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Canadian Nuclear Association
Association nucléaire canadienne



Canadian Nuclear Association

April 2006 Ontario Tracking
January 2006 National Tracking



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Methodology

How We Did The Research...

- The latest telephone survey was conducted:

	Field dates	Sample Size
February 2005		
Canada	Feb 15-20, 2005	1820
Ontario	Feb 15-20, 2005	758
May 2005		
Canada	May 4-5 & 10, 2005	1004
Ontario	May 4-5 & 10, 2005	382
August 2005		
Canada	Aug 23-25, 2005	1000
Ontario	Aug 23-28, 2005	800
November 2005		
Canada	Nov 4-7, 2005	1000
Ontario	Nov 4-10, 2005	1000
January 2006		
Canada	Jan 17-19, 2006	1000
Ontario	Jan 17-21 & 24-26, 2006	1001
April 2006		
Ontario	April 7-9, 2006	800



Sampling And The Margin Of Error...

- The results of the Ontario study are considered accurate to within +/-3.5 percentage points, 19 times out of 20, for Ontario. Sub-sample margins are higher:

	N	+/-%, 95% of the time		N	+/-%, 95% of the time
Men	400	4.9	GTA	320	5.5
Women	400	4.9	Central	85	10.6
			Eastern	135	8.4
Young	161	7.7	Southwest	204	6.9
Middle-age	347	5.3	Northern	56	13.1
Older	273	5.9			
Lower income	119	9.0			
Middle income	221	6.7			
Upper income	387	5.0			



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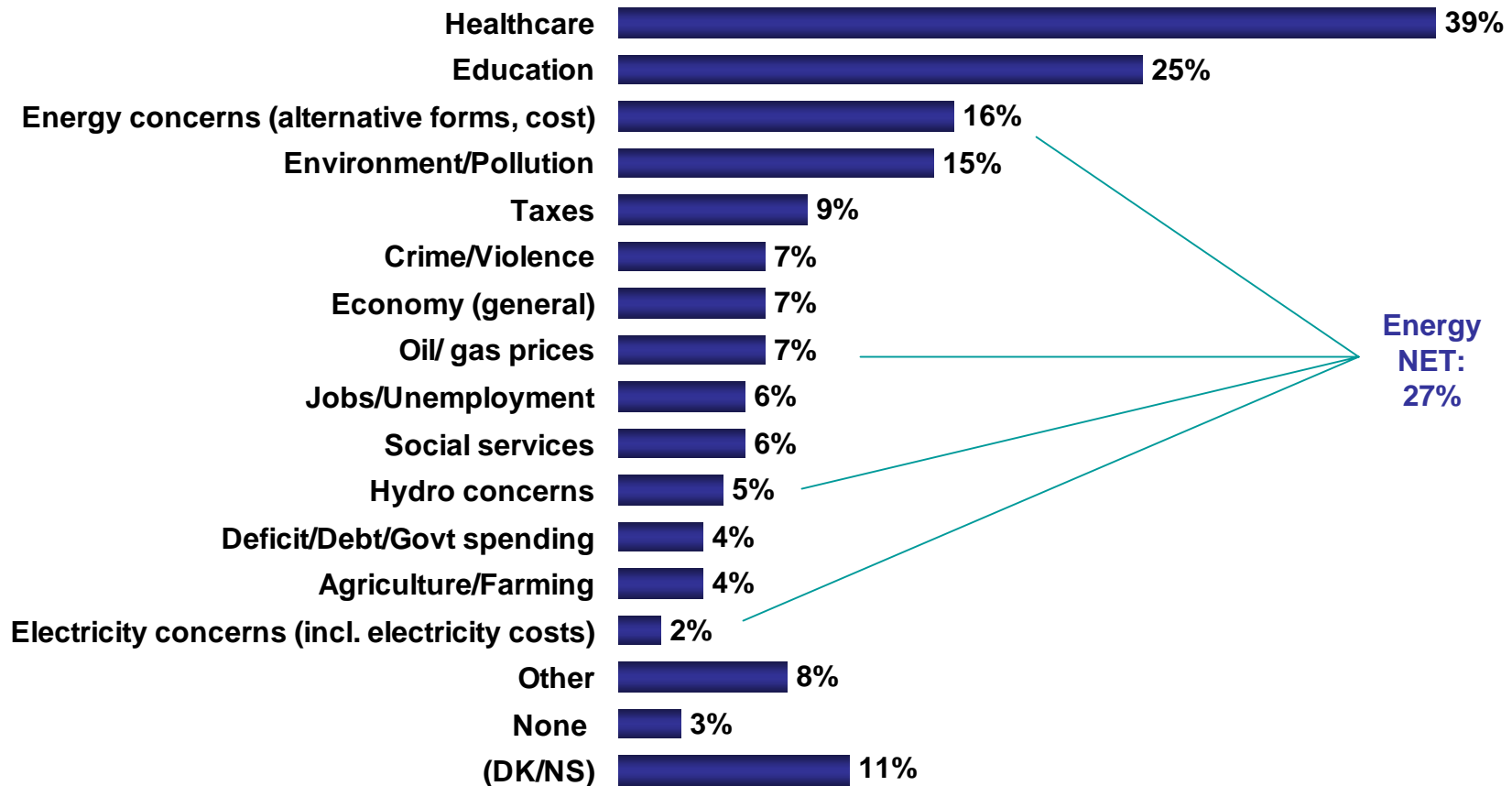
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Energy As An Issue In Ontario

Energy Is A “Net” Top Of Mind Issue For 27% Of Ontarians...

