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Still Sparkling: The Phenomenon of Bottled Water—An Irish Context

Hayley Collins¹ and Dr. Angela Wright^{1*}

Abstract

Why choose to buy one brand of bottled water over another, when, as consumers, we are effectively just buying water — H₂O — a colourless, odourless product? This study investigates the power of branding in the bottle water market—a billion euro industry that has been created to sell a product with little or no distinguishable features. Sales of bottled water continue to increase year on year globally, and in Ireland. Ballygowan and Volvic have the largest market share of the water market in Ireland, and, interestingly, they also invest the most in their marketing. One of the aims of this study is to find out why Irish consumers chose to buy bottled water in the first instance? Why do they decide to pay for a premium priced bottled product of which they have a relatively free supply at home? Is a clever marketing strategy the key to this market in aiding decision-making for consumers of bottled water? During the early stages of this study, and to inform the direction of the research, a 'taste test' pilot study was undertaken. In total, 31 people took part in this taste test. Of those, just 3 people were able to differentiate between the top three selling bottled water brands in Ireland, and tap water. From these results, the researcher's interest was piqued by whether or not marketing plays an integral part in the purchase decision of consumers when buying bottled water? To determine the answers to the research questions developed after the initial pilot testing, a quantitative methodology was applied in an effort to gather relevant data directly from the Irish market. In total, 223 people responded to the survey. The results of the study found that people purchase bottled water for three main reasons: a) they believe it tastes better than tap water; b) it is a convenient option; and c) it is a healthier alternative to other drinks on the market. This research also indicates that when consumers purchase bottled water they are often buying a brand name and not the product itself—water. This study has also found that Irish water brands such as Glenpatrick, Purely Irish, and Royal Mystic who are not as active in the marketing arena as Ballygowan or Volvic have a much lower visibility in the market place. Marketing is vital for bottled water companies to gain market share in Ireland, and one of the findings from this study indicates that vigorous marketing was an important factor in influencing brand choice in the context of bottled water. This study will be of benefit to those involved in the bottled water industry and those interested in the concepts and impact of branding in general.

Keywords: Bottled water, marketing, branding, brand equity, consumer behaviour

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Introduction

The beverage industry works hard to market a product whose characteristics for the most part are indistinguishable from brand to brand. But consumers still choose one brand over another, (Fleming, 2006).

In the last 40 years the bottled water industry has gone from a business prospect that few took seriously to a global industry worth billions of pounds. The objective of this research study is to ascertain why a consumer purchases one brand of bottled water over another when they are effectively buying the same product – H₂O. This current research will also examine why people choose to pay for bottled water when they have an ample free supply of tap water in their homes. Mooij (2011) observes that although the quality of tap water has improved all over Europe, consumption of bottled water has increased. Through a confection of advertising and marketing, bottled water has become one of the biggest success stories in the modern food and beverage industry. It is a unique product, an exceptional product, in that the difference, if any, between one sample and another is subtle at best. This research confirms that, when it comes to selling water, there is a clear and definitive co-relation between marketing spend and market share.

Justification

Initial readings of the literature indicated that there was little research available on the branding of bottled water. Previous research focused on trying to determine why people bought bottled water over tap water and not on why they chose one brand of bottled water over another. Initial research revealed that no study could be found on Irish bottled water consumption, or why Irish consumers bought branded bottled water and their personal brand preferences.

As previously mentioned, before beginning this current study a pilot taste test was conducted so as to ascertain whether there were grounds to continue with this study. This research proved that most people could not distinguish between different brands of bottled waters even though they drank bottled water on a regular basis. These results indicated to the researcher that this topic should be further explored.

Literature Review

Consider the effect of branding on bottled water. Advertising helps create enough value in the minds of consumers that they will pay for water that comes free out of the tap, (O'Guinn et al., 2012).

The History of Bottled Water

According to the European Federation of Bottled Water (2010), the bottling of water is hundreds of years old. It stems from the custom of visiting spa towns such as Vichy in France and Spa in Belgium, and the wish of visitors to continue benefiting at home from the properties of medicinal waters. Green & Green (1986), state that successive Roman emperors had a rare addiction for mineral waters both in Italy and on their conquests abroad. They established spas in France at Badoit and Vittel, while Julius Caesar took to the warm springs of Vichy. Wehr (2011) claims that bottling water started in 1820 in the United States and was quite popular throughout the 19th Century. During the 1980's, bottled water became a 'craze' and products quickly sprang up to meet the demand (Nutt & Wilson, 2010). Perrier was the first to advertise bottled water on television in 1977. The response was feverish with Perrier's American sales growing 3,000 per cent from 1976 to 1979 (Eliot & Sutherland, 2007).

