

The Role of Brand Communication in Building Loyalty in Indonesia's Bottled Water Market

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ABSTRACT

The Indonesian bottled water industry is highly competitive, with over 2,000 brands competing for consumer attention. This study investigates the role of brand communication in shaping brand image and brand preference, and how these factors influence brand loyalty. Brand communication is conceptualized as a multidimensional construct encompassing advertising-promotion, sponsorship-public relations, and corporate social responsibility (CSR). A structured questionnaire was distributed to 380 bottled water consumers across Indonesia using purposive sampling. The data were analyzed using Partial Least Squares Structural Equation Modeling (PLS-SEM) to test both measurement and structural models. Results show that all dimensions of brand communication significantly enhance brand image and preference. However, brand image alone does not directly influence loyalty; instead, brand preference plays a critical mediating role. The total effect of brand communication on loyalty increases substantially when brand preference is included as a mediator. The findings highlight the strategic importance of designing integrated communication approaches that reinforce brand preference as a pathway to consumer loyalty. Sponsorship and CSR initiatives, in particular, were found to have strong impacts, suggesting that traditional and relational communication forms remain influential in the fast-moving consumer goods (FMCG) sector. This research contributes to the brand communication literature by empirically validating a multidimensional model in an underexplored FMCG context. It provides practical guidance for brand managers in the Indonesian bottled water market to invest in targeted communication strategies that build consumer preference and long-term loyalty.

Keywords: Brand communication, brand preference, brand loyalty, bottled water, FMCG, CSR

1. INTRODUCTION

Indonesia occupies a prominent position within the global bottled water market, currently ranked fifth globally, with an estimated market valuation reaching IDR 152 trillion as of 2023 (Sukma, 2023). This substantial market size is primarily sustained by the dominance of local producers, who collectively hold approximately 95% of the total market share. Consequently, intense competitive pressures have arisen among roughly 1,200 companies that collectively manage approximately 2,100 distinct bottled water brands across the nation (Susilo, 2023). Despite the industry's robust growth trajectory, market control remains heavily concentrated among a few leading brands, while numerous smaller firms encounter substantial obstacles in securing and maintaining consumer loyalty (Top Brand, 2023; Nugroho, 2023). Such dynamics emphasize the critical importance for brands, particularly those with limited market share, to employ strategic differentiation initiatives to cultivate and sustain consumer loyalty within an intensely competitive market.

Brand loyalty assumes exceptional significance within the realm of fast-moving consumer goods (FMCG), primarily due to its direct impacts on operational efficiency,

customer retention rates, and long-term competitive advantages (Chaudhuri & Holbrook, 2001; Morrison & Crane, 2007). A considerable body of academic literature has consistently documented that effective brand communication strategies are essential in shaping consumer perceptions, fostering brand preference, and ultimately driving consumer loyalty and repeat purchasing behaviors (Madhavaram et al., 2005; Gómez-Rico et al., 2023). Indeed, the strategic management of brand communication allows firms to clearly articulate their value propositions, engage customers effectively, and reinforce lasting consumer relationships (Luxton et al., 2015).

However, despite significant theoretical advances in the understanding of brand loyalty and communication strategies, a critical gap remains concerning how multidimensional brand communication frameworks, encompassing advertising-promotion, sponsorship-public relations, and corporate social responsibility (CSR), collectively influence loyalty formation within FMCG markets. This gap is particularly pronounced within the bottled water industry, where empirical research addressing these comprehensive communication dimensions has been notably limited (Dwivedi & McDonald, 2018). Furthermore, the dynamic consumer landscape in Indonesia, characterized by diverse consumer behaviors and market preferences, presents unique complexities not fully captured by extant theoretical frameworks.

Within the broader theoretical discourse, brand image and brand preference have been identified as critical mediators that significantly influence the relationship between brand communication strategies and consumer loyalty outcomes (Chang & Liu, 2009; Ebrahim et al., 2016). Brand image encompasses consumer perceptions shaped by various associations, including quality attributes, emotional connections, and brand reputation, which collectively affect consumer decision-making processes (Salinas & Pina, 2009). Brand preference, closely related yet distinct, involves consumers' comparative evaluations among brands, directly guiding purchasing intentions and behaviors (Chinomona et al., 2013; Gómez-Rico et al., 2023). Despite substantial research affirming these mediating relationships across various sectors, empirical studies specifically investigating their nuanced roles in Indonesia's bottled water sector remain scarce. This limitation presents a significant knowledge gap within existing academic discourse, thus necessitating focused empirical investigation.

