

Consumer Research

Conducted on behalf of Harrogate Spring Water

Background

Harrogate Spring Water recently commissioned independent research to test consumer perceptions of the brand in the on-trade market.

The objectives of the research were primarily to:

- Establish consumer reactions to Harrogate Spring Water's packaging, compared to its main competitors
 - Provide statistics that can be used to substantiate information about Harrogate Spring Water
-

Methodology

An independent online omnibus study was commissioned. This is a syndicated survey, conducted with a nationally representative sample of the UK adult population on a weekly basis.

The survey was conducted by ICM during summer 2010. The omnibus used in this study reached 2,035 respondents.

Four questions in total were asked. The first three were designed to gauge respondents' perceptions of Harrogate Spring against competitors.

Competitors measured against were:

- Abbey Well
- Highland Spring
- Hildon
- Strathmore

The fourth question asked consumers which attributes they most associated with the Harrogate Spring Water brand.

Summary of results

Harrogate Spring performed favourably throughout the omnibus questions.

Based on the bottle design, consumers voted Harrogate Spring Water as:

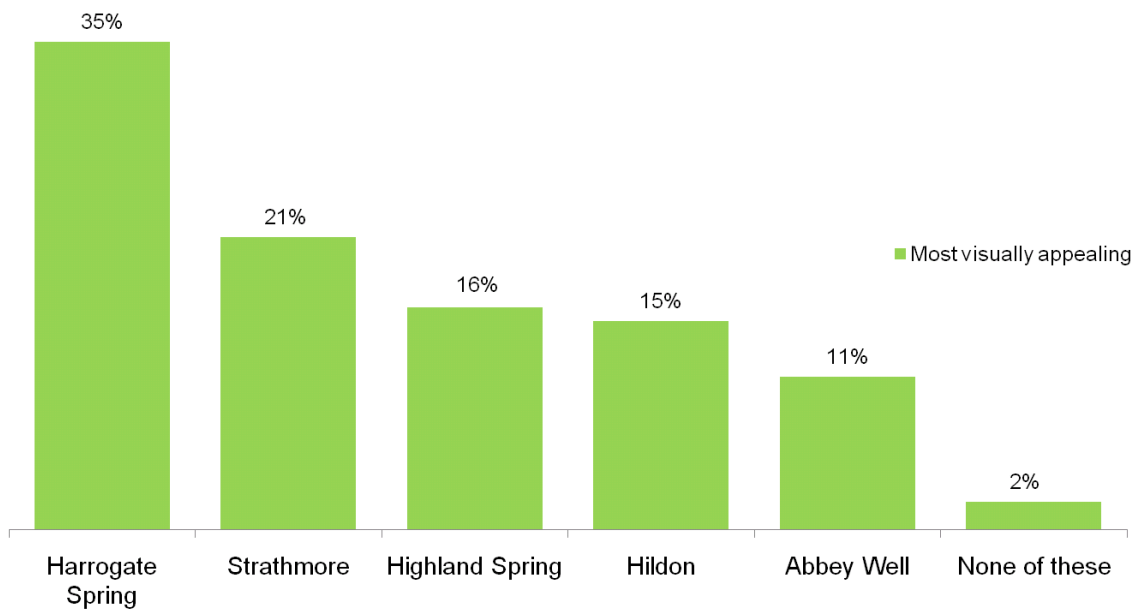
- The most visually appealing
- The most premium looking
- The most likely to be ordered at a restaurant

- The strongest association with Harrogate Spring was being a British brand (69%)
- 40% of respondents believed the brand logo and bottle were stylish

How does Harrogate Spring fare against the competition?

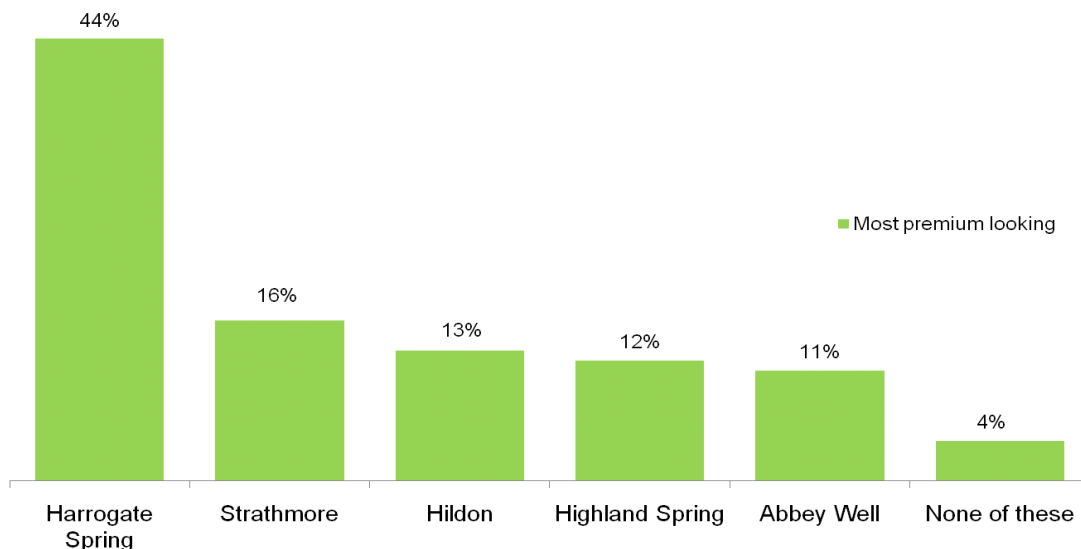
Respondents considered Harrogate Spring the most visually appealing water bottle design.

