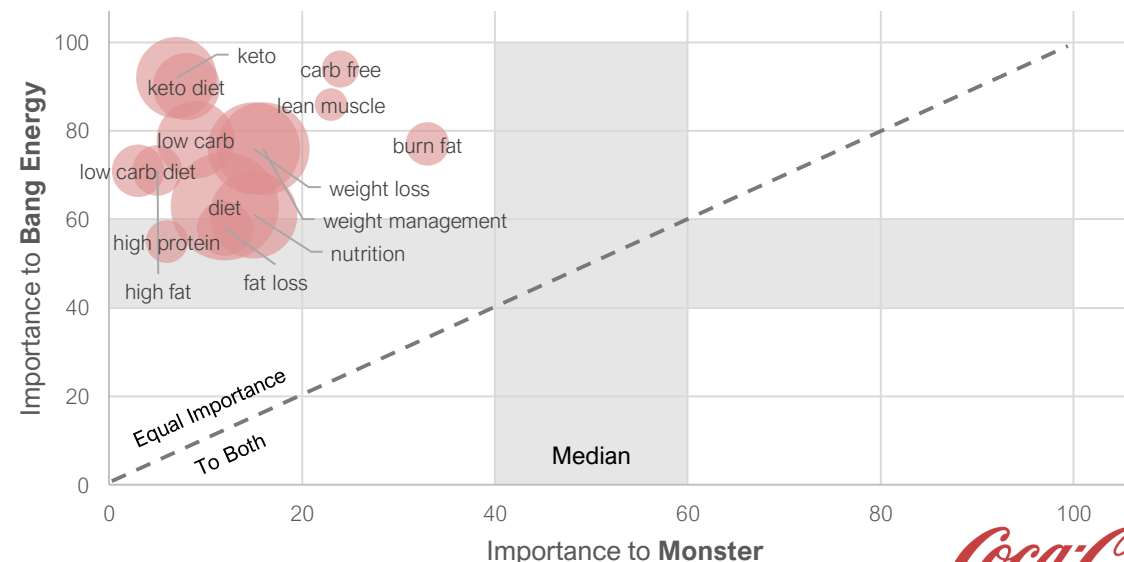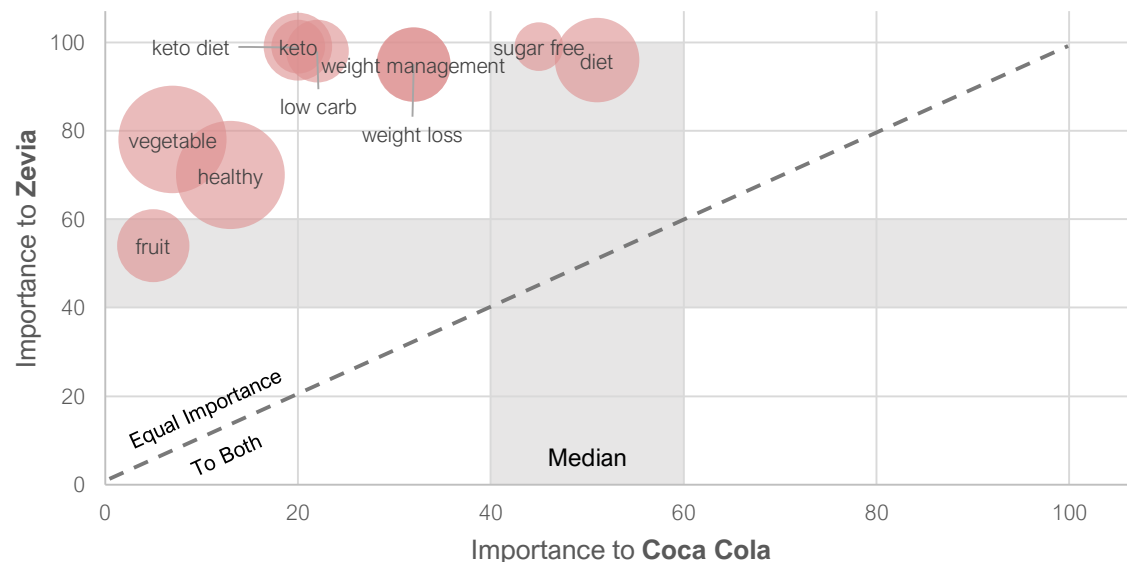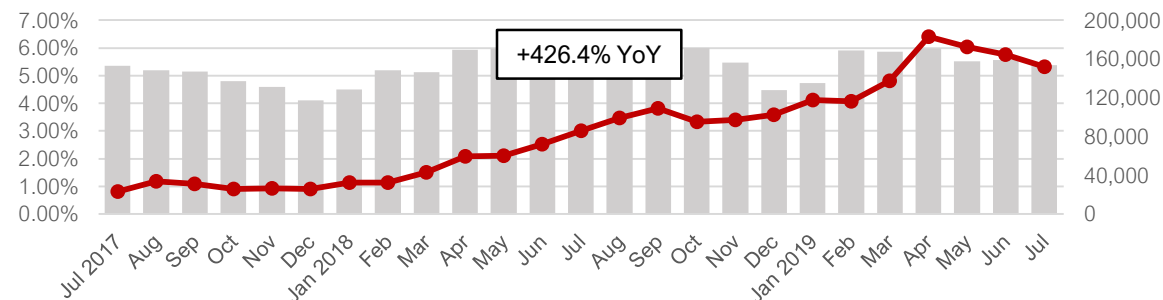|	
save the planet	800.90%
toxic	584.70%
reducing	560.70%
processed	530.60%
disposable	404.50%
eco friendly	357.40%
reusable	286.90%
detoxifying	260.40%
cruelty free	260.40%
plastic free	240.30%
sustainable	219.70%