Given the aforementioned theoretical and empirical limitations, this study addresses the following central research question: "How do various dimensions of brand communication influence brand loyalty through the mediating roles of brand image and brand preference within Indonesia's bottled water industry?" To systematically explore this query, the research sets forth several interconnected objectives. First, this study aims to empirically develop and validate a robust theoretical model that explicitly delineates the relationships between multidimensional brand communication, brand image, brand preference, and consumer

loyalty within Indonesia's bottled water context. Second, the research endeavors to critically identify and evaluate the relative significance of individual brand communication dimensions (advertising-promotion, sponsorship-public relations, and CSR) in shaping consumer brand perceptions and fostering brand preference and loyalty. Third, this study systematically integrates and assesses these communication components, clarifying their collective efficacy in driving consumer outcomes.

This research provides substantive contributions to both academic theory and marketing practice by delivering nuanced insights into loyalty formation processes specific to the FMCG sector, particularly within the bottled water market. Through an in-depth analysis of the interplay between brand communication strategies and loyalty mediators, the findings offer strategic guidance for marketing practitioners and enhance theoretical clarity concerning consumer-brand relationship management. Ultimately, this study not only enriches academic discourse on FMCG consumer behavior but also equips industry stakeholders with actionable insights to better navigate the complexities of consumer engagement and loyalty in highly competitive markets.

2. METHODS

This study employed a quantitative research design, leveraging a structured questionnaire to systematically collect data from consumers across Indonesia regarding their perceptions of bottled water brands. The questionnaire consisted of 24 items, carefully constructed to measure two primary dimensions: brand communication effectiveness (advertising-promotion, sponsorship-public relations, and corporate social responsibility [CSR]) with nine items, and consumer attitudes encompassing brand image, brand preference, and brand loyalty with fifteen items. Responses were gathered using a five-point Likert scale, ranging from 1 (strongly disagree) to 5 (strongly agree), to capture nuances in consumer opinions and behaviors.

To enhance content validity and ensure clarity, the questionnaire underwent a rigorous development and validation process. Specifically, the items were adapted from previously validated scales in the existing marketing and brand communication literature (Buil et al., 2013; Chang & Liu, 2009; Gómez-Rico et al., 2023). Additionally, the questionnaire was reviewed by a panel of experts specializing in marketing research and consumer behavior to refine wording, eliminate ambiguity, and confirm that each item adequately represented its intended construct. Subsequently, a pre-test was conducted among a smaller sample of 30 respondents, representing various demographics, to detect potential issues and further refine the questionnaire items for comprehensibility and accuracy.

Data collection occurred between November and December 2023, explicitly targeting a diverse cross-section of bottled water consumers in Indonesia to ensure representativeness across various consumer segments. Given the absence of definitive population data on Indonesian bottled water consumers, purposive sampling was employed. This method allowed for the intentional selection of participants who regularly consumed bottled water, thus enhancing the relevance and reliability of the collected data. To minimize potential

selection bias inherent to purposive sampling, researchers implemented rigorous criteria for participant inclusion, such as consumption frequency and familiarity with multiple brands.

Table 1. Respondent Profile

	Category	Amount	Percentage
Gender	Male	141	37%
	Female	239	63%
Age (Years)	17 - 21	51	13%
	22 - 30	154	40%
	31 - 40	56	15%
	40 - 50	80	21%
	>50	39	11%
Favorite brands	Aqua	154	40%
	Le mineral	181	48%
	Other brands	45	12%
Purchases per week	< 1	36	11%
	1	51	13%
	2	92	24%
	3	62	16%
	> 3	139	36%