% of adults in Ontario, TOTAL Mentions





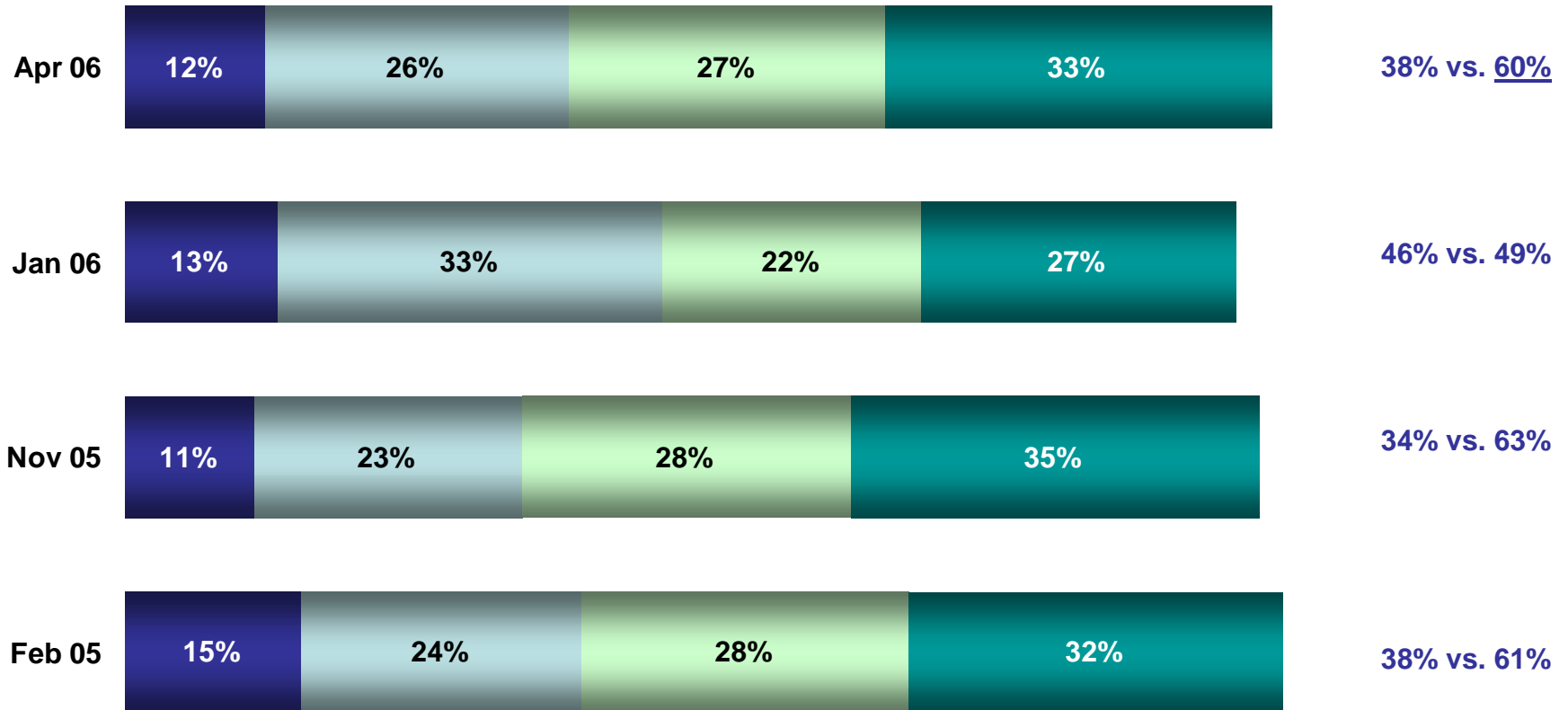
A Majority (60%) Of Ontarians *Don't* Think We Have Enough Electricity In The Province To Meet Future Needs, Back To 2005 Levels...

% of adults in Ontario

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

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

Total Agree vs. Disagree



Question 3: 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: Apr 06 N=800 Jan 06 N=1001 Nov 05 N=1000





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Support For Nuclear Energy In Ontario



Today Six In Ten Ontarians Support Nuclear Energy In Comparison To Other Types of Energy Production...

% of adults in Ontario

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

Total Support vs. Oppose



94% vs. 5%



93% vs. 6%



91% vs. 8%



78% vs. 22%



60% vs. 37%

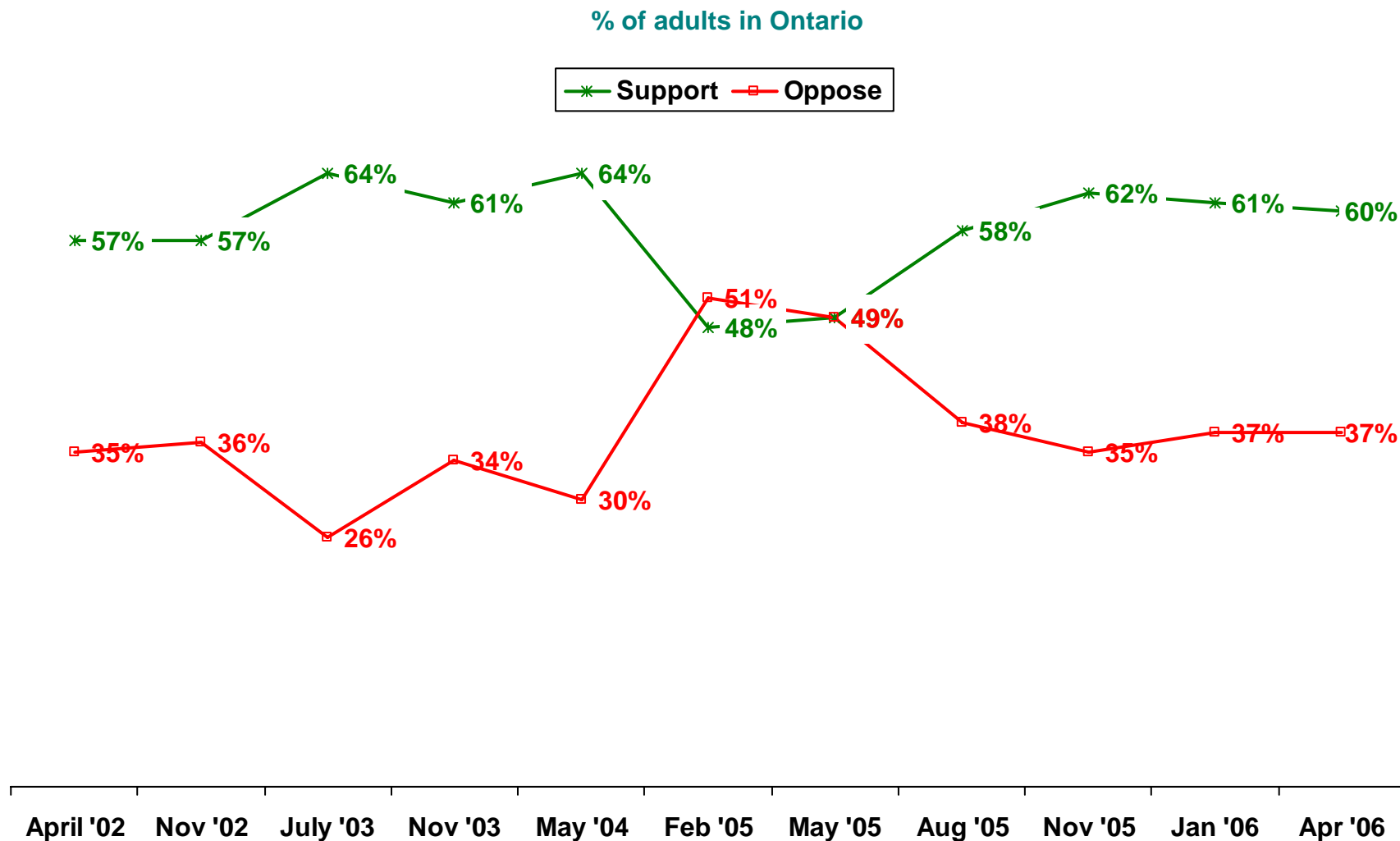


27% vs. 70%

Question 4: 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: Apr 06 N=800



Virtually Unchanged From January Polling...60% In Favour, 37% Against...



