

Jory Capital Probe Research Inc. News Release

PUBLIC ATTITUDES TOWARDS BOTTLED WATER

Release Date: TBA

This province-wide Omnibus survey was designed and conducted by Probe Research Inc. via telephone interviews conducted between June 8th and June 21st, 2007 among a random and representative sampling of 1,000 Manitoba adults.

With a sample of 1,000 one can say with 95 percent certainty that the results are within +/- 3.1 percentage points of what they would have been if the entire adult population of Manitoba had been interviewed. The margin-of-error is higher within each of the survey's population sub-groups.

Modified random digit dialling was used to ensure that all Manitoba adults would have an equal opportunity to participate in this Probe Research survey. Minor statistical weighting has been applied to this sample to ensure that the age and gender balance correspond with the province as a whole.

Jory Capital sponsors quarterly public opinion research on economic and financial issues of importance to Manitobans. These results are released exclusively to the *Winnipeg Free Press*.

PUBLIC ATTITUDES ON BOTTLED WATER

Winnipeg, Manitoba – Probe Research Inc. surveyed a sampling of Manitoba residents to determine their attitudes and behaviours regarding a range of emerging bottled water-related issues. Specifically, the research examines consumers' views on bottled water in the context of its impact in the areas of health, the environment, public policy and as a lucrative investment opportunity.

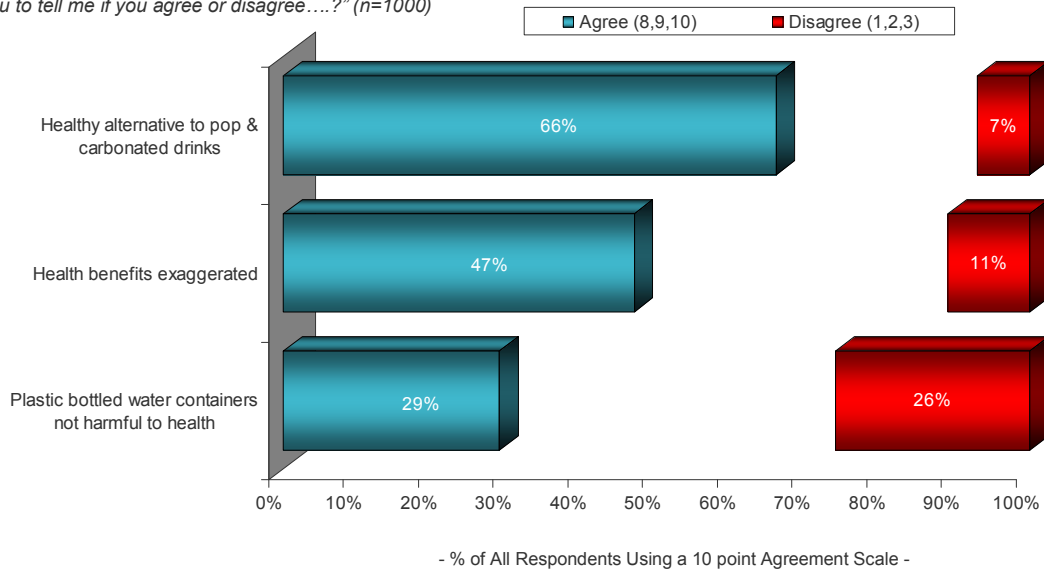
Health Issues:

Respondents were asked to indicate their level of agreement with several statements regarding bottled water consumption as it relates to health issues.



Public Perceptions of Bottled Water - Health Issues -

"There has been some public debate about tap and bottled water lately. I'm going to read you a few statements and I'd like you to tell me if you agree or disagree....?" (n=1000)



Probe Research Inc.

When asked whether or not they felt that bottled water offers consumers a healthy alternative to pop and most other carbonated drinks, fully two-thirds of Manitoba residents (66% including 41% "strongly" agree – a "10" on a 10-point scale) expressed agreement with this statement. Less than one-in-ten Manitobans (7%) were in disagreement while one-quarter (27%) of respondents offered up a more neutral response. Younger respondents were more likely to express agreement with the statement as compared to their

more senior counterparts (72% “agree” among 18-34 years versus 59% “agree” among those aged 55 years and over) as were residents of Northeast Winnipeg (70% versus 59% Core area residents).

