DIVING

in to Flavoured Sparkling Water

Contract Testing Inc.

INTRODUCTION

As its global growth continues at a steady pace, the business of bottled water has matured into a highly competitive, sometimes contentious, and increasingly segmented market space. As consumers seek out healthier beverage alternatives to soft drinks, they are finding increasingly more options in bottled water including new flavours and new fashionable or 'greener' packaging innovations. One exploding segment of the category we recently explored is flavoured sparkling water.

This research aims to explore whether there are perceivable differences between brands of sparkling water, and if so, what attributes help them stand apart. Given the seemingly straightforward nature of this product category, from a sensory perspective shouldn't we expect a similar product experience from all brands? With many veteran and rookie brands now competing for this market space – whether global, niche, premium, or value – from a product perspective, do they all make a similar splash?

MATERIALS AND METHODS

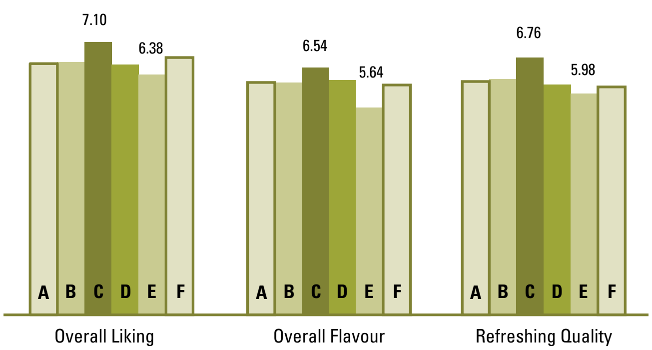
We recruited 50 females from the Greater Toronto Area who are regular users of sparkling water and put six lemon flavoured sparkling waters to the test. Three samples were national brands and three private label grocery chain brands. The samples were evaluated blind and served chilled in a 7 oz plastic cup.

To lay the groundwork we first asked our testers about brand behaviour in this category: 62% said they are not loyal to one brand of flavoured sparkling water and mainly because they tend to purchase what's on sale. However, most also believe that some brands taste better than others.

RESULTS

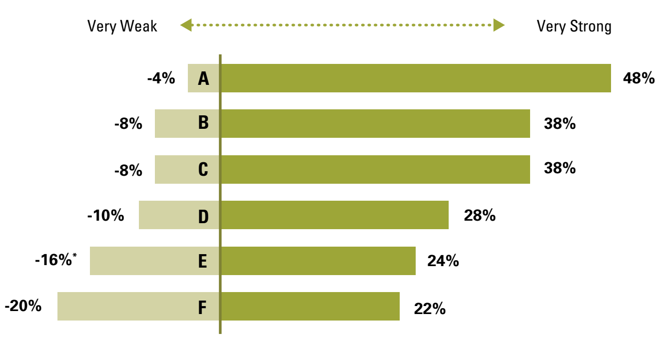
As might be expected, there wasn't a great deal of taste differentiation among the samples. In fact, four of the six products performed very similarly with no significant differences in overall liking, liking of the flavour, or their refreshing qualities (Fig 1). Only two products were significantly different from one another on these measures, Products C and E.

Figure 1 - Hedonic Mean Scores



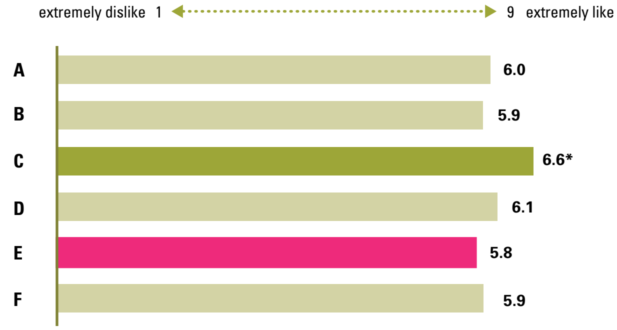
When it comes to flavour, the strength of the lemon flavour was slightly different among most of the samples, with Products E and F significantly weaker in lemon flavour than Product A, the strongest of the six samples (Fig 2). However, whether strong or mild, the lemon flavour tended to have a similar degree of appeal among all the samples with the exception of Product C (Fig 3).

Figure 2 - Strength of Lemon Flavour
(% top 3 box/bottom 3 box)



*Products E and F were significantly weaker than A at 95% confidence

Figure 3 - Liking of Lemon Flavour (mean score)



*Product C liked significantly better than E at 95% confidence

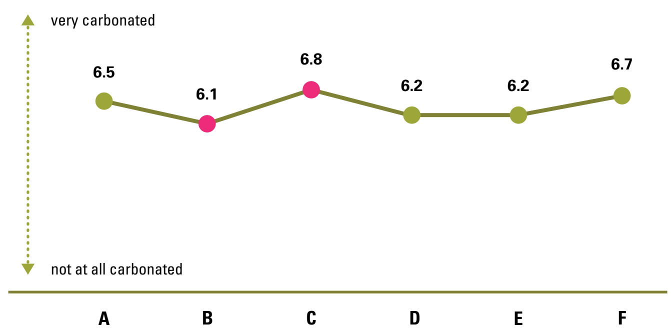
In fact, even though one product emerged as a winner, when asked to describe the qualities of the drinks that stood apart, there were very few meaningful differences between the top and bottom performing products. The top brand tended to be described a little more frequently as smooth, delicious, and fizzy, and was slightly less likely to be described as flat (Table 1).

