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Canadian Nuclear Association  
Association nucléaire canadienne



# Canadian Nuclear Association

## November Tracking 2005

November 2005



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## Methodology

# How We Did The Research...

- Two telephone surveys were conducted:

	Field dates	N
<b>February 2005</b>		
Canada	Feb 15-20, 2005	1820
Ontario	Feb 15-20, 2005	758
<b>May 2005</b>		
Canada	May 4-5 & 10, 2005	1004
Ontario	May 4-5 & 10, 2005	382
<b>August 2005</b>		
Canada	Aug 23-25, 2005	1000
Ontario	Aug 23-28, 2005	800
<b>November 2005</b>		
Canada	Nov 4-7, 2005	1000
Ontario	Nov 4-10, 2005	1000

# Sampling And The Margin Of Error...

- The results of this study are considered accurate to within +/-3.1 percentage points, 19 times out of 20, for both Canada and Ontario. Sub-sample margins are higher:

	N	+/-%, 95% of the time		N	+/-%, 95% of the time
Men	533	4.2	GTA	414	4.8
Women	467	4.5	Central	190	7.1
			Eastern	141	8.3
Young	226	6.5	Southwest	155	7.9
Middle-age	445	4.7	Northern	100	9.8
Older	313	5.5			
Lower income	157	7.8			
Middle income	246	6.3			
Upper income	475	4.5			



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# Support For Nuclear Energy In Ontario



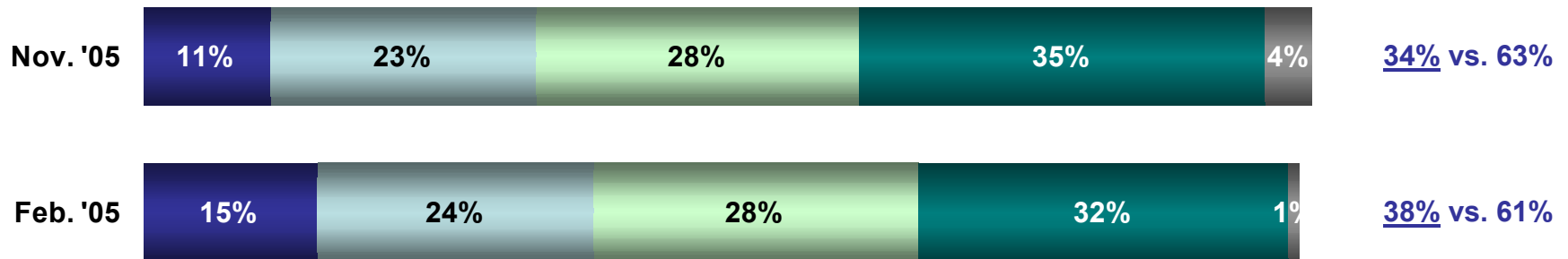
# 63% In Ontario (+2 Since February '05) Don't Believe The Province Have Enough Electricity Meet Their Future Needs And 60% (No Change) Say Conservation Won't Offset Growing Demand...

% of adults in Ontario

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose ■ Dk/Ref

Total Agree vs. Disagree

**We have enough electricity in my province to meet our future needs**



**Conservation efforts by consumers will not offset the growing demand for energy**



Question: 1. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that: 1). We have enough electricity in my province to meet our future needs, 2) Conservation efforts by consumers will not offset the growing demand for energy ?Unweighted Base: Nov 05 N=1000, Feb 05 N=758