From an initial pool of 452 completed surveys, 72 responses were excluded due to incomplete answers or inconsistent responses, resulting in a final sample size of 380 respondents. Demographic data collected included gender, age, preferred bottled water brands, and purchasing frequency. Within this final dataset, the respondents comprised 37% males and 63% females. Age distribution was as follows: 13% aged between 17-21, 40% aged 22-30, 15% aged 31-40, 21% aged 40-50, and 11% aged above 50. These demographics were consistent with previous studies, validating the representativeness of the sample (Gómez-Rico et al., 2023). Respondents also indicated their preferred brands, with Aqua and Le Minerale representing approximately 88% of preferences, which aligns with known market share data (Top Brand, 2023). Furthermore, purchasing frequency indicated robust consumer engagement, with approximately 36% of respondents purchasing bottled water more than three times weekly, demonstrating notable loyalty behaviors.

Data were analyzed using variance-based Structural Equation Modeling (SEM) with Partial Least Squares (PLS-SEM), a methodological choice explicitly justified by its flexibility in modeling complex structural relationships, suitability for predictive modeling, and robustness against non-normal data distributions (Hair et al., 2021; Nitzl et al., 2016). Unlike covariance-based SEM (CB-SEM), PLS-SEM does not require multivariate normality and is preferable for exploratory models and smaller sample sizes, making it particularly suited to this research context. Additionally, this study employed second-order construct modeling for brand communication, allowing the integration of its underlying dimensions (advertising-promotion, sponsorship-public relations, and CSR) into a single latent construct, enhancing the model's explanatory power and interpretability.

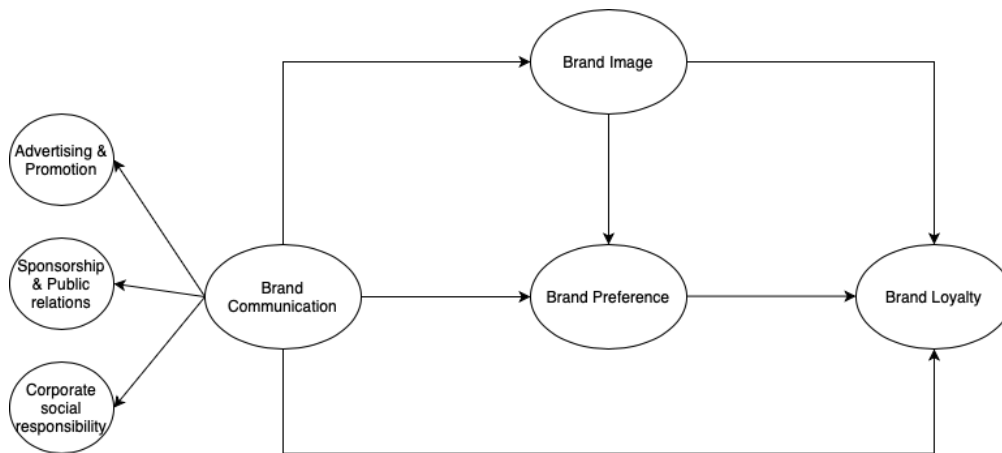


Figure 1. Brand Loyalty Model

Before testing hypotheses, confirmatory factor analysis (CFA) was conducted to verify the reliability and validity of the measurement model. Reliability was assessed using Cronbach's alpha and composite reliability measures, while validity was examined via factor loadings and average variance extracted (AVE). Discriminant validity was further evaluated through the Fornell-Larcker criterion, ensuring distinctiveness between constructs. These rigorous analytical steps ensured methodological rigor and replicability of the research findings.

3. RESULT AND DISCUSSION

3.1 Measurement Model

The evaluation of the measurement model involved rigorous assessments of construct validity and reliability. This phase included evaluations of factor loadings (outer loadings), rho values, composite reliability (CR), Cronbach's Alpha, and average variance extracted (AVE). According to guidelines by Hair et al. (2021), factor loadings and composite reliability should exceed 0.7, and AVE values should be above 0.5 to ensure adequate validity and reliability. Results presented in Table 2 confirm that all constructs met these criteria, indicating strong internal consistency and convergent validity.

