



QUESTER™

Innovation to insight.™

Capturing Global Insights

Translating Worldwide & Localized Consumer Needs: Bottled Water

Case Study #1, August 2011

Case Study – Location

n1226 Global Respondents



Case Study – Respondent Specs

Age: 18-65

Purchase and personally consume bottled water in past three months



Case Study – Survey Topics

Method: Online qualitative interviews

11 minute interview, Benefit laddering exercise

3

How does **Your Brand** make you feel

2

What are the benefits of **Your Brand**

1

Why do you drink **Your Brand**

4

Give me a story about **Your Brand**



Case Study – Elevator Speech: Global Insights

Total Sample n1226

What do you need to know in 30 seconds ...

- The major benefit of bottled water is refreshment. Refreshment has a dual meaning.
 - Physical refreshment – hydration from physical exertion or on a hot day
 - Satisfaction from feeling refreshed – relaxation, refocus on the day
- The most desired flavor is “pure,” or clean
 - Lack of flavor – no taste of minerals, no aftertaste – completely neutral taste
 - This indicates purity and cleanliness – **which is the ultimate driver of purchasing bottled water over tap**
- Bottled water is healthy – it helps hydration, digestion and is healthier than the world’s most consumed beverage, soda
- Price is a concern, although freely available, people look for economical bottled water and look to purchase in bulk in certain shopping situations
- Brands matter, but they are driven “locally.” Brands at their core are defined by what makes sense to a country’s sensibilities.

Case Study – Mexico

Mexico Sample n207



Case Study – Mexico



Security. Water needs to be safe.

No todos tienen la oportunidad de consumir buena agua. Aquí. Y gracias a agua spring si ... porque se que al tomar esta agua no corro el riesgo de contraer ninguna enfermedad



Mexico Sample n207

Conclusion

Implication

Clean taste is very important

- Tap water can taste like chlorine
- When water doesn't taste like tap water in Mexico – it seems safe
- Bottled water gives consumers a feeling of security

Brands can support security

- Brands that are well established have proven their secure
- When a brand is backed by a large conglomerate, there is money and distribution, which also establishes trust

Case Study – Mexico



Security. Water needs to be safe.

Not everyone has the opportunity to consume good water here. And with spring water I feel safe ... Because this water doesn't run the risk of contracting any disease



Mexico Sample n207

Conclusion

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Case Study – Mexico



After security, brands can establish themselves

Siento una sensación de frescura y salud, Bonafont me hace sentir saludable y fresca. Al no consumir sodio mi cuerpo es más sano y libre de impurezas eso para mí es ser saludable.



Mexico Sample n207

Conclusion

Bottled water is universal worldwide, but low sodium isn't

Bonafont has connected itself to healthy with the benefit being beauty

Implication

- Healthy, good for me and hydrating
- It's also about weight control and good for the kidneys
- There is a unique focus on low sodium in Mexico
- So, since it's universal – brands need to establish themselves as differentiating
- Advertising is focused on young beautiful fit women
- Their logo reinforces this idea – and consumers notice
- Bonafont consumption = I will become healthy and beautiful

Case Study – Mexico



Security. Water needs to be safe.

I feel a fresh sensation and healthy when I drink Bonafont. I feel like I am being healthy because I am helping my body by drinking a low sodium drink ... and it will help get rid of the toxins in my body, that to me is being healthy



Mexico Sample n207

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Case Study – Spanish Speakers

Spanish distinctions – it's the country

Mexico Sample n207; US Spanish Sample n105



Concerns lessen ...

Security ↓

Purity ↓

Large corporation ↓

Sodium content ↓

Stronger focus on great taste

Case Study – Germany

Germany Sample n308



Case Study – Germany



Germany Sample n308

Local sourcing, carbonation & prescribed healthy

1

Lots of brands, and if you can see the stream (or know it's location), you're likely to drink that brand.

2

Carbonation happens, not in all waters – but it happens in Germany. The carbonation is 'crisp' yet not 'overfilling.' Carbonation combined with clear, natural flavor provides the best taste

3

Hydration is physician recommended. Germans believe they have very specific needs in their required consumption amounts and mineral content, so they look to be exacting as they try to meet those levels

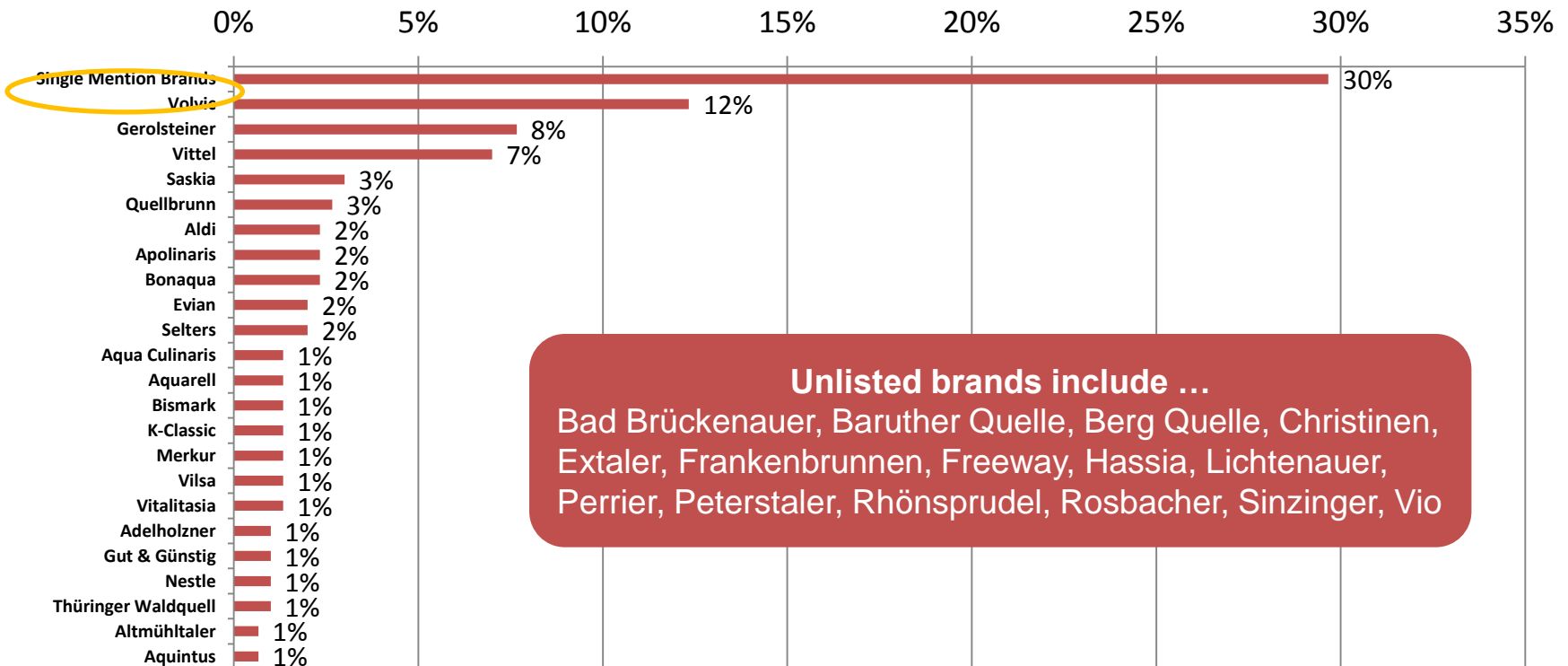
Case Study – Germany



Germany Sample n308

Branding is varied and local sourcing is strong

Brands Preferred (Respondent Brand Mentions)