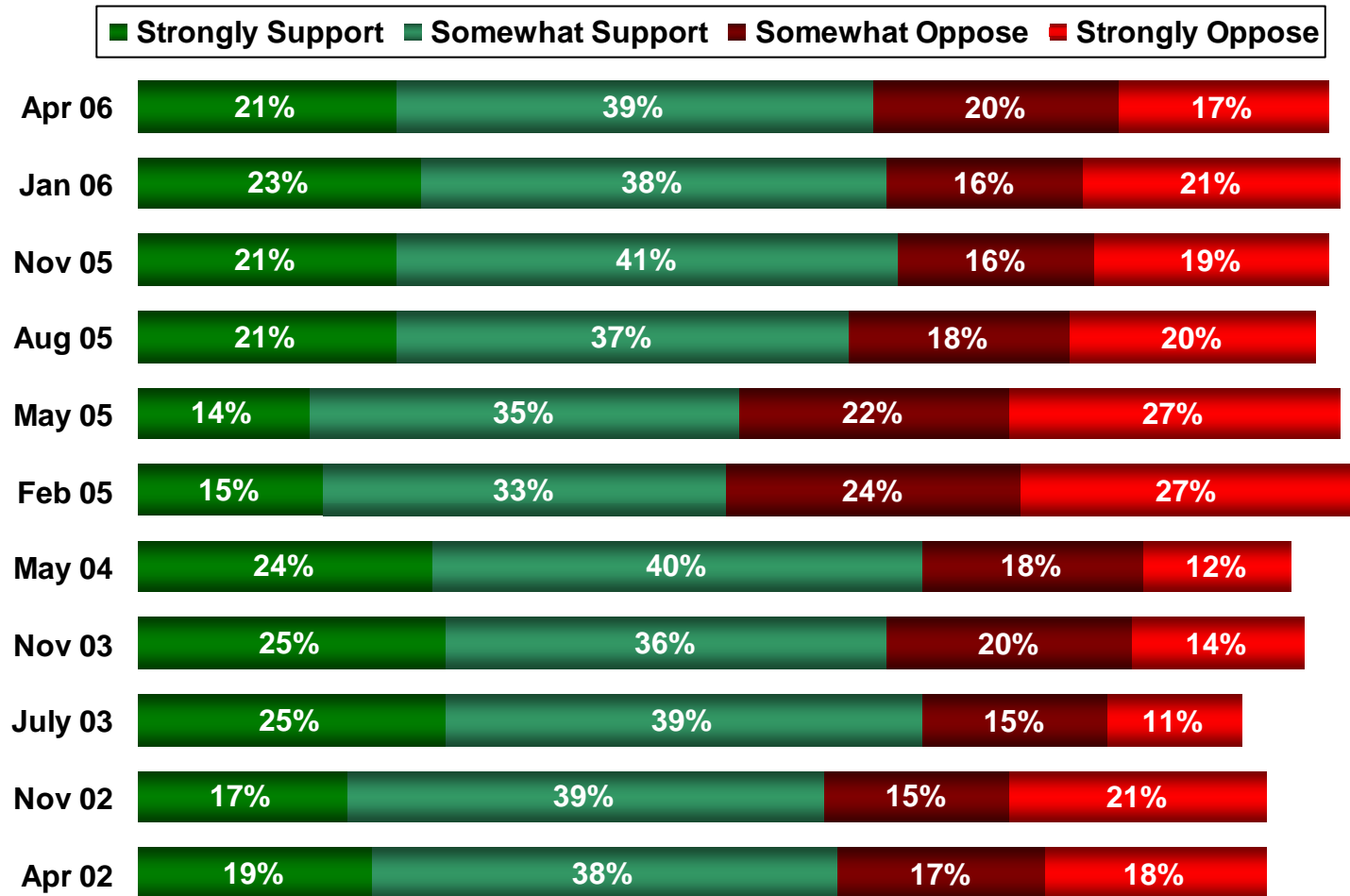
Question 4: I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity.
 Weighted Base: Apr 06 N=800 Jan 06 N=1001 Nov 05 N=1000





Intensity of Support Is Stable With Some Softening Among Those “Strongly Opposed” (- 4 Points Since January '06)...

% of adults in Ontario



Question 4: 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: J Apr 06 N=800 an 06 N=1001 Nov 05 N=1000





Looking Back To Baseline Levels In 2005 (Pre-Advertising), Support Is Up Among All Demographics, And Regions ...

	Baseline Support Nuclear Feb '05	Support Nuclear Apr '06	Change		Baseline Support Nuclear Feb '05	Support Nuclear Apr '06	Change
Men	57%	68%	+11	GTA	51%	61%	+10
Women	40%	54%	+14	Central	48%	58%	+10
				Eastern	50%	57%	+7
Young	43%	54%	+11	Southwest	46%	67%	+21
Middle-age	49%	64%	+15	Northern	33%	57%	+24
Older	52%	63%	+11				
Low income	37%	47%	+10				
Mid income	46%	58%	+12				
Upper income	55%	65%	+10				

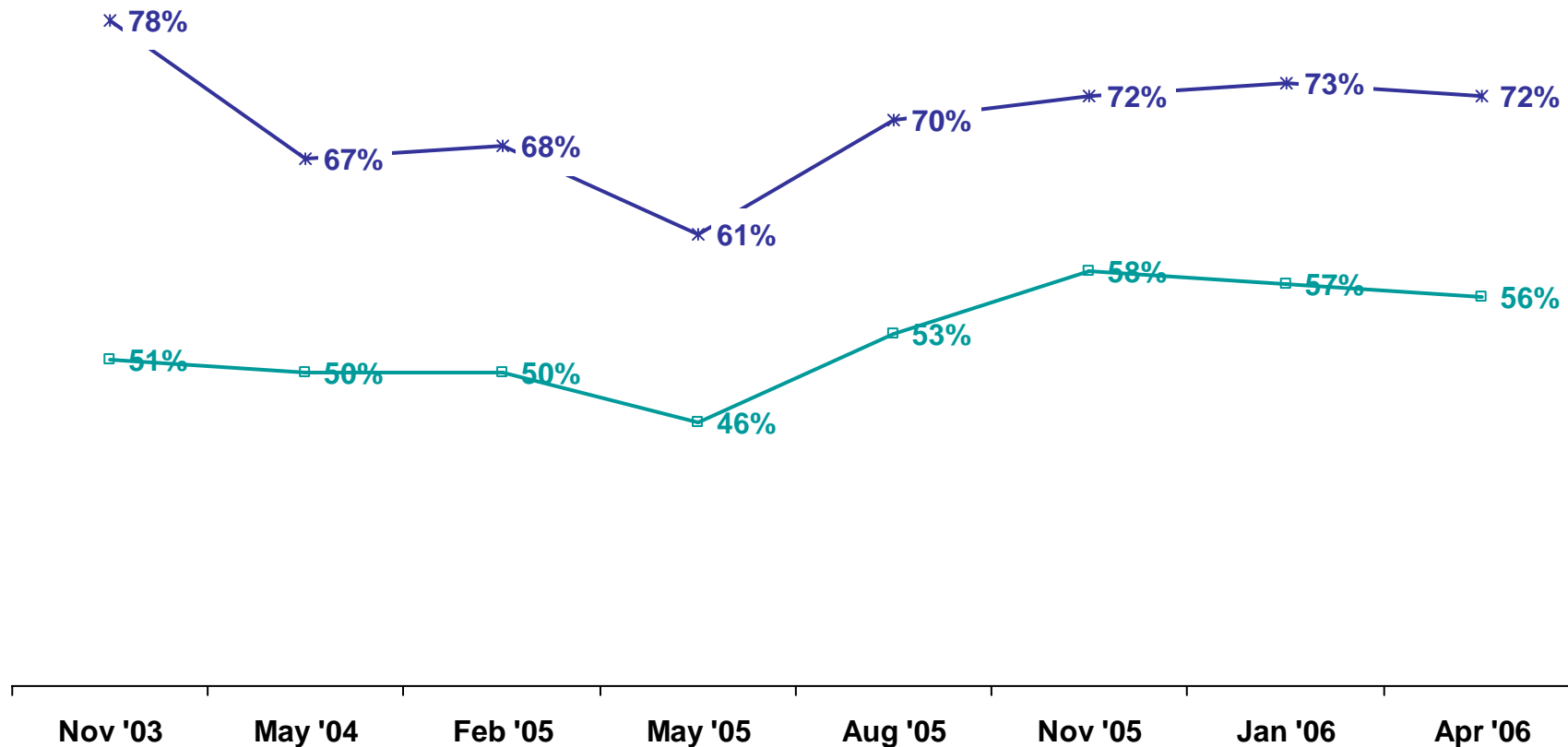




Support For Refurbishing And New Builds Is Also Stable At 72% And 56%, Respectively...