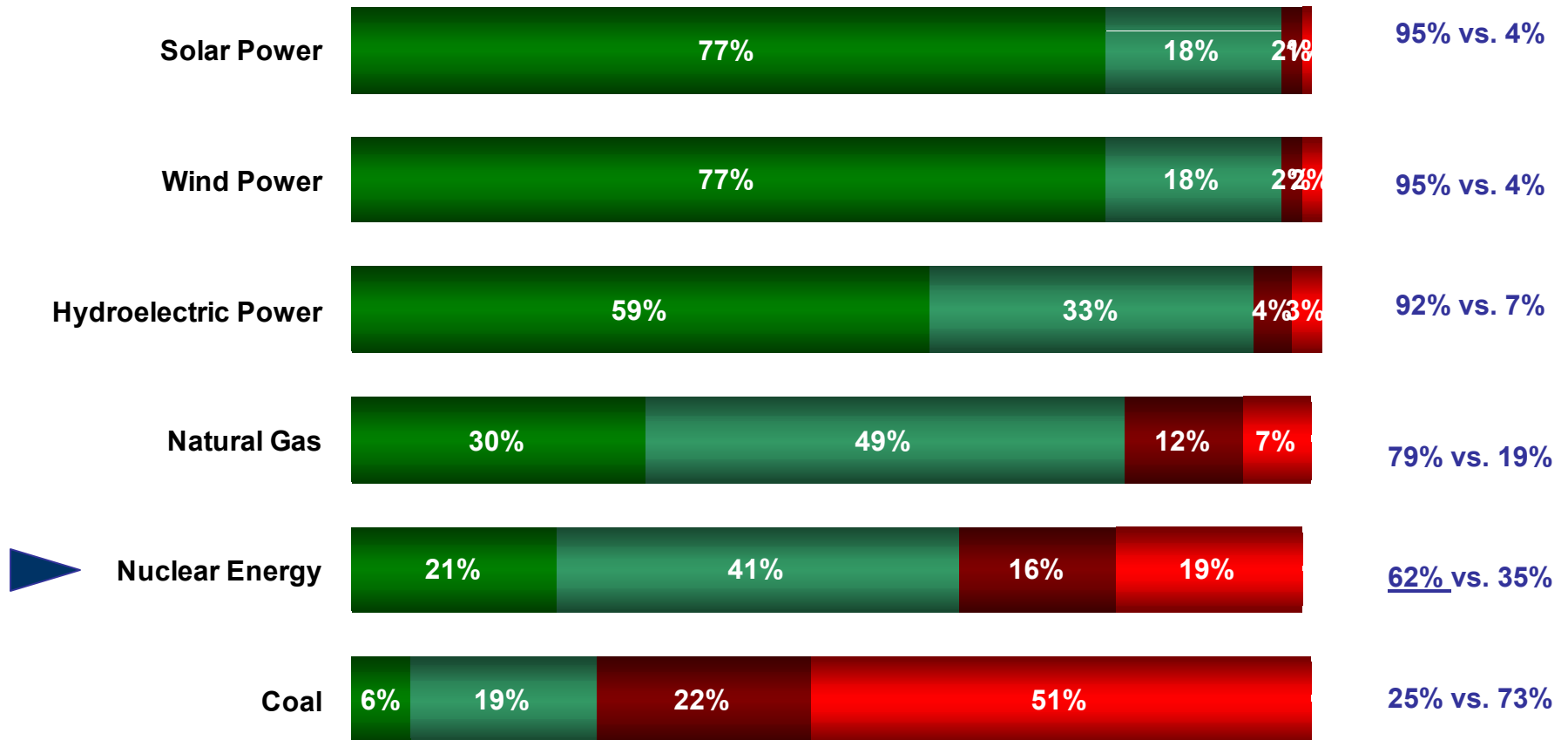


# 62% of Ontarians (Up From 58% In August) Currently Support Nuclear Energy...

% of adults in Ontario

■ Strongly Support ■ Somewhat Support ■ Somewhat Oppose ■ Strongly Oppose

Total Support vs. Oppose



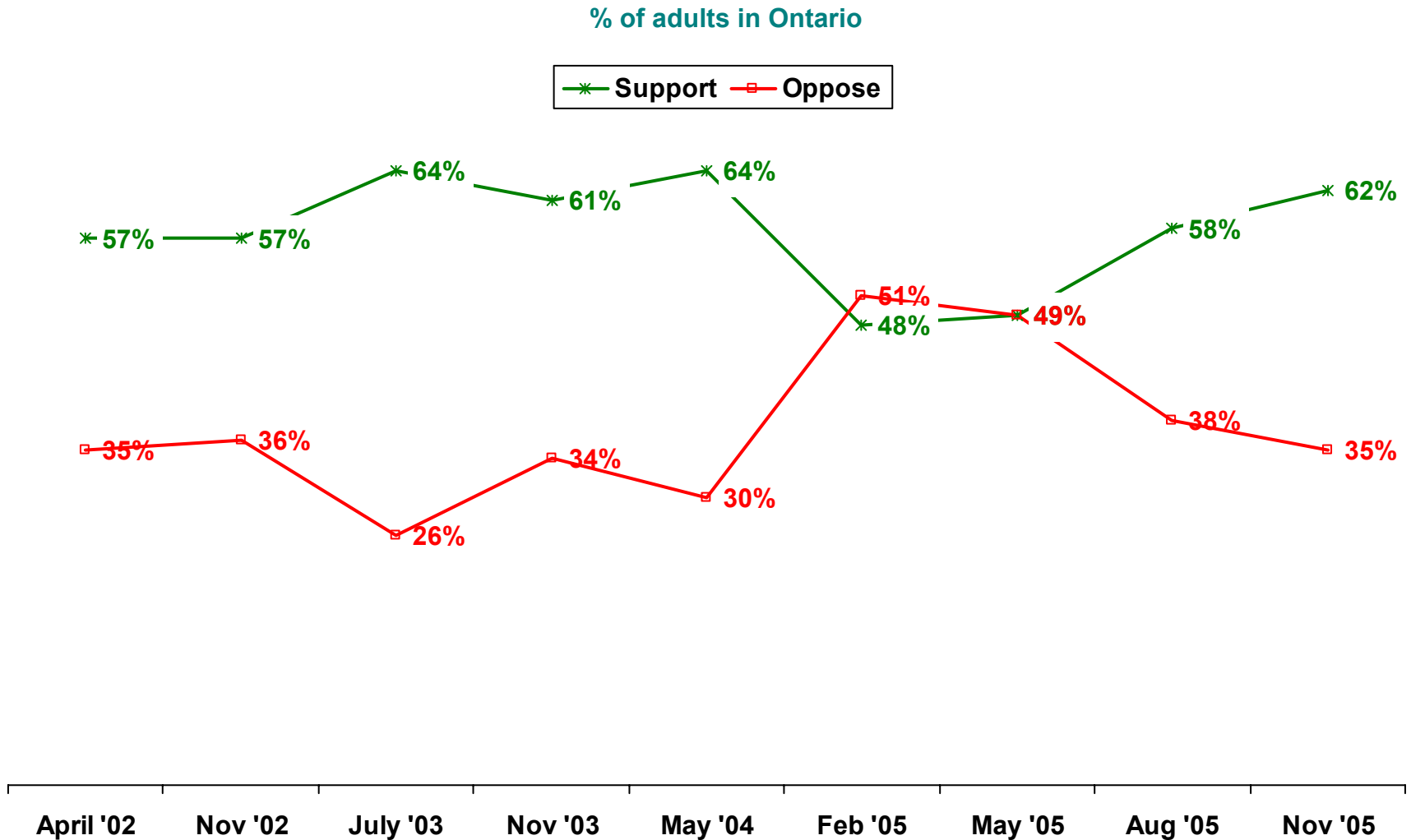
Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Weighted Base: Nov 05 N=1000





# With Support Trending In the Right Direction For The Industry...



Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Weighted Base: Nov 05 N=1000

