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Branding water

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ABSTRACT

Branding is a key strategy widely used in commercial marketing to make products more attractive to consumers. With the exception of bottled water, branding has largely not been adopted in the water context although public acceptance is critical to the implementation of water augmentation projects. Based on responses from 6247 study participants collected between 2009 and 2012, this study shows that (1) different kinds of water – specifically recycled water, desalinated water, tap water and rainwater from personal rainwater tanks – are each perceived very differently by the public, (2) external events out of the control of water managers, such as serious droughts or floods, had a minimal effect on people's perceptions of water, (3) perceptions of water were stable over time, and (4) certain water attributes are anticipated to be more effective to use in public communication campaigns aiming at increasing public acceptance for drinking purposes. The results from this study can be used by a diverse range of water stakeholders to increase public acceptance and adoption of water from alternative sources.

1. Introduction

In theory, the problem of water supply shortage is solved: a range of engineering solutions exist which can augment existing water supplies using wastewater, seawater, or water from difficult to procure locations. However, these engineering solutions are insufficient alone to ensure successful implementation. Consideration is needed of the often significant economic, social and environmental costs of such water augmentation projects. In many instances public opposition (perceived or real) to alternative water sources has prevented the implementation of alternative water sources. This opposition can be based on many components including philosophic opposition to augmentation rather than demand management, concern for the siting of such infrastructure, and opposition to the use (particularly potable use) of the alternative water source.

Public support or rejection of alternative water sources is influenced by people's images of different sources of water. Many practical cases are known where people's negative image of recycled water led to the abandonment of plans for such projects, which were to be critical components of the future water supply of the respective regions. Negative images

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can be actively reinforced by people opposed to water augmentation projects. For example, a community group opposed to the development of a potable water recycling plant in Toowoomba (Australia) heavily communicated what they perceived to be the dangers of recycled water in a successful attempt to prevent the construction of a recycling plant at a public referendum (van Vuuren, 2009a,b; Dolnicar and Hurlimann, 2010; Price et al., 2012).

The case of Toowoomba demonstrates that the image of water matters. The importance of image is well understood in commercial market research, where billions of dollars are spent each year trying to understand brand images of products and developing advertising campaigns to modify or reinforce brand images. Branding is successfully used in the bottled water market, where over 200 billion litres of bottled water were sold worldwide in 2008 (Gleick and Cooley, 2011). Wilk (2006) argues that cultural branding has been successful in turning water into a consumer good. Despite having a clean, cheap and safe supply of water delivered to their homes, many people in developed nations are willing to spend significant amounts of money buying bottled water (Wilk, 2006). This is in contrast to several cities in developing nations where demand for bottled water is driven by the fact that centralised supplies, if provided at all, fail to meet basic criteria for drinking water quality (UNESCO, 2006).

Despite the importance of water to supporting human life, the image of water has not been extensively studied (one exception is the study by Dolnicar and Schäfer (2009) which reports – based on a one-off cross sectional survey study – on perceptions the Australian population holds about four kinds of water: recycled water, desalinated water, tap water and bottled water). What is lacking is knowledge of the images people hold of a range of water sources, how these images differ between sources, and across a comprehensive range of potentially perceived water attributes. Additionally, knowledge relating to how these perceptions may vary over time and in relation to significant water events is limited.

The reason for the lack of study of water images may be that water is predominantly supplied to consumers in cities of developed nations in a centralised monopoly commodity situation. Thus, there may be little need for public policy makers or water companies to invest in understanding the public image of water and developing branding and positioning approaches to improve the image of a specific type of water. Or, if they do conduct such studies, they may not be making them publicly available. There are limited examples of branding campaigns conducted by authorities responsible for centralised water supplies. Examples include "Tap™" (Sydney Water, 2014) which highlights the environmental benefits of tap water, and asks members of the public to 'pledge' to drink tap. Another notable example is the marketing of NEWater in Singapore – with the introduction of recycled water into the nation's supply, including for drinking purposes (PUB, 2014). This was associated with the distribution of bottles of NEWater to the public when launched, and a visitor centre. The majority of such examples provide little publically available information of the factors motivating these activities, of the research undertaken to inform them, or of any critical analysis of their success or otherwise.

The lack of publically available information about the image of drinking water means its image is not well understood, and there is little on which to base systematic communication with people to either reinforce (positive) or modify (negative) images. Additionally, it means there is limited information on which to base decisions and communications regarding the use of alternative water sources, which has and will continue to be an increasing imperative in the future, given the predicted impacts of climate change on water resources in many locations across the globe (Bates et al., 2008).

The present study builds on the work by Dolnicar and Schäfer (2009) and investigates the following research questions: Which attributes of water are seen by the public as desirable and undesirable (Research Question #1)? What image does the public have of different water sources (specifically tap water, bottled water, recycled water, desalinated water, and water from one's own rainwater tank), and are these images different from one another (Research Question #2)? Do water images remain stable over time (Research Question #3)? Which water attributes are most powerful for branding or (re)positioning campaigns (Research Question #4)?

Throughout this paper Keller's (1993, p. 2) definition of the term "image" is adopted: "the set of associations linked to the brand that consumers hold in memory". The term "brand" is used to refer to the different sources of water studied.

The study is based in Australia, which allows for an interesting case study of water. Major cities have traditionally been supplied water through centralised supply systems aided by dams to capture rain runoff and conveyed to the population through pipes (Dingle and Rasmussen, 1991). Locations across the country have periodically experienced drought, most recently for many major urban settlements in the country during the 2000s. For many of these locations, the drought ended with devastating floods. As a consequence, water was a major topic of public debate and most states initiated water augmentation projects to secure future water supply given the projected shortfall between demand and supply.

Findings from this study can be used by water authorities, public policy makers and water retailers to develop and maintain more positive water brand images.

2. Sources of water

The source of water which a population draws upon for consumptive use differs across the globe, depending on a location's physical and geological characteristics and the consideration of economic and environmental efficiency. However, the water source used can change over time, influenced by change to factors such as environmental and climatic conditions, population size and economic circumstances. These are important considerations, because an ample supply of water has historically been a key determination of a population's ability to grow (Mumford, 1989).

In developed nations, water supplies predominantly take the form of centralised systems. In many locations, water has traditionally been drawn from surface and ground water