% of adults in Ontario

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



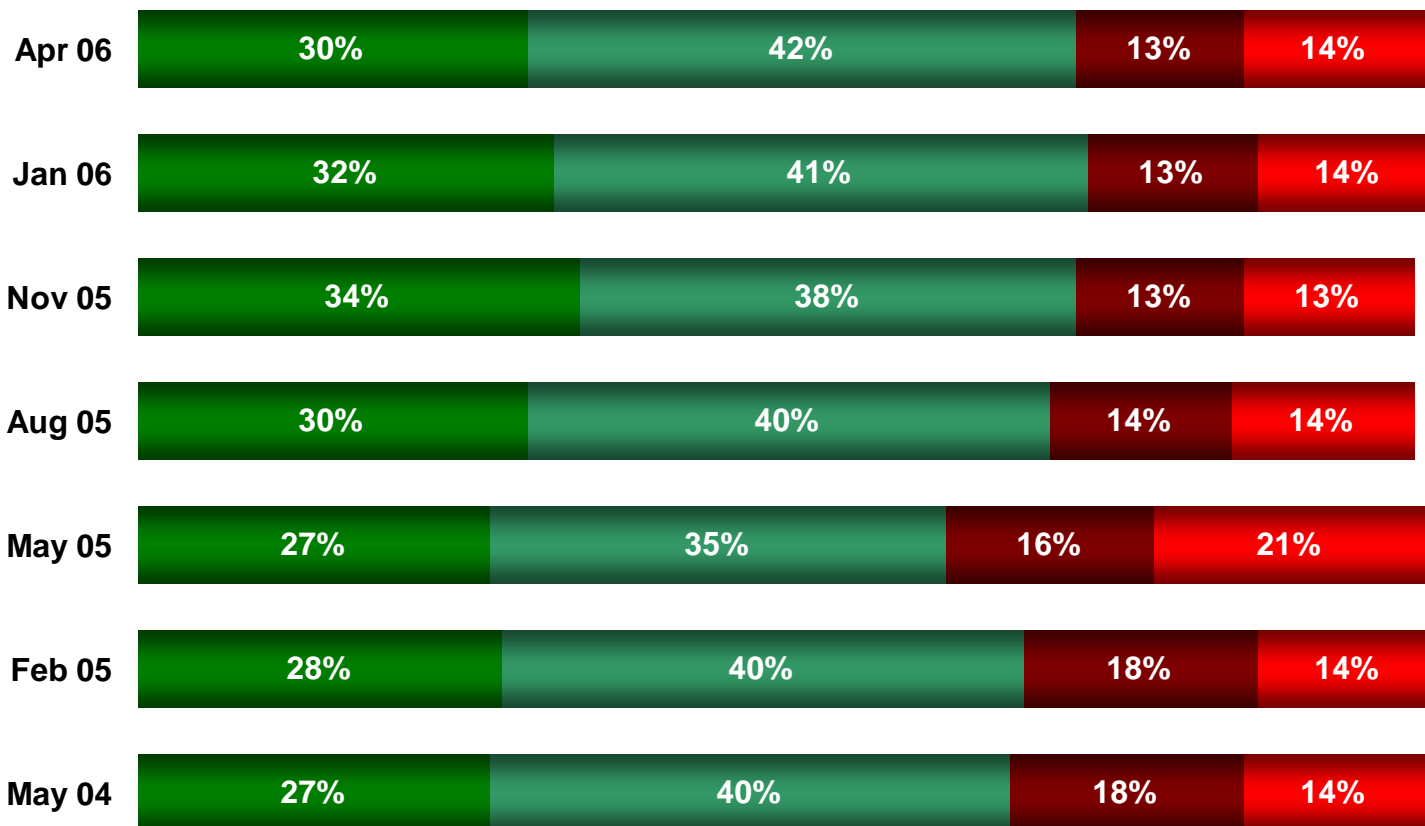
Question 6: Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: J Apr 06 N=800 an 06 N=1001 Nov 05 N=1000



With *Intensity* Of Support/Opposition Towards Upgrading & Refurbishing Unchanged...

% of adults in Ontario

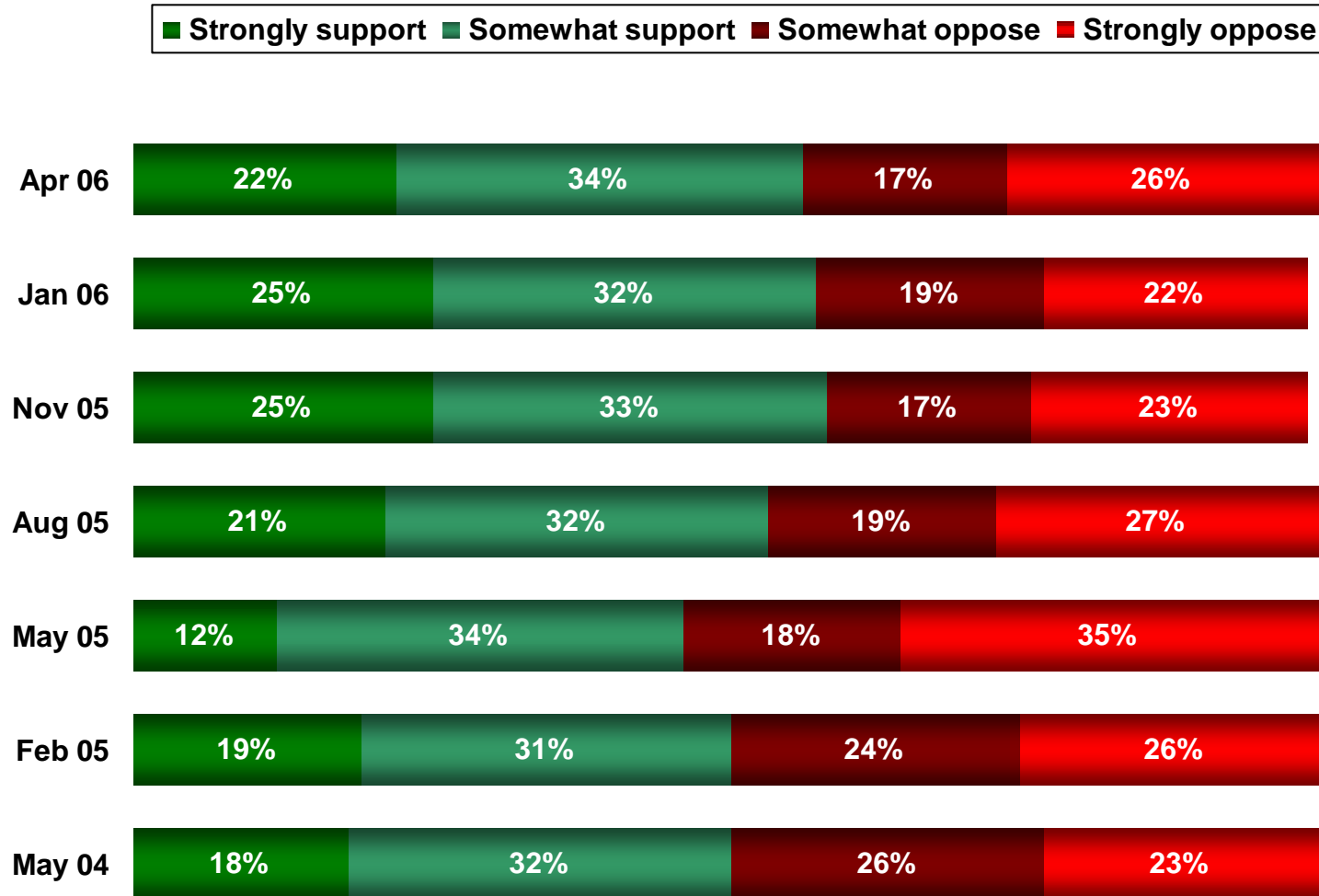
■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose



Question 6: 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: Apr 06 N=800 Jan 06 N=1001 Nov 05 N=1000

And There Is Slight Movement In The Proportion Who “Strongly” Support/Oppose New Builds...

% of adults in Ontario



Question 6: 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: Apr 06 N=800 Jan 06 N=1001 Nov 05 N=1000

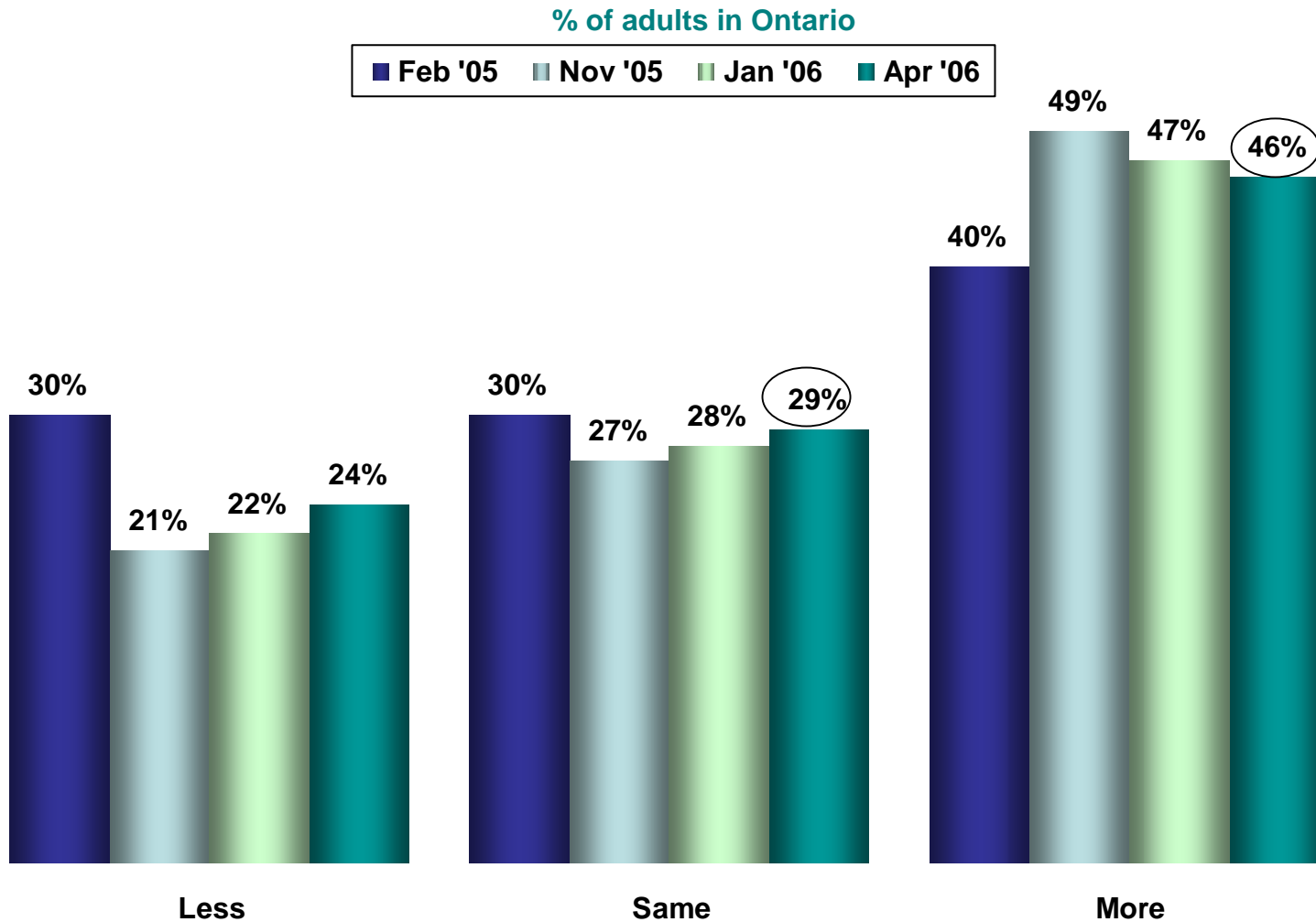
Support For Refurbishing Is Up (Or Stable) From Baseline Survey Among All Groups...

	Baseline Support Refurb Feb '05	Support Refurb Apr '06	Change		Baseline Support Refurb Feb '05	Support Refurb Apr '06	Change
Men	68%	75%	+7	GTA	67%	72%	+5
Women	67%	69%	+2	Central	70%	67%	-3
				Eastern	72%	71%	-1
Young	69%	76%	+7	Southwest	66%	77%	+11
Middle-age	69%	73%	+4	Northern	63%	73%	+10
Older	66%	67%	+1				
Low income	66%	71%	+5				
Mid income	64%	71%	+7				
Upper income	72%	72%	-				

And Support For New Builds Is Up (Or Stable) From Baseline Survey Among All Groups, Especially Northern Ontarians...

	Baseline Support New Build Feb '05	Support New Build Apr '06	Change		Baseline Support New Build Feb '05	Support New Build Apr '06	Change
Men	56%	62%	+6	GTA	51%	55%	+4
Women	44%	50%	+6	Central	50%	54%	+4
				Eastern	61%	59%	-2
Young	45%	52%	+7	Southwest	48%	57%	+9
Middle-age	51%	57%	+6	Northern	32%	53%	+21
Older	54%	58%	+4				
Low income	46%	53%	+7				
Mid income	45%	52%	+7				
Upper income	55%	58%	+3				

A Majority Continues To Believe Nuclear Will Play The Same Or A Bigger Role In The Future...



Question 5: 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: Apr 06 N=800 Jan 06 N=1001 Nov 05 N=1000



But, There Is A Disconnect About How Much Nuclear Contributes To Power In Ontario...