Bottled Water—Present Day

Wilk (2006), states that bottled water has become a pervasive global business, and bottled water consumption continues to increase rapidly particularly in countries where clean potable tap water is available at very low or no cost.

According to Seabrook (2011), advertisements represent bottled water as being a healthy alternative to tap water. Snitow *et al.*, (2011), believe that in a spectacular triumph of marketing, the beverage industry found a replacement for sagging soda sales by convincing great numbers of people that drinking bottled H₂O, rather than plain old tap water, produce miraculous results: youth, good health, vitality, sexiness, affluence, enhanced memory and general well-being. This resulted in bottled water having a higher retail value than milk and oil (Glennon, 2002).

Bottled Water—Becoming a Commodity

Tvedt *et al.*, (2006), states that the sales of bottled water continue to increase and it is generally agreed that effective marketing has played a crucial role in shaping bottled water consumption. Reilly (2012), notes that the widely feared impact on retail sales caused by January's VAT hike has pushed more small businesses to the brink, with increasingly cash-strapped consumers abandoning "brands" to save money, however, discretionary treats like spring water and bottled water are up by up to 4 per cent in some cases. Despite the challenging economic climate, several brands in Ireland have actually managed to increase their market share by both value and volume (Hamell, 2009). Ultimately, it is the convenience and taste of bottled water which appears to have retained and attracted customers in spite of the recession. Mackey *et al.*, (2003), posit that marketing is a major component of most bottled water companies. Bottled water middlemen with their advertising hype would make consumers think they are getting a higher-quality product when they buy bottled water when in reality, 40 per cent of all bottled water is simply taken from municipal tap water (Cordain, 2002),.

The Marketing and Branding of Bottled Water

The bottled water industry has become extremely profitable over the last decade but when bottled water was first produced consumers laughed at the concept (Lake, 2009). Mineral water tends to be advertised by its purity attribute which is often symbolised by showing the brand in a nature setting (Mooij, 2010). The question still remained however—why would consumers buy water in a bottle when they could drink it from the kitchen tap?

That's when the marketing message changed: people weren't buying bottled water for convenience but rather for their health and protecting themselves from impurities in their tap water. The emotion of fear moved consumers into action.

The marketing message changed consumer behaviour by making the issue personal. The attraction of new market entrants, as well as convenience considerations, boosts growth within the bottled water market (Smit, 2010).

Shrimpton (2009), notes that Evian spent £6 million marketing their brand in the UK in 2008. In 2009, Evian's 'Roller Babies' film recorded over 45 million views on YouTube, in the process, it became recognised by the Guinness Book of Records as 'the most viewed online advertisement' to date. Research found that 72 per cent of respondents agreed that the Evian 'Roller Babies' advert 'is an ad I will tell other people about' against a Nielsen norm of 50 per cent' (Burcher, 2012). The advert is surreal and funny and not at all what consumers had come to expect from a brand that has historically taken a more elegant and understated approach in its advertising. The company division saw sales in the twelve-month period to the end of December 2010 climb by 5.3 per cent to 2.87 billion euro (Cholle, 2012).

Packaging of Bottled Water

Folsom (2004), states that marketers in recent years have made millions of dollars selling bottled water. Chemical studies usually show bottled water to be of no better quality than tap water, but blue bottles and French names appeal to consumer's self-image. Norman (2004), ponders how the packaging of water has become an art form? Some of the bottles are special, sensuous and colourful. People keep the empty bottles, sometimes refilling them with tap water, which, of course demonstrates that the entire success of the product lies in its package, not its content. How does one brand of water distinguish itself from another? Packaging is one answer, distinctive packaging, that in the case of water means bottle design. Glass, plastic, whatever the material, the design becomes the product. Opel (1999) believes that people are willing to pay more money for a product based on the images inscribed on the product through advertising. In the case of bottled water, the inscription of meaning is vital because there is so little difference between the products.

Mascha (2006) further notes, that the label and bottle of the water play an important role in the overall perception of the product. Since water has no notable physical characteristics of its own, the bottle and label have a significant impact on the perceived value.

