



directiveanalytics
Guiding Strategic Marketing Decisions



At Directive Analytics, we have all taken small steps in our personal lives to help the environment. Many of us have switched to energy-efficient appliances and run them during off-peak times. We recycle and look for recycled products when shopping. Some of us also make efforts to utilize public transportation more often, support conservation efforts, and purchase organic foods.

Collectively, we would like to continue to improve our green practices and make a difference in the lives of others by encouraging similar practices among our colleagues.

Bottled water has become a part of our everyday lives in the United States. Even when we recycle our used plastic water bottles, we expend valuable environmental resources in the process. We view reuseable water bottles as a small way we can all help this growing environmental concern. **Please join us in using reuseable water bottles whenever possible and recycling when we cannot.**

The Directive Analytics Team



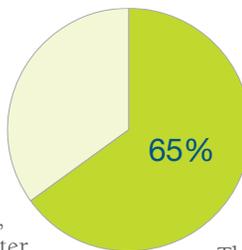
Through our own research among the Directive Analytics online panel, we learned that 66% of American households are purchasing plastic bottles of water, but current concerns about the impact of the leftover bottles on the environment and individual health are relatively low.

Plastic water bottles are most often purchased in bulk and are often used by multiple members of the household—with an average of 9 plastic bottles of water consumed per week.

Approximately 8-in-10 consumers reuse their plastic water bottles. While there is little concern about bacteria that can be found with water bottle reuse among users in general (29% Top 2 Box), this concern is significantly greater among those who choose to reuse their bottles less frequently (38%).

Frequent plastic water bottle reuse is more common among women than men (46% vs. 35% Top 2 Box).

Water Bottle Users Who Frequently Recycle Their Water Bottles (Top 2 Box)

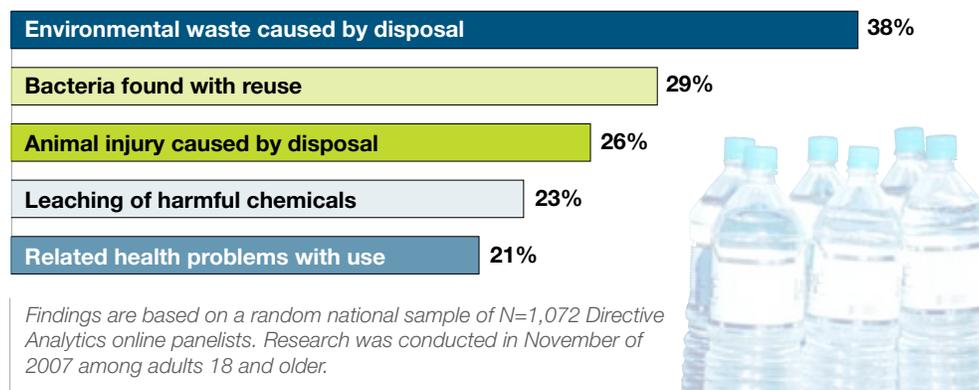


Nearly all bottled water using households with children under the age of 18 indicate that their children use the water bottles as well (93%).

Concern for the waste caused by the disposal of plastic bottled water is low among users—only 38% Top 2 Box concern. However, most claim to frequently recycle their plastic water bottles (65%), though 16% never recycle.

Those who abstain from purchasing plastic water bottles have a greater concern for environmental waste caused by disposal and the leaching of harmful chemicals (51% vs. 38% and 28% vs. 23% respectively).

Plastic Water Bottle Concerns Among Users (Top 2 Box)



Facts & Figures

- Research suggests plastic containers, including bottled water, leak chemicals such as phthalates or Bisphenol A into their contents and may be harmful to human health.
- According to the Beverage Marketing Corp, the average American consumed 1.6 gallons of bottled water in 1976. In 2006, each person consumed 28.3 gallons of bottled water.
- Bottled water costs between \$1 and \$4 per gallon and 90% of the cost is in the bottle, lid, and label.
- Manufacturing bottled water uses over 1.5 million barrels of oil per year. In one year, that's enough oil to fuel 100,000 cars.
- According to the Container Recycling Institute, only about 14% of all dis-

posable water bottles are recycled. Those that make it to the recycling center become 'down-cycled' into a lower form of plastic and seldom become remade into other plastic water bottles.

- Statistics show that 30 million plastic water bottles are tossed into U.S. landfills each day. One bottle can take up to 1,000 years to break down.
- If everyone in NYC gave up water bottles for one week, they would save 24 million bottles from going into the landfill. If they gave up water bottles for one month they would save 112 million bottles from going into the landfill, and if they give up water bottles for one year they would save 1.328 billion bottles from going into the landfill.

Sources: <http://www.environmentalleader.com>; <http://www.biotaspringwater.com>; <http://www.earth911.org>; http://en.wikipedia.org/wiki/Bottled_water; <http://www.inhabitat.com/2007/11/03/sigg-kids-bottles>



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ABOUT US

Directive Analytics provides its clients with the consumer insights and strategic action plans necessary to set themselves apart and grow their business. We offer a blend of the methodological expertise and rigor of the traditional research company with the consultative approach of the traditional marketing consultancy. Through this unique approach, Directive Analytics will help you:

- Build and grow brands
- Develop and bring to market successful new products
- Build and strengthen customer loyalty
- Create a compelling marketing strategy
- Develop and enhance your web strategy

Our mission is to cultivate client relations and loyalty through strategic consulting relationships that provide a measurable return for our clients' businesses. We do this through superior customer service, exceptional quality, innovative thinking, and cutting edge analytic techniques.

OUR EXPERTISE

In today's economic environment it is imperative to create distinctive and compelling value in your clients' eyes. Directive Analytics helps clients understand what customers value and how to deliver

Directive Analytics helps clients understand what customers value and how to deliver against those things.

against those things. We employ a number of different methodologies and proprietary techniques to help our customers. Our research armamentarium includes:

- Traditional quantitative research methodologies such as telephone, mall, and mail surveys
- Online quantitative research
- Traditional qualitative research such as focus groups, in-depth interviews, dyads, and triads
- Online qualitative techniques including in-depth interviews, focus groups, and bulletin board discussion groups
- Data mining and direct marketing response modeling

We have developed strategic partnership with leading data collection and technology vendors to bring our clients timely and cost-effective solutions.

THE KEY TO OUR SUCCESS

Our people are the key to our success. Directive Analytics professionals bring together expertise in a broad range of industries including but not limited to consumer packaged goods, telecommunications, financial services, and health care.

Because many of our staff members bring client-side experience, we have a deep understanding of the business issues and hurdles our clients face.

We utilize our collective experience and education to maximize the insight and value we bring to each and every research engagement. We strive to be more than vendors to our clients. We become strategic partners who provide actionable insights and recommendations which can only result from a deep understanding of client businesses.

Research Experience

- Advertising Awareness & Tracking
- Brand Equity
- Category Driver Analysis
- Concept Testing
- Conjoint & Choice Modeling
- Employee Satisfaction
- In-home Usability Testing
- Market Sizing
- Product Messaging
- New Product Development
- Packaging
- Positioning
- Pricing
- Product Optimization
- Satisfaction & Loyalty
- Segmentation
- Website Evaluation
- Website Usability

Industry Experience

- Consumer Products
- Financial Services
- Food Services
- Health Care/Pharmaceutical
- Hospitality/Travel
- Non-Profit
- Media (online & offline)
- Retail
- Technology
- Telecommunications

To learn more about Directive Analytics and our market research offerings, visit our website at www.directiveanalytics.com

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