

**FACTORS THAT AFFECT BRAND POSITIONING IN
THE BEVERAGE INDUSTRY: A CASE STUDY OF
EASTLEIGH, NAIROBI, KENYA**

**BY
GERALD GATITU GITAU**

UNIVERSITY OF NAIROBI
EAST AFRICANA COLLECTION

**A RESEARCH PROJECT REPORT SUBMITTED IN PARTIAL
FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF
MASTERS IN PROJECT PLANNING AND MANAGEMENT AT
UNIVERSITY OF NAIROBI**

AUGUST 2010

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DECLARATION

I hereby declare that this Masters Project Report is my original work and has not been submitted for a degree in any other Institution.

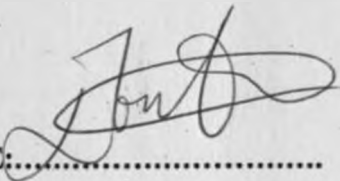
SIGNATURE:.....

DATE: 30TH AUG 2010

NAME: GERALD GATTITU GITAU

REG NO: L50/72317/2008

This project report has been submitted for examination with my approval as the university supervisor.

SIGNATURE:.....

DATE: 30/8/2010

SUPERVISOR: Dr. EVANS MBUTHIA

LECTURER, UNIVERSITY OF NAIROBI

DEDICATION

I dedicate this study to the Nairobi Bottlers Sales team - Area Five of Nairobi East Region.

ACKNOWLEDGEMENT

There are many people who have assisted me in putting this report in shape and their support is highly appreciated. I am specifically grateful to Dr. Evans Mbuthia and Mr. S. Githinji for their continued support during the study period.

I also thank my colleagues, in PPM class for their moral support throughout the process. The class comprising of Anthony Waruru, Jean Kahianyu, Winnie Kanana, Terry Kigundu and Morris Buliva.

To Mercy my workmate, the assistance accorded in proof-reading and timely information that has contributed greatly to the success of this proposal. I am grateful, I cannot over-emphasize.

To my family, my wife Carol, my son Gren, my siblings and my Mum & Dad, Mr. and Mrs Gitau: I appreciate and I am proud of being related to you all. Every moment with you has this far seen the construction of this proposal smoother and easier. May God bless you for your love and care.

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ACRONYMS AND ABBREVIATIONS

FMCG	Fast Moving Consumer Goods
NBL	Nairobi Bottlers Limited
TCCC	The Coca-Cola Company
TCE	Total Customer Experience
LCL	Lasting Customer Loyalty
PET	Plastic package in a material known as polyethylene terephthalate
WOM	(Word of Mouth) communication about a service provider offered by someone who is perceived not to obtain monetary gain from so doing.

ABSTRACT

The notion that bottled water is a new product in the beverage industry has like any other new idea or product, been met with cynicism. This study examined factors that affected brand positioning in the beverage industry. It is important to examine how bottled water is channeled through to the consumer given the fact that the market is flooded with different brands (currently estimated about thirty distinct types). The marketing rationales that are used to ensure success in this industry were investigated. The phenomenon growth of this industry begs the question whether what attracts businessmen is unexploited business opportunity or is a superb way of marketing.

The study defines what a brand is and highlights the three categories of a brand namely primary, secondary and tertiary. With too many competing products in the market this study appreciates that there is need to brand. On the other hand positioning is defined as a deliberate, proactive, iterative process of defining, measuring, modifying, and monitoring consumer perceptions of a marketable object.

Using random sampling techniques, this study investigated to what extent these factors affect brand positioning. The findings of this study envisage assisting the beverage industry and other industries to understand the impact of customer perception on their products.

The study established that brand names, customer experience, communication channels and packaging are distinct factors and conditions (independent variables) that affect brand positioning in the beverage industry. Their importance has been rated in this study and it is very clear on how they affect brand positioning. The findings recommend serious consideration of positioning during business plan, product launch and product lifecycle.

CHAPTER ONE

INTRODUCTION

1.1 Background of the Study

Branding can be defined as a value-adding process that increases the value of a product by packaging, naming, and positioning and promoting it in the customers' mind. The American Marketing Association describes a brand as follows: "brand is a name, a term, a sign, a symbol or a combination of these to determine and distinguish the products of a firm from the others" (Theodore, 2005).

A brand essentially includes a promise and the promise consists of a continuous submission of some properties, benefits and services to the customers. A strong brand guarantees that the promise is fulfilled. A general branding process involves three steps: In the first step, customers are offered a brand, which is useful for them. In the second step, firms attempt to persuade their customers to try the brand. In the third step, the firm makes the customers who try and see the benefit of the brand to buy it. Firms practice different promotion methods to make their customers buy their products for the first and subsequent times. A firm having a strong brand will gain high market penetration, less risk, more sales and more profit. Besides these properties, a brand is a marketable intangible asset and has a market value.

Although most industries and products or services can benefit from a brand, not every product needs its own stand-alone brand. Brands can be separated into three categories: primary, secondary and tertiary. Primary Brand is a company's core brand or umbrella brand. Primary brands typically garner a large percentage of a company's revenue potential and therefore need

to be given priority and have a sufficient amount of advertising in order to root them firmly. Secondary Brands are often line extenders, or "flankers," for a core brand. Secondary brands do not need to have their own name; usually a modifier to the brand name will suffice and strengthen the core brand. Take, for instance the two brands; *Coca-Cola* and *Coke Light*. *Coca-Cola* is the core brand, and *Coke Light* is the secondary brand. Line extenders are characterized by having a descriptive term that allows the base brand to be the true selling proposition and the flanker to really designate to the audience what that particular product's key feature or benefits are. Tertiary brands typically have insignificant revenue potentials or expectations, but they contribute to the company's overall image in some way. Therefore, they sometimes do not spot registered brand names, but just descriptors. They mostly serve a certain niche market.

Arnott (1992) wrote that positioning is concerned with management's attempt to modify the tangible characteristics and the intangible perceptions of a marketable offering in relation to the competition. Arnott (1993) formally defines positioning as deliberate, proactive, interactive process of defining, measuring, modifying, and monitoring consumer perceptions of a marketable object. . . "According to the author, the application of positioning involves certain related activities, i.e. defining the dimensions of a particular perceptual space that adequately represents the target audience's perceptions; measuring objects locations within that space and modifying actual characteristics of the object and perceptions of the target audience via a marketing communications strategy. In other words, the process of positioning is interactive and requires deliberate and proactive involvement of the marketer (Darley & Smith, 1993).

Over the years, the issue of service positioning has received much attention and interest due to the challenges encountered by service managers (Blankson & Kalafatis, 1999). The latter

arising due to the characteristics of services, compared to physical goods, and which means that not only are services difficult for consumers to compare with competing services but they pose challenges in their positioning. The former and the latter assertions are evidenced in the work of Assael (1985) who states that: Positioning a service is more difficult than positioning a product because of the need to communicate vague and intangible benefits. The challenges encountered in positioning of service brands is confirmed in research undertaken by Darley and Smith (1993) who contend that, in positioning, tangible product attributes provide more favorable consumer perceptions than intangible attributes (with similar importance and value). The authors claim that when equivalent tangible and intangible attributes are available for positioning purposes, the former can often be, expected to be more effective in affecting consumers' perceptions than the latter. This is because, in the case of intangible attributes positioning (i.e. services), consumers have no objective perceptual criterion and therefore in most cases, marketers rely on consumers' emotions. It is for this reason that brand positioning becomes an important area of study for the Beverage industry and in particular for the Bottled water category.

Bottled water is drinking water packaged in plastic or glass containers. The dominant form is water packaged in new polyethylene terephthalate bottles and sold at retail outlets. According to *Wikipedia* (March 2010), the global bottled water market valuation grew by 7% in 2006 to reach a value of \$60,938.1 million. The volume of bottled water grew by 8.1% in 2006 to 115,393.5 million litres. In 2011, the market is projected to have a value of \$86,421.2 million, an increase of 41.8% since 2006. In 2011, the market is forecasted to have a volume of 174,286.6 million litres, an increase of 51% since 2006.

The global rate of consumption more than doubled between 1997 and 2005. Purified water is currently the leading global seller, with U.S. companies dominating the field, and natural spring water, mineral water and flavoured water being the fastest-growing market segments.