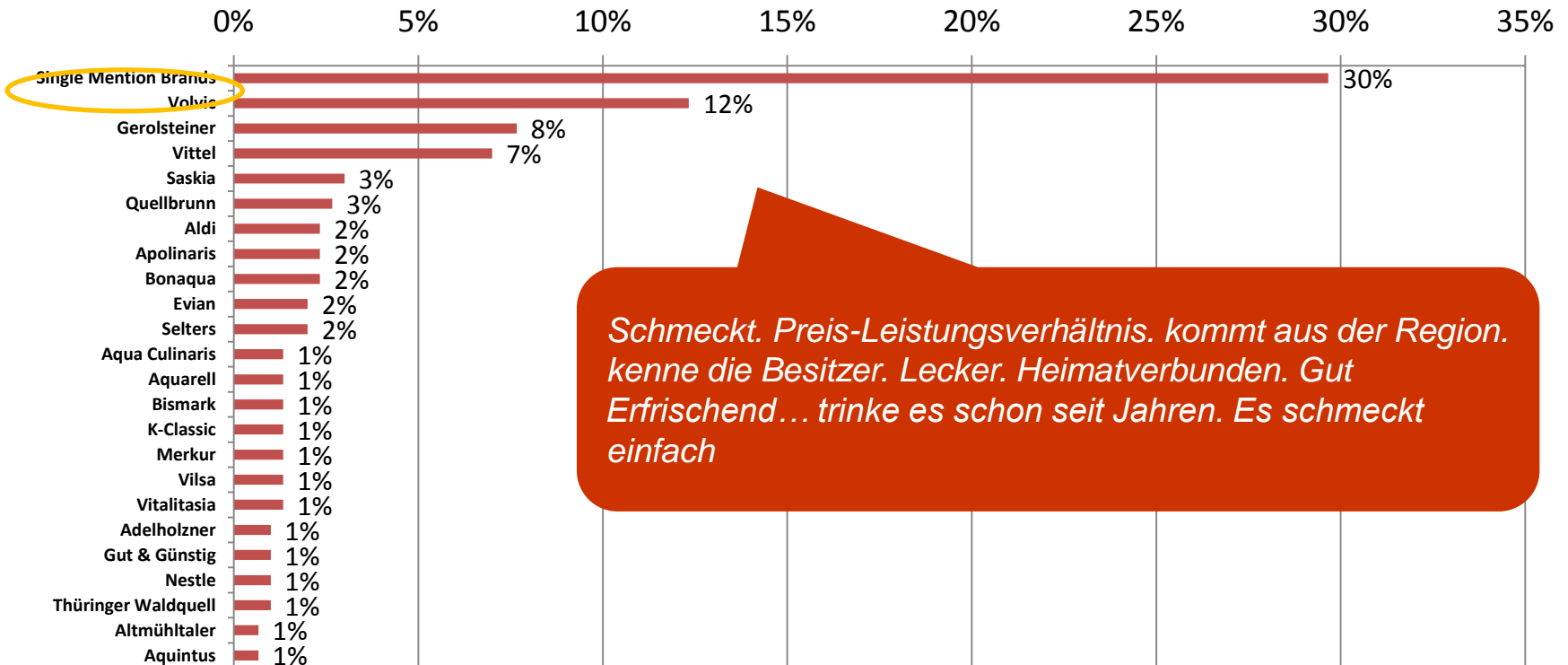
Case Study – Germany



Germany Sample n308

Branding is varied and local sourcing is strong

Brands Preferred (Respondent Brand Mentions)



Schmeckt. Preis-Leistungsverhältnis. kommt aus der Region. kenne die Besitzer. Lecker. Heimatverbunden. Gut Erfrischend... trinke es schon seit Jahren. Es schmeckt einfach

Case Study – France

French Sample n105



Case Study – France



French Sample n105

Where water branding was born ...

FROM WIKIPEDIA about Evian...

In **1789**, during a walk, the Marquis of Lessert drank water from the Sainte Catherine spring on the land of a Mr. Cachat. The marquis, who was allegedly suffering from kidney and liver problems, drank regularly of the water while he walked, and claimed that his health improved.

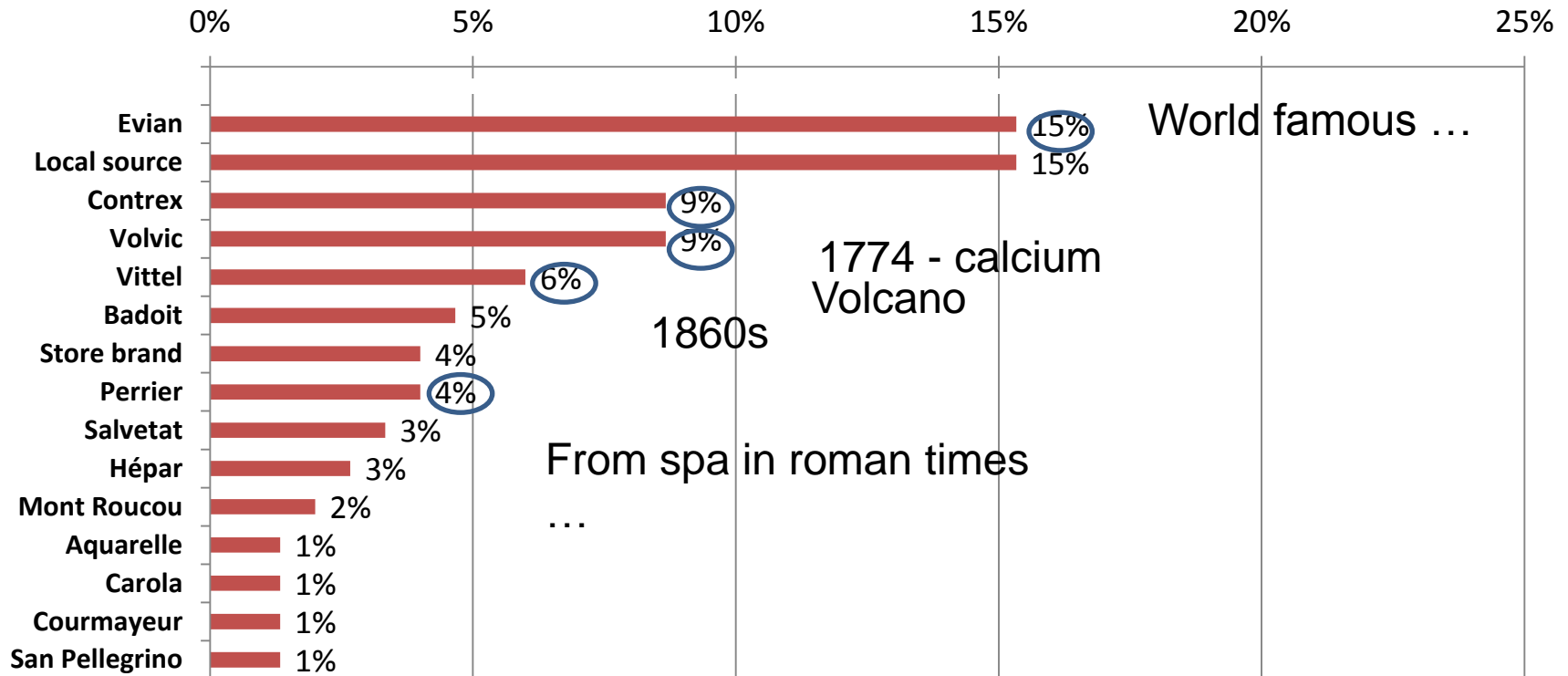
Case Study – France



French Sample n105

Where water branding was born ...