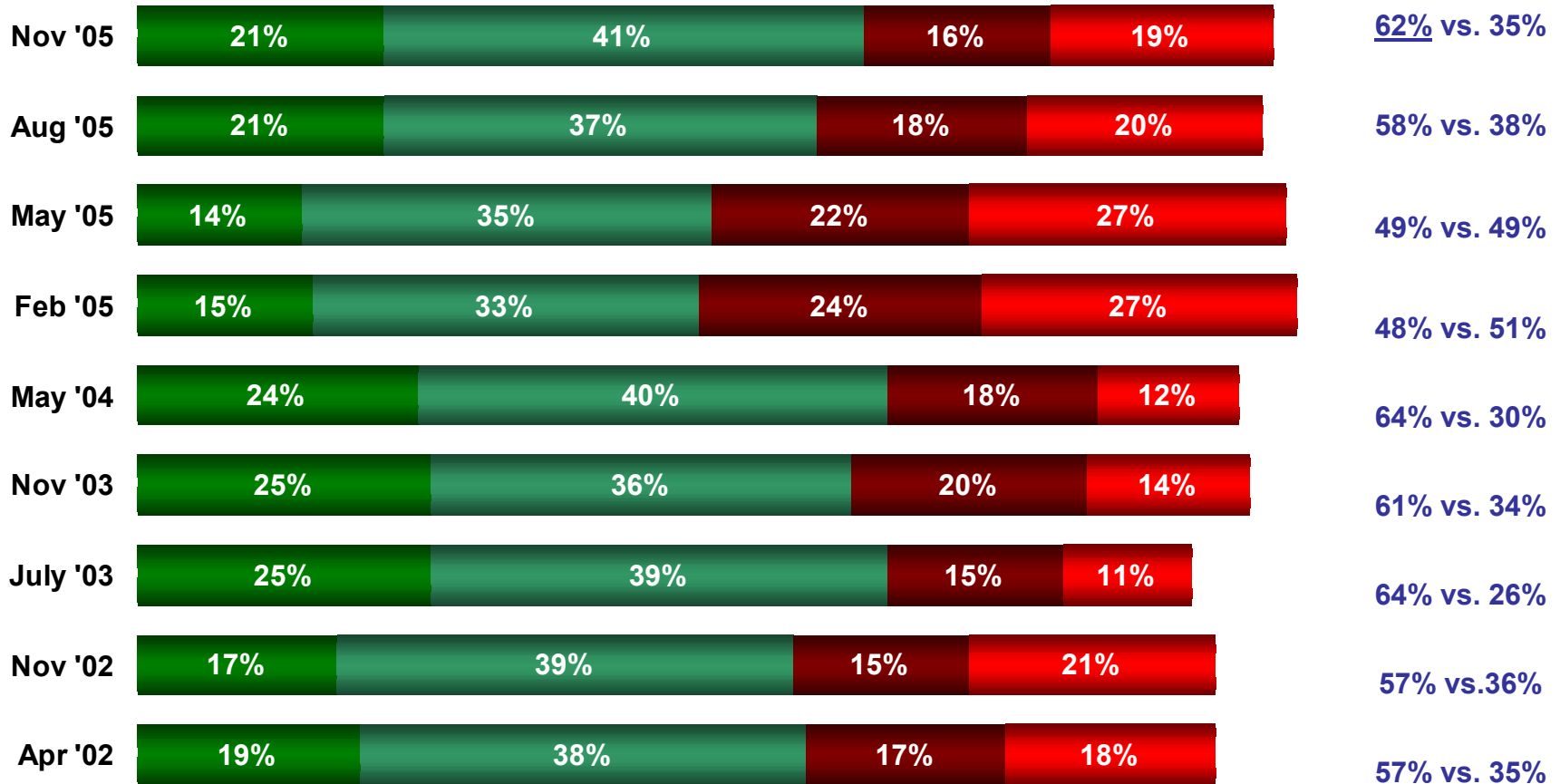




# The “Somewhat Oppose” Are Moving To “Somewhat Support” ...

% of adults in Ontario

■ Strongly Support ■ Somewhat Support ■ Somewhat Oppose ■ Strongly Oppose



Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Weighted Base: Nov 05 N=1000





# Support Has Risen Among Men, Older Adults, Lower Income, And SW & Northern Regions (Stable Among Other Demos)...

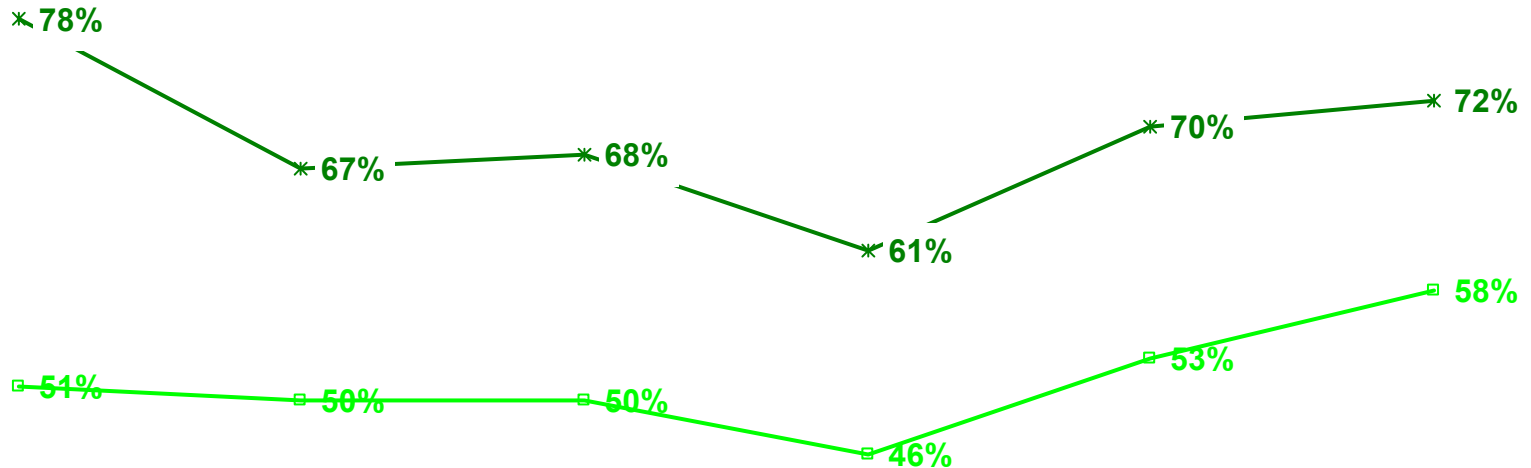
	% Support Nuclear Feb. '05	% Support Nuclear Aug. '05	% Support Nuclear Nov. '05	Change		% Support Nuclear Feb. '05	% Support Nuclear Aug. '05	% Support Nuclear Nov. '05	Change
Men	57%	65%	<b>71%</b>	↑ <b>+6</b>	GTA	51%	62%	63%	+1
Women	40%	52%	54%	+2	Central	48%	62%	63%	+1
					Eastern	50%	63%	60%	-3
Young	43%	56%	55%	-1	Southwest	46%	48%	<b>64%</b>	↑ <b>+16</b>
Middle-age	49%	61%	63%	+2	Northern	33%	42%	<b>51%</b>	↑ <b>+9</b>
Older	52%	58%	<b>68%</b>	↑ <b>+10</b>					
Low income	37%	42%	<b>49%</b>	↑ <b>+7</b>					
Mid income	46%	59%	63%	+4					
Upper income	55%	63%	67%	+4					