Bottled water has become a multi-billion dollar business and is the fastest growing segment of the entire beverage industry as well as the most profitable. Statistics indicate that sales of bottled water in Kenya now exceed Kshs. 1.3 Billion annually with no slow down in sight. Industry estimates value the world market in excess of ten billion in gross sales (*Wikipedia* 2010).

The late 1990s and early 2000s saw the emergence of bottled water as a new product selling in kiosks, retail shops, supermarkets and restaurants in Kenya. Many Kenyans considered it a product of the rich and they could not understand why one could buy water while it is running in the taps, in the rivers and wells. According to Nyang'au, (2003) the key to success in the beverage industry is a firm being able to protect itself from the adverse effects of intense rivalry by differentiating itself in the market. From his findings, water consumption grew from 130 million litres in 1993 to 175 million litres in 2001.

Bottling of drinking water in Kenya was started by few companies in the late 1990s most of them targeting the tours and travel agencies a practice basically copied from the developed countries whereby the firms intended to extend the same in the tourism industry. It must have been a consumer demand given that foreigners or tourists necessitated this development. The first companies in the bottled water market were Food Crown, producers of Keringet, Aquamist, producers of Aquamist water, The Coca-Cola Company, producers of Dasani water and Mwanza Bottling Company producing Kilimanjaro water.

These four companies came in with their individual distinctive propositions establishing the bottled water as mineral water, purified water, clean water, water from trusted sources and water with positive health impact. The whole job of transforming Kenyan consumers to accept bottled water as product was done at this stage and Brand Positioning was substantiated at this point in time.

1.2 Statement of the Problem

For the last decade, it has been difficult to comprehend the number of different brands of bottled water on shelves of different shops, kiosks and supermarkets (Abdallah, 2001). The offerings are far too many, different names, different packaging shapes and sizes, different quality and with varying communication (Appendix two, Plate 1,2 and 3).

The essence of branding to marketers is to enhance easy selling (Philip Kotler, 1998). By branding, consumers are able to differentiate offerings in the market by attributes. This is enhanced simply by each brand communicating benefits that are unique and that seek to fulfill the needs of different customers. For example, Delmonte offers Mango Flavour, Apple Flavour, and Tropical Flavor among others and consumers can easily select from the retail outlets.

Branding is also a method recommended by law of differentiating one firm's product from the others (King, 1991). The association of a brand by consumers is also enhanced by branding. When customers are attracted by brands, they form and retain a considerable loyalty. Branding also helps in segmenting the market. For example, most of the bottled water use PET (Polyethylene Terephthalate) material and the main colour used in branding is blue. The other

important element of branding is giving a product a corporate image. Consumers, retailers and distributors like associating themselves with the best. It is always easy to sell a brand that is perceived to be of value and the image represents quality.

Buyers today are becoming more cautious with their spending and prefer to play it safe by buying from well-known brands. This has been as a result of counterfeiting of products and services leading to customer dissatisfaction. For a long time United States, Japan and European companies have created strong brands to remain competitive.

But according to Theodore (2005) the cost associated with efforts to conceptualize and implement a new brand in Canada has been approximated at \$100-million, and there is a 50% probability of failure. With such an apparent risk, many question the inherent value that a brand may contribute to operational performance.

In Kenya, companies have seen the need to brand their products due to the high competition in the market (Kisese, 2002). Well established companies such as KCB, Diamond Trust Bank, Uniliver Kenya and many others have resulted to re-branding their products and services to make them competitive by creating a value proposition. Kisese (2002) illustrates how branding or re-branding is done by associations that create value. This is further measured by surveying how a brand is bought more often than others. As a matter of fact branding is more important today than ever due to the reasons stated above. Though the market dictates that customer creates loyalty to branded products management on the other hand is in dilemma whether to invest a lot of resources into branding and risk the possibility of failure. It is against this background that the researcher will undertake this study to find factors that affect brand positioning. .

1.3 Purpose of the Study

This study investigated the factors that affect brand positioning and the effects of the same.

1.4 Objective of the Study

The broad objective of the study was to investigate to what extent these factors affect brand positioning in the beverage industry (bottled water category).

1.4.1 The specific objectives are:

1. To establish whether communication channels deter or enhance brand positioning.
2. To establish whether customer experience affect brand positioning.
3. To determine whether Brand Names affect brand positioning.
4. To determine whether Brand packaging affect brand positioning.

1.5 Research Questions

1. To what extent does communication channels affects brand positioning?
2. How does customer experience affects brand positioning?
3. To what extent does brand name affect brand positioning?
4. How does packaging affect brand positioning?

1.6 Significance of the Study

This study worked to benefit the following groups:

The Beverage industry dealing with bottled water and other FMCGs companies can use the findings of the research to develop market for their products and competitive advantage that will impact on customer perception. The findings of this study is of use to marketers, advertising agency firms, management consultants, to redesign their product so as meet the

consumer needs. The information generated will also greatly benefit the Universities by bridging into a knowledge gap and proving a basis for further research.

The findings of this study are expected to be of significance to new companies or companies that want to develop new products. Brand positioning in the Bottled water market has not been adequately researched (Kisese, 2002). The conclusion of this research will therefore be used by future researchers and will in addition open areas for further research.

1.7 Delimitation of the Study

The delimitations of this study were three fold. These are; the experience of the researcher working in the FMCG industry. The exposure in the market and the subject under research therefore having access of the population, and the rapport created with customers and sellers over time may have influenced their co-operation.

1.8 Limitations of the Study

The study looked at Bottled water as a beverage and the factors that affects its brand positioning. This study anticipated some limitations which included the time factor becoming a challenge that hindered the researcher from interviewing all the stakeholders. It was therefore necessary to draw a sample from the total population targeted and findings were generalized as representative of the same. This included the views from dealers and consumers in Eastleigh area of Nairobi only.

1.9 Assumptions of the Study

The study assumed that the sample (Eastleigh area of Nairobi) represents the population (beverage industry and the consumers). It also assumed that all the respondents (Retailers, Distributors and Consumers of bottled water) answered the questions

correctly and truthfully. In stratifying of the sample, the study also assumed that the population was fully representative.

1.10 Definition of Terms

- Brand:** It is a name, term, sign, symbol, design, or any combination of these concepts, used to identify the goods and services Bennett, (1988).
- Brand name:** It is the component of a brand which can be spoken or verbalized Bennett, (1988)
- Brand personality:** Set of human characteristics associated with a brand.
- Brand Positioning:** It is management's attempt to modify the tangible characteristics and the intangible perceptions of a marketable offering (brand) in relation to competition.
- Communication:** All types of pictorial and worded advertisements (ads) on Bottled water appearing in the following media: Radio, TV, Newspapers and brochures, pamphlets, leaflets and outdoor, i e. advertisements from billboards, bus shelters, buses, taxis, and companies' premises.
- Marketers:** Professionals in the Marketing Field
- Packaging:** Wrapping, casing or covering a product in a presentable way for the consumers
- Positioning:** It is the perception of what happens *in the minds of* the target market.
- Consumer:** Any person termed as user, shopper, buyer, purchaser or end user.

CHAPTER TWO

LITERATURE REVIEW

2.1 Introduction

This section provides literature that has been reviewed on factors that affect brand positioning in the FMCG industries. In particular it provides literature on dependent variable of brand positioning and independent variables of brand communication, customer experience, brand name and packaging.

2.2 Brand Positioning

Although the craft of positioning is a defining function of modern branding, the idea of positioning dates back to Classical Greece, with Plato's assertion that memories evoke related memories, thus colouring interpretation (Warren, 1916). In the seventeenth and eighteenth centuries, the British empiricists elaborated the Aristotelian notion that ideas are stored in memory by association, developing the three "Laws of Association" that is similarity, contrast and contiguity. In this view, the positioning of a concept in the associative structure of memory defines the meaning of that concept, allowing complex concepts to be constructed out of associative combinations of simpler concepts. Indeed, modern psychology makes much of this insight into the associative structure of human memory and this distributed understanding of meaning, using associative techniques to identify how an idea is positioned in the mind in order to unpack its subjective meaning (Anderson and Bower, 1973).

The key challenge facing chief executives today is how to further increase the value of the products and services they sell. As customers become ever more demanding in a business environment where competition is fiercer (Day, 1999) and innovation faster (Datar *et al.*, 1997)

the more enlightened ones know that they will not achieve this through the traditional 4Ps (product, place, price and promotion) approach to product marketing. By marketing the organization at a broader level, customers become involved in many of the organization's business systems and processes, so no one department can effect that nor guarantee consistency in dealing with the company across departments. The job of the chief executive, as manager of the corporate brand (King, 1991), is to transform the organization's marketing strategy, and then to manage the organization as a brand to ensure that customer value can be delivered consistently.