Brands Preferred (Respondent Brand Mentions)



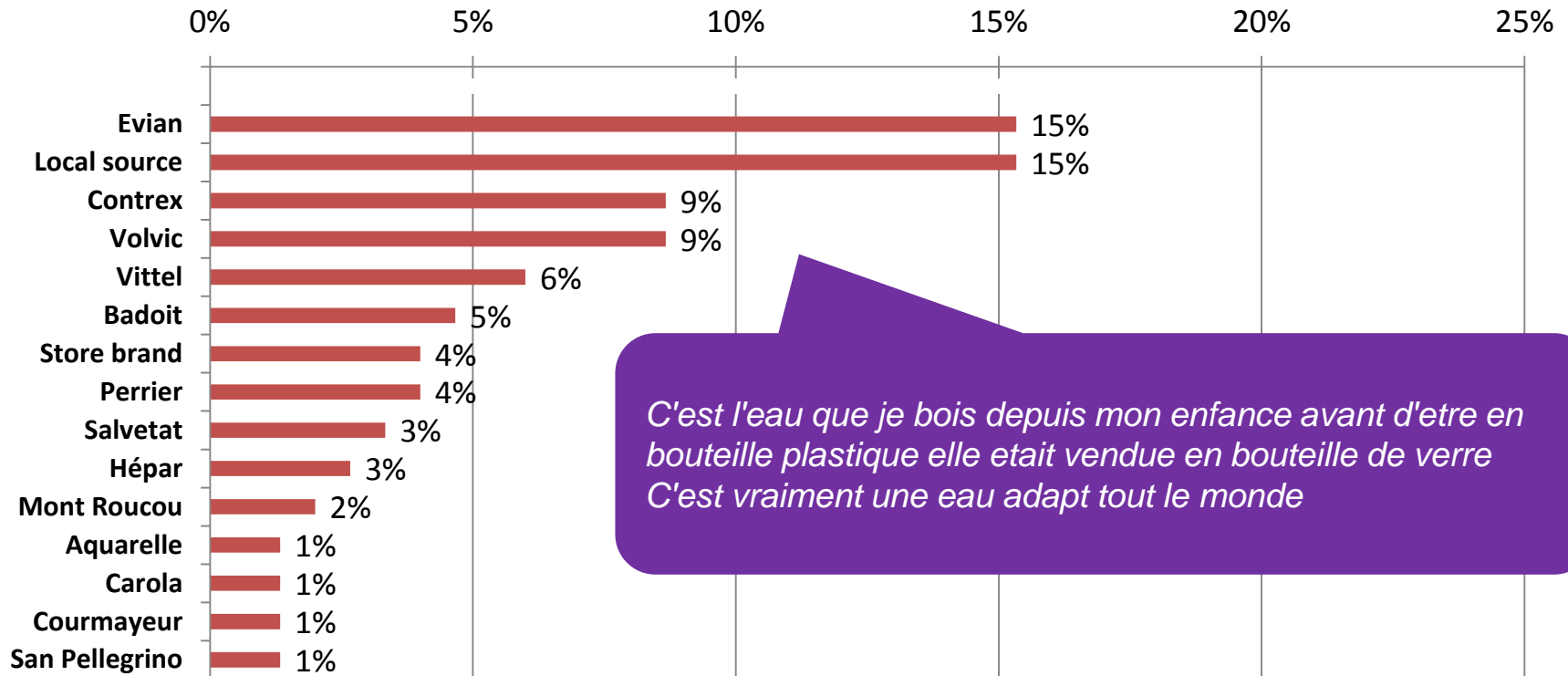
Case Study – France



French Sample n105

Consumers also recount long histories with brands...

Brands Preferred (Respondent Brand Mentions)



*C'est l'eau que je bois depuis mon enfance avant d'être en bouteille plastique elle était vendue en bouteille de verre
C'est vraiment une eau adapté tout le monde*

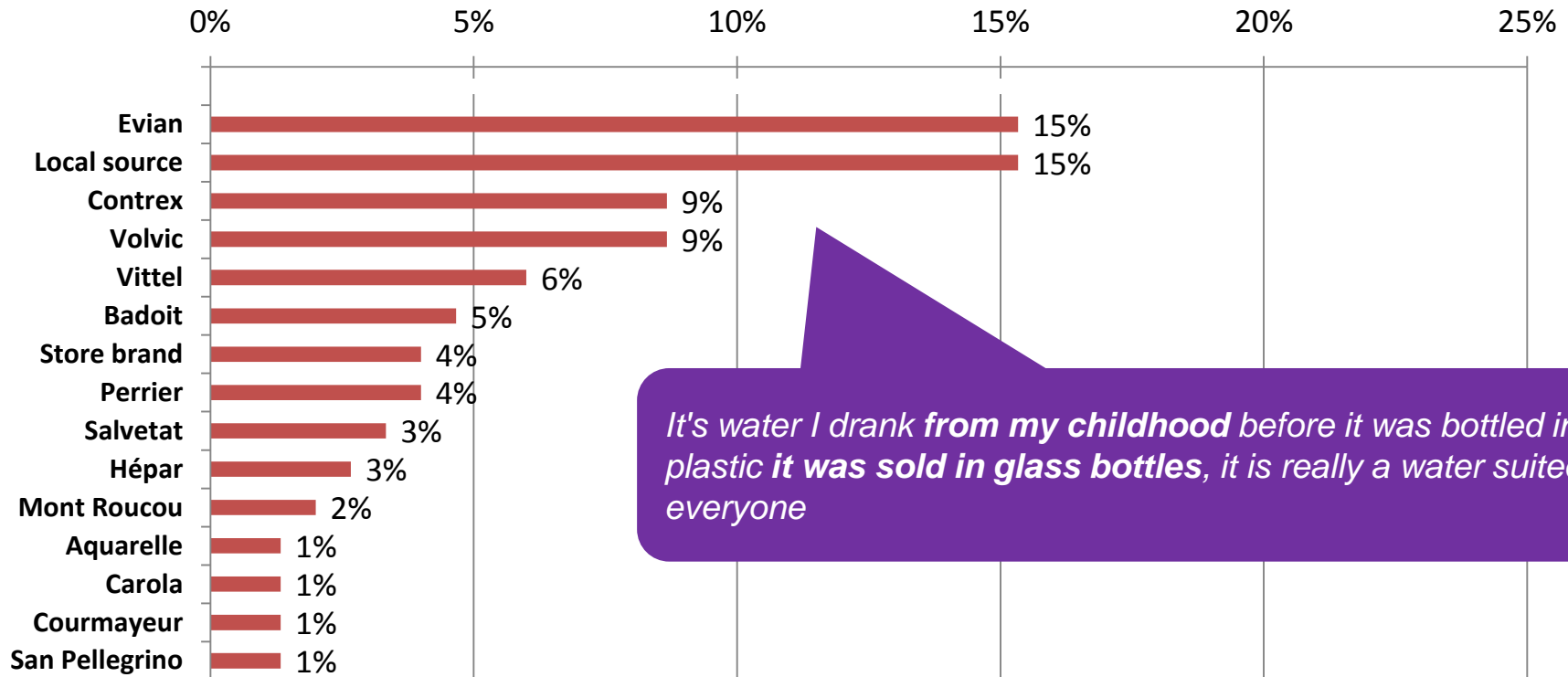
Case Study – France



French Sample n105

Consumers also recount long histories with brands

Brands Preferred (Respondent Brand Mentions)



Case Study – France



...and where that might be changing

French Sample n105

Brands and their traditions matter, but new players changed the model ...