Respondents were asked to assess the reliability of claims made by bottled water companies regarding the superior health benefits derived by drinking their products. While one-half of respondents concurred that the alleged health advantages purported by bottled water companies were overstated (47%, including 26% “strongly” agree), only one-in-ten Manitobans expressed disagreement with this statement (11%). Four-in-ten consumers offered a more muted response (42% “neutral”). Seniors were amongst those who expressed the highest level of skepticism regarding the claims of superior health benefits put forth by bottled water manufacturers (60% aged 55 years and over “agree” versus 35% aged 18-34 years).

A third health-related topic area explored in the research pertained to the long-term health effects of drinking water from plastic containers. Consumers were just as likely to indicate they were confident the long-term effects of drinking from a plastic container were *not* harmful, as they were to disagree with this statement. Indeed, while three-in-ten consumers (29%, including 14% “strongly” agree) felt confident that the plastic in bottled water would not be harmful to those who drink from these containers over a long-term period, a similar number (26%, including 11% “strongly” disagree) were concerned about the negative long-term impact of plastics on one’s health. Close to one-half of respondents (45%) took a more neutral stance regarding this issue. There was little variation in responses among sub-populations examined, although residents of the Core region of Winnipeg were more likely than those from the Northwest region to indicate agreement with this health assertion (31% versus 20% respectively).

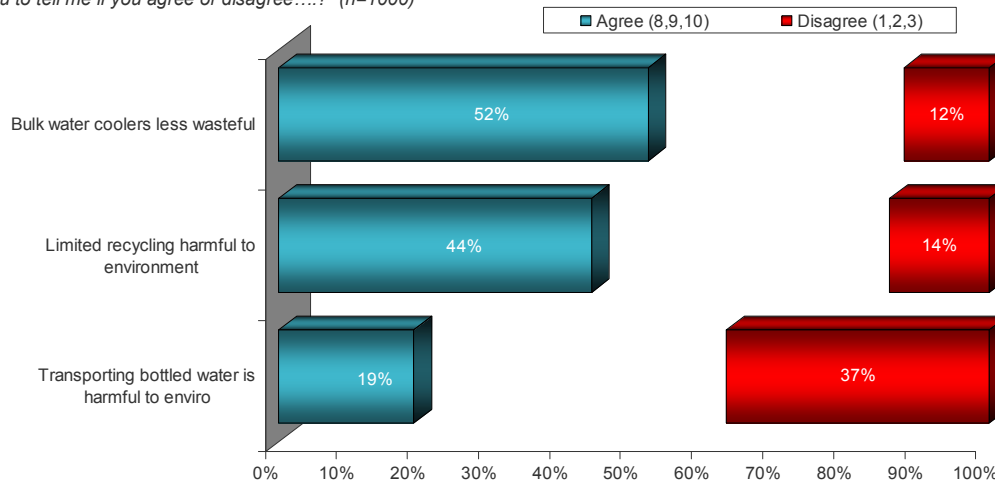
Environmental Issues:

An examination of consumers' views regarding the effects of bottled water consumption levels on the environment reveals that a significant proportion of Manitoba residents have concerns in this area.

P R O B E

Public Perceptions of Bottled Water - Environmental Issues -

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- % of All Respondents Using a 10 point Agreement Scale -

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When asked to consider whether or not drinking water from a bulk water cooler was better than drinking from single serve bottles because it is less wasteful, fully one-half of Manitobans (52%, including 28% "strongly" agree) felt this to be true. One-in-ten residents (12%, including 6% "strongly") disagreed with this statement while one-third of households (36%) expressed a more neutral view on this issue. Middle-aged and younger respondents (57% and 56% respectively) were more likely than their older counterparts to agree that bulk water coolers are less wasteful than individual bottles (43%), as were residents from Northwest Winnipeg (58% versus 47% Southeast region).