Howard (2003), states that it is ironic that many people who purchase bottled water end up refilling the containers from a tap. Clearly some consumers may be more interested in buying the product for its packaging than for the water itself.

Cavalli (2010) believes it is thanks to designer labels, international influence and consumer desire, that the bottled water industry has become a competition of taste, design and style. Thottam (2005) reveals that the luxury brand Bling H2O sells for an estimated \$240 a case wholesale. Suzuki (2007), points out that when so many of the world's people lack the basic human right of safe drinking water, it seems misguided to direct so much money and so many resources into designer bottled water.

Labelling of Bottled Water

More often it's what is on the label that counts. The most impressive brands boast that their contents come from "long-hidden primal springs", "sparkling mountain streams high in the Himalayas" or perhaps "ancient glaciers" (Beiswinger, 1998). It seems the more distant and remote the water source, the greater the waters mystique – and price. The labels of bottled waters do suggest they're special. Some show mountains or polar bears or glaciers. You have to look at the fine print to find out that popular American brand Everest Water is not from Mount Everest. It's from Corpus Christi, Texas and Glacier Clear Water is not from a glacier in Alaska, its source is tap water from Tennessee (Stossel, 2005).

Plastic Bottle Packaging – Coming Under Fire

Rees (2012), states that bottled water is the totemic *bête noire* of the environmental world. It is a multi-million dollar industry that takes what in the west is clean and readily available from the tap, packages it up in non-degradable plastic, and sells it back to consumers at hugely inflated prices. While plastic bottles can be recycled, the majority are not (Moore *et al.*, 2001). Moreover, plastic never actually degrades; it just breaks down into smaller and smaller pieces.

In some parts of the ocean, plastic outweighs plankton by a six-to-one ratio. Boone & Kurtz (2012), note that environmentalists say it takes more than 17 million barrels of oil to produce the plastic water bottles for just one years consumption in the United States – enough to power a million cars in a year. These bottles are an environmental hazard and according to a recent estimate, less than one-fifth of them are properly recycled with the rest ending up as litter or in landfills.

Branding of Bottled Water

According to Wilk (2006), bottled water is an exceptionally clear example of the power of branding to make commodities a meaningful part of daily life. Gleick (2010) believes that bottled water companies have used the classic advertising and marketing tools of sex, fear, style and image to drive people toward their product and away from the tap. Consumers are spending all that extra money on billions of gallons of bottled water because they have bought into the beverage industry's marketing magic that water in a plastic bottle is safer and healthier than tap water (Food and Water Watch, 2007). Pepsi's AcquaFina brand is nothing more than tap water purified, yet registered \$425.7 million in sales in 2005. This was closely followed by Coca-Cola's Dasani bottled tap water which had sales of \$199.7 million in the same year.

The Power of Marketing – Bottled Water for Dogs

Blatt (2005), states that even our treasured pets can enjoy the thrill of bottled water designed especially for them. The K9 Water Company in California sells beef, liver, chicken and lamb flavoured bottled water for dogs. Linnell (2009), further notes that a Sydney based animal product company called *Pets Palace* has launched a range of natural mineral water for dogs that is more expensive than bottled water for humans. *Bellaqua* is a sparkling mineral water that is sold in handmade crystal bottles with jewels that sell for \$42.50AU for a box of four. According to Zmuda (2008), the pet industry is worth \$40 billion and this is why companies such as Cott Corp have developed brands such as Fortifido—the "first-ever fortified water for pets with real functional benefits." The brand comes in vitamin-enhanced formulas to promote healthy bones, healthy skin, fresh breath and healthy joints in flavors including spearmint, parsley and peanut butter. Nestle & Nesheim (2010), maintain that fortified pet waters are about marketing and not the health of your pet.

Bottled Water in Ireland

According to King Taylor (1993), the first brand of bottled water in Ireland was Ballygowan Irish Spring Water. It was launched by Geoff Read in 1983. He first had the idea of bottling Irish spring water when he was living in London, where tap water was recycled up to ten times.

He noticed the increasing presence of imported bottled waters on the supermarket shelves, especially French brands, and realised there was chance for Ireland to utilise its wild and natural environment (King Taylor, 1993: 87). Sheehan (2007), notes that the market in Ireland is growing by 15 per cent per year with an estimated worth of €100 million. Hickey (2010) concurs and states that consumption of bottled water has soared in recent years. In Ireland, sales have risen from 113 million litres in 2001 to 193 million litres in 2008.

