More closeness to everyday life

So that regional mineral springs become better brands

→ The year 2022 was a good year for the mineral water industry! Per capita consumption rose again in Germany and Soda-Stream had to accept losses in market share for the first time. Market growth should not be equated with brand growth. Toilet paper also grew during Corona, but branded products hardly played a role here. And the same applies to mineral springs: not every spring is also a brand.

Certainly, the hype for water sparklers seems to be dying down, especially since in urban households and at
at least one in three younger consumers owns such a device. But whether it can be deduced directly from this that younger consumers have "found their way back to mineral water" cannot be seriously confirmed. Nor should it be forgotten that in the "good old days" of mineral water - before the grandiose success of Soda- stream - low-priced C-brands or mineral water from discounters were the biggest beneficiaries.
Mineral water was cheap to buy and the majority of consumers were

decided in favour of cheaper offers in a market without a marker.

Many fountains, great choice!

The VDM can nevertheless be proud of its variety of mineral wells **(Fig. 1)**. Around 150 fountains are officially listed on the website, plus around 20 mineral water brands in Austria (with Römerquelle and Vöslau-er), over 20 mineral springs in Switzerland and over 30 mineral and thermal water springs in South Tyrol (incl. Plose). The German-speaking region is something like the "number one drinking nation" in the world when it comes to the consumption of natural mineral water. Since the 1970s, a bottle of mineral water has almost always been on the dinner table in German-speaking households.

Even at that time, tap water was drinkable and of a higher quality than in other regions of the world. However, the willingness to bind water to selected mineral wells already began in

The water industry began to waver in the 2000s with the solidification of the trade and the expansion of its private labels. Considering that consumers have relatively little knowledge about the origin of tap water and the majority believe it comes from groundwater or springs (cf. Hamburg Drinking Water Study 2020), no one was surprised that soda stream made everyday decisions easier for consumers: no lugging boxes, avoiding waste, making sparkling water yourself at low cost and always having a clear conscience. Wonderful!

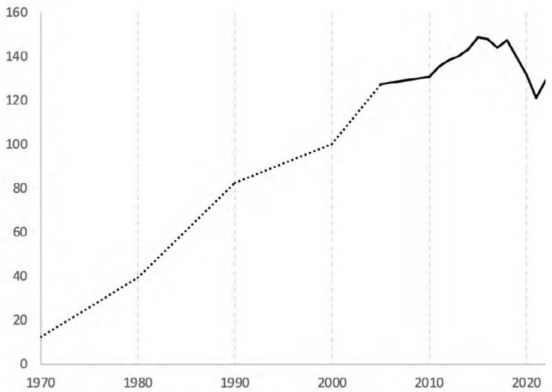
If the ignorance of consumers about mineral water compared to chemically treated drinking water from the tap were to be
If the problem were eliminated, numerous trends would tend to reinforce increased consumption. One mega-trend, for example, is increasingly health- and nutrition-conscious behaviour: Everything that is classified as unhealthy for the body, mind and self-optimisation, our mindset degrades relatively quickly as "not good".

In addition to too many calories, mass animal husbandry, too much meat/juices/alcohol or a lack of climate neutrality, residues of pesticides, antibiotics or germs in pipes that have not been eliminated could also be added.
The topic of sustainability in

Fig. 1: Well locations in Germany

Development per capita consumption of mineral water in litres

Source: obs/Verband Deutscher Mineralbrunnen (VDM)/Statista 2023



in its many facets is playing an increasingly important role in consumer attitudes. Whether an attitude is translated into action (behaviour) is another matter altogether. This is why an attitude-behaviour gap is statistically proven relatively often in serious surveys of consumers: Attitudes and actual behaviour sometimes diverge widely!

Another advantage of mineral water is its regionality. Regional products have been in vogue for more than 15 years. However, just being regional is not enough to mentally anchor a fountain brand with consumers. Current surveys on the unsupported awareness of mineral water brands underline the fragmentation of the market, in which Gerolsteiner in particular has been able to establish itself alongside global waters such as Volvic, Vittel, Evian and San Pellegrino.
If the analysis is carried out on a smaller scale according to Nielsen areas, then further "regional players" gain in prominence.