Since the Second World War, customers have relied on a familiar and trusted brand name as the antidote to the perceived risk of the product or service failing to provide its basic functional benefits (de Chernatony and McDonald, 1998). At the heart of the matter is the fundamental shift in what customers perceives as value, and this is challenging the way that business activities create customer value. It is then at a psychological level, a trusted brand minimizes the risk that the image created for customers using the product or service falls short of that which is desired (Doyle, 1998).

In the search for superior customer value, managers are realizing that their organization has to touch customers in a myriad of ways, which go far beyond marketing communications about products and services (Mitchell, 1999). For example, customer contacts made through the company web site including the tailoring of products and services sold over the internet; from call centers and help lines for product advice and complaints. Each experience provides a context for customers to evaluate and test the organization's image and reputation; its ability to deliver against expectations.

To develop an integrated approach to these endeavours, the context of the brand has to change to embrace culture, know-how and organizational systems and processes, as well as products. According to Doyle (1998), senior management need to use available assets and capabilities effectively so that transformation used in strategic ways for brand positioning can effectively be achieved. Abdallah (2001) observed that Marketing Managers from six top most bottling companies in Kenya were keen in embracing new strategic marketing practices to maintain and increase their market share.

2.3 Brand Communication

Brand communication is the art of bridging the gap between our target audiences and the organization (or product or service) being promoted. It is the ethereal connection between the physical entity, and the audiences we believe are best suited to its purchase or promotion. It can therefore be argued that a brand only exists when this link has been made, that is, a brand is only a brand when it is communicated effectively. A brand that remains unknown is only an experiential brand - that is to say it is only our existing customers who know the brand; the brand is only doing half the job (Thomsett, 2007).

In the marketplace of the 21st century, the critical form of customer communication will be broader than advertising and promotional messages. Customers have relationships with the brand, combining all the forms of communication that give meaning to products and services. Brand communication creates an interactive relationship between the product or service and consumers. This is a major change in the way advertisers and marketers have traditionally viewed customer communication (Schultz & Barnes, 1999).

Satisfying customers has become a marketing imperative, primarily because the value of satisfied customers has been realized in terms of positive brand attributes and repeat purchases (Spreng *et al.*, 1995). In the context of services, customer satisfaction is seen as almost synonymous with service quality and is argued to arise when an individual's perception of performance exceeds the expected performance (Oliver, 1980). In addition to performance, it is also recognized that communications such as advertising, word of mouth (WOM) and publicity also affect consumers' levels of satisfaction with a brand. Spreng *et al.*'s (1996) argues that overall satisfaction with the brand is comprised of satisfaction with attributes and satisfaction with the information. They describe information satisfaction as "a subjective satisfaction judgment of the information used in choosing a product" (Spreng *et al.*, 1996). Based on the disconfirmation paradigm, Spreng *et al.* (1996) argue that dissatisfaction with information can arise when the expectations of a product's performance as communicated, are not met through actual performance. Thus, the effect of brand communications must not be overlooked when seeking to satisfy customers and, in the long term, creating positive brand attributes.

Advertising has been consistently found to play an important role in creating positive brand attitudes (Kempf & Smith, 1998) as has word of mouth (WOM) and non-paid publicity (Swanson and Kelley, 2001). However, it appears that uncontrolled sources such as word of mouth (WOM), while playing a significant role in enhancing positive brand attitudes, can just as easily diminish brand attitudes through negative WOM and publicity (Ennew *et al.*, 2000).

Issues related to the advertising of services versus products have been at the forefront of research in more recent times. Such research has focused on the examination of services advertising in terms of intimacy theory (Stem, 1997), the difference between business-to-

business and consumer services advertisements and the effect of services advertising on brand salience and brand image (Turley and Kelley, 1997). In terms of services, controlled communications such as advertising are argued to be an important tool used to communicate the service. For example, service advertisements adopting a rational or informational approach have been shown to reduce uncertainty and increase the likelihood of future purchase intentions (Stafford and Day, 1995). Research on the advertising of tangible goods shows that advertising can enhance perceived quality (Kisese, 2002).

The main influences on brand attitudes are uncontrolled communications such as WOM and non-paid publicity (Swanson and Kelley, 2001). This is so because communications that are not marketer-driven are perceived to be more credible (Mangold *et al.*, 1999). Turley and Moore (1995) advocate that due to the difficulty in service evaluation; the service brand name becomes a crucial component of the brand and important source of information to the consumer.

2.4 Customer Experience

Traditionally, marketing activities have focused on success in the product marketplace by examining the physical aspects of products and services such as quantity, quality, functionality, availability, accessibility, delivery, price and customer support. More recently, marketing managers have shifted their emphasis to creating value for their customers (Clutterbuck and Goldsmith, 1998). The current trend in marketing is to create engaging and lasting experiences for the customers (Macmillan and McGrath, 1997 and Wyner, 2000). About 85 percent of senior business leaders interviewed in a recent study agreed that differentiating solely on the

traditional physical elements such as price, delivery and lead times is no longer an effective business strategy (Shaw and Ivens, 2002). The new differentiator today is customer experience.

The competitive battleground of differentiators is also changing. In the 1970s, the differentiator was quality or functionality; in the 1990s it has been brand and price; in the early 2000s, it is service, information and delivery (Shaw and Ivens, 2002, p. 2). All these attributes are considered as givens today; that is, customers take them for granted and feel entitled to them. In the mid-2000s, it is customers' emotional attachment with the brand, the brand community and the brand company via customer experience that is gaining importance in the literature (Anderson 2006; Selden and Macmillan, 2006).

Delivering total customer experience (TCE) goes beyond mere customer satisfaction and is a relatively new concept since satisfied customers could still defect (Jones and Sasser, 1995). In the past, companies have primarily focused on the physical aspects of the product, while totally neglecting the emotional and value aspects and hence, losing many customers in the long run (Nunes and Cespedes, 2003). To compete successfully in this customer experience territory, a growing number of organizations are systematically applying the principles and tools of TCE to generate, strengthen and sustain enduring lasting customer loyalty. Marketers today believe that engineering TCE and lasting customer loyalty (LCL) are important for maintaining customer focus and creating customer preference.

In understanding total customer experience, the study reviews a few of the many cases from the literature to develop the definition of Total Customer Experience (TCE) with an example of Disney World. As a pioneer in experience management, Disney is dedicated to the delivery of unique customer experiences. Disney theme parks with their hundreds of engineered cues are

all coordinated and networked to generate that consummate mix of excitement, entertainment and adventure that ensure TCE. Disney has a holistic approach to TCE – every adventure, every Disney character, every employee, every shop, and even the long waiting lines systematically manage positive sensory and emotional experience in a commercial setting that achieve a level of differentiation far beyond the commodity zone. Experiences have always been at the heart of Disney's entertainment business (Pine and Gilmore, 1998).

In Avis Rental Car there was a pronounced decline in its customer-ratings to counter this problem. Avis applied the TCE technique at one of its largest operations, Newark International Airport. After an experience audit, Avis developed an experience motif focused on relieving customer stress and anxiety, both of which are commonplace at airports. For instance, customers dropping off cars were worried about making their flights, so to reduce this flight anxiety Avis installed monitors showing flight departure times and gates and placed them at the door of the car-return facility. Avis also established a new communication center to make calls, send faxes or just plug-in laptops. Within 18 months, Avis rolled out the experience design to other key locations. By 2001, Avis had moved from a bottom rank to rank number one in the Brand Keys customer-loyalty recognition survey of more than 140 national representative brands of 26 industries (Berry 2002).

Firms have increased their efforts to retain customers for various reasons, but most often the reasons relate to the customers' direct value to the company. Loyal customers can lead to increased revenues for the firm (Reichheld, 1993). They can also result in predictable sales and profit streams and these customers are more like to purchase additional goods and services (Clark and Payne, 1994). Yet, to more accurately assess the full value of a loyal customer, it is

apparent that firms must look beyond the influence of these direct measures. That is, firms should look beyond direct revenue streams and include the value of all the benefits associated with possessing a loyal customer (Zeithaml and Bitner, 1996).