Hollensen (2007) claims the location of Ireland to source bottled water is a good idea in that Ireland is generally perceived as green, unspoiled and lacking in industrialization or pollution. Ireland is at an early stage of development of consumption of bottled water. Few consumers can distinguish between alternative brands while in Europe and the United States, bottled water is part of a way of life. O’Gorman (2012), states that the size of the bottled water sector in Ireland is difficult to pin down but industry insiders estimate it is worth circa €250 million per annum. Ireland’s bottled water companies have established an international reputation for high levels of quality such as Ballygowan, Tipperary and Kerry Spring. A study on the bottled water industry in Ireland by Euromonitor International (2012), states that Ballygowan are the market leader with 11 per cent of the Irish market.

Ballygowan

In November 1983 Geoff Read and Richard Nash launched Ballygowan still water (Hourihane, 2000). Ballygowan spring water is an Irish success story where the interplay of marketing and design disciplines in practical decision making can create a product of real success. The case of Ballygowan, an ‘invisible’ product in a market which could neither be anticipated nor predicted, points to the achievements of design in branding and packaging, as well as the efficiencies of distribution, logistics and pricing (O’Sullivan, 1998).

In recent years, Ballygowan has decided to divest itself of the mythological garb that cloaked its previous marketing campaigns such as ‘Children of Lir’ and ‘Butterflies’. Instead it has adopted a postmodernist abstract style, depicting people of various colours dancing and interacting in its—‘Bodies Never Lie Campaign’ (O’Boyle, 2006). Reactions to this work, however, tend to be mixed and the iconic water brand embarked on a major marketing drive and re-launch campaign in 2012 in a move to halt falling sales (Lynch, 2012).

Methodology

For the purposes of this study, a quantitative methodology was applied to gather as many responses as possible from bottled water drinkers to answer the research question. Creswell (2003) explains that in quantitative studies, one uses theory deductively and places it toward the beginning of the plan for a study. With the objective of testing or verifying a theory rather than developing it, the researcher advances a theory, collects data to test it, and reflects on the confirmation or disconfirmation of the theory by the results. The research question was directly linked to the purchasing decision of the consumer in this study. It is the researcher's opinion that targeting a sample of the population of bottled water consumers will give the best possible results. Initially, a blind 'Taste Test' was conducted with 31 participants as a pilot test to ascertain if drinkers of bottled water could actually tell the difference between different brands of bottled water. According to Sieber (1992), pilot testing refers to an informal investigation with one or a few individuals to 'fine tune' research procedures until they are satisfactory. Of the 31 tested, only 3 people were able to differentiate between the top three selling bottled water brands in Ireland and tap water. It was based on these results that the researcher believed that investigating whether marketing is involved in the purchase decision of a consumer when buying bottled water would be viable and further investigation was needed on the topic.

The researchers then decided to undertake a larger sample. To choose the sample for this investigation, nonprobability sampling was applied. Henry (1990), states that nonprobability samples are selected based on the judgement of the researcher to achieve particular objectives of the research at hand. Due to the time and budget restrictions of this study, the researcher opted to use the 'snowballing' effect.

Jugenheimer *et al.*, (2010), explain that snowball sampling identifies members of a population with a particular knowledge and experience. These prospective respondents are then asked to identify people they know with unique characteristics that match the purpose of the research.

In total, 376 people received the survey and of those, 223 completed the survey successfully which contained mostly rated scale (likert) questions to gain as many feasible opinions and attitudes as possible.

This means that a response rate of 59.3 per cent was achieved. The researchers aimed to establish how effective the branding of bottled is in Ireland and whether it had a role to play in the purchase decision of bottled water consumers. Prior to conducting the 'Taste Test', intensive secondary research was also undertaken with the aim of identifying any gaps that might emerge in the literature.

Main Findings

1. Taste of Tap Water

Of the 223 people who responded to the survey almost eighty per cent purchased bottled water because they did not like the taste of their own tap water. It is interesting to note, however, that the results from the pilot taste test which was conducted as part of this current research found that most people could not differentiate between bottled water and tap water.