- **Ontarians were asked, to the best of their knowledge, what percentage of Ontario's total power needs are met by nuclear generated energy?**
 - **17% are unsure and did not provide an estimate percentage (up from 10% in Feb '05)**
 - **The remaining 83% of Ontarians, on average, estimate 40% of the province's total power needs are met by nuclear generated energy (down from the 45% estimated in Feb '05)**
 - **In fact, the Canadian Nuclear Association reports that approximately 51% of Ontario's electricity is generated by nuclear reactors.**





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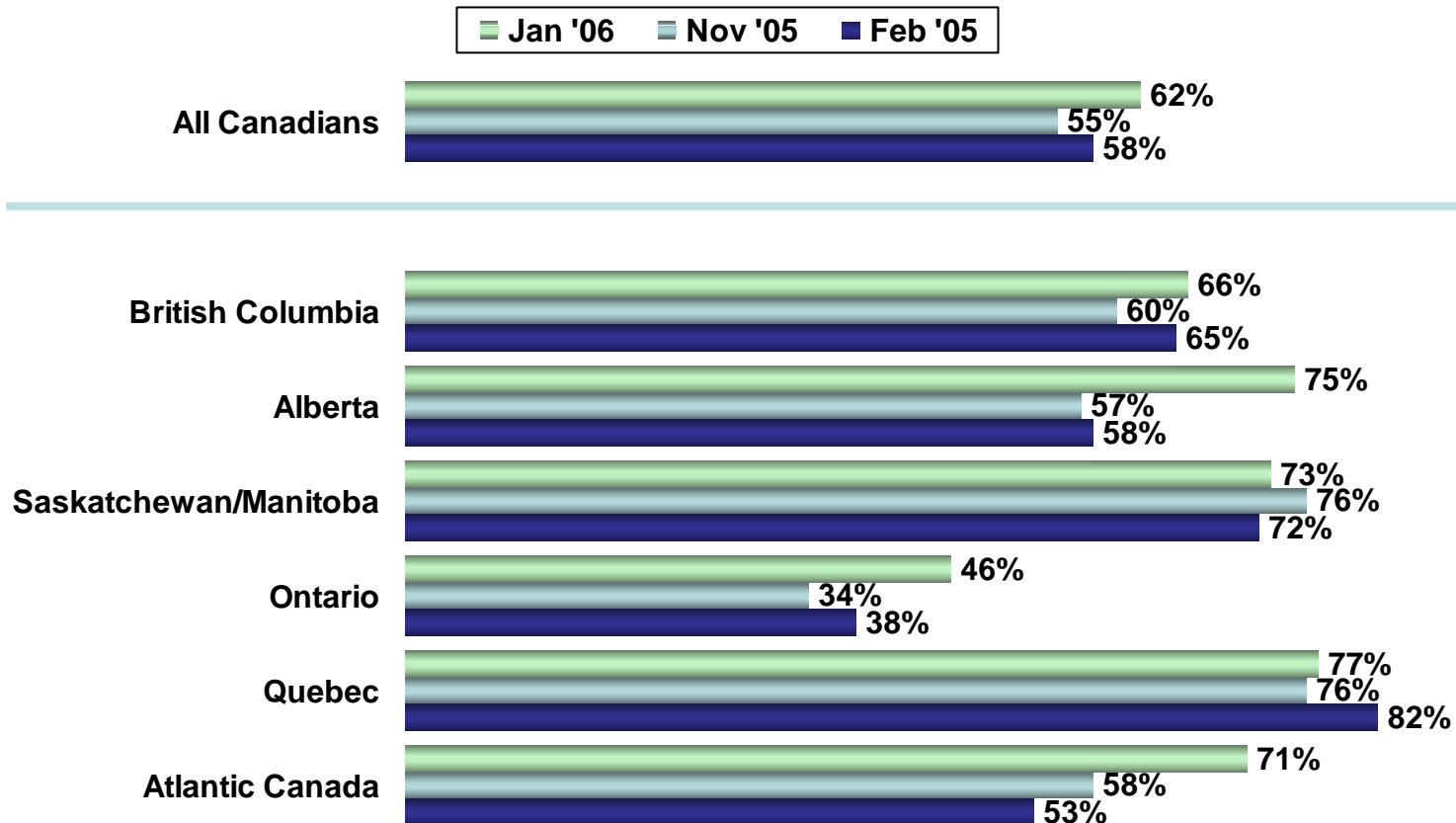
National Tracking

January 2006



Among All Canadians, 3 In 5 Think There Is Enough Electricity In Their Province To Meet Future Needs—Up 7 Points From November 05...

% of Canadian adults who agree...



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: Jan 06 N=1000 Nov 05 N=1000 Canada/N=1000 Ontario

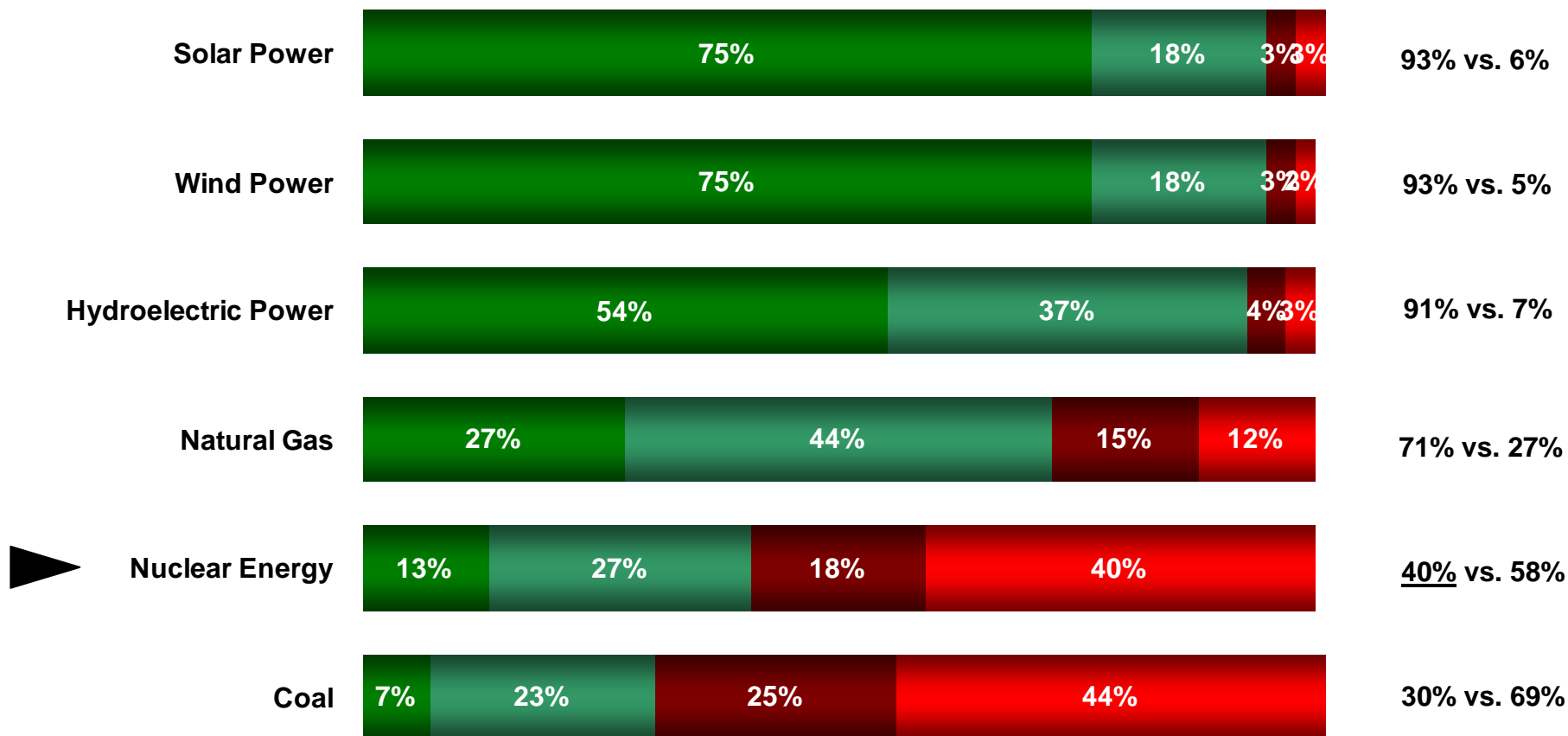


40% Of Canadians Support Nuclear Energy...