One particularly salient benefit, especially for service organizations, is word-of-mouth (WOM) communication. Loyal customers often generate new business via WOM recommendations to prospective and other existing customers of the firm (Reichheld, 1996; Reichheld and Sasser, 1990). That is, the recommendations made by a loyal customer, especially those helping to generate new customers, add to the value that core customer brings to the firm.

From a marketing perspective, word-of-mouth (WOM) communications "consist of informal communications directed at other consumers about the ownership, usage, or characteristics of particular goods and services and/or their sellers" (Westbrook, 1987). Word of mouth is a form of communication that is simply described as "oral, that is person-to-person communication between a perceived non-commercial communicator and a receiver regarding a brand, a product, or a service" (Westbrook, 1987). Using these definitions as a basis, the researcher will consider WOM communication to be communication about a product offered by someone who is perceived not to obtain monetary gain from so doing.

Although WOM communication can be very influential in any purchase decision, previous research suggests it is particularly important for services. That is, personal recommendations received about service providers are often very influential in consumers' purchase decisions. In many instances, WOM has been reported to be the major source of information potential customer's use in making a services purchase decision (Murray, 1991). WOM is particularly important for those products for which potential customers have high levels of perceived risk

(high cost, uncertainty or once off use product), which can be partially alleviated by asking a friend for advice (Heskett & Schlesinger 1997).

2.5 Packaging

Packaging is the science, art and technology of enclosing or protecting products for distribution, storage, sale, and use. Packaging also refers to the process of design, evaluation, and production of packages. Packaging can be described as a *coordinated system* of preparing goods for transport, warehousing, logistics, sale, and end use. Packaging contains, protects, preserves, transports, informs, and sells. In many countries it is fully integrated into government, business, and institutional, industrial, and personal use (Wyner, 2000).

The packaging and labels can be used by marketers to encourage potential buyers to purchase the product. Package graphic design and physical design have been important and constantly evolving phenomenon for several decades. Marketing communications and graphic design are applied to the surface of the package and (in many cases) the point of sale display is therefore being used as an important element of brand positioning (Wyner, 2000).

2.6 Brand Name

A principal component of branding is the selection of a brand name. A commonly used definition of a brand name is that component of a product which can be spoken or verbalized (Bennett, 1988). It can contain words, numbers or letters. Choosing a brand name for a consumer product or service is so critical that some writers argue it is one of the most important marketing management decisions (Landler, 1991). A brand name can provide a customer with a symbolic meaning which assists in both the recognition of the product and the decision-making process (Herbig and Milewicz, 1993). A well-chosen brand name can produce

a number of specific advantages including suggesting product benefits (McCarthy and Perault, 1990), contributing to brand identity, simplifying shopping, implying quality, evoking feelings of trust, confidence, security, strength, durability, speed, status and exclusivity (Shimp, 1993). There are even times, particularly when marketing homogeneous goods, where the brand name may be a product's only distinguishing characteristic (Skinner, 1990).

Although branding has attracted considerable attention from marketing academics in recent years, the overwhelming majority of this interest has been directed at products with physical forms (goods), rather than services. The intangibility factor associated with services has led to the suggestion that branding and image creation may be even more critical for services (Onkvisit and Shaw, 1989). Also, while the rationale for branding is the same for goods and services, at least some of the concepts from the marketing literature associated with goods branding may not apply in the service sector. The authors contend that due to the heterogeneous nature of services and service deliveries, branding strategies, particularly brand name strategies, used by diverse types of services are likely to differ.

A descriptive brand has a natural advantage in that the brand name describes a benefit or key aspect of the service. In other words, the brand name contains some important information about the brand. The name "Sprint" is an example of this strategy. Sprint connotes speed, and indicates to consumers that if you use this service your long distance calls will connect quickly.

A person-based brand usually uses names of the owners as the brand name. This is very common in professional services, and is particularly common for attorneys. Interestingly, however, this option violates most "rules" associated with selecting a good brand name.

Person-based brand names are not short (especially when three or four names are strung

together), crisp or particularly memorable. However, this option may serve to personalize and tangibilize an intangible service (Krentler and Guiltinan, 1984). An associative brand uses a brand name with no inherent meaning to represent a service. Like a person-based brand, this option may require a large amount of promotion to get the brand name established in a consumer's mind. However, these brands are often distinctive, which may provide some advantage over the competition. A "fanciful" brand name uses a brand name which is not currently used in the English language, such as Pip Printing.

Geographic brand names attempt to associate a service with a particular place or region. The information inherent in this option is usually that "we're one of you, a neighbour, not some out-of-towner or a foreigner". Consumers who prefer locally owned businesses or have a strong affiliation with an area may be influenced by these brand names. (Berry, 1988) have argued, this option may be a disadvantage for a firm that expands into additional geographic areas. For a small service, however, this option may be a competitive advantage. For example, the name Bowling Green Bank may have some advantages in the Bowling Green market not shared by Trans Financial Bank.

Finally, alpha-numeric brand names use a combination of letters and numbers to identify a service. The numbers may be expressed as digits or in script form (Pavia and Costa, 1993). Similar to associative brands, they also enjoy a high degree of legal protection. However, numbers may have connotations which are unique. For example, the name First Federal for a bank indicates that the bank must have been around for a while since it was the "first". While this option is probably not as common in services as it is with goods, banks and financial institutions have traditionally chosen this option.

Bottled water in the market use all these different forms combined and this research will find out what works best.

2.7 Conceptual frame work

The conceptual framework outlines the independent, dependent, moderating and intervening variables. The independent variables are the Brand name, Packaging, customer experience and Integrated Marketing Communication. The moderating variables are price, location and distribution methods while the intervening variables are Profit margins, credit facilities, government regulations, inflation and infrastructure. This study focused on the independent variables that affect Brand positioning, the dependent variable.