Brand communication was analyzed as a second-order construct comprising three clearly defined sub-dimensions: advertising-promotion (ADV), sponsorship-public relations (SPO), and corporate social responsibility (CSR). Each dimension reflects distinct but interrelated communication strategies. Advertising-promotion captures the persuasive communication activities aimed at stimulating consumer interest and purchase intention. Sponsorship-public relations pertains to strategic partnerships and brand-building activities designed to enhance visibility and credibility. CSR encompasses socially responsible actions demonstrating the brand's commitment to ethical practices and societal values. The second-order analysis demonstrated robust validity, with significant factor loadings above 0.7 at $p < 0.01$, aligning with prior research (Gómez-Rico et al., 2023).

To further validate the distinctiveness among constructs, discriminant validity was assessed using the Fornell-Larcker criterion (Fornell & Larcker, 1981). Table 2 shows each construct's AVE square root was greater than its correlations with other constructs, confirming robust discriminant validity and mitigating concerns about measurement overlap or redundancy.

Table 2. Construct Validity

Constructs/Dimensions		Items	Factor loading	Cronbach's Alpha	Rho	Composite Reliability	AVE
Brand Communication	ADV	ADV1	0.867	0.825	0.825	0.895	0.741
		ADV2	0.880				
		ADV3	0.834				
	SPO	SPO1	0.826	0.822	0.822	0.894	0.738
		SPO2	0.882				
		SPO3	0.867				
	SOC	SOC1	0.879	0.846	0.848	0.907	0.765
		SOC2	0.897				
		SOC3	0.847				
	CSR	CSR1	0.863	0.816	0.821	0.890	0.731
		CSR2	0.828				
		CSR3	0.872				
Brand Image	IMA	IMA1	0.793	0.767	0.730	0.839	0.636
		IMA2	0.865				
		IMA3	0.729				
Brand Preference	PRE	PRE1	0.892	0.822	0.808	0.886	0.722
		PRE2	0.839				
		PRE3	0.817				
Brand Loyalty	LOY	LOY1	0.772	0.851	0.811	0.866	0.620
		LOY2	0.865				
		LOY3	0.774				
		LOY4	0.731				

Note: ADV: advertising-promotion; SPO: sponsorship-public relations; CSR: corporate social responsibility

Table 3. Discriminant Validity

Fornell-Larcker							
	ADV	IMA	LOY	PRE	CSR	SOC	SPO
ADV	0.861						
IMA	0.560	0.798					
LOY	0.434	0.540	0.787				
PRE	0.421	0.561	0.714	0.850			
CSR	0.544	0.569	0.441	0.426	0.855		

SOC	0.595	0.533	0.429	0.457	0.617	0.875	
SPO	0.673	0.610	0.506	0.449	0.591	0.612	0.859

Note: ADV: advertising-promotion; SPO: sponsorship-public relations; CSR: corporate social responsibility; PRE: brand preference; LOY: brand loyalty. Fornell-Larcker: The values on the diagonal are the square root of the AVEs; and the values on off-diagonal are the correlation between the constructs.

3.2 Structural Model

The structural model evaluation employed a bootstrapping procedure with 5,000 subsamples, following Chin et al. (2008), to examine path coefficients and indicator significance comprehensively. Analysis of the structural paths revealed that all brand communication dimensions significantly contributed to the higher-order construct of brand communication, with sponsorship-public relations showing the strongest influence ($\beta = 0.886$, $p < 0.001$), followed closely by advertising-promotion ($\beta = 0.862$, $p < 0.001$) and CSR ($\beta = 0.824$, $p < 0.001$). A variance inflation factor (VIF) analysis indicated no multicollinearity concerns, as all values were below the recommended threshold of 3.3 (Gómez-Rico et al., 2023).

Explanatory power assessment demonstrated considerable predictive capabilities: brand communication explained 45% of the variance in brand image, and together, brand communication and brand image accounted for 34% of the variance in brand preference. Finally, the model explained 55% of the variance in brand loyalty, indicating a substantial explanatory power aligned with Hair et al. (2021).

Hypothesis testing yielded significant insights. Brand communication significantly influenced brand preference (H1: $\beta = 0.229$, $p < 0.05$) and brand image (H2: $\beta = 0.676$, $p < 0.01$). Interestingly, brand communication also directly influenced brand loyalty (H3: $\beta = 0.189$, $p < 0.05$). Furthermore, brand image had a significant positive impact on brand preference (H4: $\beta = 0.406$, $p < 0.01$) but did not directly affect brand loyalty (H5: $\beta = 0.096$, $p > 0.05$). Brand preference, however, exhibited a strong positive impact on brand loyalty (H6: $\beta = 0.565$, $p < 0.01$).