Unfortunately, the brand plays a (initially) subordinate role in an unaided survey of the central purchase criteria for mineral water **(Fig. 2)**. Just 5 per cent of the mineral water consumers surveyed in the K&A Mineral Water Study in December 2022 (n = 1010) stated that brand was central for them. For the largest part of the consu- ments, taste and above all price are the most important factors.
role in purchasing decisions.

Many mineral springs experience themselves as a brand in their self-perception, as the consumer plays back. Many fountains lack concrete brand assets, which then Interchangeability and arbitrariness on the consumer side enforced
- unless there is a constantly recurring
recurring routine purchase ("always

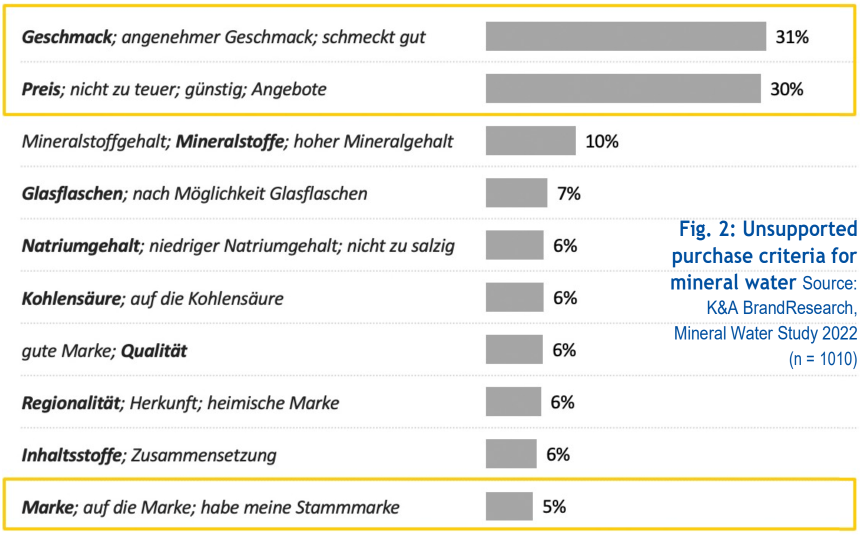


Fig. 2: Unsupported purchase criteria for mineral water Source: K&A BrandResearch, Mineral Water Study 2022 (n = 1010)

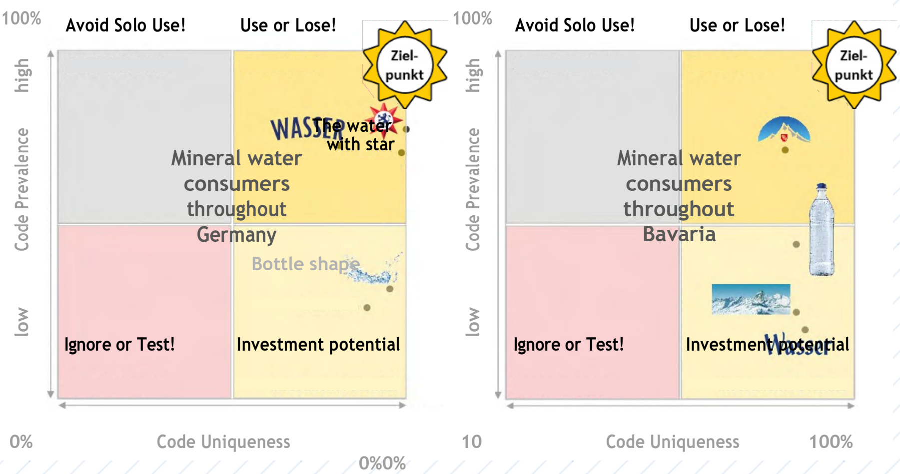
the same box again") is assumed. According to marketing professor Jenni Romaniuk in her latest book "Better Brand Health", it is indispensable for brand managers that bran- ding is carried out continuously. Ideally, a brand has three to five brand assets that are dis- tinct. These are brand signals or codes that consumers unaided assign to only one (correct) brand. In such cases, storytelling and a communicative approach are easier to achieve, since mentally anchored assets ensure that the brands can be decoded quickly.