The perceived impact of bottled water consumption on the environment was further explored in this research by examining consumers' views on recycling bottled water containers. Respondents were asked to express their level of agreement or disagreement with the statement that "Bottled water from single-serve containers is harmful to the environment because people don't recycle their bottles". Across the province, close to one-half of consumers (44%, including 23% "strongly" agree) felt that bottled water containers were harmful to the environment because of limited recycling efforts. One-in-seven households (14%, including 5% "strongly" disagree) disagreed that single serve containers were

adversely affecting the environment while four-in-ten respondents (42%) offered a neutral response to this question. Respondents from Winnipeg's Core region were far more likely to express agreement that the lack of recycling individual water bottles negatively impacts the environment than were residents from Southeast Winnipeg (54% versus 33%).

A third area of inquiry regarding the environmental impact of bottled water consumption involved an examination of consumers' views on the transport of bottled water. Respondents were asked whether or not they thought that people should avoid drinking bottled water as much as possible because transporting this product is harmful to the environment. One-fifth of Manitobans (19%, including 10% "strongly" agree) felt that bottled water consumption should be curtailed to avoid the negative environmental impact associated with transporting this product while twice as many (37%, including 18% "strongly" disagree) were averse to limiting bottled water consumption on these grounds. Close to one-half of respondents expressed a more muted response (44%) towards this proposition. While one-half of households (47%) with some post-secondary education expressed *disagreement* with the statement, significantly fewer respondents with high school or less education (38%) or post-secondary graduates (33%) disagreed that bottled water consumption should be limited to reduce the negative environmental impact resulting from transporting bottled water. Winnipeg's Core area residents were more likely than their Northeast Winnipeg counterparts to agree with the negative aspects of bottled water transportation (25% versus 14% respectively).

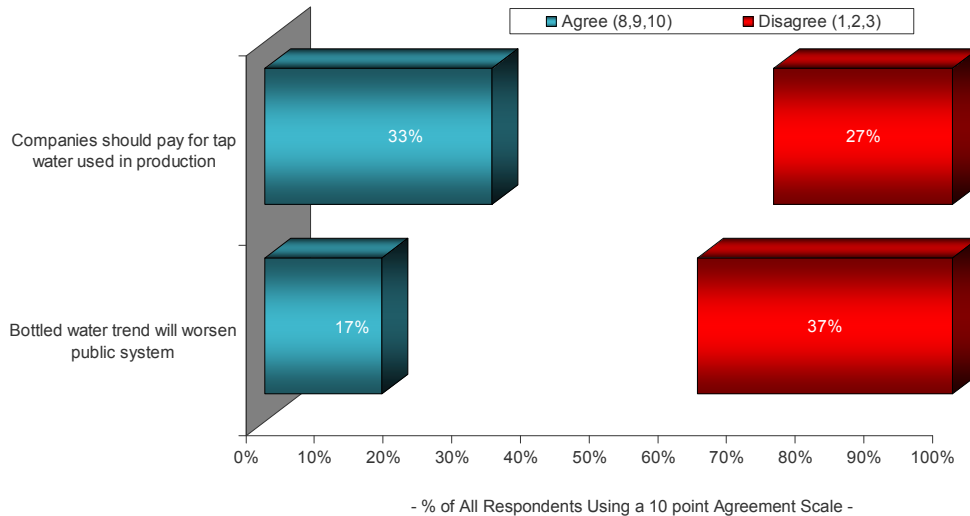
Public Policy:

Probe Research Inc. investigated public views towards policy and pricing issues involving bottled water.