2. 'Healthier Option' to Other Drinks Available on the Market

This current research suggests that consumers buy bottled water as they perceive it to be a 'healthier' option than other drinks available on the market. 77 per cent of respondents who drank bottled water regularly answered that they "bought bottled water for its health-related benefits".

3. A Convenient Option

Another reason why respondents to this current research purchased bottled water was due to the fact that it so convenient. Results of this investigation have found that 73 per cent of respondents bought bottled water for this reason.

4. The Branding of Bottled Water

This current research has found that, when consumers purchase bottled water, they are buying the brand name and, generally, not the specific product which, after all, is water. Without the presence of the visible cues, such as the bottle and label, the respondents were unable to tell the difference between the four samples of water.

5. The Role of Marketing in the Purchase Behaviour of Consumers

This research has shown that the companies with the largest market share are those who invest the most in their marketing. In 2011, Deep RiverRock invested €3 million in overall brand marketing while Ballygowan invested €850,000 into their marketing budget for their brand in 2012. Lesser known brands such as Royal Mystic and Essentia spend little on marketing their product and this is reflected in the small percentage share which they have of the Irish market.

Recommendations for the Bottled Water Industry

Analysis of the macro-environment of the bottled water industry in Ireland provides information on possible threats to the industry but also gives an insight into possible opportunities for companies within this sector. Marketers need to seriously consider capitalizing on the recommendations being put forward by the researcher as there is potential for them to gain large market share. To become a market leader within this industry companies need to differentiate their brand and gain as much exposure as possible. By utilising a first-mover advantage and implementing the ideas being proposed before their competition, bottled water companies will undoubtedly acquire market share.

1. New Legislation

It is widely recognised that bottled water is less regulated than tap water. Therefore, the researcher believes it is imperative that the government introduce new legislation which will govern the quality of bottled water. Sodium levels, in particular, need to be addressed, as high levels of this substance are harmful to the human body.

A new opportunity for bottled water companies may be provided by the current debate regarding advertising of alcoholic beverages. This current research has proven that consumers who exercise regularly purchase a large amount of bottled water so sponsoring major sporting events would be an ideal marketing 'fit' for bottled water companies.

2. Economic Factors

As Ireland struggles to emerge from recession, the bottled water sector needs to adjust their pricing accordingly. This research has shown that there is a clear link between income and purchase of bottled water. The bottled water industry needs to realise that discretionary income has been reduced for many and so their ability to buy 'optional' goods such as bottled water has decreased.

3. Competitors

Marketers of bottled water products need to be prepared for new entrants into the market. 'Enhanced water' products could potentially steal market share as more and more of these products enter the market. These are waters designed to provide you with vitamins, help you sleep and curb your appetite.

4. Technology

This current research has established that the success of the bottled water industry is largely due to marketing. Marketing in this present day requires creativity and the ability to incorporate several different marketing media into one campaign. A strategy which encompasses both the internet and mobile technology along with television and other media will appeal to the consumers of bottled water.

5. Social-Cultural Factors

There will be a potential opportunity for the sales of bottled water to increase as attention focuses on obesity levels in Ireland. Marketers need to be prepared for this opportunity and have a strategy in place to take advantage of the publicity which addressing obesity levels in Ireland demands.

The bottled water industry needs to understand the damage that plastic containers are causing to the environment. The industry is coming under increased scrutiny from the media, environmentalists and eco-friendly consumers because of the amount of waste caused by the plastic bottles from bottled water, along with the amount of crude oil required to make a bottle.

PET approved bottles have been created by some companies but this has not proved enough for environmentalists. Developing packaging which is acceptable could lead to positive media attention and a differentiating factor among competitors.

6. Demographics

The recession and emigration figures have had an effect on the current demographics for the bottled water industry in Ireland especially Irish brands which have little or no market share outside of Ireland. Brands such as Ballygowan and Celtic Pure need to invest in developing their market share outside of Ireland with particular focus on the United Kingdom which is a popular destination for Irish emigrants.

Conclusion

From a marketing point of view, bottled water is a modern day phenomenon. Within just a few decades, this industry has been transformed from formerly providing a product to a niche market to a product which has created worldwide demand. Marketers have created a multi-million euro industry through effective advertising and attractive packaging amongst other elements. The clever and innovative marketing within the bottled water industry is directly responsible for its development into a global success story and this research recognises what a success it has been.

This investigation has clearly proven the power of branding in the fact that a billion euro industry has been created around selling a product with little or no distinguishing features.

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