# And Ontario Support For **Refurbishing** (72%) And **New Builds** (58%) Continue To Trend Upwards...

% of adults in Ontario

—\*— Support for Upgrading/Refurbishing —□— Support for New Build



Nov '03

May '04

Feb '05

May '05

Aug. '05

Nov '05

Question 4: Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Nov 05 N=1000

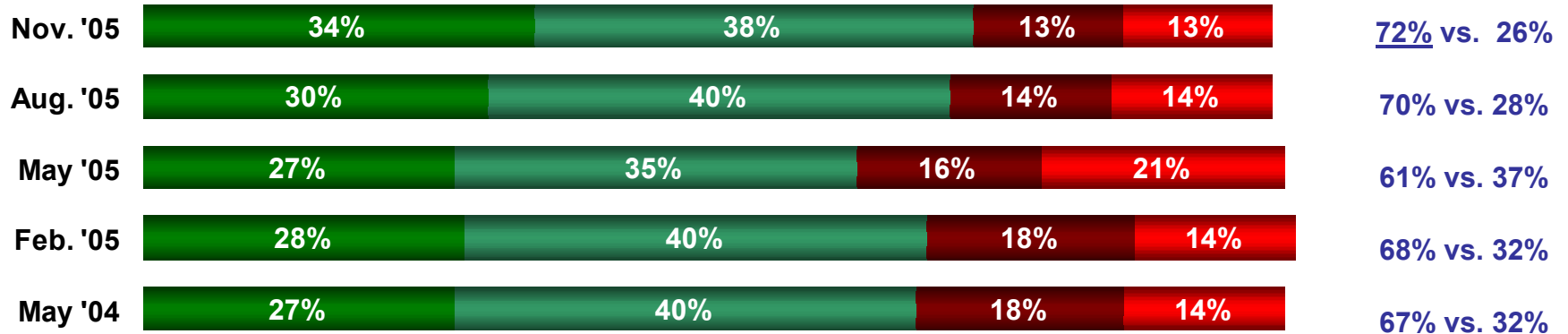


# With Intensity On Both Rising...

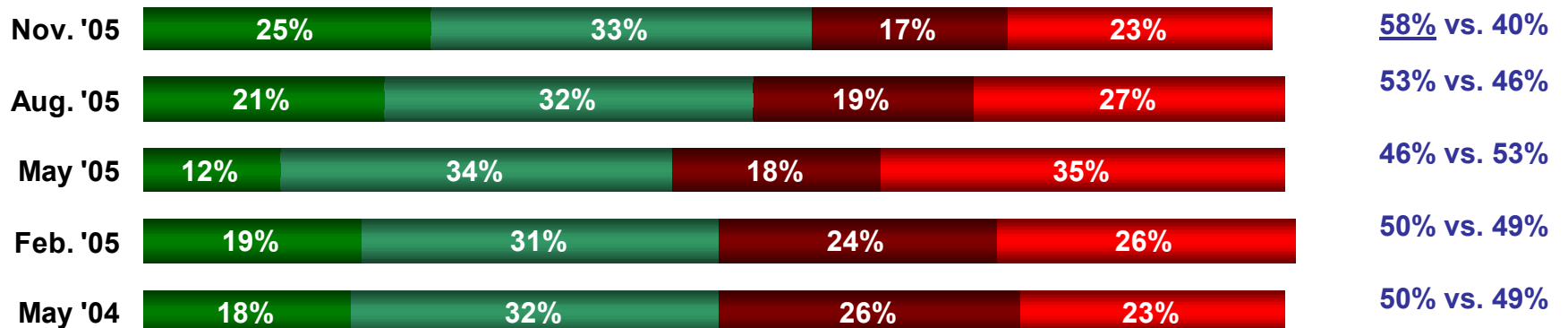
% of adults in Ontario

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose

## Upgrading and refurbishing existing nuclear power plants



## Building new nuclear power plants



Question 4: Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Nov 05 N=1000





# Support For **Refurbishing** Up Among Men, Upper Income, And The Southwest Region...

	% Support Refurb Feb. '05	% Support Refurb Aug. '05	% Support Refurb Nov. '05	Change		% Support Refurb Feb. '05	% Support Refurb Aug. '05	% Support Refurb Nov. '05	Change
Men	68%	71%	<b>75%</b>	↑ <b>+4</b>	GTA	67%	70%	72%	+2
Women	67%	69%	69%	-	Central	70%	76%	71%	-5
					Eastern	72%	73%	75%	+2
Young	69%	73%	69%	-4	Southwest	66%	68%	<b>76%</b>	↑ <b>+8</b>
Middle-age	69%	68%	75%	+7	Northern	63%	59%	59%	-
Older	66%	71%	72%	+1					
Low income	66%	69%	66%	-3					
Mid income	64%	73%	73%	-					
Upper income	72%	67%	<b>75%</b>	↑ <b>+8</b>					





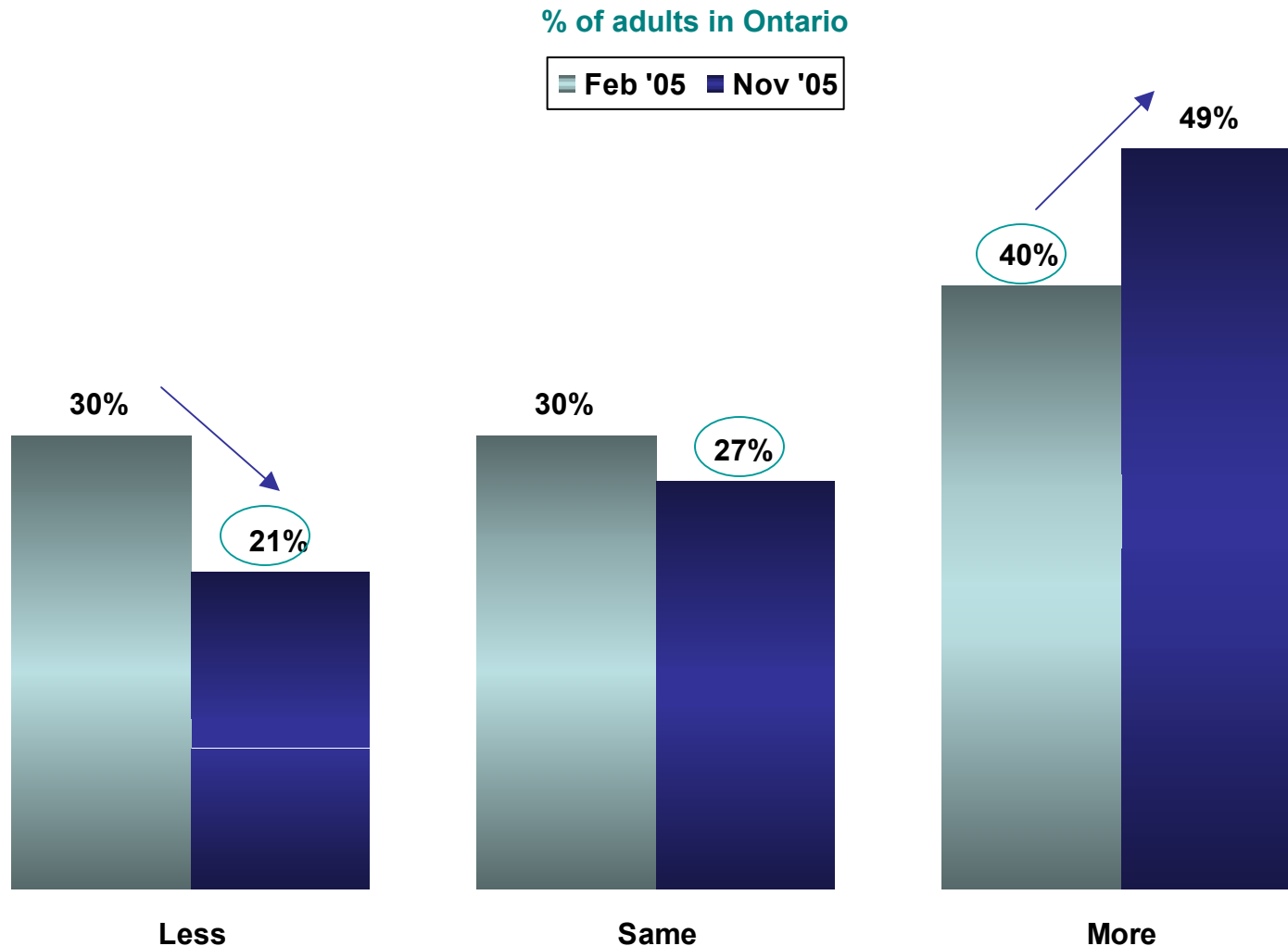
# And, For **New Build**, Support Is Up Among Men, Middle-Aged & Older, Low Income & Upper Income, And The Northern Region...