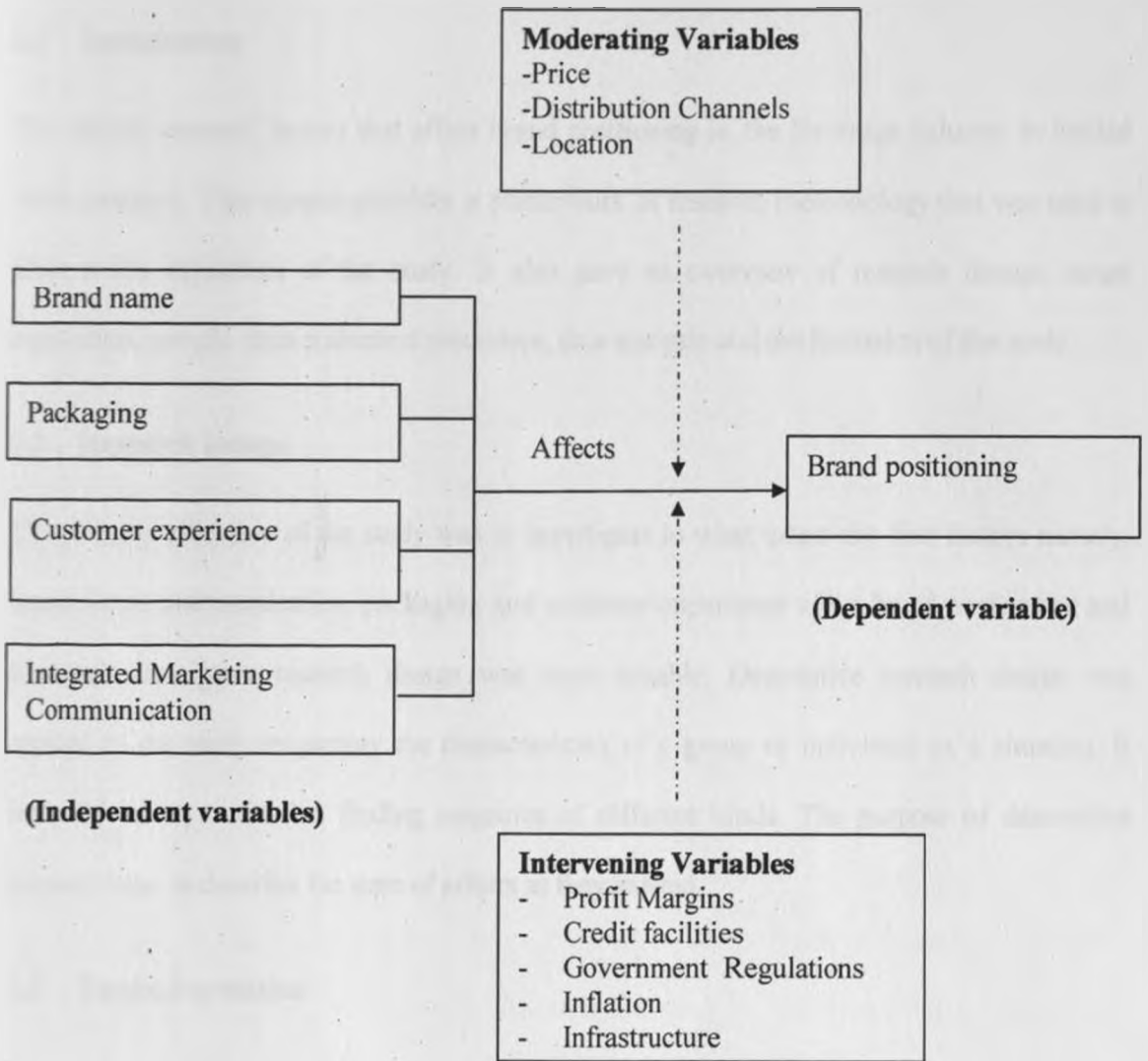


Figure 2.1 The Conceptual Framework

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Introduction

The studies assessed factors that affect brand positioning in the Beverage industry in bottled water category. This chapter provides a frame work of research methodology that was used to achieve the objectives of the study. It also gave an overview of research design, target population, sample, data collection procedure, data analysis and the limitation of the study.

3.2 Research Design

The primary objective of the study was to investigate to what extent the four factors namely, brand name, communication, packaging and customer experience affect brand positioning and therefore descriptive research design was most suitable. Descriptive research design was applied to the study to portray the characteristics of a group or individual as a situation. It included surveys and fact finding enquiries of different kinds. The purpose of descriptive research was to describe the state of affairs as they existed.

3.3 Target Population

The target population was consumers, distributors and retailers of bottled water who sell it as a beverage in Eastleigh area of Nairobi. The main focus was the distributors and retailers operating stores or outlets in Eastleigh, Nairobi and their consumers / customers. Data collected from one of the key Company selling beverages in the area indicated that the total number of outlets in Eastleigh is 2,500. Out of this number there are 2,000 outlets selling bottled water of which 80% outlets sell more than three competing brands NBL Master list (2009). The reason

for selecting the population is that Eastleigh has a more concentrated outlet base with a mixture of different classes of people and stands a better position to state how they perceive the different brands. The other reason is that Eastleigh is a destination of new and varying brands and this study will investigate why this is so. According to Kothari (2004) population means all items in any field of enquiry but for the purpose of this study a sample will be taken.

3.4 Sample Design

From the above population of 2,000 outlets, a stratified 10% sample of 200 outlets was taken. It was selected at random after stratifying. A sample size of 10% of the population was considered adequate as stated by Mugenda and Mugenda (1999) the purpose of the sampling was to gain an understating about the same feature or attribute of the whole population, based on the characteristics of the sample. The study used simple randomly stratifying sampling techniques. According to Lucey (2000) in random stratifying sampling each item in the population has an equal probability of being chosen and different streets captured as the strata in this case were taken care of.

For the purpose of this research the sample population was made up of Distributors, retailers and consumers found in the different streets of Eastleigh area. The Sample units were dukas, kiosks, stores or distribution points and individuals found along the streets of Eastleigh Nairobi. The strata were based on the streets as established by the local government that is the City Council of Nairobi and outlets were be randomly picked (appendix three map 1 and 2).

3.5 Data Collection Procedure

Data was collected by use of the questionnaire method. The study made use of close and open ended questions to solicit ideas related to the research problem from the respondent. The questionnaire was pilot tested with a few of the respondents to check reliability and validity of the response. The research made use of interview method where the respondents were interviewed with the questionnaire which was filled as the questions was being asked. Secondary data was also obtained to clarify issues to the problem especially from the producing companies.

3.6 Data Analysis

Since the study is a survey in nature and most of the data is qualitative, descriptive statistics was used in analysis including frequency distribution tables, percentages and graphs. Cross tabulation was also done to related different variables in the study. This was done using SPSS (Statistical Package for Social Scientist) version 18.

3.7 Validity and Reliability

Most of the dealers have been in the trade for several years and have a wealth of experience with customer needs and purchasing habit which is vital to ensure the reliability of the data collected. Eastleigh area of Nairobi is a permanent business hub which favors' a continued business for beverages with unchanging consumption pattern thus promoting the need for the research.

CHAPTER FOUR

DATA ANALYSIS, PRESENTATION AND INTERPRETATION

4.1 Introduction

A total of 200 respondents were interviewed during the study period. This included 26 distributors, 59 retailers and 115 consumers. This represents a presentable distribution of bottled water users in such an urban setting. It is important to note that most of the distributors and retailers are also consumers and therefore in most of the subsequent analysis, the opinion of all the respondents was considered together.

4.2 Brands of Bottled Water Sold and Consumed in Eastleigh

Twenty six brands of bottled was observed in Eastleigh, most of the respondents use or sell three, two or one of the brands (Table 4.1). This represents about a third of all brands of bottled water in Kenya although there are some brands that are region specific. Nine of the twenty six distributors stock more than four brand of bottled water with one distributor reporting selling eight brand of bottled water.

Table 4.1 Number of respondents using/selling different brands of bottled water in Eastleigh, Nairobi

Brands of bottled water	Distributor	Retailer	Consumer	Total
1	5	10	38	53
2	8	21	40	69
3	2	20	27	49
4	2	6	9	17
5	5	1	1	7
6	1	1		2
7	2			2
8	1			1
Total	26	59	115	200

Results showed that Dasani is the most popular brand of bottled water in Eastleigh, followed by a Star pop which is produced in Eastleigh (Figure 2). Popularity of Dasani was also by it being the favourite, which was measured as the first mentioned brand of water by the respondent (Figure 3). Note that the percentages are more than 100 because most respondent reported having used more than one brand.

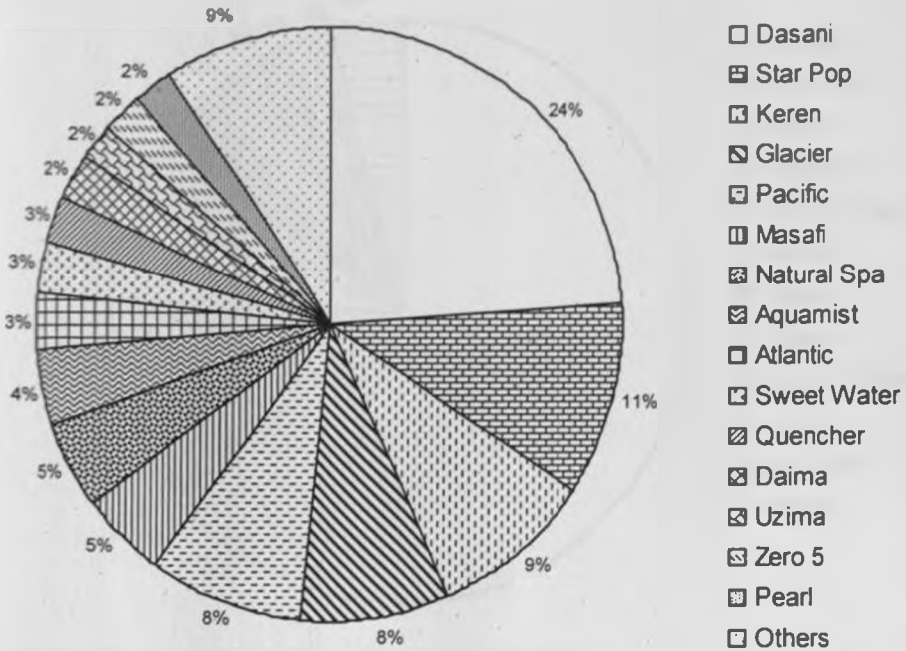


Figure 4.1 Popularity of the twenty six brand of bottled water among the distributors, retailers and consumers in Eastleigh, Nairobi. Others include Maisha, Avian, Mt. Kenya, Keringeti, Majestic, Revees, Mazuri, Cuba, Aberdare, Sarina and Carrent with less than 2%