In the K&A mineral water study, only two brands were able to meet this requirement **(Fig. 3)**: Besides Gerolsteiner (Germany-wide), this is the Adelholzener brand for Bavaria. Certainly, there are others that succeed in presenting a presentable branding on a smaller scale. Unfortunately, however, most of the fountains have to be denied "real" branding: These are more "sham brands" than actual (being) brands.

Ideal mineral water

Nevertheless, the desire of consumers is great when it comes to receiving certainty for their decision for a really good mineral water. Assuming a good taste and containing a balanced amount of minerals (ingredients), two thirds of consumers are strongly oriented towards "brand quality".
in the broader sense (well-known brand with good experience and quality awards, see **Fig. 4**). The

Fig. 3: Distinctive Brand Assets for Gerolsteiner and Adelholzener
Source: K&A BrandResearch, Mineral Water Study 2022 (n = 1010)



However, for the majority of consumers, price has become the implicitly most important criterion in personal purchasing decisions. Consumers have (learned) a rough idea of how many euros a good mineral water may cost them. The upper price limits vary: On average, a price range of 4 to 9 euros for a crate of mineral water (12 x 1 l) is acceptable for mineral water consumers (as of December 2022) according to the van Westendorp price calculation. The optimal price would be around 6 euros, whereby about one third of mineral water consumers would be prepared to pay between 9 and 12 euros.

It has been known for a long time from behavioural ecology that time-related enquiries about the price as well as attitudes towards the container are no guarantee for actual purchase decisions. The specific environment and the respective context are essential for how people actually decide despite predetermined assessments and previous experiences. For example, a built-in

The effects of limited household income as well as specific contexts in which mineral waters are considered particularly suitable (and valuable) for personal fasting campaigns. Context matters - every time!

And even if the majority of consumers interpret reusable glass bags as the optimal container **(cf. Fig. 4),** this still means that this does not mean that glass is the The glass bag has to be the "real thing" when it comes to the choice of container. In this case, too, there are occasions and situations where glass bottles do not simplify everyday life or are not suitable for everyday use. Brands can also offer assistance to make it easier for consumers to decide on an ideal mineral water that is best suited to individual everyday situations.

tertainment. A container can have a supporting effect, although even with the strongest German mineral water brands, the container has only partly been distinctively located as a brand asset. Besides branding, which has so far been solved sub-optimally for most fountains, the

The brand's image is also enhanced by product and taste awards as well as a consistent experience of the brands in everyday life. Communication is a central stylistic device here, but it should not be reduced to surface advertising alone.

Because most mineral springs advertise their brands with various associations with nature (streams close to nature, images of forests and nature, beautiful landscapes, idealised flora and fauna), consumers almost automatically attribute "naturalness", "from intact nature", etc. as reason-to-believe. However, this hardly achieves differentiation between the individual (regional) brands. And a sense of amazement, which must be triggered by communication, is certainly not aroused on the part of the consumer: category advertising alone (e.g. via nature images) ultimately does not cause a wow **(Fig. 5)**!

Gerolsteiner and Adelholzener are currently strong mineral water brands compared to the German average. Vilsa comes close to this in northern Germany and individual brands succeed in convincing consumers in their respective segments through specific positioning or special occasions (Teinacher, Staatlich Fachingen, Biokristall, San Pellegrino). However, even among mineral water consumers, no mineral water brand has triggered enthusiasm so far, but Sodastream and Coca-Cola, which is comparatively always tangible (Fig. 5). There would be enough reasons to make mineral water more relevant to everyday life.

to position themselves more attention-grabbing in the minds of the consumers. As the example of Gerol- steiner in its #zwischenwasser action with the monk Gerolt at the metal event Wacken W.O.A 2022 had forcefully revealed.