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Brands that are more aligned with macro trends experience high growth within their category.

By measuring "conversational asymmetry", we can begin to see the effect proper trend alignment has on a brand's growth within a category.
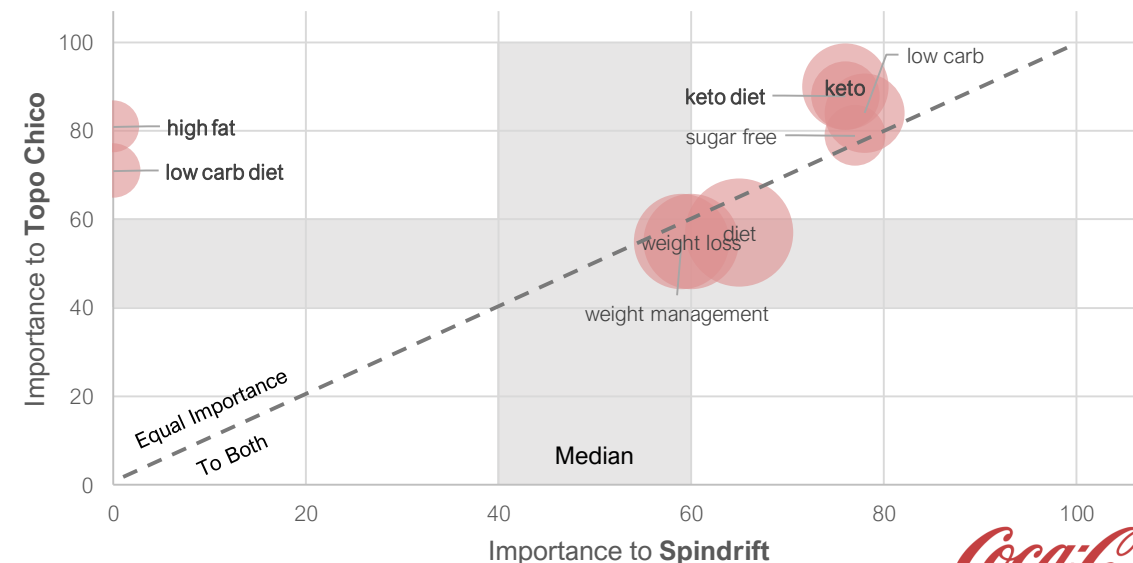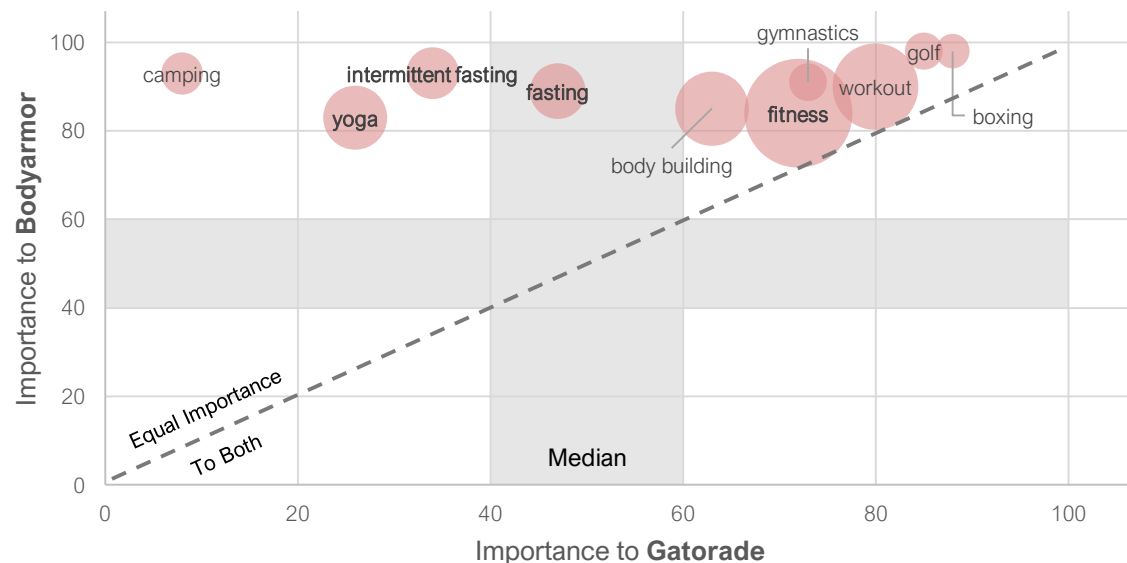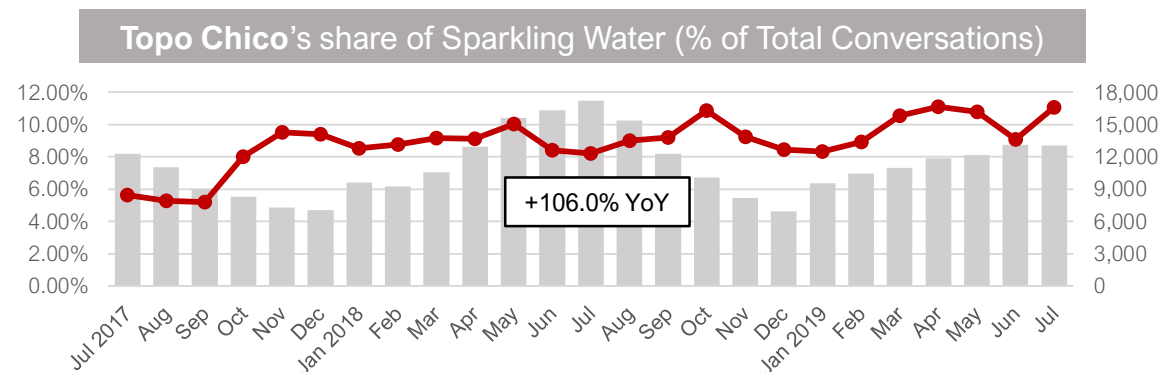