Q1. Looking at the following brands of bottled water, could you please rank them in order of how visually appealing they are.



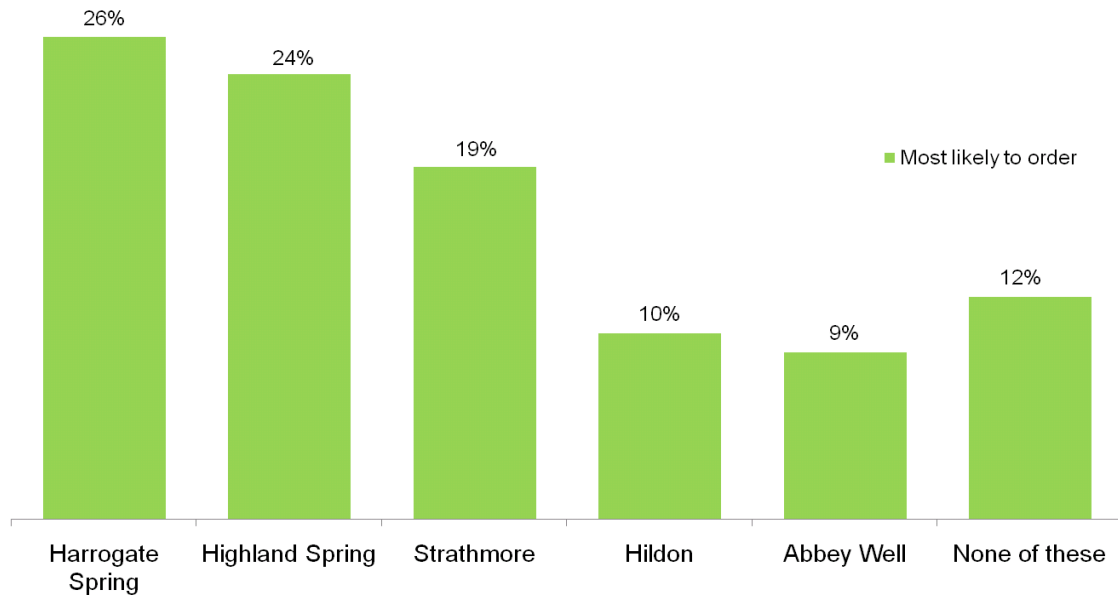
Harrogate Spring was also considered the most premium looking bottle.

Q2. Looking at the following brands of bottled water, could you please rank them in order of how premium they look.



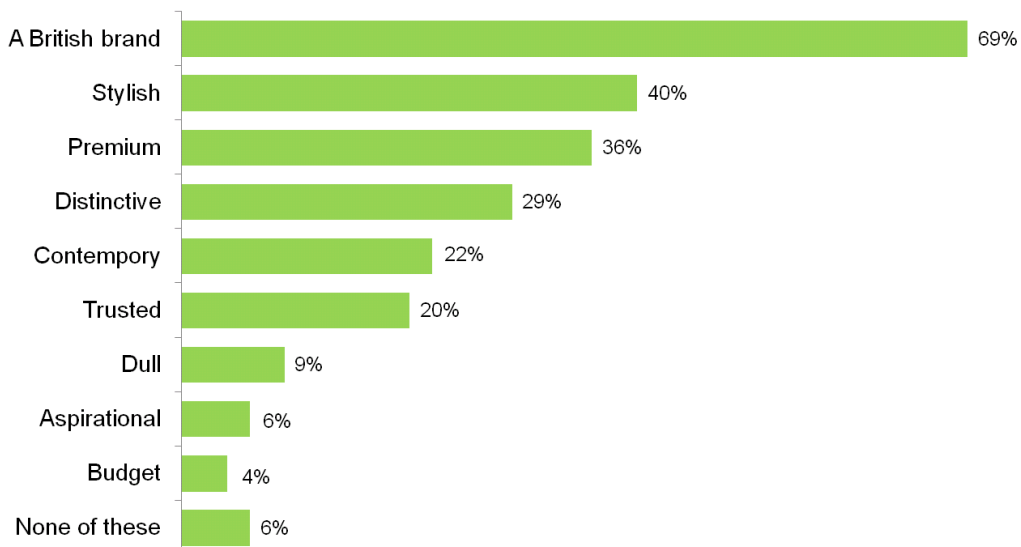
In a bar or restaurant setting, Harrogate Spring was the bottle respondents considered they would be most likely to order.

Q3. Looking at the following brands of bottled water, could you please rank them in order of how likely you would be to order them at a bar or restaurant.



Consumers mostly associated Harrogate Spring with being a British brand.

Q4. Which of the following words, if any, would you use to describe Harrogate Spring Water, based on the logo and bottle?



For further information, or to enquire about stocking Harrogate Spring Water, please contact Harrogate Spring Water on 01423 730000.