Concrete occasions for water

Consumers currently find it difficult for most mineral water brands to link them concisely and distinctively with brand codes, simple positioning or concrete contexts. In principle, mineral waters are regarded as particularly refreshing (natural) thirst quenchers for the whole family **(Fig. 6)**. In principle, every well fulfils these requirements and would therefore be interchangeable on the consumer side. The variety of minerals is implicitly also somehow guaranteed, whereby it is of little relevance to most consumers which minerals are contained and in which dose (cf. **Fig. 6** "Contains particularly high levels of silicon" as an experimental test item). More interesting are brands that are able to influence consumer perception through specific product characteristics. Among other things, by emphasising value-added statements about refreshment and enjoyment. Teinacher in Baden-Württemberg, for example, succeeded in establishing itself in the market through touchpoint management.

the upscale gastronomy sector as a pleasure mineral water, Rosbacher (2 : 1 calcium-magnesium ideal) and Ensinger SPORT as an intuitively fast choice for sportsmen's mineral water or Fachinger via wellness-rehab links as a pre-mium water also for personal health cures.

Simply by means of simple posi- tions - the emphasis is on "simple" - that go beyond a connection to nature and naturalness, it is possible for Consumers many everyday contexts automatically derive. But other drinking occasions could also use hitherto pale (little branded) fountains, if some become their momentum in context **(cf. Fig. 7)**. In this context, the focus can also be on an everyday situation that at first glance may not apply to all and sundry. Specific context workshops can help mineral water brands to find their own way to more everyday closeness with consumers.

Conclusion

It is crucial that those responsible in the mineral springs pay more attention to verifiable differentiation and deal more intensively with the everyday situations for which a specific brand water will become the automatic choice of the consumer's autopilot in the future.

For many, a commitment to distinctive contexts would already be a revolutionary step in the
Brand management. Whether such a definition of content will prevail in the market can be checked relatively just as easily and reliably (Category Entry Point Analysis) as the success or failure in branding (Distinctive Asset Grid). Mineral water also needs disruption and more differentiation and wow, if it really wants to be perceived as a brand. In this respect, Soda Stream can very well serve as a role model for efficient branding.

leadership can be used.

→ Dr Uwe Lebok
In the German-speaking world, this is considered a marketing
Expert for brand positioning and strengthens brands as an impulse generator.

Fig. 4: Importance of selected purchase criteria (IAT - Implied Association Test)
Source: K&A BrandResearch, Mineral Water Study 2022 (n = 1010)

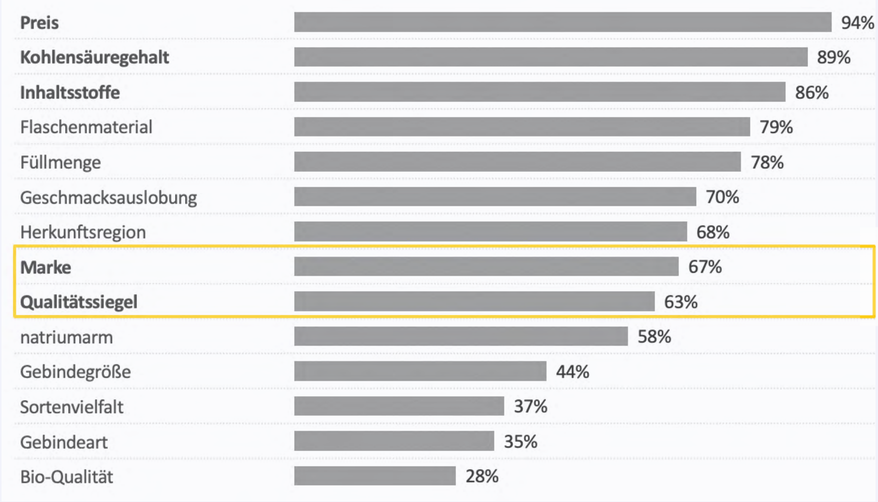


Fig. 5: K&A Brand-Wow Analysis (Split by Region/Usage)
Source: K&A BrandResearch, Mineral Water Study 2022 (n = 1010)