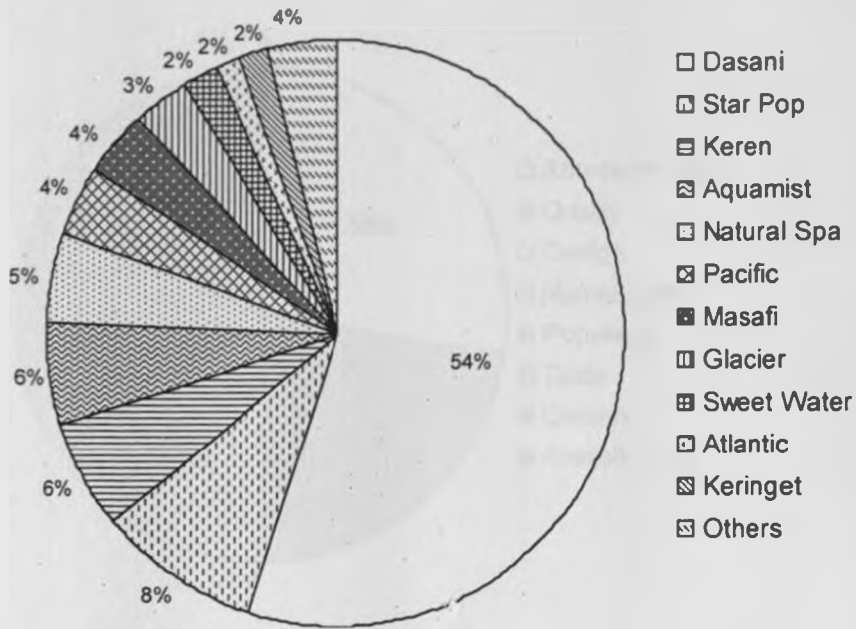


Figure 4.2 The most favourite brand of bottled water as measured by the first mentioned brand of bottled water by the users/sellers in Eastleigh. *Others include Uzima, Mt Kenya, Maisha, Majestic, Quencher and Daima which have less than 1%.*

4.3 Concept of Brand

Most of the respondents in this study (77.5%) considers brand as a choice when deciding to trade or drink bottled water. However, the respondents have different understanding of what is a brand. Over fifty percent suggested price and quality as a measure of a brand, while a few suggested availability and demand as the measure of a brand (Figure 4). It is noteworthy that some respondents suggested low price while a few said good price. For traders good price meant good profit margins while for some consumers good price meant the market price a price that can be associated with good quality.

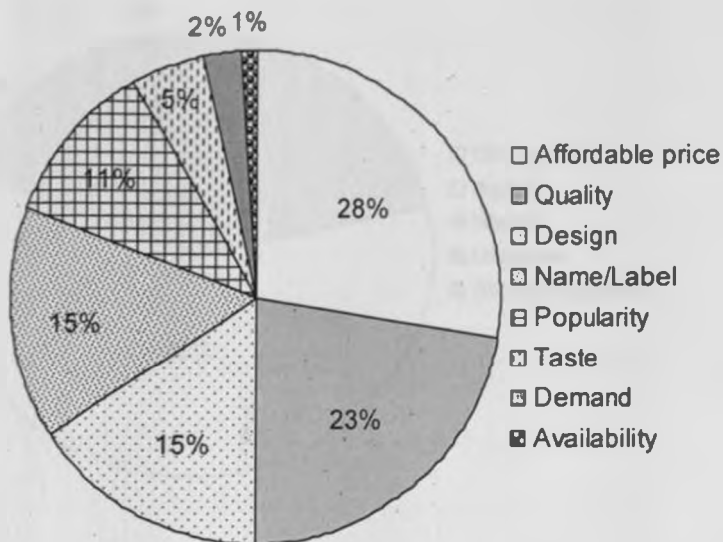


Figure 4.3 Qualities associated with a brand of bottled water by the residents of Eastleigh Nairobi.

4.4 Data interpretation on how companies should embrace Brand positioning

Most of the users/sellers of bottled water in Eastleigh (80%) agree that the water producing companies make concerted effort to modify the tangible characteristics and the intangible perceptions of a marketable offering (brand) in relation to competition (Figure 5). Most of them (76%) believe that that the communication strongly affects brand positioning, followed by brand name (66%) and then customer experience and packaging with 61% and 59% of the respondents agreeing respectively (see table 4.2). It is interesting to note that, over a quarter of the respondents (27%) disagreed that packaging affects brand positioning. There was also a good proportion of respondents who were indifferent or neutral about the effect of these factors on brand positioning as shown in table 4.2.

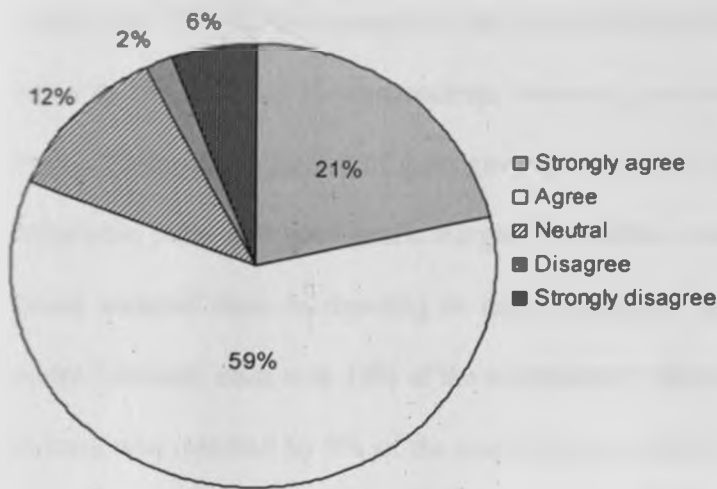


Figure 4.4 Opinion on whether the water producing companies position their brands in relation to competition.

Table 4.2 Effect of communication, customer experience, brand name and packaging on brand positioning of bottled water

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Communication	65%	11%	11%	6%	7%
Customer experience	30%	31%	20%	4%	15%
Brand Name	53%	13%	16%	6%	12%
Packaging	47%	12%	14%	5%	22%

4.4.1 Effect of Brand Names on Brand Positioning

As noted above that 66% of the respondents believed that brand affects brand positioning in bottled water markets, over three quarter (76%) of the respondents associates the brand name with the water of their choice either as traders or consumers (Figure 7). This agrees with

results that 75% of the respondents said that name of the brand influences their choice of water to sell or drink. The respondents, however, gave varied reasons for choosing a given brand. Twenty four percent of them gave reasons related to pricing of the products such as affordable price and good profit margins for traders. Another 24% said popularity of the brand attracted them to choosing its name. Popularity of the company and quality of the water followed; each with 13% of the respondents, while design features such as labels and colours was reported by 9% of the respondents. Another 9% of the respondents suggested taste as what attracted them to a particular brand. Finally six percent of the respondents quoted things associated with availability of the brand such as locally produced and delivery to their shops by the producers.

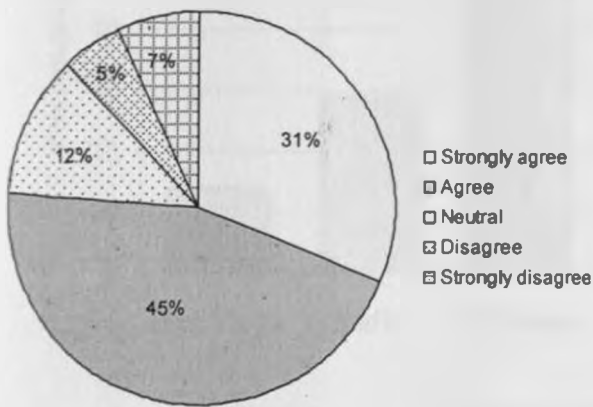


Figure 4.5 Association of the brand name with the value of the bottled water of choice

4.4.2 Effect of Communication Channels on Brand Positioning

Communication about a brand emerged to be a strong factor in brand positioning (see figure 7 above). Nevertheless, some channels of communication reach more people than others. In this study, most of the respondents got information about the water they sell or drink from

television (Figure 8). This might be as advertisement but also in news items that feature conferences where bottled water is served or in entertainment programmes. Word of mouth was the second popular source of information about bottled water among the people of Eastleigh (Figure 8). Over 80% of the respondents indicated to have gotten enough information from the source. The print media and television were most informative with 89% of the respondents who got information from this source reporting it was enough, this was followed by radio (85%), word of mouth (78%), out door advertisements (71%) and promotions (65%).

