



**Understanding consumer preferences for STILL water in Germany  
and what it means for the Volvic brand**  
*July 2021*



## **BACKGROUND, OBJECTIVES AND METHODOLOGY**

## Quotas Achieved

### GENDER

Male	52%
Female	48%

### AGE

18-35	46%
36-65	54%

### LOCATION

Frankfurt	36%
Munich	35%
Cologne	29%

### USER GROUPS

Bottle Stoppers	34%
Bottle Reducers	34%
Filter Users	32%

### VOLVIC

Considerers	47%
Non Considerers	53%

## n=301

All of whom were...

- Regular still water users
- Non rejectors of Volvic

Standard industry and security screen-out also applied. Participants screened for Covid safety

### USER GROUPS

- Bottle Stoppers: Have been bottled users in the past but stopped due to plastic waste
- Bottle Reducers: Drink tap AND bottled water; reduced bottled water due to plastic waste
- Filter Users: Drink mostly filtered water







# CONSUMERS TESTED ALL 12 PRODUCTS

## ALL PRODUCTS WERE INTRODUCED AS STILL WATERS AND SERVED AMBIENT

Product  
TDS (mg/L)



**Volvic**  
154.5



**Adelholzener Naturell**  
348.8



**Aldi Quellbrunn:  
Rheinfürst Quelle**  
462.7



**Black Forest**  
38.8



**Edeka - Gutt & Günstig:  
Urstromquelle**  
144.2



**Evian**  
337.1

Product  
TDS (mg/L)



**Gerolsteiner Naturell**  
529.2



**Lidl - Saskia:  
Wörth am Rhein**  
309.5



**Plose**  
25.9



**Rhön Sprudel Naturell**  
222.2



**Vilsa**  
224.6



**Vittel**  
865.6



## **OVERALL PERFORMANCE OF THE STILL WATERS**

## SEGMENTATION BASED ON BLIND SENSORY PREFERENCES:

### IDENTIFIES 2 CLEAR UNDERLYING PATTERNS OF PREFERENCE:

- A LARGE SEGMENT REPRESENTING 63% OF CONSUMERS
- A SECOND SEGMENT OF 37%

Slightly more likely to be based in **Frankfurt** (42% vs 32%) and **ABC1** (68% vs 56%)  
More likely to be regular drinkers of **flavoured still water** (36% vs 24%) and **Volvic brand** consumers (39% vs 28%)

**NOT INTENSE NOR BITTER**  
**FRESHNESS AND NOT METALLIC, NOT BITTER, NOT INTENSE, NOT PERSISTENT**  
**37%**

**VOLVIC TASTE LOVERS**  
**BITTER, EARTHY AND PERSISTENT AND NOT SALTY**  
**63%**

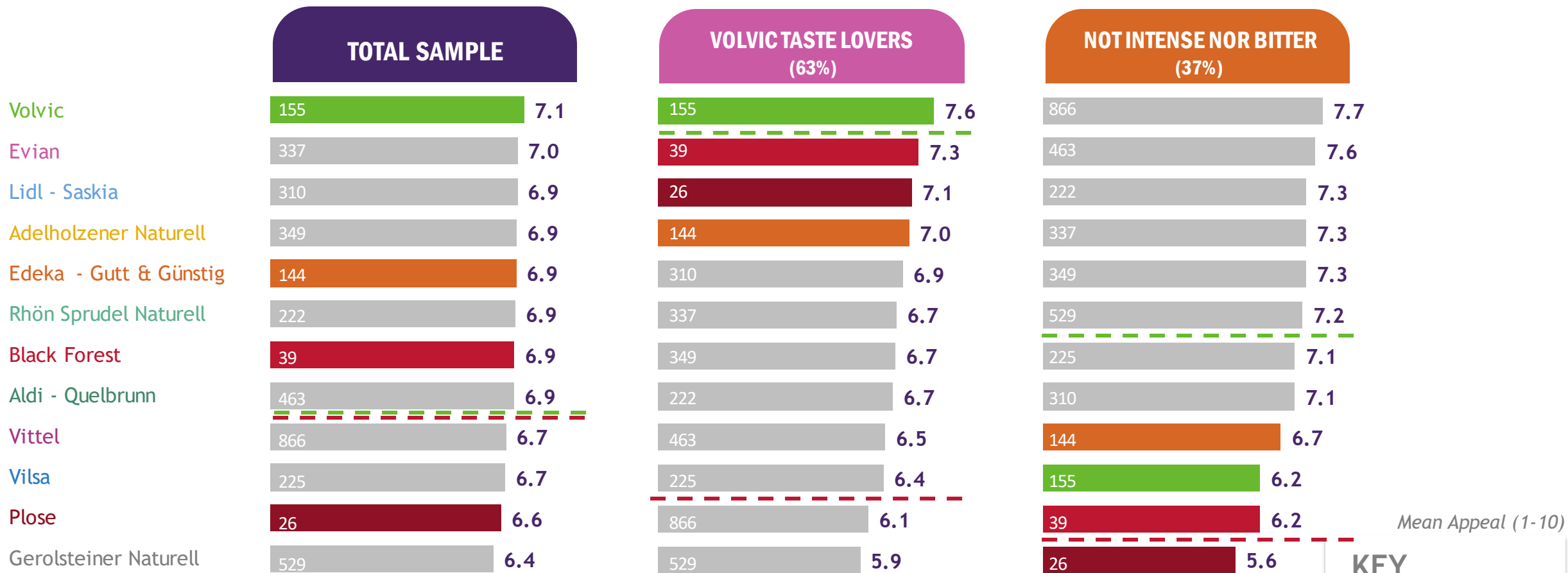
Slightly more likely to be based in **Cologne** (33% vs 21%) and to be **C2DE** (44% vs 32%)