% of Canadian adults

■ 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.

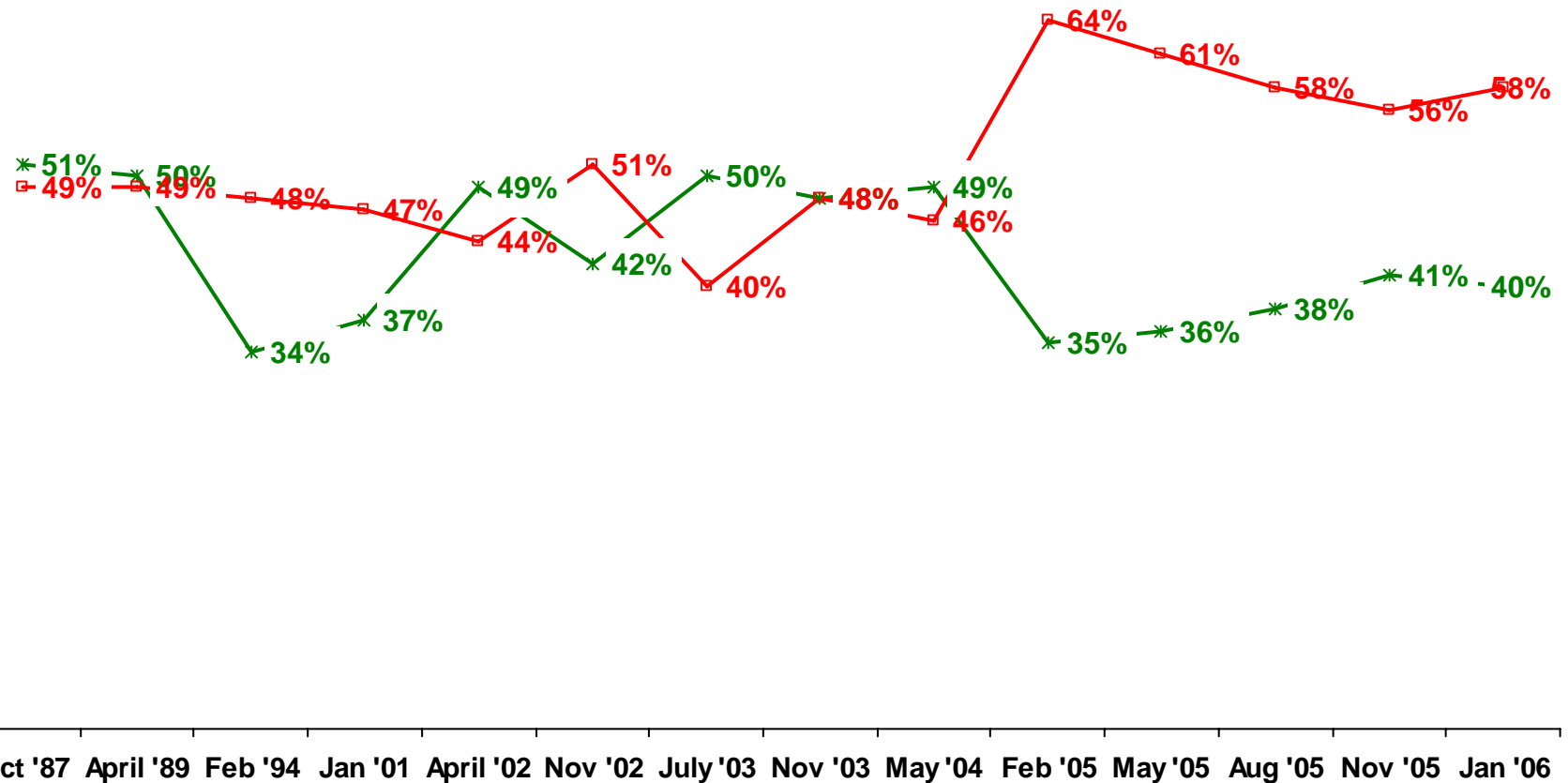
Base: Jan 06 N=1000



Unchanged From November...

% 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.