	% Support New Build Feb. '05	% Support New Build Aug. '05	% Support New Build Nov. '05	Change		% Support New Build Feb. '05	% Support New Build Aug. '05	% Support New Build Nov. '05	Change
Men	56%	56%	<b>67%</b>	↑ <b>+11</b>	GTA	51%	54%	58%	+4
Women	44%	50%	51%	+1	Central	50%	55%	60%	+5
					Eastern	61%	56%	62%	+6
Young	45%	53%	52%	-1	Southwest	48%	55%	59%	+4
Middle-age	51%	51%	<b>58%</b>	↑ <b>+7</b>	Northern	32%	32%	<b>52%</b>	↑ <b>+20</b>
Older	54%	57%	<b>66%</b>	↑ <b>+9</b>					
Low income	46%	46%	<b>53%</b>	↑ <b>+7</b>					
Mid income	45%	57%	61%	+4					
Upper income	55%	53%	<b>60%</b>	↑ <b>+7</b>					





# Today, More Ontarians Want Nuclear To Play An Increased Role Over The Next Few Decades—Up 9 Points Since February...



Question: 3. Today, the largest fuel sources for electricity production in Canada are hydro, coal, and nuclear. Over the next 25 years, the demand for electricity on average is expected to increase by almost 40%. What role do you believe that nuclear power should play in Canada for the next few decades...more than it is today, less than it is today, or the same as today?

Unweighted Base: Nov 05 N=1000, Feb 05 N=758



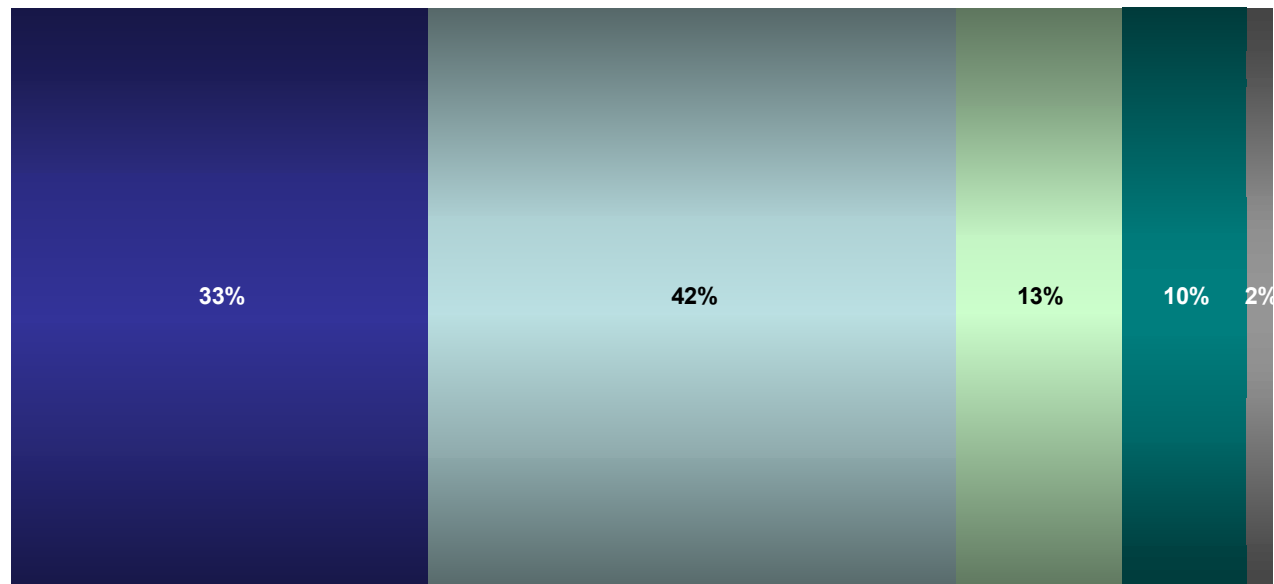


# And, 75% Agree That Nuclear Energy Will Always Be An Important Part Of Our Future Energy Mix...

% of adults in Ontario

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ DK

Nuclear energy will always be an important part of our future energy mix



Question: 5. I am now going to read you a number of statements about nuclear energy and I'd like you to tell me whether or not you agree with each. Would you say that you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Unweighted Base: N=1000





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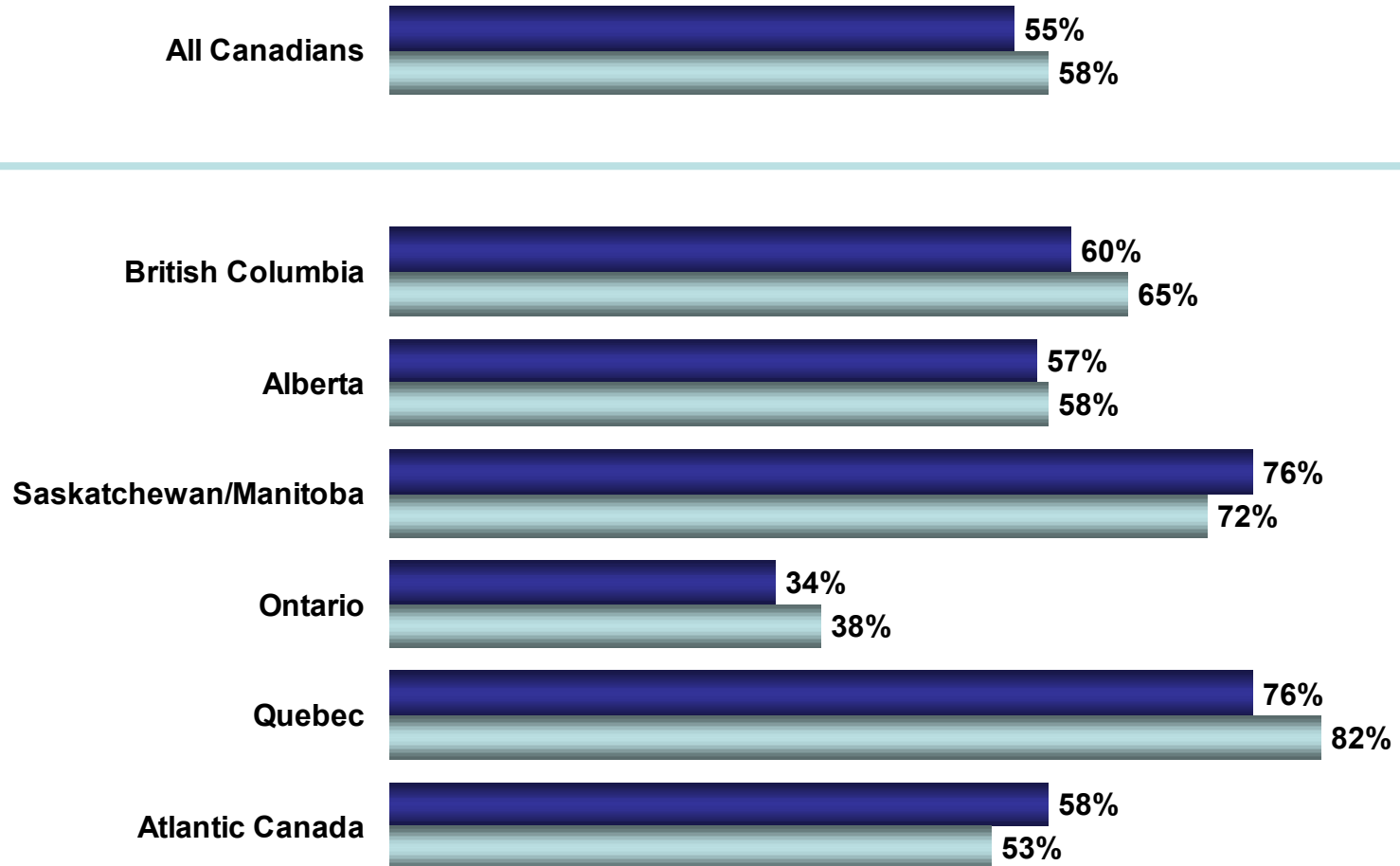
# National Tracking



# Among All Canadians, Just Over Half (55%) Think There Is Enough Electricity In Their Province To Meet Future Needs...Ontario Is Clearly Distinct...