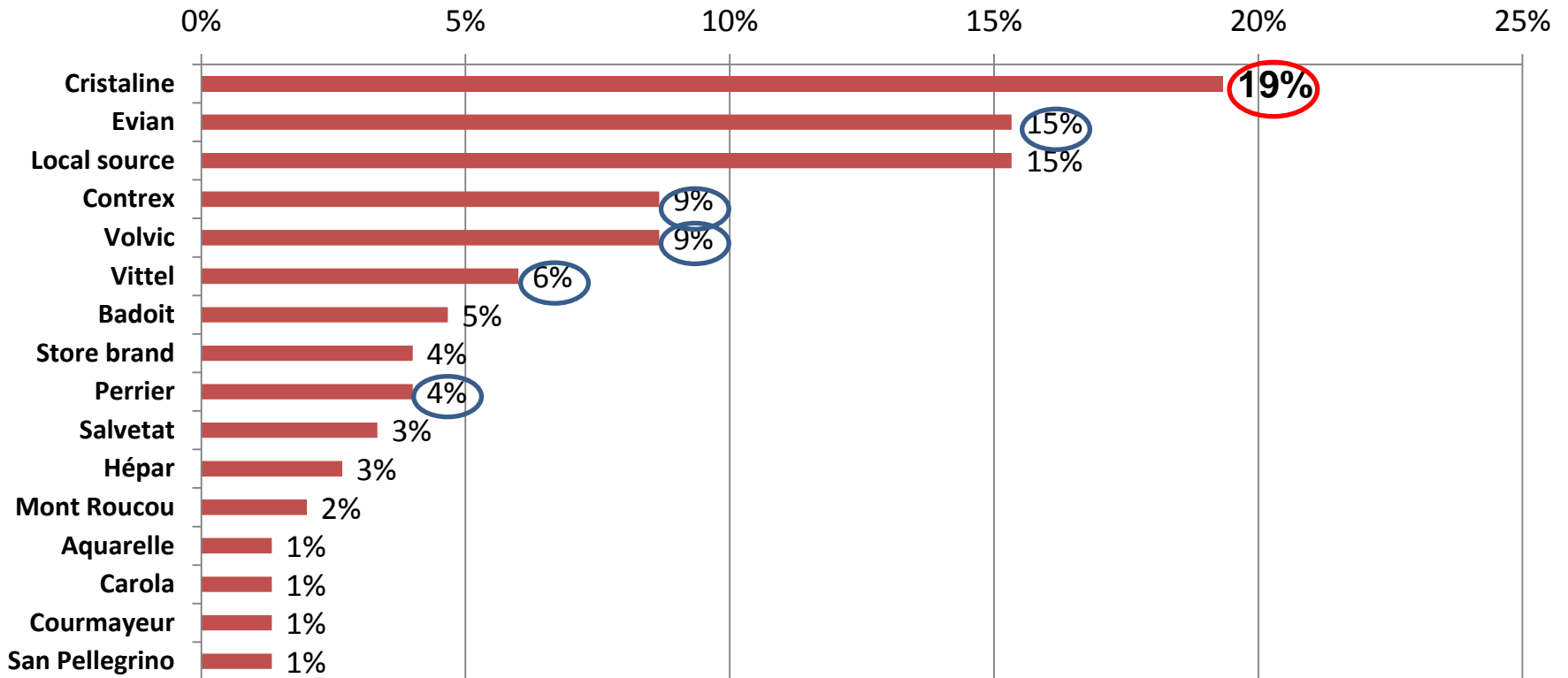
Case Study – France



French Sample n105

Using different sources, using same brand...

Brands Preferred (Respondent Brand Mentions)



Case Study – French Speakers

French Sample n105; French Canadian Sample n207

...Canadians still care about local sourcing.



Sparkling is absent ...

The language may not be all they share –
localized, brand sourcing matters

Pure Canadian Springs!

Glacial/Snowmelt

Distinct Natural Northern Sources

Case Study – United States

United States English n301



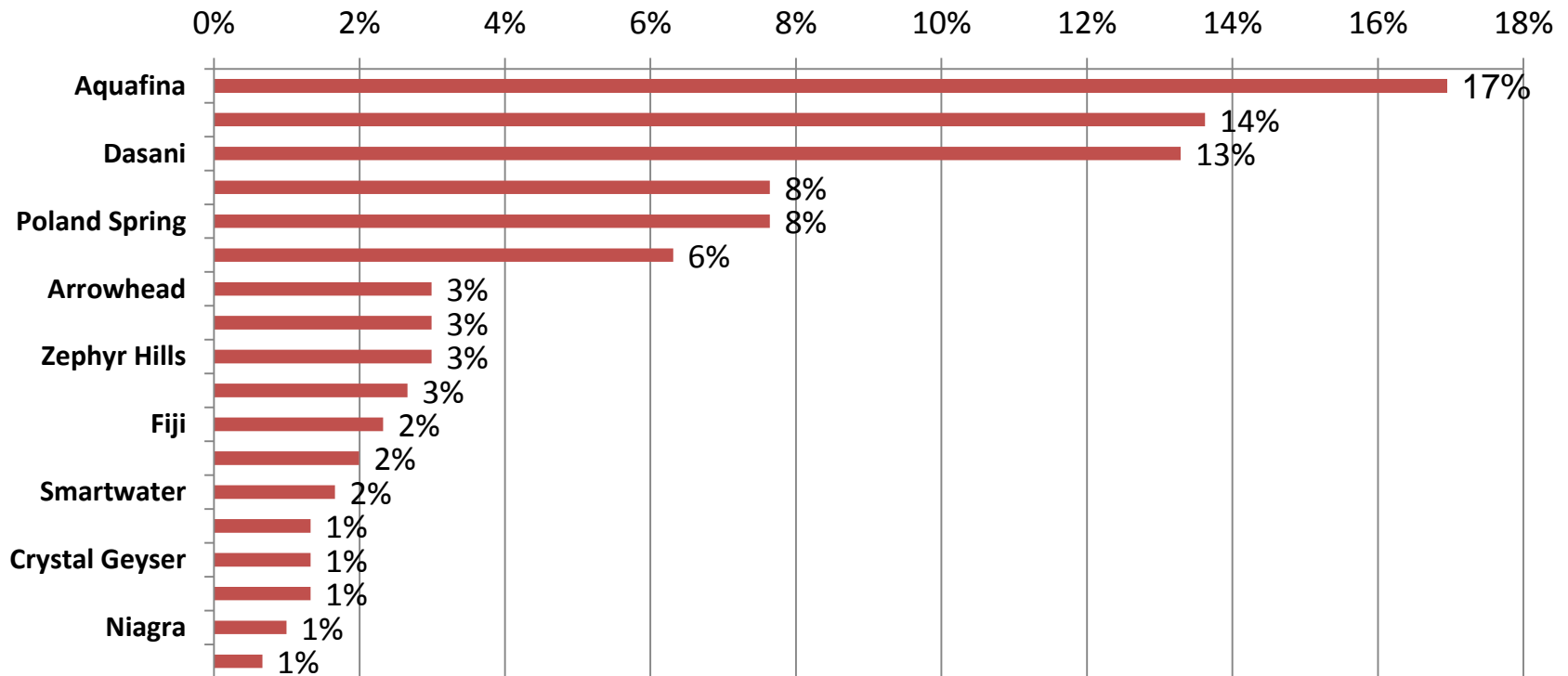
Case Study – United States



United States English n301

Americans brands have definitive meanings.