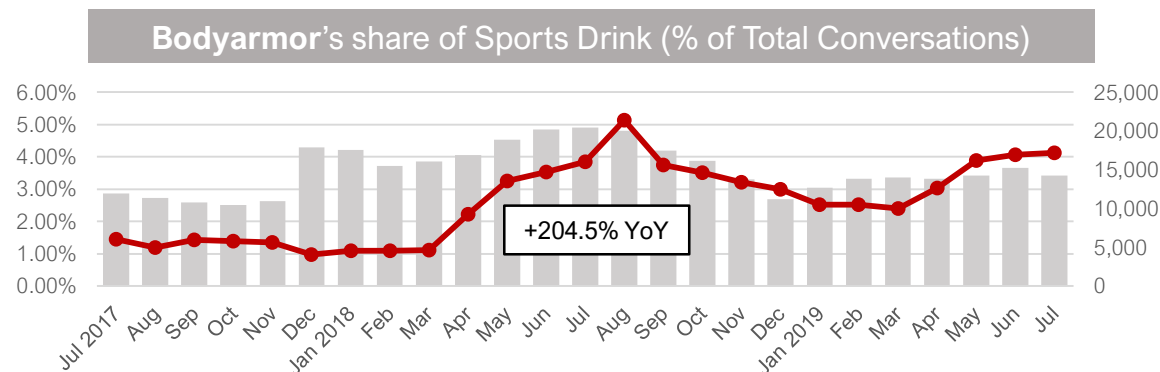**Zevia**'s share of Soda (% of Total Conversations)

+186.3% YoY
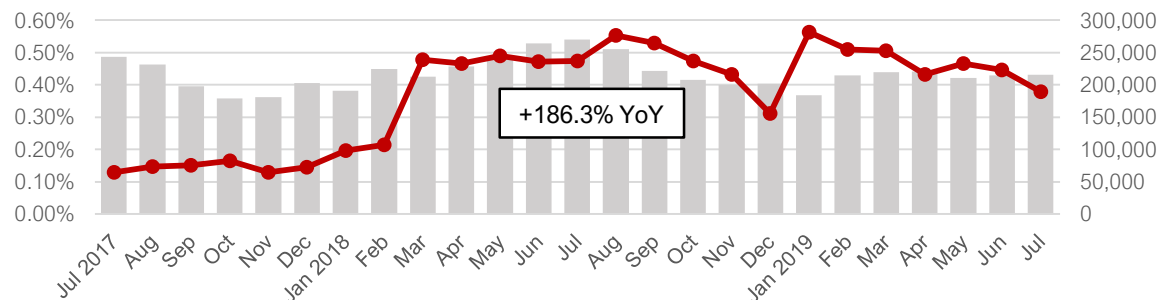
Bang Energy's share of Energy Drinks (% of Total Conversations)

+426.4% YoY

Importance to Zevia / Importance to **Coca Cola**

keto diet, keto, weight management, sugar free, diet, low carb, weight loss, vegetable, healthy, fruit

Equal Importance To Both

Median

Importance to **Bang Energy** / Importance to **Monster**

keto, carb free, keto diet, lean muscle, low carb, burn fat, low carb diet, weight loss, diet, weight management, high protein, nutrition, high fat, fat loss