THE SEGMENTS ARE OPPOSING IN TERMS OF THE PRODUCTS THEY LIKE WITH VOLVIC, BLACK FOREST, PLOSE AND EDEKA DOING WELL IN THE LARGER SEGMENT, ALL WITH LOW TDS VALUES...

## SEGMENT OVERALL OPINION

TDS (mg/l)



Mean Appeal (1-10)

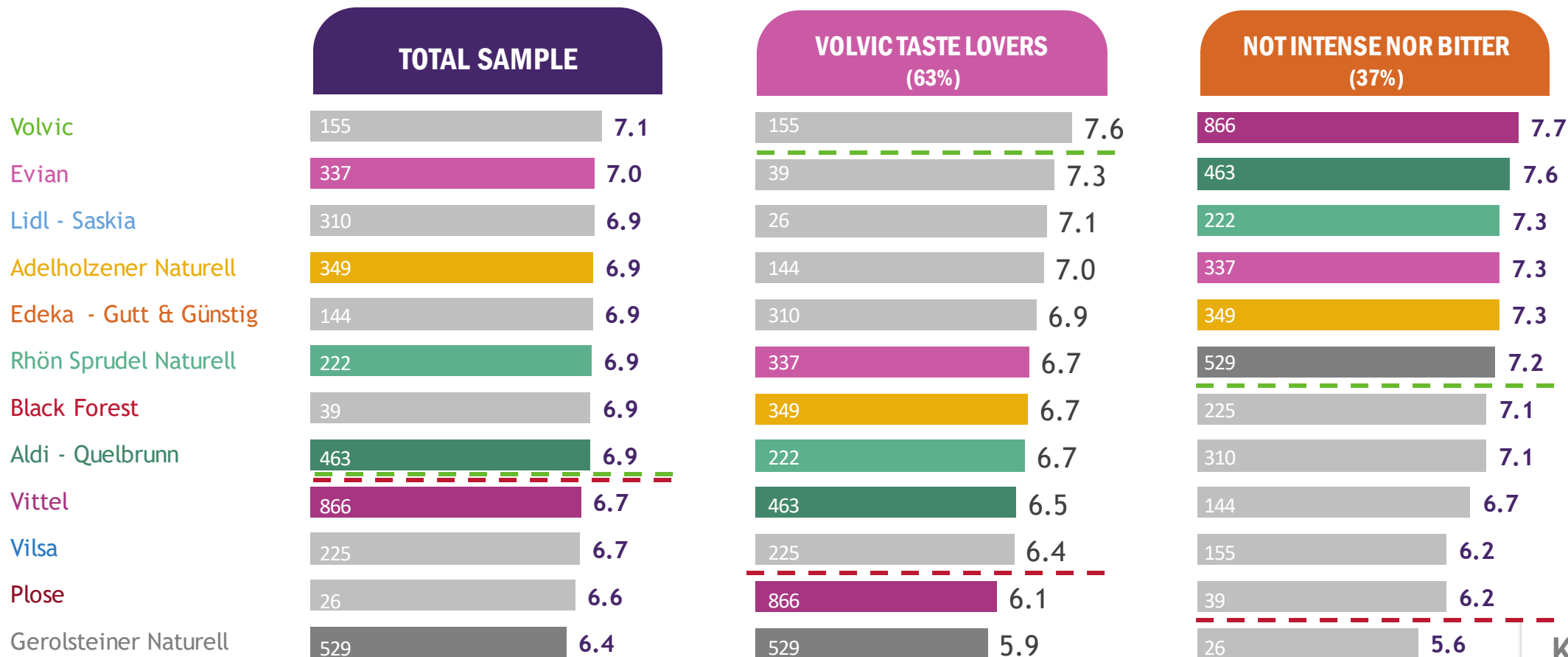
- KEY**
- Green dashed line: Parity with top performer at 95% loc
  - Red dashed line: Parity with lowest performer at 95% loc



# ...AND HIGHER TDS VALUES DOING WELL IN THE 'NOT INTENSE NOR BITTER' SEGMENT of 37%, INCLUDING EVIAN AND VITTEL

## SEGMENT OVERALL OPINION

TDS (mg/l)



Mean Appeal (1-10)

**KEY**

- Green dashed line: Parity with top performer at 95% loc
- Red dashed line: Parity with lowest performer at 95% loc

Q2. Taking everything into consideration, what is your overall opinion of this drink? Base size Total Sample: n=301, VOLVIC TASTE LOVERS: n=189, NOT INTENSE NOR BITTER: n=111





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WITH THANKS!



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