Brands Preferred (Respondent Brand Mentions)



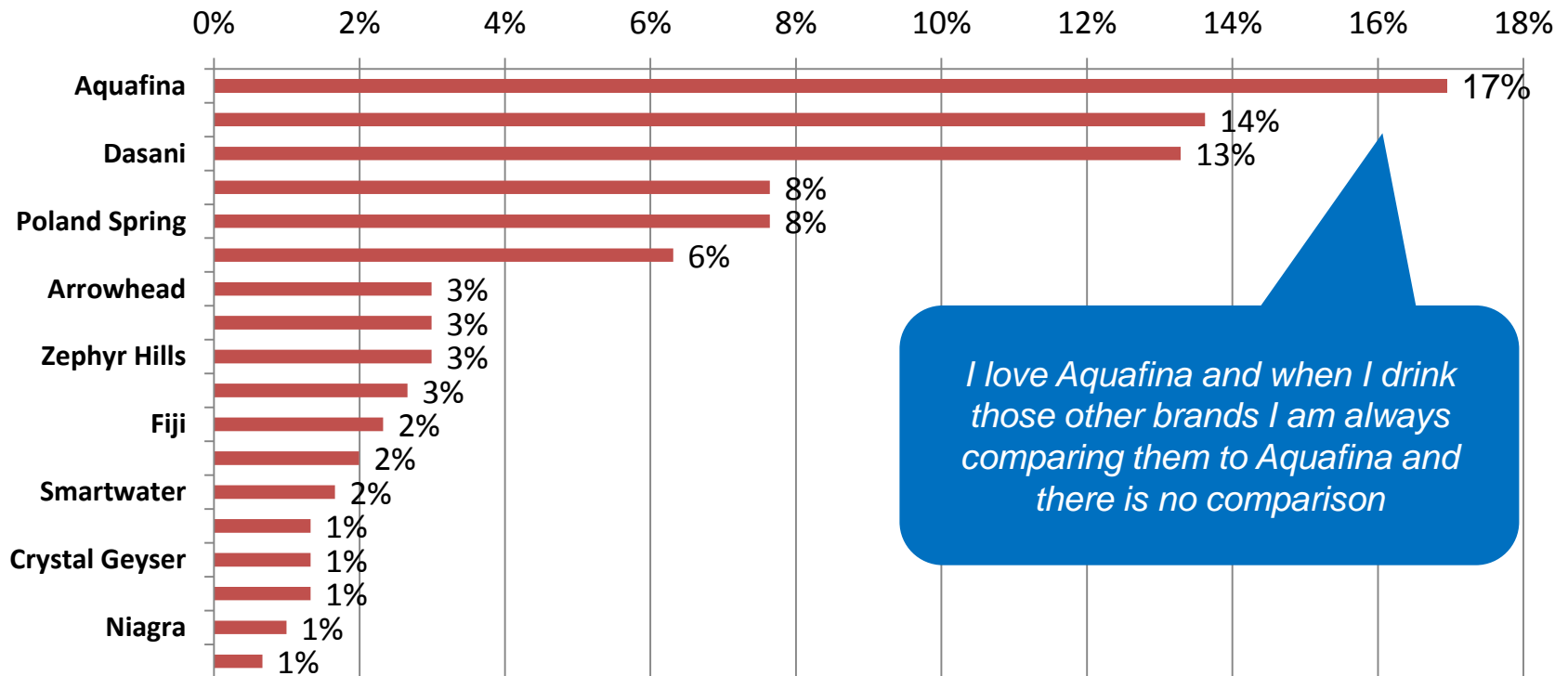
Case Study – United States



United States English n301

Aquafina – nothing tastes better.

Brands Preferred (Respondent Brand Mentions)



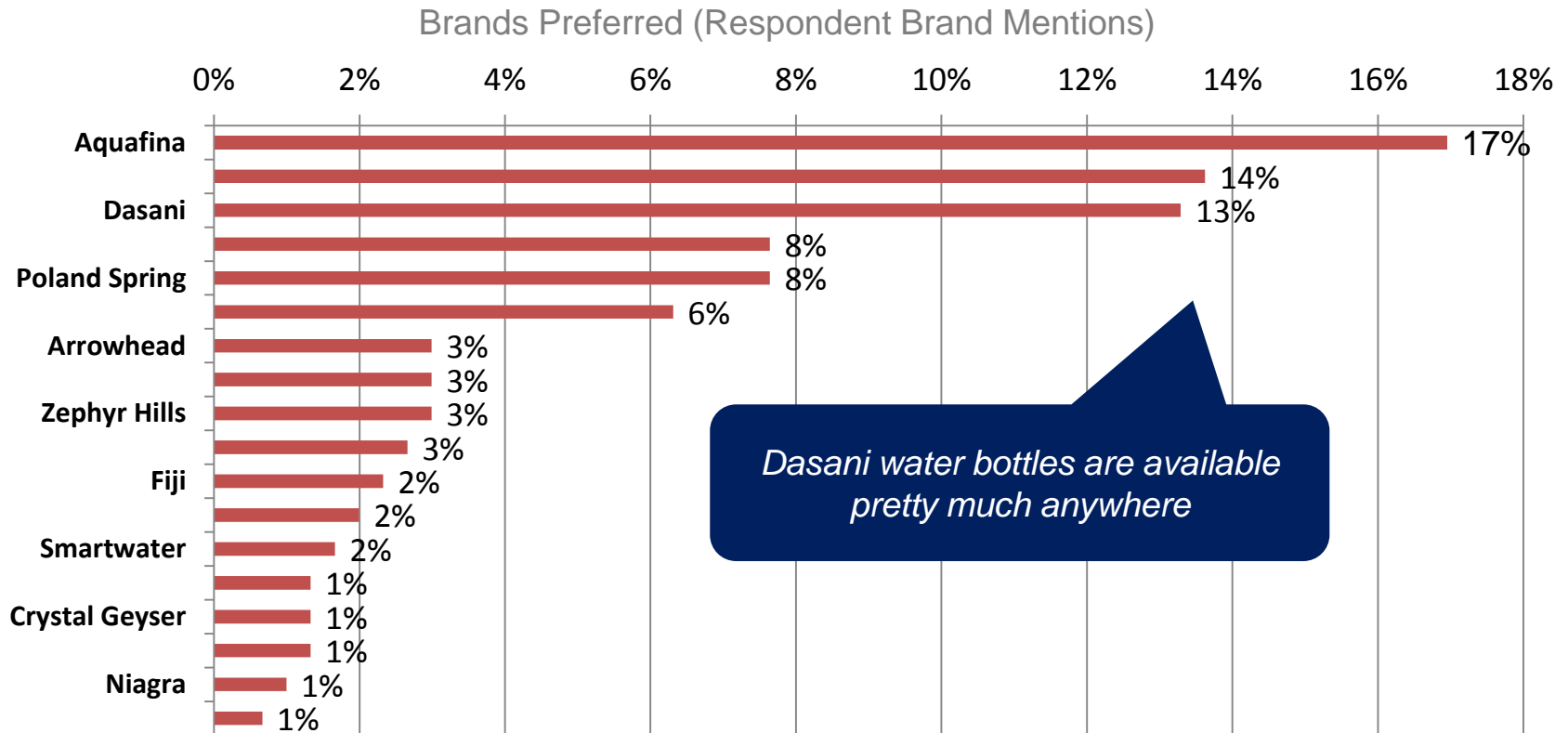
I love Aquafina and when I drink those other brands I am always comparing them to Aquafina and there is no comparison

Case Study – United States



United States English n301

Dasani is well distributed, so well known.