Equal Importance To Both

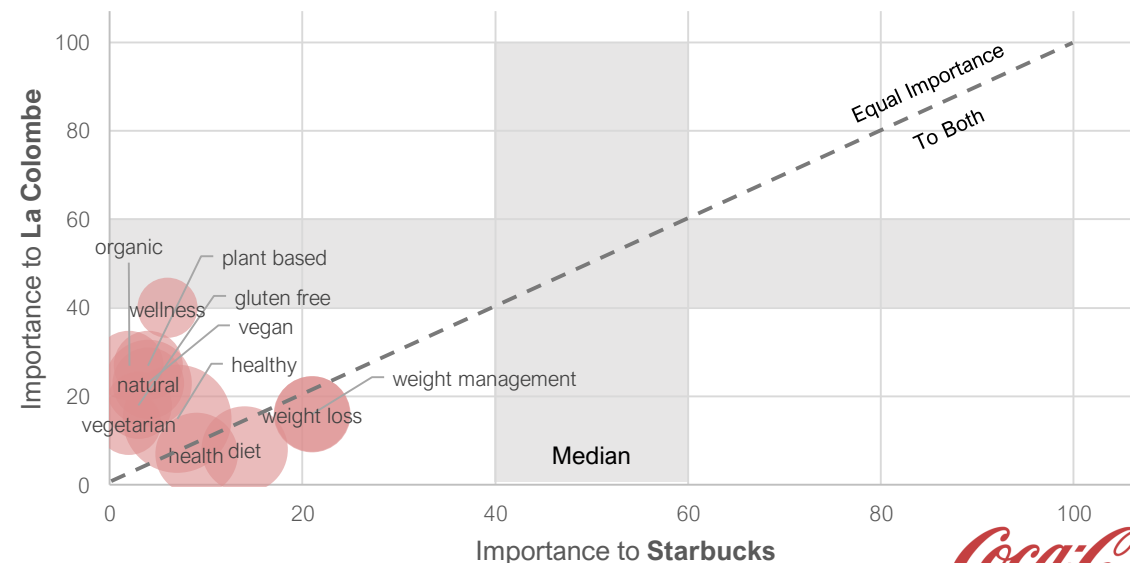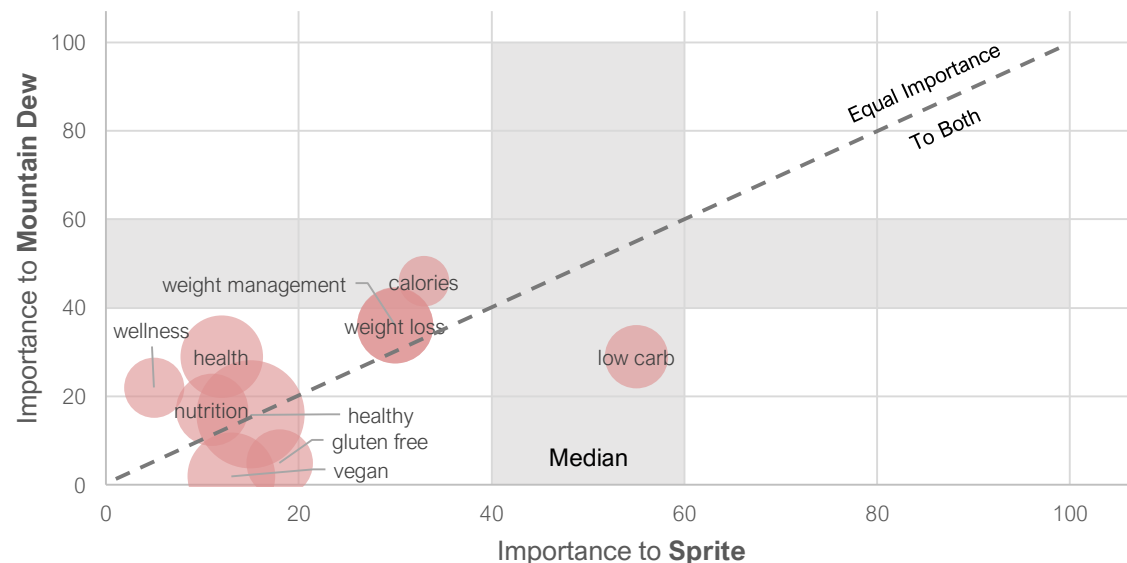