% of Canadian adults who agree...

■ Nov '05 ■ Feb '05



Question: 1. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that: 1). We have enough electricity in my province to meet our future needs, 2) Conservation efforts by consumers will not offset the growing demand for energy ?

Unweighted Base: Nov 05 N=1000 Canada/N=1000 Ontario, Feb 05 N=1820

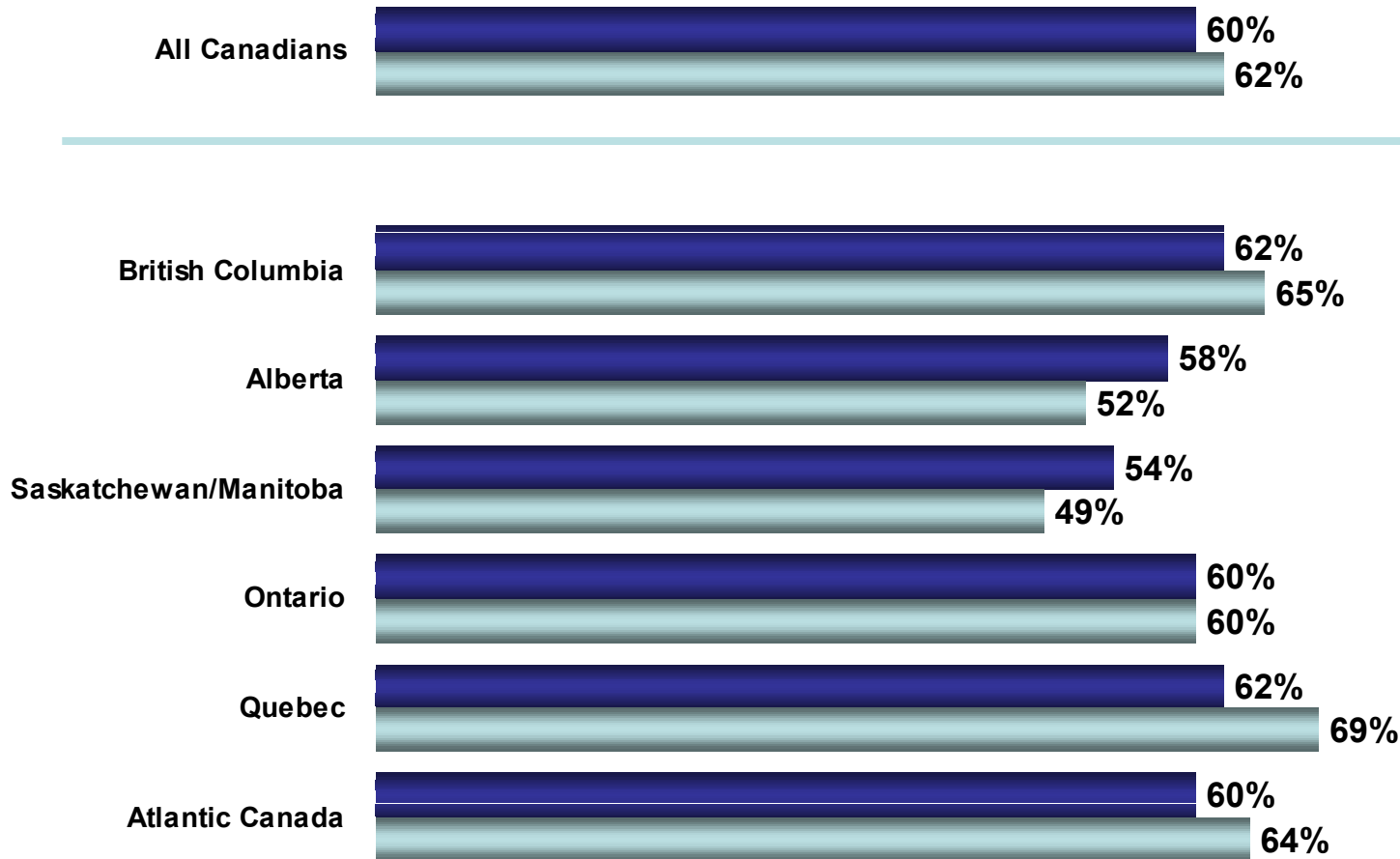




# And Most (60%) Continue To Believe That Conservation Efforts Won't Offset Potential Future Demand...

% of Canadian adults who agree...

■ Nov '05 ■ Feb '05



Question: 1. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that: 1) We have enough electricity in my province to meet our future needs, 2) Conservation efforts by consumers will not offset the growing demand for energy ?