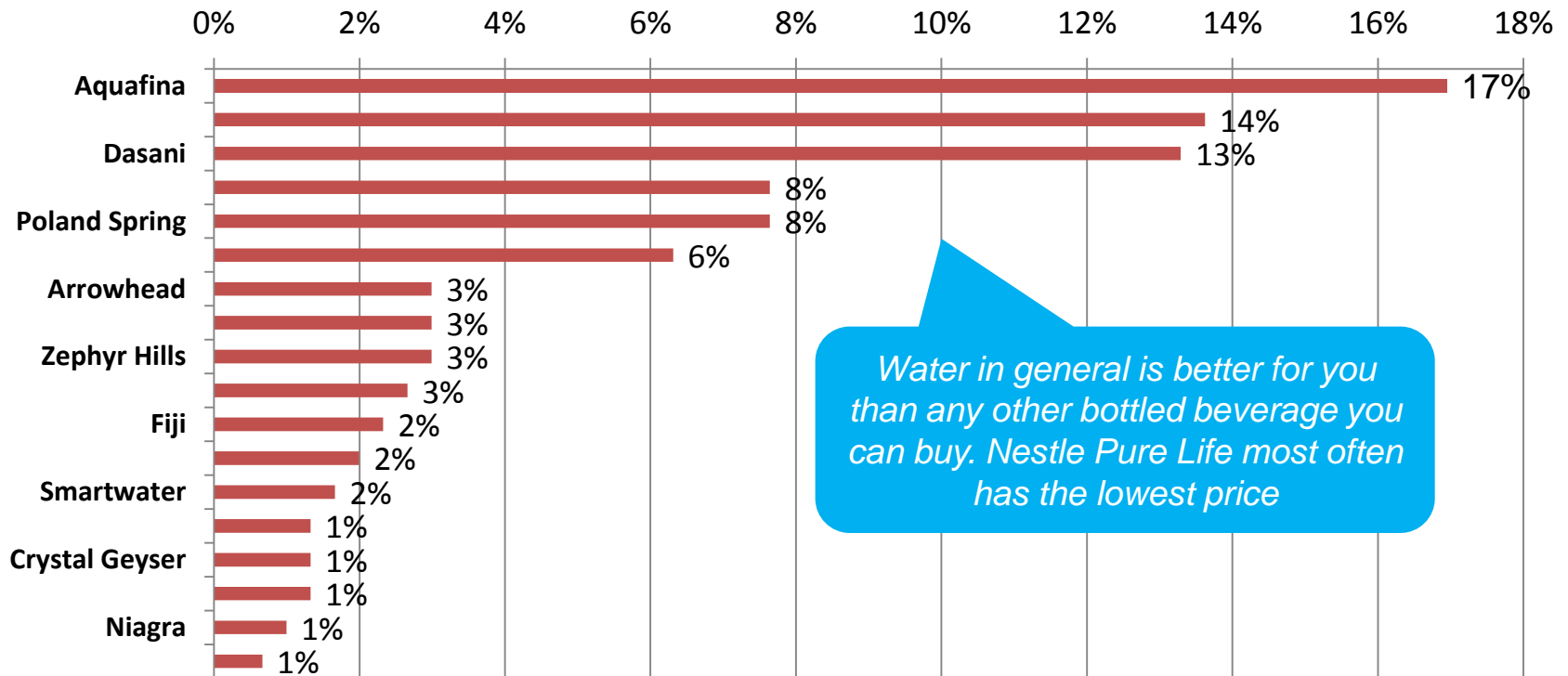
Case Study – United States



United States English n301

Nestle is seen to be affordable and well

Brands Preferred (Respondent Brand Mentions)



Water in general is better for you than any other bottled beverage you can buy. Nestle Pure Life most often has the lowest price

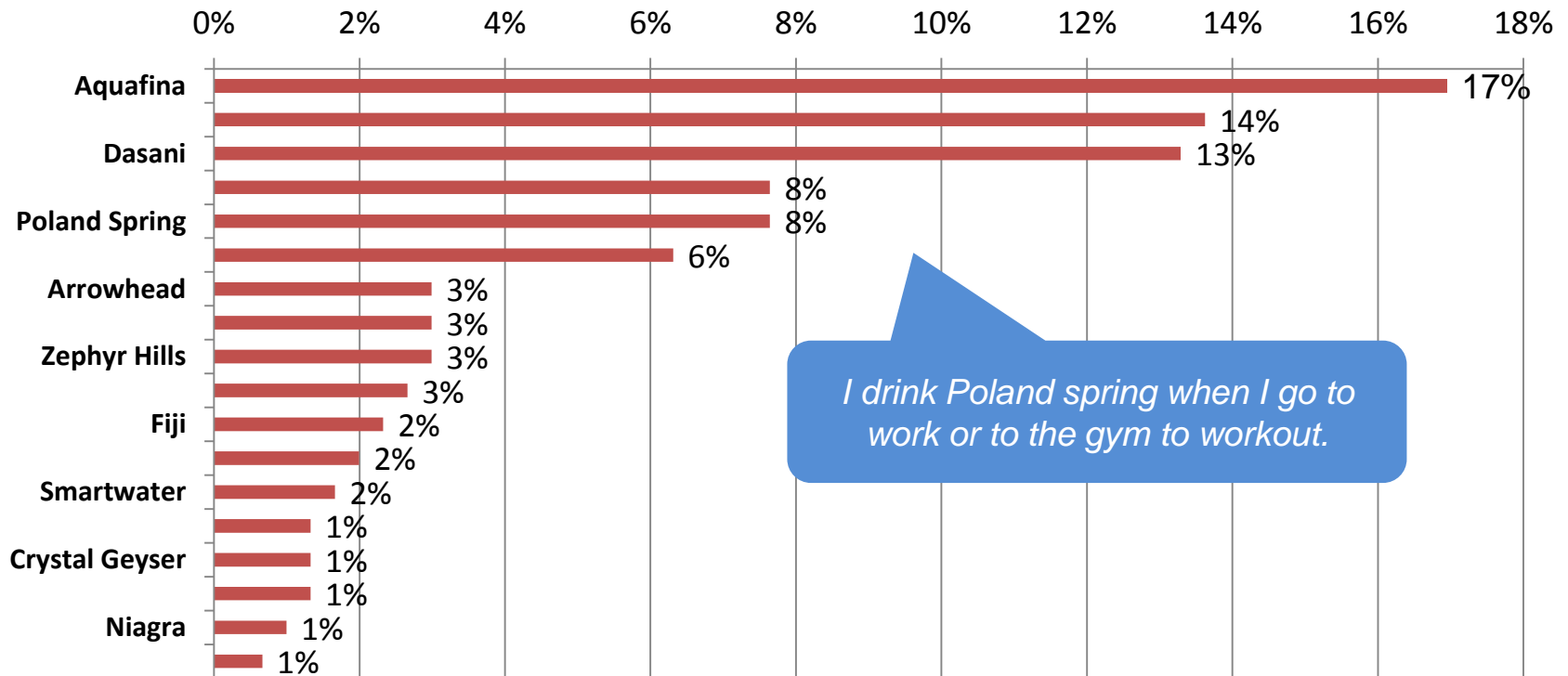
Case Study – United States



United States English n301

All water is good for working out Poland Springs excels

Brands Preferred (Respondent Brand Mentions)



I drink Poland spring when I go to work or to the gym to workout.