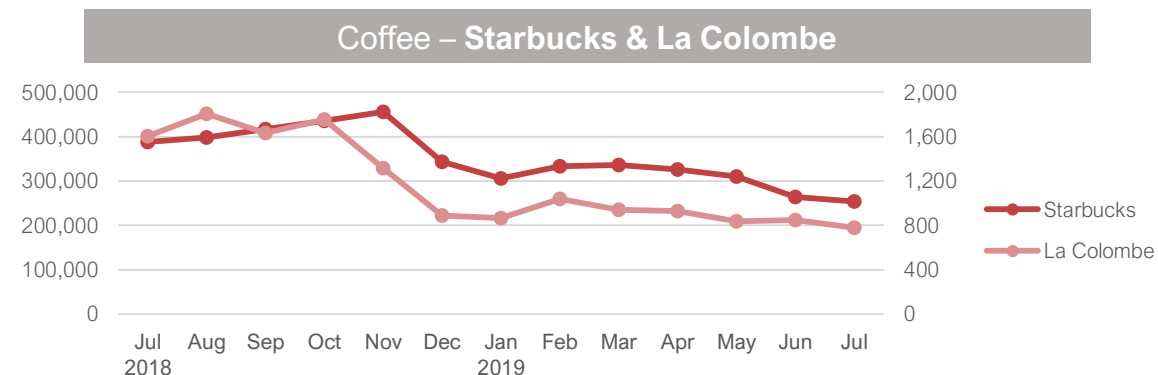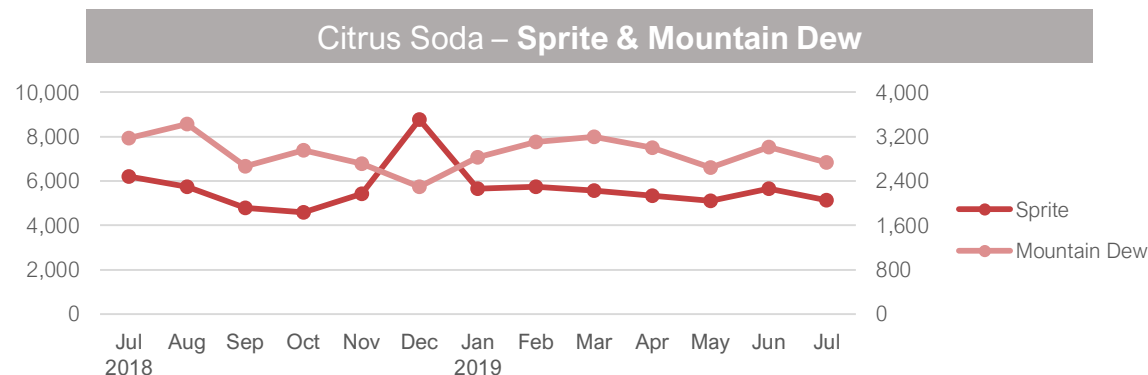Median