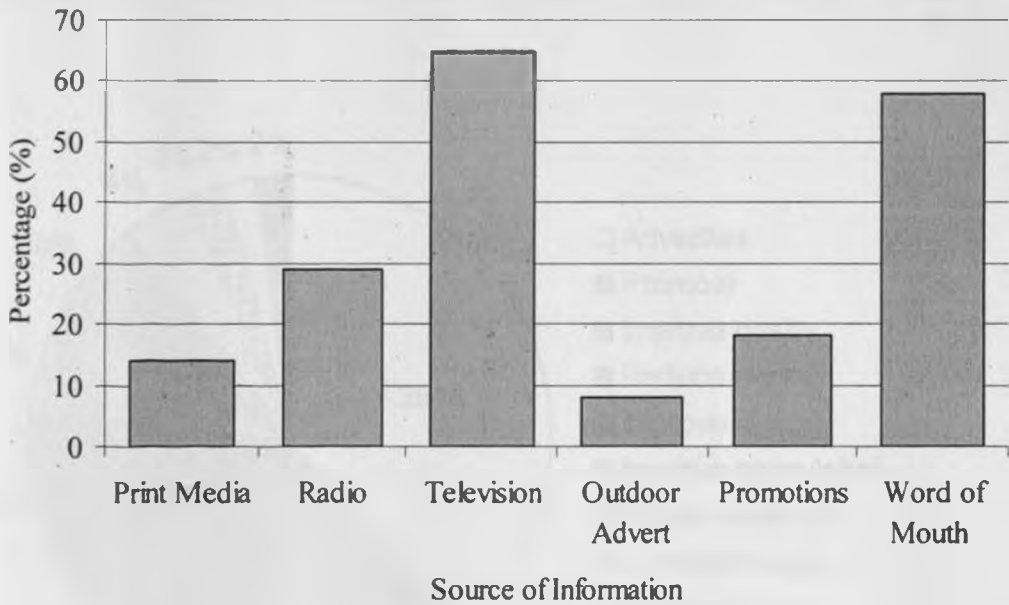


Figure 4.6 Sources of information about bottled water among the residents of Eastleigh. *Note that this percentages add up to more that 100 because most of the respondents got information from more than one source.*

The twenty percent of the respondents who did not receive enough information from either of the above sources, 25% of them said they did not require more information, while the rest either said they got more information from, advertisements, friends, distributors, trying the brand, checking the prices or from customers in case of traders. Note that this percentages add up to more that 100 because most of the respondents got information from more than one source.

The respondents suggested different methods that can be used by water producing companies to communicate well about their brand. Advertisement was suggested by most of the respondents followed by promotions and quality improvement among others (Figure 9).

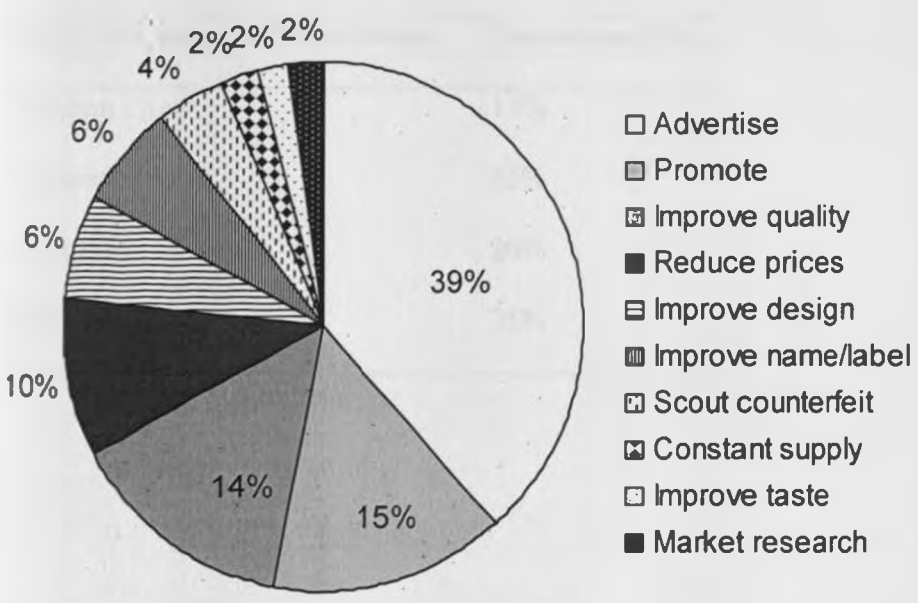


Figure 4.7 Strategies suggested to water producing companies for improving communication about their brand.

4.4.3 Effect of Customer Experience on Brand Positioning

The results of the present study suggest intermittent recruitment of new users of bottled in Eastleigh. This is shown in figure 10, which indicates that there have been few new users in the last one year. This is also supported by data in table 4.2 which shows that 11 of the 26 brands have not had new users in the last one year. In fact, Aberdare, Mazuri, Cuba, Sarina and Carrent have not had new users in the past three years. The brands in the first five rows seem to be having new users every year.

Table 4.3 Proportion of people who have used bottled water for different durations in Eastleigh, Nairobi

Duration of usage of bottled water	Percentage (%)
Less than 1 year	13%
1-2 years	35%
2-3 years	20%
More than 3 years	35%

Table 4.4 Number of respondents reporting having used the different brands of bottled water for different duration in Eastleigh.

	Less than 1Year	1-2 Years	2-3 Years	More than 3 Years	Total
Dasani	6	43	28	36	113
Star pop	4	16	10	20	50
Keren	6	13	11	13	43
Glacier	5	11	9	14	39
Pacific	4	13	7	15	39
Maisha	4	9	2	8	23
Natural Spa	6	6	4	6	22
Aquamist	3	8	3	6	20
Atlantic	3	5	3	4	15
Sweet water	2	4	3	4	13
Quencher	0	3	5	4	12
Daima	1	1	1	8	11
Uzima	0	2	4	4	10
Zero 5	6	0	4	0	10
Pearl	4	4	2	0	10
Avian	0	3	1	4	8
Mt. Kenya	0	2	2	3	7
Keringeti	2	2	2	1	7
Majestic	0	1	0	3	4
Revees	0	0	1	2	3
Mazuri	0	0	0	2	2
Cuba	0	0	0	2	2
Aberdare	0	0	0	1	1
Sarina	0	0	0	1	1
Carrent	0	0	0	1	1
Total	56	146	102	162	

When asked if their perception has changed since the respondent started using the bottled water, 91% said yes where 74% of them said it has changed positively (Figure 11a). Based on experience, over a three quarter of the respondents said they can recommend their brand to other people (Figure 11b). Further cross tabulation revealed that the same 10% who have had negative experience could not recommend some brands of bottled water to other people.

Table 4.5 Change of perception about bottled water (a) and whether the user can recommend the choice of bottled water based on experience (b).

a) Change of perception	Percentage
	24%
	50%
	15%
	4%
	7%
b) Experienced based recommendation	
	36%
	40%
	12%
	5%
	7%

4.4.4 Effects of Packaging on Positioning

Although packaging was relatively less important factor in brand positioning as compared to other factors such as communication (Figure 6), 81% of the respondents agree that it affects it (Figure 12). Most respondents first consider the design and colour of the packaging while the environment emerged as the least considered factor (Table 4.3). It was noted that the shapes that are easier to handle and the blue colour of the PET bottles are preferred by most consumers.

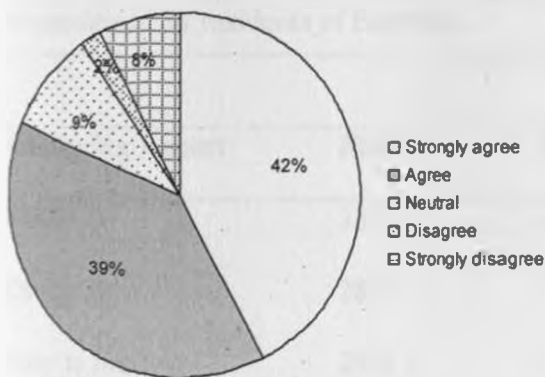


Figure 4.8 Opinion on whether packaging affects brand position in Bottled water market in Eastleigh

Table 4.6 Priority of different aspects of packaging when choosing a brand of bottled based on packaging.