Table 1 - Taste and Carbonation

Percentage of Respondents describing the product as:	Most Liked Brand	Least Liked Brand
Smooth	18%	8%
Delicious	28%	18%
Fizzy	68%	60%
Flat	4%	12%

There was also very few differences in the degree of carbonation between the six samples, although the top performing brand (Product C) had the highest amount of carbonation (Fig 4).

Figure 4 – Amount of Carbonation



*Product C was significantly more carbonated than Product B

BRAND EQUITY

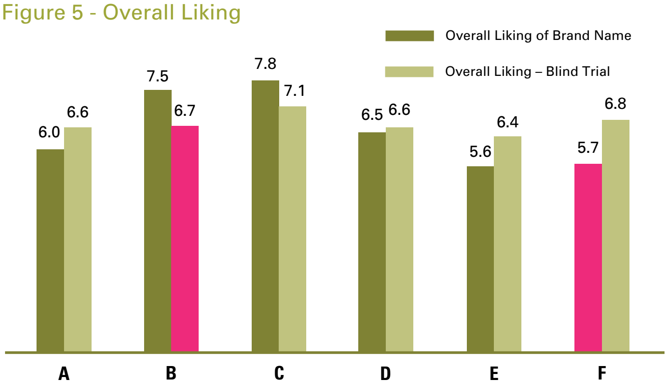
Following the blind tasting, we asked our panel a few questions about their brand awareness in this category: Brands B and C had close to 100% awareness and trial. Three of the brands (D, E, and F) were lower in trial but had nearly full awareness. There was only one brand (A) which had low awareness (Table 2).

Table 2 – Brand Familiarity

	A	B	C	D	E	F
Aware of and have tried	32%	94%	94%	68%	30%	24%
Aware of but have not tried	32%	6%	2%	32%	64%	66%
Haven't heard of	36%	0%	4%	0%	6%	10%

Those who were aware of the brands were also asked to rate their overall like or dislike for each brand. At this point there is no reference to the tasting, so ratings are specifically on brand impressions (Fig 5). By comparing these results to the blind evaluation scores, we are given a sense of the gap between the sensory performance and the brand equity. Is the product delivering to the standards conveyed by the brand image? Is the brand selling itself short?

Figure 5 - Overall Liking



Some interesting patterns are observed: Product D comes closest to delivering a product score that is equal to the brand perceptions; Product B on the other hand, has one of the highest brand liking scores but the largest gap in actual product delivery; and, Product F, one of the lowest in brand liking, performs much better in blind tasting.

CONCLUSIONS AND IMPLICATIONS

The objective of this research was to investigate the sensory performance of six lemon-flavoured sparkling waters. We included both national brands and private label brands, and recruited female consumers residing in one geographical area – Greater Toronto. Further research might also explore whether there are similar outcomes in other geographic markets, or among other flavour varieties of sparkling water, including unflavoured sparkling water.

As we might expect, in a category which boasts a very simple, plain flavour profile, it is difficult to be 'differentiable'. However, even given a lack of differentiable attributes, it is still possible to stand out from the crowd, whether in a positive or negative manner. Even in a category where homogeneity is almost a foregone conclusion, we revealed both a champion and an underdog – a testament to the fact that product development efforts are not 'for naught' in any category…even one as simple as water.

Also revealed here is the essential role of the brand image - particularly in a category with little differentiation on product attributes. If there is only a narrow margin for differentiating the sensory experience, we can often rely on Brand equity to take us the extra mile. But there are risks of having product quality misaligned with the brand: a product that does not meet brand expectations runs the risk of diluting brand equity; while on the other hand, a high quality product married with a lack-lustre brand, may live out its days collecting dust in the grocery aisle and be a costly waste of product development efforts.

In the end, consumer brand choice among sparkling waters is certainly largely driven by price and brand equity. But if you're diving into this category, having a superior product profile may just make the difference between a big splash… and a belly flop.

For questions about this research, or how you can leverage consumer taste buds in your business, contact Andrew Scholes at andrew.scholes@contracttesting.com.

Contract Testing Inc. is an industry leader in sensory evaluation and consumer product testing. We are the only sensory evaluation and consumer product research company with corporately managed test sites in both Canada and the United States. With nearly 30 years of experience, we are innovators in testing with consumers across all major food, beverage and household and personal care categories.

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