Unweighted Base: Nov 05 N=1000 Canada/N=1000 Ontario. Feb 05 N=1820



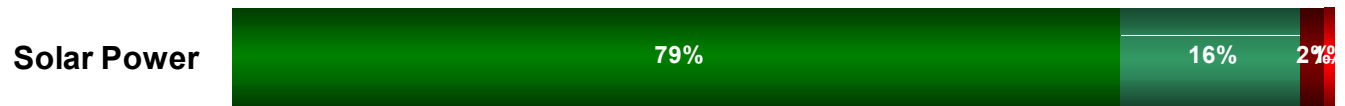


# 41% Of All Canadians Currently Support Nuclear Energy (Up From 38% In August) ...

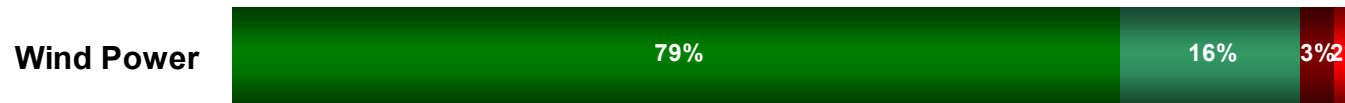
% of Canadian adults

■ Strongly Support ■ Somewhat Support ■ Somewhat Oppose ■ Strongly Oppose

Total Support vs. Oppose



95% vs. 4%



95% vs. 5%



92% vs. 7%



73% vs. 25%



41% vs. 56%



26% vs. 72%

Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Base: Nov 05 N=1000

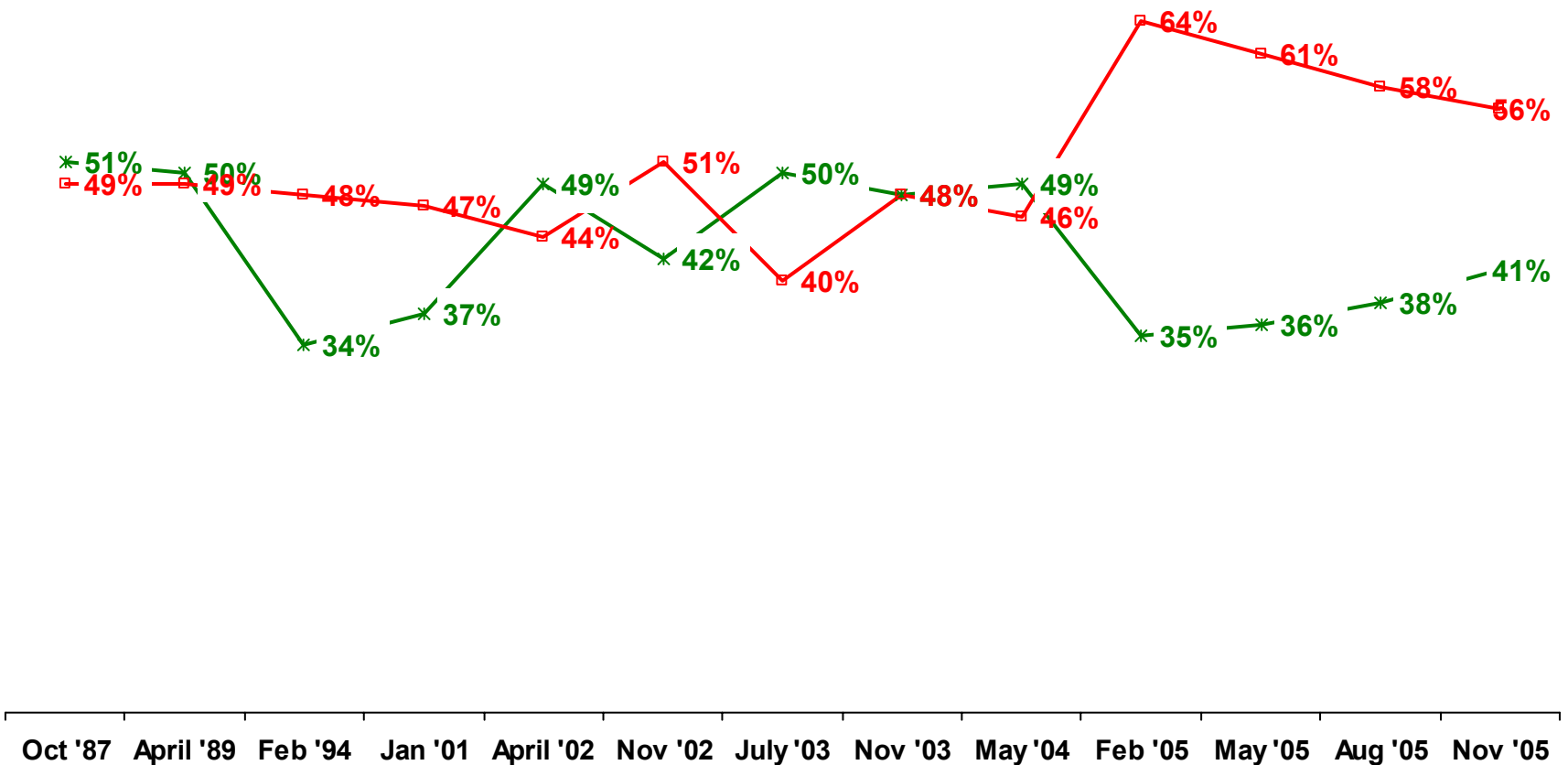




# And Apparently Trending Overall In The Right Direction...

% of Canadian adults

—\*— Support —□— Oppose

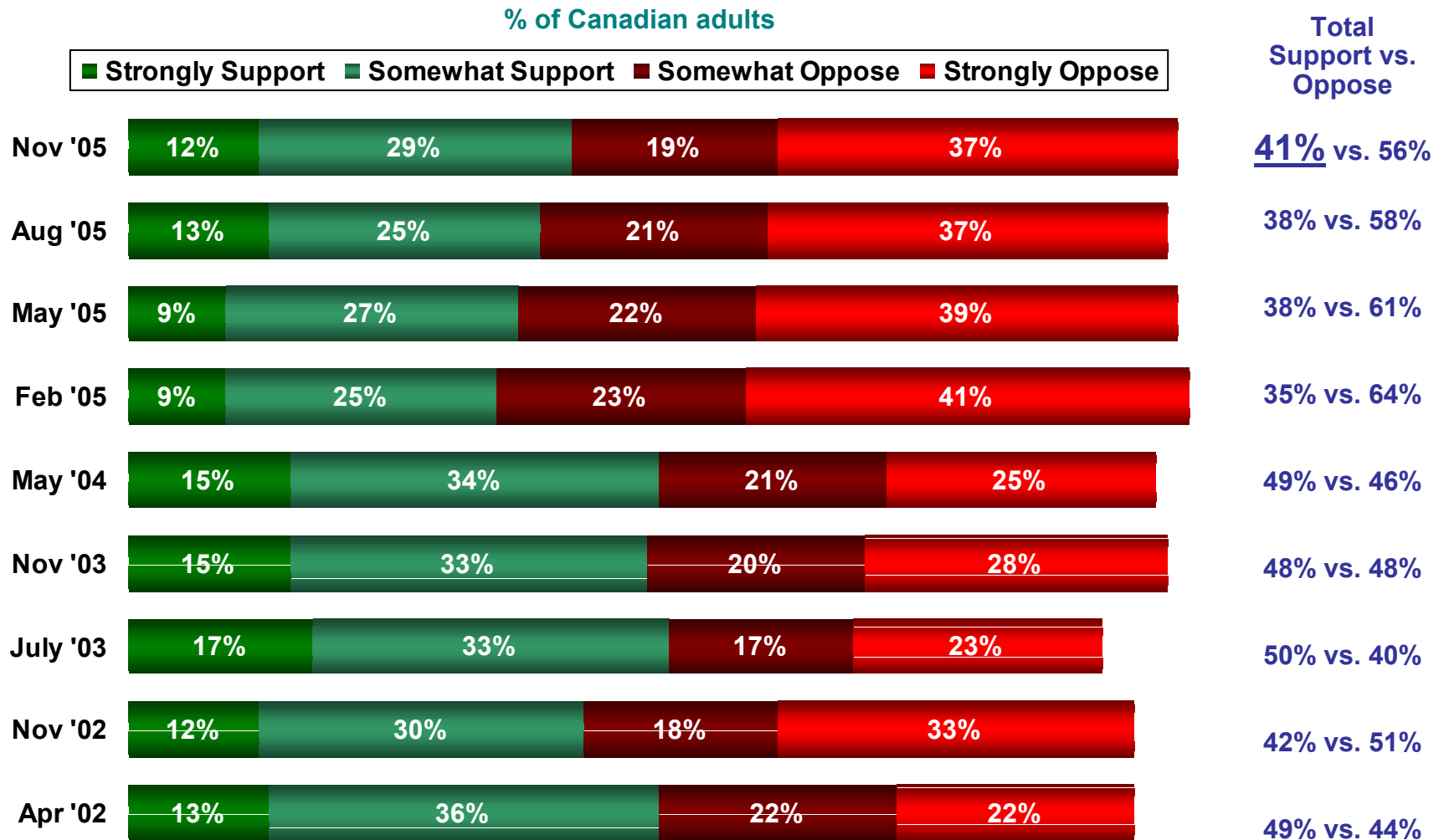


Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Base: Nov 05 N=1000



# With Overall Strength Of Support/Opposition Relatively Steady...



Question: 2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.