Packaging Aspect	PRIORITY		
	First	Second	Third
Material	35%	32%	33%
Environment	10%	44%	46%
Design and Colour	54%	27%	19%

It is noteworthy that, the environment tailed in among the above three consideration because there is only one type of packing material, PET, and there are no environmentally friendly packaging alternatives. Likewise the types of material seem not to be matter much because there is only one type in the Kenyan market. Nevertheless, when influence of some aspects of packaging was considered with availability, it emerged that availability of the brand has strong choice of the water for sale or consumption (Table 4.4).

Table 4.7. Priority of factors influencing the choice of bottled water sold or consumed by residents of Eastleigh.

Packaging Aspect	PRIORITY		
	First	Second	Third
Shape	38%	12%	50%
Design	28%	17%	55%
Easy to handle	29%	24%	47%
Availability	50%	30%	20%
Durability and re-usable	26%	51%	24%

CHAPTER FIVE

SUMMARY OF FINDINGS, DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

This chapter presents a discussion, conclusion and recommendations from a study that sought to establish the factors that affect brand positioning in the beverage industry: A case study of Eastleigh, Nairobi, Kenya

5.2 Discussion

From the results analyzed above, various determinant attributes that define the product space' in which positions of current offerings are located were determined. Affordable prices were considered key while Advertising and bottle shapes came in second. The importance of perpetual attributes with their subjective components varied across consumers and product classes. Consumers familiar with a given product class/ water type were more apt to rely on physical characteristics and less on perceptual attributes than consumers who were less familiar with that product class.

5.2.1 How Brand packaging affects brand positioning.

In many cases too, the value customers attach to a particular brand is at least partly determined by the sensory experiences they derive from the attractiveness of the product's design, packaging, graphics and advertising and promotional material (Walker, Boyd & Larreche, 1999). Thus, to successfully pursue a differentiation strategy based on product quality, managers must understand what dimensions or cues their firm's potential customers use to

judge quality. They also should pay particular attention to some of the less concrete, but more visible sensory and symbolic attributes of the product. This enhances brand positioning especially when distributors of many water types choose the brands to sell depending on their bottle shapes.

5.2.2 Brand Names and brand positioning

A brand is a name or symbol which identifies a product. A successful brand identifies a product as having sustainable competitive advantage. Most people are aware of the coca cola/ pepsi-cola blind taste tests, in which little difference was perceived when colas were drunk “blind”. On revealing the labels, however, 65 percent of the consumers claimed to prefer Coca-Cola (Walker, B. & Larreche, 1999). This is one of the best indications of the value of what is called ‘product surround’. Whenever brand names are neglected, the commodity slide begins. This is because the physical characteristics of products are becoming increasingly difficult to differentiate and easy to emulate. Brand positioning is therefore adversely affected by brand names. Purchasing decisions therefore tend to be made on the basis of price or availability in the absence of strong brands.

5.2.3 Customer experience and brand positioning

The distinctive values of a brand are eroded over time, with consequent reduction in the ability to command a premium price. The difference between a brand and a commodity can be summed up in the term ‘added values’ which are the additional attributes, or intangibles, that the consumer perceives as being embodied in the product (Malcom McDonald, 2005).

5.2.4 How communication channels deter or enhance brand positioning

Knowledge in the market place can provide a company with a sustainable advantage and therefore very essential in brand positioning. A company with in-depth knowledge about the market place can maintain its superiority by providing a continuous flow of innovative and highly desirable products as well as finding new ways of becoming more efficient. Constant communication with the customers is therefore very essential for successful brand positioning. This is because knowledge accrued from the market place can provide manufacturers with sustainable advantage by giving consumers what they want and doing it better than anybody else.

5.3 Conclusions

To maintain a competitive advantage in product quality, a firm must understand what dimensions customers perceive as underlying differences across products within a given category (Walker, Boyd & Larreche 1999). These perpetual attributes are extremely important when there is great similarity across products. Information about the market place can serve as the basis for brand positioning and is therefore essential. Manufacturers need to always be aware of brands in the market and the brand share of each. This enables brand positioning. It is also important for manufacturers to advertise their products. Even though there is considerable truth in modes of communication employed by consumers, advertising highlights the strengths in a product over the competitors and enables a manufacturer cut out its brand.

5.4 Recommendations

The following recommendations are necessary in the light of the response from the respondents and in view of the research findings. Although manufacturers always seek a prominent position for their brands, attaining such a position requires constant communication with the consumers. Constraints on future strategies incurred while advertising should always be put into consideration and planned for. This ensures that positioned brands are not slowly alienated due to the heavy price tags they carry.

5.5 Areas of further research

Brand positioning has also been thought as key business driver that requires the support of the entire organization. It would therefore be important to study on how organizations with successful brands in the beverage industry effectively acquire market segments.

It is also important for the many market entrants' in the beverage industry to map the location of their new products as compared to the existing competing products. This will further enable the marketers to determine how their products compare with the competition.

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APPENDICES

APPENDIX ONE

QUESTIONNAIRE

FACTORS THAT AFFECT BRAND POSITIONING IN THE BEVERAGE

INDUSTRY: A CASE STUDY OF EASTLEIGH, NAIROBI, KENYA.

Dear Sir / Madam,

This questionnaire is geared to attaining a Master's Degree in Project Planning and Management from University of Nairobi. Please respond by putting a tick to the answer you deem fit.

Your response is highly valued and will be kept in confidence and anonymous. Your business name or your business location will not be quoted anywhere in the research or given to anyone.

SECTION A

1. Kindly indicate whether you are a **Distributor, Retailer or a Consumer** of any bottled drinking water

Distributor

Retailer

Consumer

2. Please name the water brand that you use, know or sell

List the Brands in the spaces	
	None

3. For how long have you known, used or sold the brand you mentioned

- Less than one year 2-3 years
1-2 years More than 3 years

SECTION B

4. In your opinion do you think water producing Companies position their brands-
(attempt to modify the tangible characteristics and the intangible perceptions of a marketable offering (brand) in relation to competition).

- Strongly Agree Disagree
Agree Strongly disagree
Neutral

5. Did you consider brand as a choice before you started using or selling the water brand you mentioned.

Yes

No

6. Do you consider the type of water you sell as a brand?

Yes

No

7. What do you consider as brand in the water you sell or consume?

.....

.....

.....

8. How did you learn about the brand (the water you are selling)?

Print Media Outdoor Advertising

Radio Promotions

Television Word of Mouth

9. Did you get enough information from the mode of communication chosen in question 6 to make a decision

Yes

No

10. If the answer in question 9 is **NO** then how did you gather more information

.....

.....

.....

.....

11. In your opinion what should the Water producing companies do to communicate their brand well?

.....

.....

12. Has your perception changed between the time you started selling / using the water of your choice and now

Yes

No

13. If you answer in question 12 is yes then how do you perceive the brand now?

More positively Negatively

Positive More Negatively

Neutral

14. Would you recommend another person based on your experience to use or sell your water of choice?

- Strongly yes No
- Yes Strongly No
- Neutral

15. Do you associate brand name with the value provided

- Strongly Agree Disagree
- Agree Strongly disagree
- Neutral

16. Did the name of the water you sell or use influence your choice?

- Yes
- No

17. If your answer in question 16 above is yes what attracted you in your choice of name?

.....

.....

.....

18. In your opinion does packaging affect brand positioning?

Strongly Agree

Disagree

Agree

Strongly disagree

Neutral

19. What factor would you consider while making a decision based on packaging

(Prioritize them from no. 1 to 3)

Material Used

Environment

Design and colour

20. Which factors influence your choice in question 19, did you consider?

(Prioritize them from no. 1 to 3)

Shape

Design

Easy to handle

Availability of in the market

Durability / re usable

21. Do you believe the following factors affect brand positioning

	1	2	3	4	5
Brand communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Packaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key

1	2	3	4	5
Strongly Agree	Agree	Neutral	Strongly Disagree	Disagree

APPENDIX TWO

PHOTOS OF VARIOUS BRANDS OF BOTTLED WATER



Plate 1. Photo of bottled water on display in typical supermarket in Eastleigh

UNIVERSITY OF NAIROBI
EAST AFRICANA COLLECTION



Plate 2. Photo of bottled water and other beverages in a supermarket in Eastleigh

UNIVERSITY OF NAIROBI
EAST AFRICANA COLLECTION



Plate 3. Photo of bottled water and other beverages in tuck shop in Eastleigh

APPENDIX THREE

MAPS OF THE STUDY AREA

KENYA



Map 1. Nairobi map showing Eastleigh in the middle. Modified from Google maps (<http://maps.google.co.ke>)