Public Perceptions of Bottled Water - Public Policy Issues -

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When asked whether or not they felt that bottled water companies should be allowed to access public tap water supplies for the production of their products as long as they pay for it, one-third of Manitoba residents (33%, including 16% "strongly") agreed that tap water should be readily accessible to bottled water processors. Close to three-in-ten households were opposed to the notion of bottled water companies tapping into public water supplies (27%, including 17% "strongly") while two-in-five (40%) Manitobans were more neutral in their assessment of the acceptability of such a situation. Men were significantly more amenable towards the usage of public water supplies by bottled water processors as compared to women (40% versus 27% respectively "agree"). Those residing outside of Winnipeg were also slightly more likely to agree that bottled water producers should have access to municipal water supplies for their processing operations as compared to residents of the City of Winnipeg (38% versus 30% "agree" respectively).

When asked whether or not they felt that the trend towards increased bottled water consumption would eventually lead to a deterioration of the public drinking water system, one-in-six Manitobans (17%, including 8% "strongly") agreed that this would inevitably occur. While one-third of respondents (37%, including 18% "strongly") were convinced that such an outcome was highly unlikely, one-half of households (46%) offered up a more neutral view. Levels of *disagreement* were more prevalent among men as compared to women (41% versus 32% "disagree" respectively).

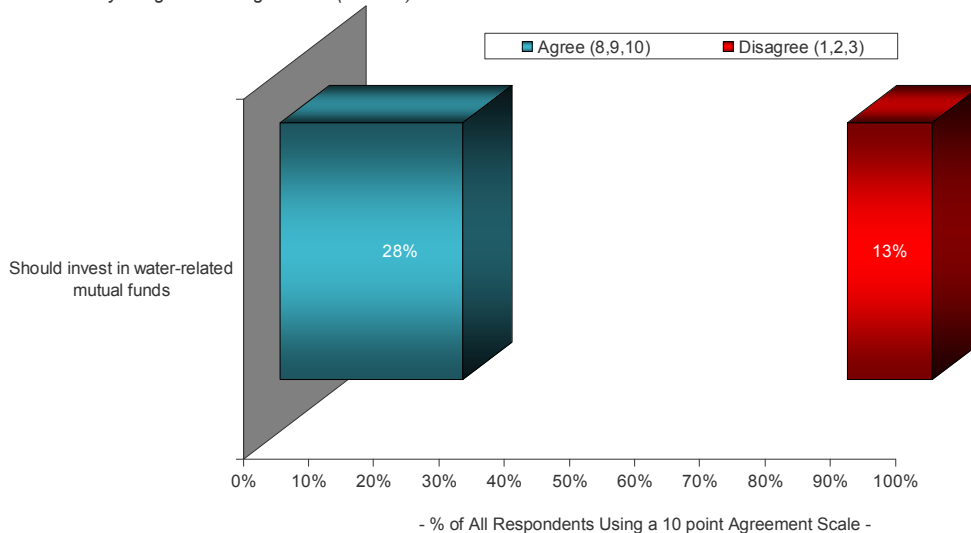
Investment:

The perceived profitability of the water sector as a desirable area of investment was examined in this research.



Public Perceptions of Bottled Water - Investment Issue -

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Manitobans were asked whether or not they felt that investing in a water-related mutual fund would be wise because this sector is profitable and will continue to expand. Three-in-ten respondents (28% including 12% “strongly”) agreed that the water sector is lucrative and poised for expansion while only half as many (13%, including 6% “strongly”) expressed disagreement to this statement. The vast majority of households expressed uncertainty in this regard or offered a more muted response (59%). Individuals with some post-secondary education were significantly more likely to view the water industry as a profitable investment opportunity (38% “agree”) as compared to their counterparts with high school or less (27% “agree”) or those who have graduated from a post-secondary educational institution (25% “agree”).

For more information on this survey, please contact:

<p>Mr. Patrick Cooney Chairman, CEO and President Jory Capital Inc. Suite 2070-360 Main St. Winnipeg, MB R3C 3Z3 Tel: (204) 942-7711 Fax: (204) 942-0047</p>	<p>Mr. Scott MacKay President Probe Research Inc. Suite 850 – 125 Garry St. Winnipeg, MB R3C 3P2 Tel: (204) 926-6567 – Cell: (204) 955-9777 Fax: (204) 926-6566 E-mail: scott@probe-research.com</p>
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