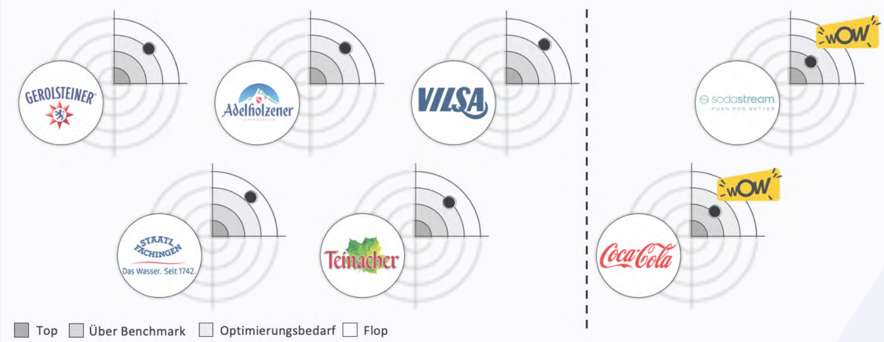


Fig. 6: Expected product characteristics for mineral water
Source: K&A BrandResearch, Mineral Water Study 2022; sub-sample: quality buyers (n = 339)

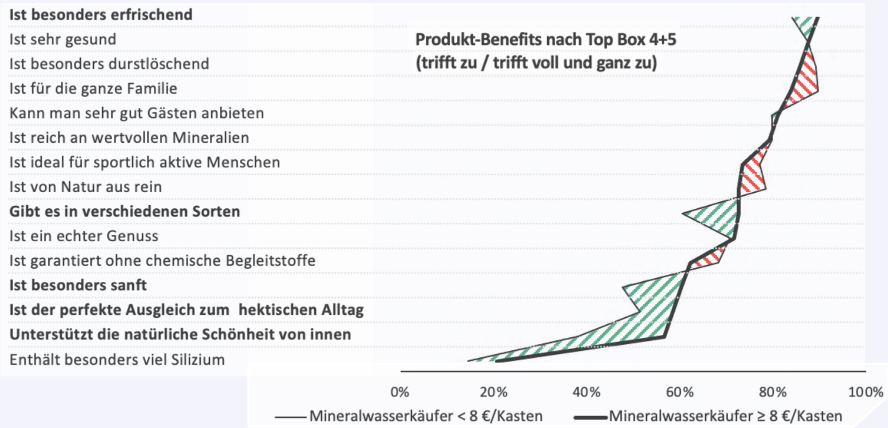


Fig. 7: Usage situations for mineral water
Source: K&A BrandResearch, Mineral Water Study 2022 (n = 1010)

To quench my thirst	82 %	For more vitality when hiking, cycling or other outdoor sporting activities.	26 %
To quench my thirst on the go	65 %	As an accompanying drink to a glass of	wine26
Against a dry throat	55 %	At a party/event when I still have to drive a car	25 %
As a drinks accompaniment to lunch	54 %	For a conscious start to the day	25 %
As a drinks accompaniment to dinner	51 %	As a companion when out shopping	25 %
During a long car journey, in order to to be provided for	49 %	For more endurance during sports	21 %
To pay attention to a healthy diet	43 %	To satisfy a feeling of hunger	21 %
To support my health	40 %	As a support for healthy skin and hair	20 %
To stay focused at work	35 %	Because no alternative drink was available	15 %
As a non-alcoholic alternative when eating	35 %	To support my voice in a lecture/presentation	14 %
To give my body and mind something Doing goods	33 %		
To meet my daily mineral requirements cover	30 %		
As a thirst quencher in the fitness centre	26 %		