Base: Nov 05 N=1000





# But It Continues To Be Driven By Slices Of The Country: Increases Among Women, Middle-Aged, Albertans, And Ontarians...

	% Support Nuclear Feb. '05	% Support Nuclear Aug. '05	% Support Nuclear Nov. '05	Change		% Support Nuclear Feb. '05	% Support Nuclear Aug. '05	% Support Nuclear Nov. '05	Change
Men	43%	43%	46%	+3	Low Income	25%	31%	30%	-1
Women	27%	33%	<b>38%</b>	↑ <b>+5</b>	Mid Income	34%	38%	39%	+1
					Upper Income	41%	45%	48%	+3
Young	31%	36%	39%	+3					
Middle-age	35%	37%	<b>43%</b>	↑ <b>+6</b>	BC	23%	30%	26%	-4
Older	38%	41%	42%	+1	Alberta	41%	30%	<b>41%</b>	↑ <b>+11</b>
					Sask/Manitoba	40%	36%	35%	-1
					Ontario	48%	58%	<b>62%</b>	↑ <b>+5</b>
					Quebec	17%	17%	18%	+1
					Atlantic	36%	37%	36%	-1

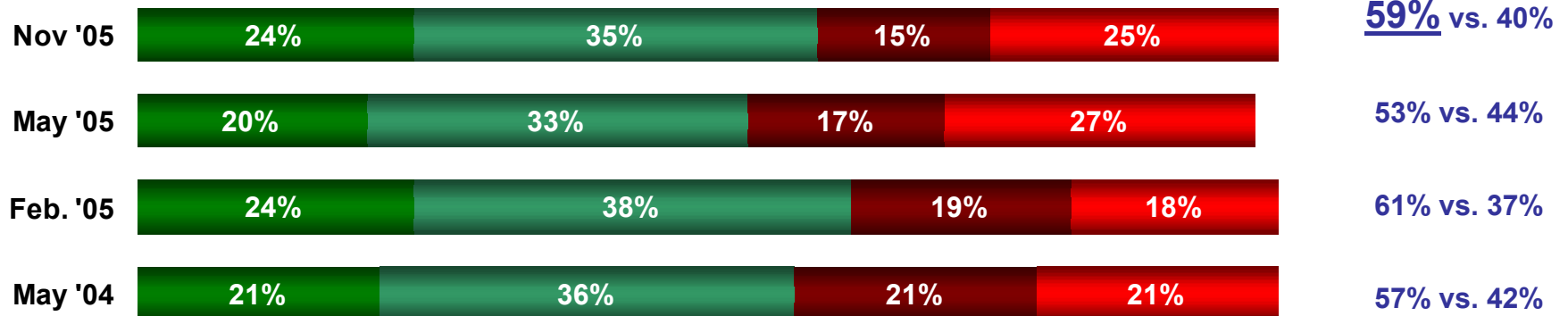


# And While Canadians Continue To Support Refurbishing More Than Building New, Support Is Up For Both...

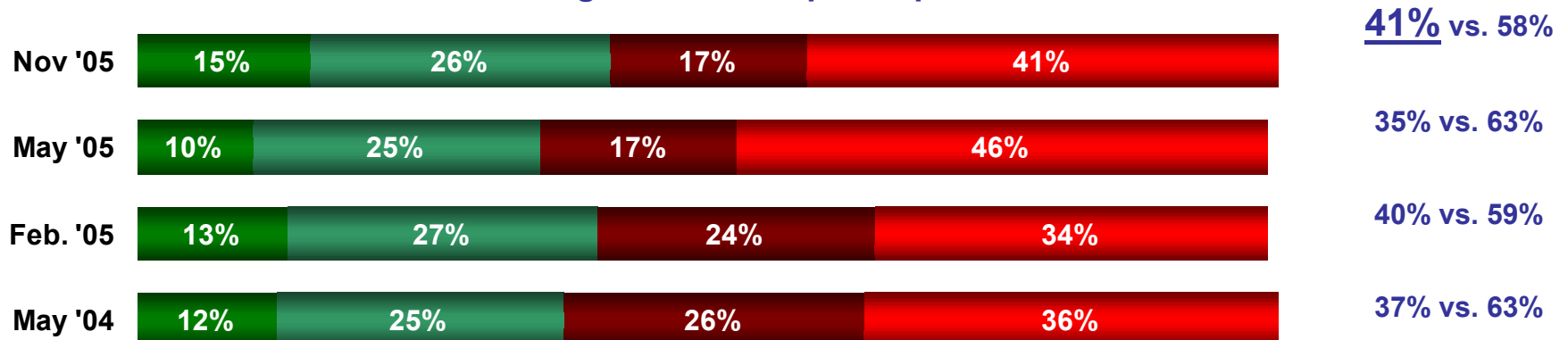
% of Canadian adults

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose

## Upgrading and refurbishing existing nuclear power plants



## Building new nuclear power plants



Question 4: Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Nov 05 N=1000



# But Support For Refurbishing Is Down In Alberta, Saskatchewan/Manitoba And Quebec...

	% Support Refurb Feb. '05	% Support Refurb Nov. '05	Change		% Support Refurb Feb. '05	% Support Refurb Nov. '05	Change
Men	63%	61%	-2	Low Income	60%	55%	-5
Women	60%	57%	-3	Mid Income	60%	57%	-3
				Upper Income	65%	63%	-2
Young	62%	61%	-1				
Middle-age	62%	58%	-4	BC	51%	49%	-2
Older	60%	58%	-2	Alberta	66%	<b>58%</b>	↓ -8
				Sask/Manitoba	66%	<b>57%</b>	↓ -9
				Ontario	68%	72%	+4
				Quebec	55%	<b>43%</b>	↓ -12
				Atlantic	60%	55%	-5



# And, Support For New Build Is Mixed: Down In Alberta, Quebec, And The Atlantic...Up In Ontario And BC

	% Support New Build Feb. '05	% Support New Build Nov. '05	Change		% Support New Build Feb. '05	% Support New Build Nov. '05	Change
Men	46%	47%	+1	Low Income	38%	37%	-1
Women	35%	36%	+1	Mid Income	36%	40%	+4
				Upper Income	45%	45%	-
Young	36%	41%	+5				
Middle-age	42%	41%	-1	BC	24%	<b>32%</b>	↑ <b>+8</b>
Older	42%	42%	-	Alberta	49%	<b>40%</b>	↓ <b>-9</b>
				Sask/Manitoba	48%	<b>43%</b>	<b>-5</b>
				Ontario	50%	<b>58%</b>	↑ <b>+8</b>
				Quebec	26%	<b>20%</b>	↓ <b>-6</b>
				Atlantic	44%	<b>33%</b>	↓ <b>-11</b>





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# For more information

**For more information about the study, please contact one of our project team members:**

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