Case Study – Go Dos & So Whats

What can you do with this data...

- A brand positioning that is not focused on refreshment, and more specifically pure refreshment will not be successful
- Across all brands, as it relates to distribution and channel management, understand shopping behavior of channels and level bulk purchase options for increased consumer consumption ("stock ups") and savings.
- For manufacturers in the US, brand plays an important role, both in building credibility, but also building cache - celebrity sponsorships, package innovation and product innovation will cement differentiation of branding in the market place.
- For manufacturers in Mexico, safety communications will be most beneficial to brands, since water security is paramount. Build relationships with water boards, consumer safety committees and invest in a water purification standard.

Case Study – Go Dos & So Whats

What can you do with this data ...

- In Europe, tradition can hold well established brands. For upstarts, or large manufacturers entering the marketplace, invest in localized sourcing and bottling.
- Additionally, in Europe, as it relates to distribution and channel management - establish appropriate bottle size, bulk sizes and establish a strong understanding of both rural and city dwelling consumers.
- **The last: Listen to your customers, find their stories and find innovation through their behaviors and their attitudes**

Methodology

Method: Virtually moderated by Socrates

Open ended topics presented by software

- Respondents type answers into chat interface
- Each respondent on average received 1 probe per topic

Respondents shared personal stories

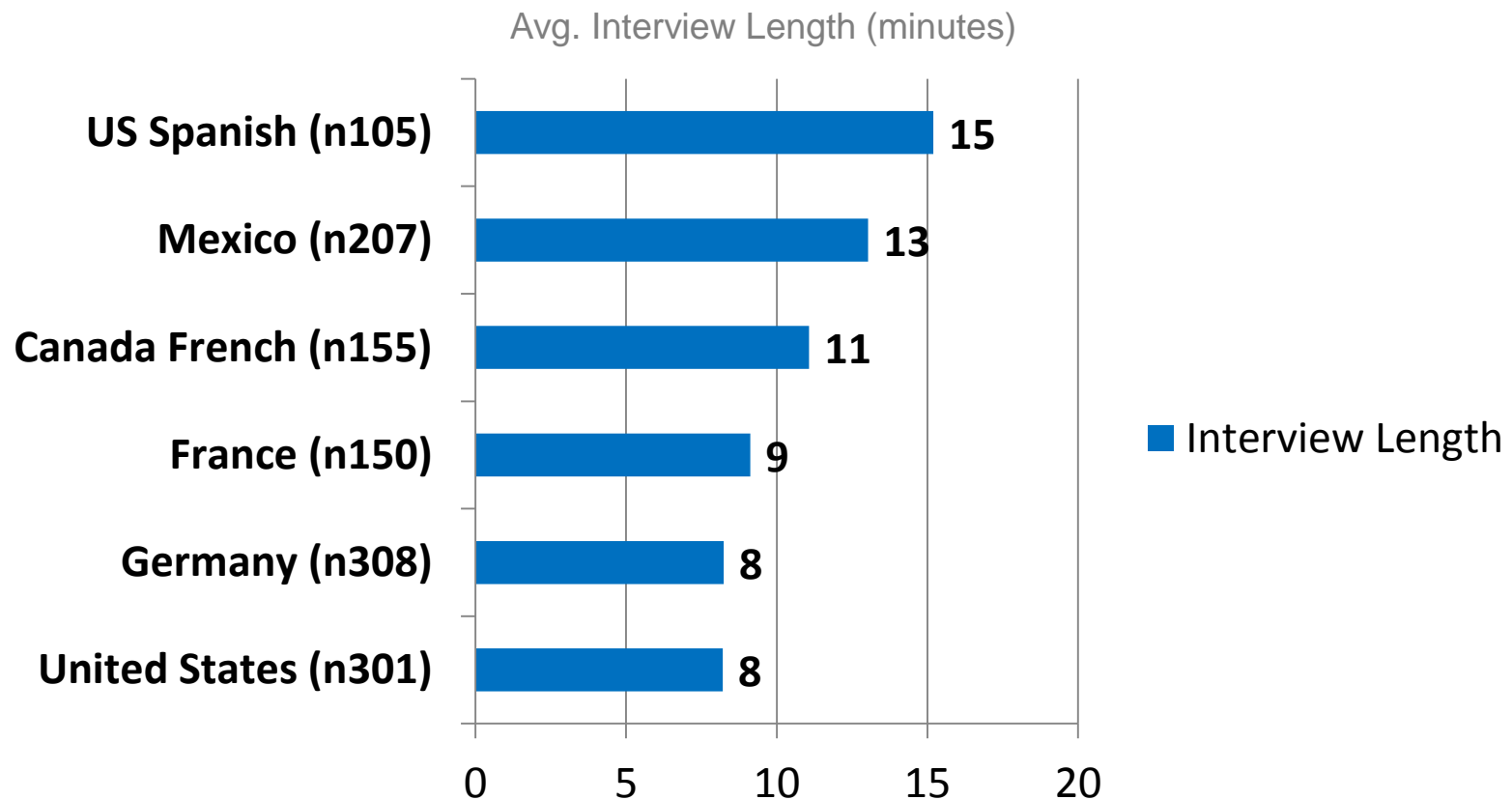
- Stories were about brands and personal stories
- Emotional benefits were explored throughout countries

Linguistic analysis to identify, define key themes – performed by software and analysts

- Cultural distinctions were explored across countries
- Language distinctions were made across countries speaking the same language