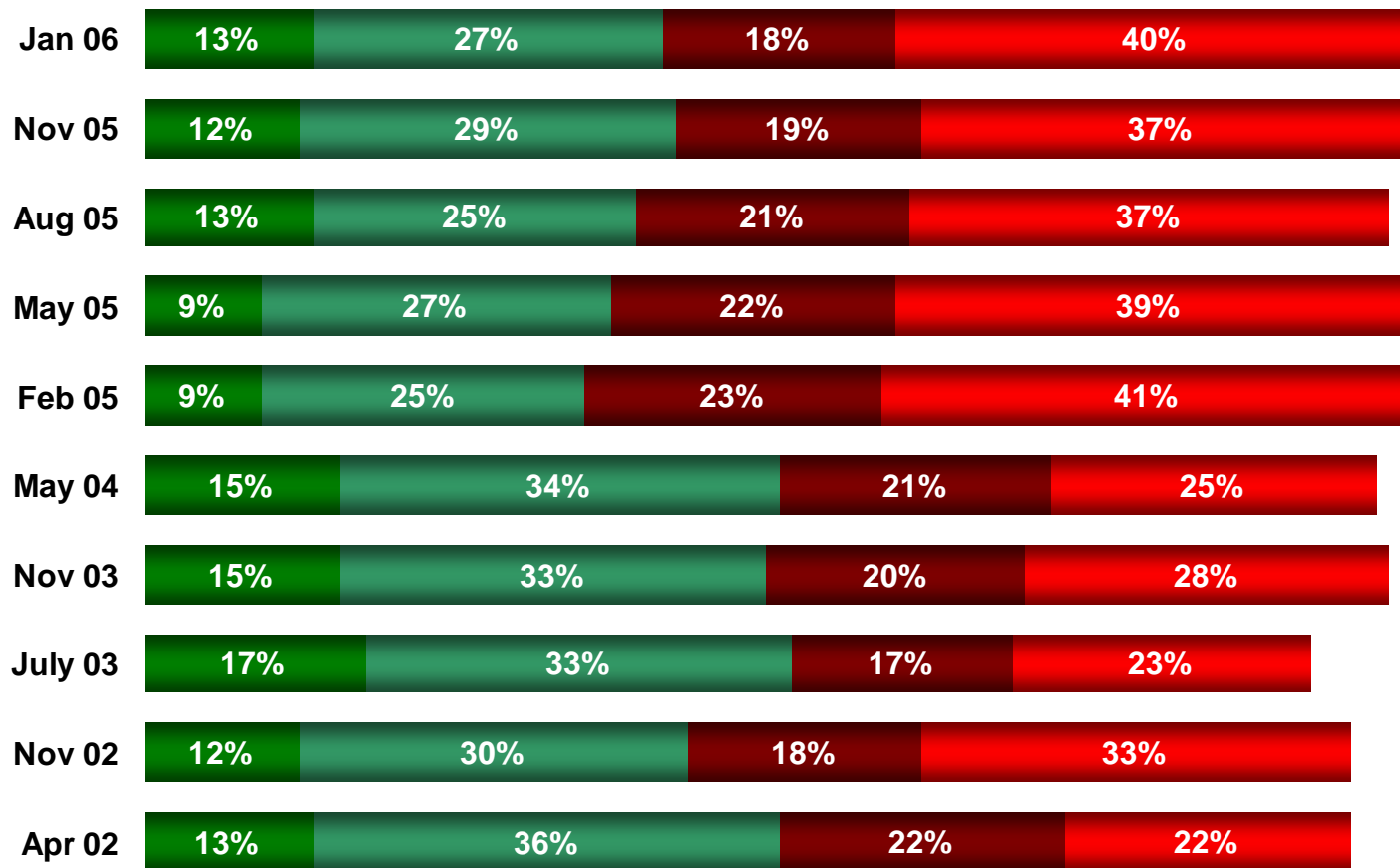
Base: Jan 06 N=1000 Nov 05 N=1000



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

% of Canadian adults

■ 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.

Base: Jan 06 N=1000 Nov 05 N=1000

Across The Regions And Demographically...

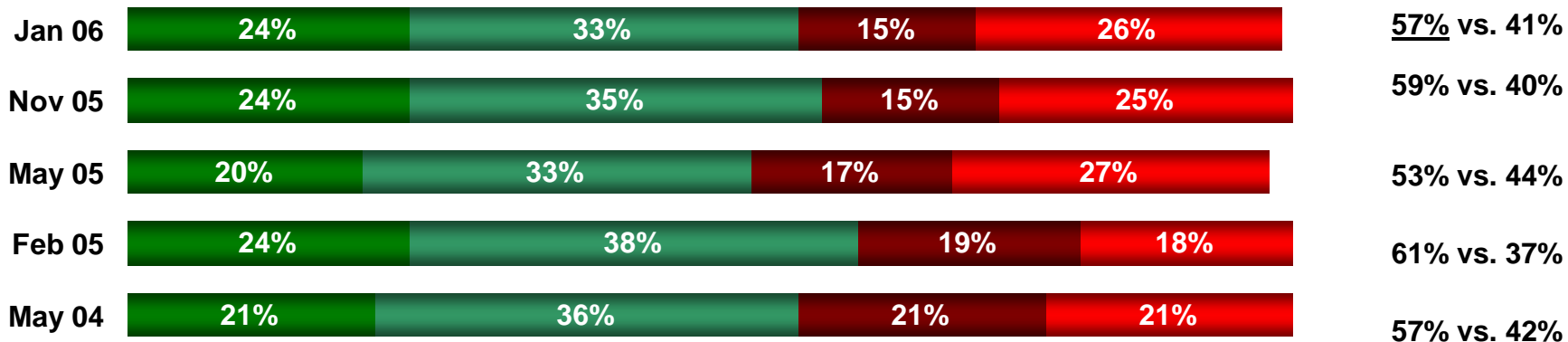
	Baseline Support Nuclear Feb '05	Support Nuclear Apr '06	Change		Baseline Support Nuclear Feb '05	Support Nuclear Apr '06	Change
Men	43%	44%	+1	Low Income	25%	34%	+9
Women	27%	35%	+8	Mid Income	34%	38%	+4
				Upper Income	41%	45%	+4
Young	31%	41%	+10				
Middle-age	35%	39%	+4	BC	23%	20%	-3
Older	38%	39%	+1	Alberta	41%	31%	-10
				Sask/Man	40%	44%	+4
				Ontario	48%	61%	+13
				Quebec	17%	22%	+5
				Atlantic	36%	28%	-8

Canadians Continue To Support Refurbishing More Than Building New... Support Stable For Each...

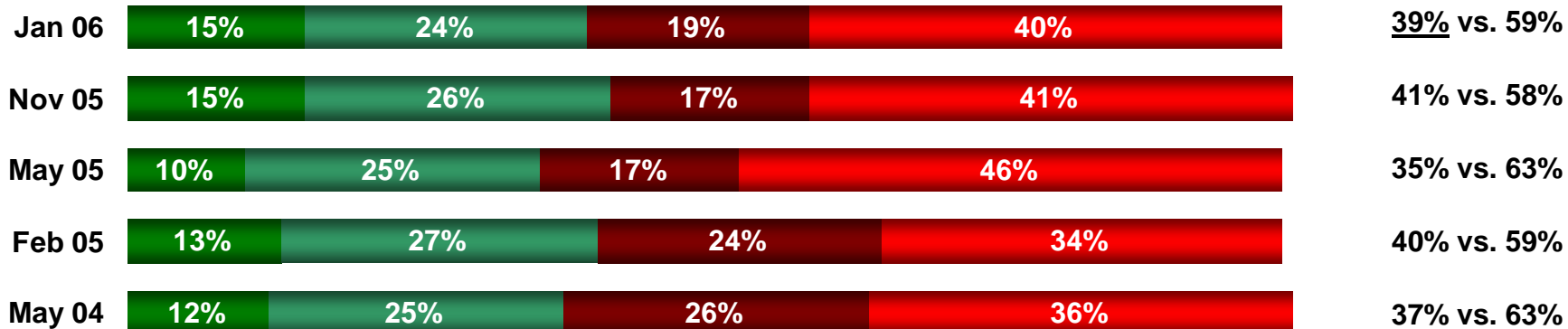
% of Canadian adults

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

Upgrading and refurbishing existing nuclear power plants



Building new nuclear power plants



Question 5: 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: Jan 06 N=1000 Nov 05 N=1000

Support For Refurbishing Across The Provinces And Demographic Groups...

	Baseline Support Refurb Feb '05	Support Refurb Apr '06	Change		Baseline Support Refurb Feb '05	Support Refurb Apr '06	Change
Men	63%	60%	-3	Low Income	60%	52%	-8
Women	60%	55%	-5	Mid Income	60%	56%	-4
				Upper Income	65%	61%	-4
Young	62%	62%	-				
Middle-age	62%	60%	-2	BC	51%	55%	+4
Older	60%	55%	-5	Alberta	66%	47%	-19
				Sask/Man	66%	56%	-10
				Ontario	68%	73%	+5
				Quebec	55%	40%	-15
				Atlantic	60%	52%	-8

And, For New Builds...

	Baseline Support New Build Feb '05	Support New Build Apr '06	Change		Baseline Support New Build Feb '05	Support New Build Apr '06	Change
Men	46%	44%	-2	Low Income	38%	33%	-5
Women	35%	35%	-	Mid Income	36%	39%	+3
				Upper Income	45%	45%	-
Young	36%	42%	+6				
Middle-age	42%	39%	-3	BC	24%	28%	+4
Older	42%	38%	-4	Alberta	49%	32%	-17
				Sask/Man	48%	46%	-2
				Ontario	50%	57%	+7
				Quebec	26%	17%	-9
				Atlantic	44%	33%	-11



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For more information

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