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In categories where the macro trend is essentially table stakes, brands that find new angles to approach consumers succeed.

Bodyarmor's share of Sports Drink (% of Total Conversations)

+204.5% YoY

(Monthly data from Jul 2017 to Jul 2019; left axis 0.00%–6.00%, right axis 0–25,000)

Topo Chico's share of Sparkling Water (% of Total Conversations)

+106.0% YoY

(Monthly data from Jul 2017 to Jul 2019; left axis 0.00%–12.00%, right axis 0–18,000)

Importance to Bodyarmor vs Importance to Gatorade

- camping
- intermittent fasting
- yoga
- fasting
- gymnastics
- golf
- workout
- fitness
- boxing
- body building

Equal Importance To Both

Median

Importance to Topo Chico vs Importance to Spindrift

- low carb
- keto diet
- keto
- sugar free
- high fat
- low carb diet
- weight loss
- diet
- weight management

Equal Importance To Both

Median

Source: Social Standards Consumer Analytics – Authentic posts on Instagram: July '18 to July '19 – Global; July '19 for Sports Drink; May '19 for Sparkling Water. Change calculated at 3-month rolling avg.: Jul-Sep '17 vs. Jul-Sep '19. CONFIDENTIAL

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In cases where brands are not well aligned with macro trends, growth for these brands and categories stifled.

None of the brands we examined in both the Citrus Soda and Coffee categories experienced any meaningful growth, if not decline, in conversation volume over the past year.

Citrus Soda – **Sprite & Mountain Dew**

Legend: Sprite, Mountain Dew

Coffee – **Starbucks & La Colombe**

Legend: Starbucks, La Colombe

Conclusion: Frameworks for analyzing trends and brands

A modern framework for analyzing **trends**	A new framework for analyzing **brands**

Identify a **macro trend**.

Identify which **brands** within a category are **best aligned** with our established **macro trends**, and which **micro trends** are driving growth in their consumer conversations.

Assess the **viability of a micro trend's longevity** based on its **relationship** with the macro trend.

In cases where **all brands are well-aligned** with the macro trend, identifying which brands are **deviating from the primary message** of the category and **extending** their social footprint to encompass more **unique relevant topics**.

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