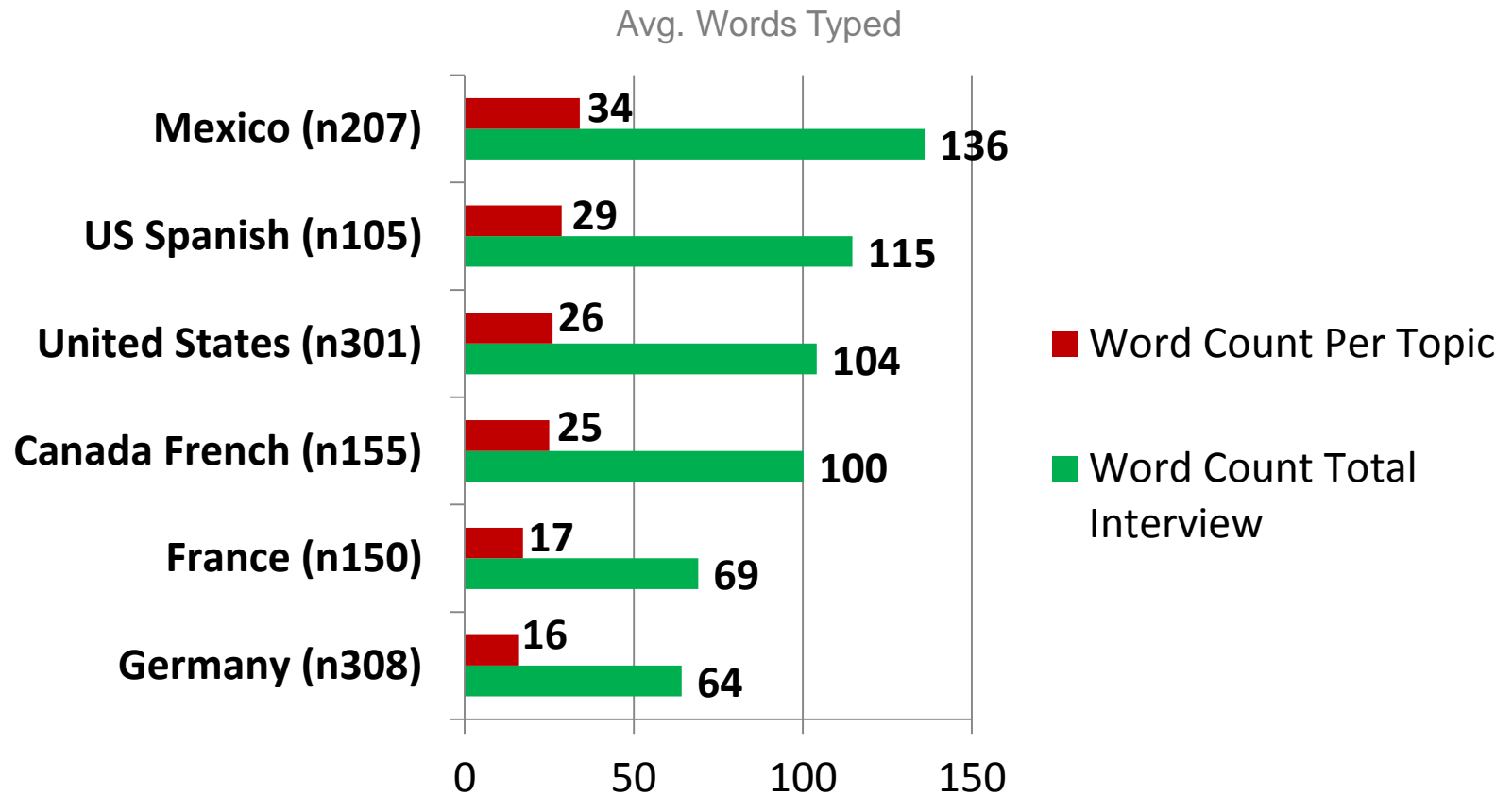
Cultural Idiosyncrasies – Interview Length

Interview length varied by country



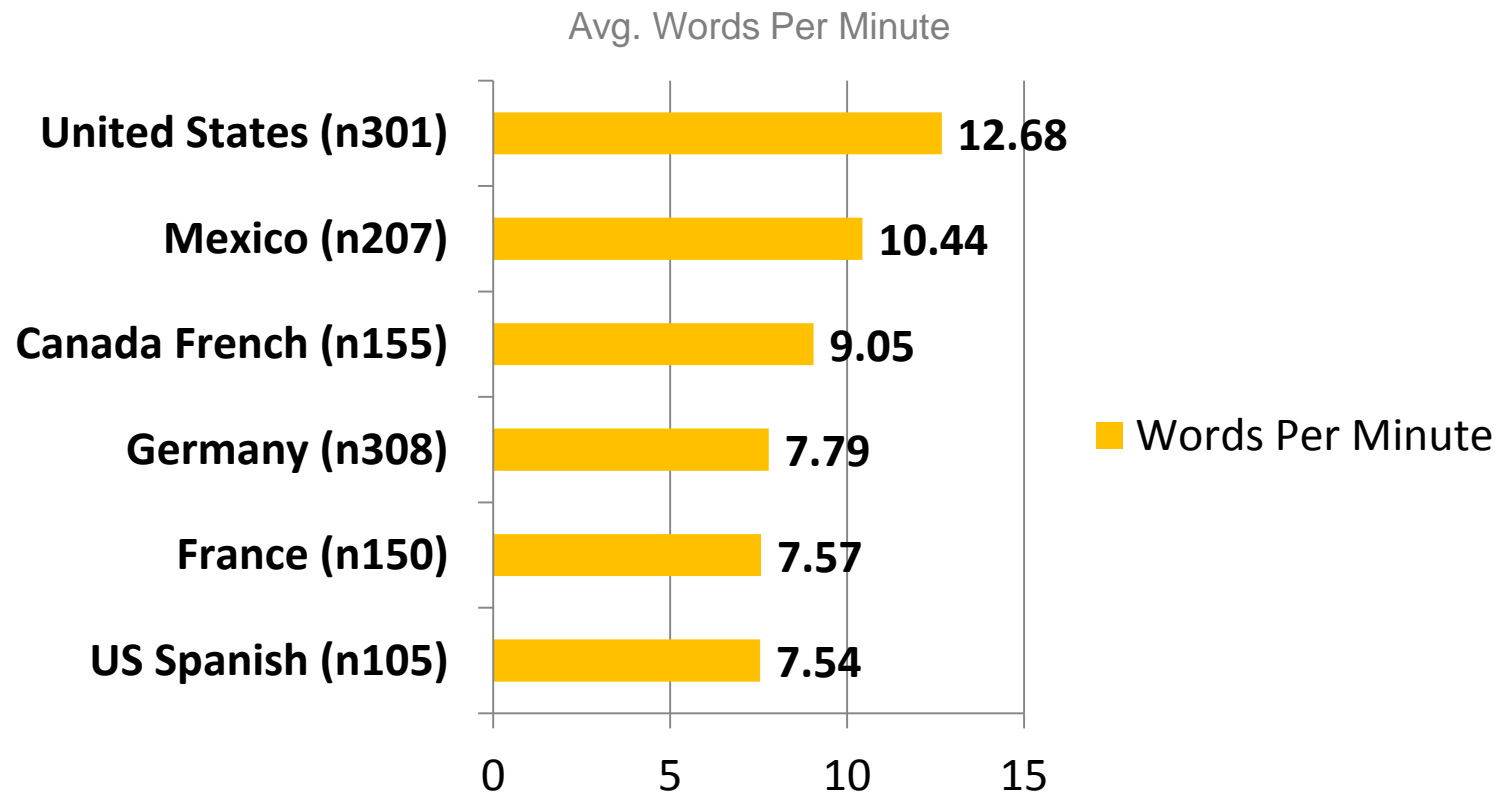
Cultural Idiosyncrasies – Word Count

Spanish speakers are the most verbose



Cultural Idiosyncrasies – Words Per Minute

Words typed per minute favors North America



Cultural Idiosyncrasies – Language

We all have our unique peccadilloes.

- In Germany, a single word can capture several ideas, in fact German has some of the longest compound words in the world, which can lead to lower “word counts”
- For example ... this is a word → Rindfleischetikettierungsüberwachungsaufgabenübertragungsgesetz
- In Europe, professional interviewing is essential – no need to build a relationship with the respondent, not casual – be direct, be specific about what you want to learn – don’t be overly personal
 - In Germany, there could be some concerns with follow ups as “interrogations” ... again, be direct, do not over personalize probing – instead focus on the facts with their experiences
 - In France, respondents can be impatient and get irritated quickly, be brief, be professional, be direct.
- Spanish speakers require fewer topics, because they are open, respond well to sharing and engage in a very personal and conversational dialogue
- Americans need probes, otherwise they will operate in a lazy undisciplined fashion. They don’t like to type if they don’t have to.

For additional information

Contact us at info@quester.com or visit www.quester.com

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