An important theoretical implication emerged from the mediating role of brand preference. Initially, brand communication had a modest direct effect on loyalty; however, inclusion of brand preference as a mediator significantly amplified the total effect (from $\beta = 0.189$ to $\beta = 0.538$, $p < 0.01$). Similarly, brand image indirectly influenced brand loyalty through brand preference mediation ($\beta = 0.230$, $p < 0.01$). These results underscore brand preference's critical role as a mediator, partially supporting hypothesis H7 (H7a and H7b).

Table 4. Hypothesis testing

Constructs			<u>Direct</u>		<u>Indirect</u>		<u>Total</u>	
			Path Coefficient	T Statistic	Path Coefficient	T Statistic	Path Coefficient	T Statistic
H ₁ :	COM	□	0.229	2.839**	0.275	5.515***	0.504	8.763** *
	PRE							

H ₂ : COM □ IMA	0.676	20.304* **	-	-	0.676	20.304* **
H ₃ : COM □ LOY	0.189	2.256* *	0.349	5.373***	0.538	11.526* **
H ₄ : IMA □ PRE	0.406	5.521** *	-	-	0.406	5.521** *
H ₅ : IMA □ LOY	0.096	1.61	0.230	4.664***	0.325	5.155** *
H ₆ : PRE □ LOY	0.565	8.368** *	-	-	0.565	8.368** *

Notes: COM: brand communication; IMA: brand image; PRE: brand preference; LOY: brand loyalty; * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$

3.3 Multigroup Analysis

A multigroup analysis was conducted to examine variations across major bottled water brands, including Aqua, Le Minerale, and other smaller brands. Findings highlighted distinct challenges facing each brand. Aqua showed relatively weak brand communication effectiveness, suggesting a need to enhance strategic advertising, sponsorship, and CSR initiatives. In contrast, Le Minerale faced significant issues with brand image, possibly due to its more recent market entry, indicating a priority for image-building initiatives. Smaller brands struggled with comprehensive deficiencies in both communication and image, underscoring the necessity for sustained strategic communication and image-building efforts to effectively compete against dominant market players.

Table 5. Multigroup Analysis

Constructs	<u>Aqua</u>		<u>Le Mineral</u>		<u>Another Brands</u>	
	Path Coefficient	T Statistic	Path Coefficient	T Statistic	Path Coefficient	T Statistic
COM □ PRE	0.241	2.297*	0.488	5.471** *	-0.272	1.571
COM □ IMA	0.733	13.867** *	0.622	12.64** *	0.617	9.695***
COM □ LOY	0.149	1.565	0.221	2.441**	0.434	1.402
IMA □ PRE	0.483	4.693***	0.176	1.798*	0.659	4.043***
IMA □ LOY	0.149	1.855*	0.082	1.085	-0.90	0.518
PRE □ LOY	0.483	4.478***	0.538	7.89***	0.648	3.710***

Notes: COM: brand communication; IMA: brand image; PRE: brand preference; LOY: brand loyalty; * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$

