

# Bottle Water Consumption in Europe and North America

[www.Quester.com](http://www.Quester.com) | [info@Quester.com](mailto:info@Quester.com) | 877.232.1005

## CONDUCTING ONLINE QUALITATIVE INTERNATIONALLY

### Overview

The need for international market research has been well established throughout the industry. The world is, indeed, shrinking – companies, brands and products now have unprecedented reach around the world. The need to speak to customers globally means that it is becoming increasingly important to understand how to speak to customers locally.

Qualitative research is critical to understanding foundational consumer needs, as well as understanding how to effectively communicate with consumers. However, large scale qualitative, especially when addressing an international component, is a huge challenge. Cultural differences exist that must be examined, both from the perspective of product needs and perceptions, as well as in the approach to effectively engaging and gathering input from respondents around the globe. Consumer needs can vary drastically given where they live – and the best approach to talking to consumers about these needs can vary drastically as well.

Quester developed a case study to understand ways to address the challenge of global insights through qualitative interviews conducted online. The approach involved dual goals – to test the effectiveness of online qualitative in a global environment, and to understand differing consumer perceptions around the world. In order to do this, we used a very basic product with a vast global reach – bottled water – to set the stage for understanding international needs.

### Methodology

Quester’s innovative approach utilizes a proprietary software moderator to conduct online one-on-one in-depth interviews. Respondents are guided through a conversation presented in a topic-oriented format. They are further probed by Socrates, on the language they use in their responses, to create a deeper understanding of their thoughts and perspectives. The base intelligence of the system was translated to conduct interviews in German, Spanish and French (with separate systems developed to address French language distinctions between Canada and France).

### Approach

Respondents were targeted based on bottled water purchase and personal consumption within the previous three months. They were asked to identify the brand of bottled water they purchase most often, and led through a conversation discussing the benefits of their brand and their emotional associations with it. Respondents were then asked to “tell a story” that would exemplify their experience with the brand, a qualitative technique frequently used in Quester’s depth interviews.

Sample was accessed through a partner online panel provider. 1226 Respondents were interviewed across five countries, seen in Table 1.

**Table 1. Bottle Water Sample Composition**

Country	n
US (English)	301
US (Spanish)	105
Germany	308
Mexico	207
Canada (French)	155
France	150

## INSIGHTS & CULTURAL DISTINCTIONS

### Key Overview of Research Findings

Several key bottled water benefits were consistent among all respondents. Across countries, a major benefit of bottled water is refreshment, which is defined with both physical (hydration, cooling) and emotional (relax, refocus) connotations. The most desired flavor is completely neutral – this communicates that the water is “pure” and “clean,” which is the ultimate driver of purchasing bottled water over tap. Not surprisingly, bottled water is also seen as healthy – it helps hydration, digestion and is healthier than the world’s most consumed beverage, soda.

Additionally, price is a concern for all consumers. Although freely available, people look for economical bottled water and look to purchase in bulk in certain shopping situations.

However, it was the difference in focus among countries that provides a fascinating view into the unique international perspectives. For example, in Mexico, bottled water is grounded in security. Clean water is a necessity and bottled water provides a safer alternative to tap water. Mexican consumers are also uniquely concerned with sodium content. European consumers have the additional consideration of a sparkling element – and finding the right level of carbonation is important to ensure water offers the right lightness.



In 2010, bottled water experienced over \$99 Billion in Global Sales, and the United States and Mexico led in consumption.

Brands also matter across countries, but brand needs are driven “locally.” Brands, at their core, are defined by what makes sense to a country’s sensibilities. In Mexico, large global companies provide credibility and trust, which is necessary when security is a factor. Compare this to France and Europe (and to an extent, Canada, with its glacial snowmelt) where tradition rules and local sources are abundant – and much preferred. In the US, brand image is a driver – with so many options on the market, a brand needs to stand out by offering something different, whether that’s unique packaging, a distinct health benefit or a flashy celebrity endorsement.

### Engagement: Cultural Idiosyncrasies

Just as needs vary, so did respondent engagement with the online qualitative platform. Among all respondents, Spanish speakers were the most highly engaged (both in the US and in Mexico). These respondents logged the most time engaging with the program and typed the most words, on average, through the interview. Interviews with Spanish speakers could have, in fact, involved less probing, as this group was very open, responded well to sharing, and engaged in a very personal and conversational dialogue.

Conversely, French and German respondents provided fewer words in an average interview. It was also critical, with these groups, to adjust the tone of the interview. While conversational engagement is important in the US, in Europe a distinct professional tone was more preferred and more effective at eliciting information. For example, the request to “tell a story” was too fantastical to these respondents, necessitating a shift to a more concrete question type, i.e., please describe a specific experience.

**About Quester:**

Since 2001, Quester has leveraged our online software moderator, Socrates, to conduct in-depth qualitative one-on-one interviews, which allows for large sample sizes and further geographical reach versus traditional methods. For over 30 years Quester has been grounded in linguistic analysis, utilizing proprietary software and trained linguistic analysts to uncover the themes, ideas and nuances in consumer language and translate them into actionable insights.

Quester's services can be deployed directly or through partners, within quantitative surveys, to enhance standard open-ended questions.