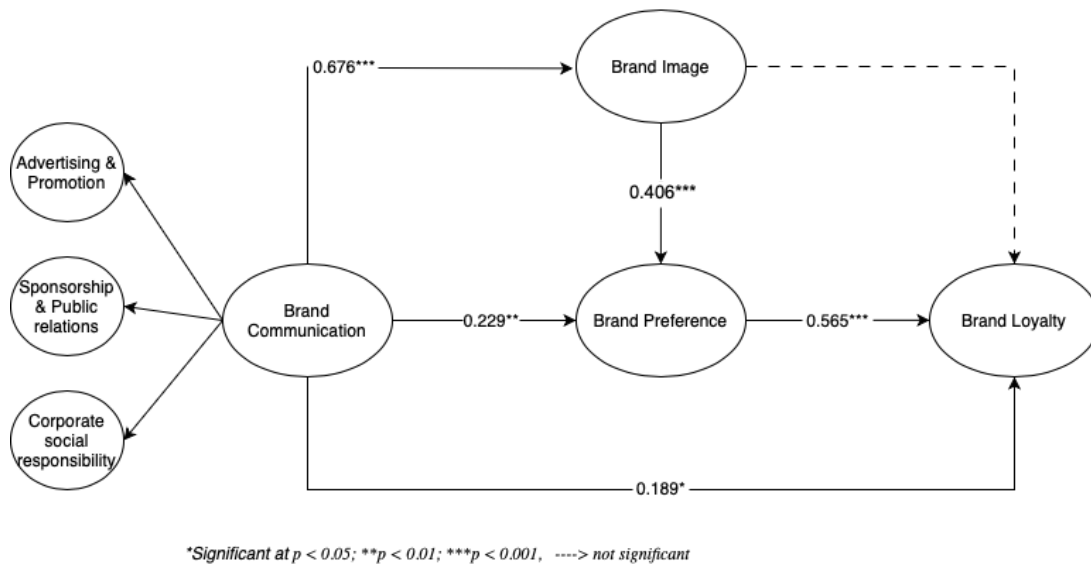


Figure 2. Final Final Structural Model Result

This study extends theoretical understanding by empirically validating the multidimensional conceptualization of brand communication within Indonesia's bottled water industry, distinguishing itself from prior research primarily situated within service sectors (Gómez-Rico et al., 2023). By integrating diverse communication dimensions, this study provides a nuanced understanding of how traditional and relational communication strategies interact to influence consumer loyalty. From a managerial perspective, the findings emphasize the strategic importance of fostering brand preference through targeted communication strategies to drive loyalty. Companies should prioritize sponsorship-public relations and CSR as these dimensions significantly enhance brand credibility and long-term consumer engagement. This study provides critical insights into the dynamics of brand communication and loyalty formation, offering robust theoretical contributions and actionable recommendations for brand managers navigating Indonesia's intensely competitive bottled water market.

4. CONCLUSION

This study significantly advances the understanding of brand communication by analyzing it as a multidimensional concept within the context of Indonesia's bottled water industry. Unlike prior studies, which largely explored brand communication in the service sector, this research sheds light on its applicability in a fast-moving consumer goods (FMCG) context, highlighting its importance in daily consumer products. The research identifies three critical dimensions of brand communication: advertising-promotion, sponsorship-public relations, and corporate social responsibility (CSR) that provide a holistic perspective, encompassing controlled and uncontrolled media, traditional and digital communication channels, and one-way and two-way interactions. A notable finding is that conventional marketing activities, such as advertising, sponsorship, and CSR, remain pivotal for consumers in the bottled water industry, contrasting with service-based sectors where

digital and social media are often predominant. This study further enriches theoretical understanding by demonstrating the unique factors influencing consumer choice and loyalty within the FMCG industry, providing valuable insights into consumer behavior and preference formation.

The research clarifies that brand loyalty in the bottled water sector is primarily shaped by brand preference and brand communication rather than directly by brand image. While previous studies reported both direct and indirect positive relationships involving brand image, this study uniquely highlights brand preference's mediating role in fostering brand loyalty. Hence, both brand communication and image are vital in enhancing brand preference, subsequently leading to stronger brand loyalty.

This study provides actionable insights for brand managers in the bottled water industry. It emphasizes that consumer loyalty heavily depends on consistent brand preference reinforced through strategic communication efforts. Managers should prioritize sustained investments in sponsorship and public relations due to their long-term impacts, alongside traditional advertising campaigns. Additionally, incorporating CSR initiatives significantly influences consumer preferences, making it an essential component of comprehensive marketing strategies. It is crucial for managers to test these communication tactics rigorously within target markets to optimize their effectiveness and returns on investment.

Despite its valuable contributions, this study presents certain limitations. Firstly, its scope is limited geographically to Indonesia, suggesting a need for replication in different countries to validate and generalize findings. Expanding geographic contexts would enhance the study's robustness and reliability. Secondly, the research was constrained to three brand communication dimensions. Future studies could explore additional marketing channels and communication dimensions to yield more comprehensive insights.

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