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Toronto :: Vancouver



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# Canadian Nuclear Attitude Survey▶▶

## Key Findings

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Prepared For:

**CANADIAN NUCLEAR ASSOCIATION**

# Methodology

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- This survey was conducted by telephone among 1012 randomly -selected Canadian residents, 18 years or older, between April 14<sup>th</sup> and April 21<sup>st</sup>, 2011.
- The sample has been weighted for age, gender and region using Statistics Canada's 2006 Census data to reflect actual demographic breakdown.
- After weighting a sample of this size, the aggregated results are considered accurate to within 3.1%, 19 times out of 20.
- The margin of error will be larger within each sub-grouping of the sample.

Note: *Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*



# Fukushima

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While Canadians have been paying close attention to Fukushima and are concerned about its implications for Canada, Canadian operators and regulators are seen to be taking the issue seriously:

- While Canadians are following the story closely, only a quarter feel they know any details about how the Canadian industry is responding to the issues.
- A majority feel Fukushima is a result of systematic problems with nuclear energy.
- Half think something like Fukushima could happen here but just 14% say it is very likely.
- Despite knowing few specifics, three quarters of Canadians think operators are taking safety seriously.
- Almost as many say the same of regulators, but with less passion.



## Support for nuclear energy

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When it comes to support for nuclear energy, it is a tale of two solitudes – Ontario versus the rest of Canada. A majority of Ontarians answered that they support nuclear energy in response to three separate questions. In the rest of Canada, two out of three times, the majority of respondents oppose nuclear energy.

- Nuclear is opposed at a general level by 56% of Canadians overall but supported by 53% in Ontario
- Building new plants is opposed by even more (61%) nationally but still supported by 50% in Ontario
- Upgrading and refurbishing enjoys nationwide support at 53%



# Fukushima

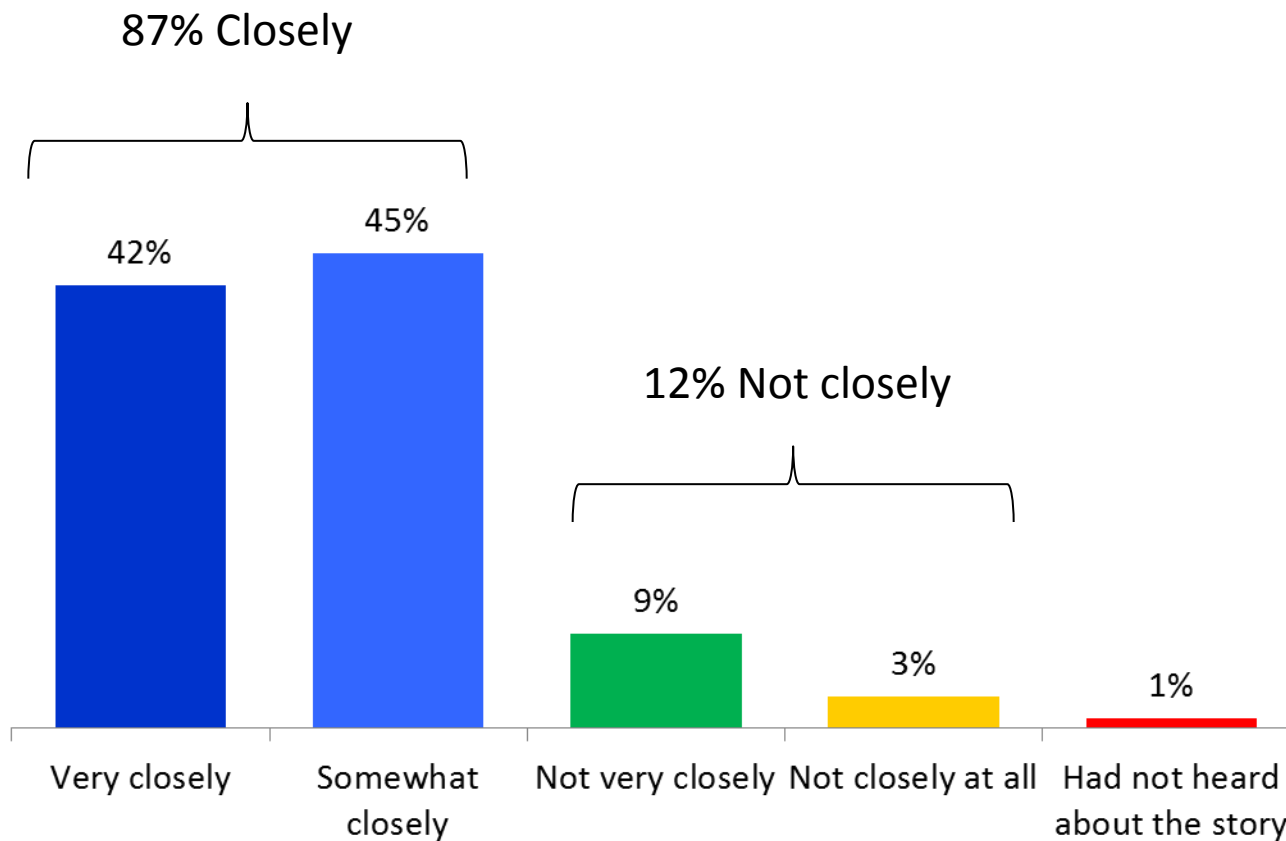
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# Almost all say they followed events in Fukushima closely



As a result of the Japanese earthquake and tsunami, nuclear reactors in the city of Fukushima were damaged. How closely have you been following this news story? If you have not heard about the story before this survey, just say so.



Percentage who said  
"Very Closely"

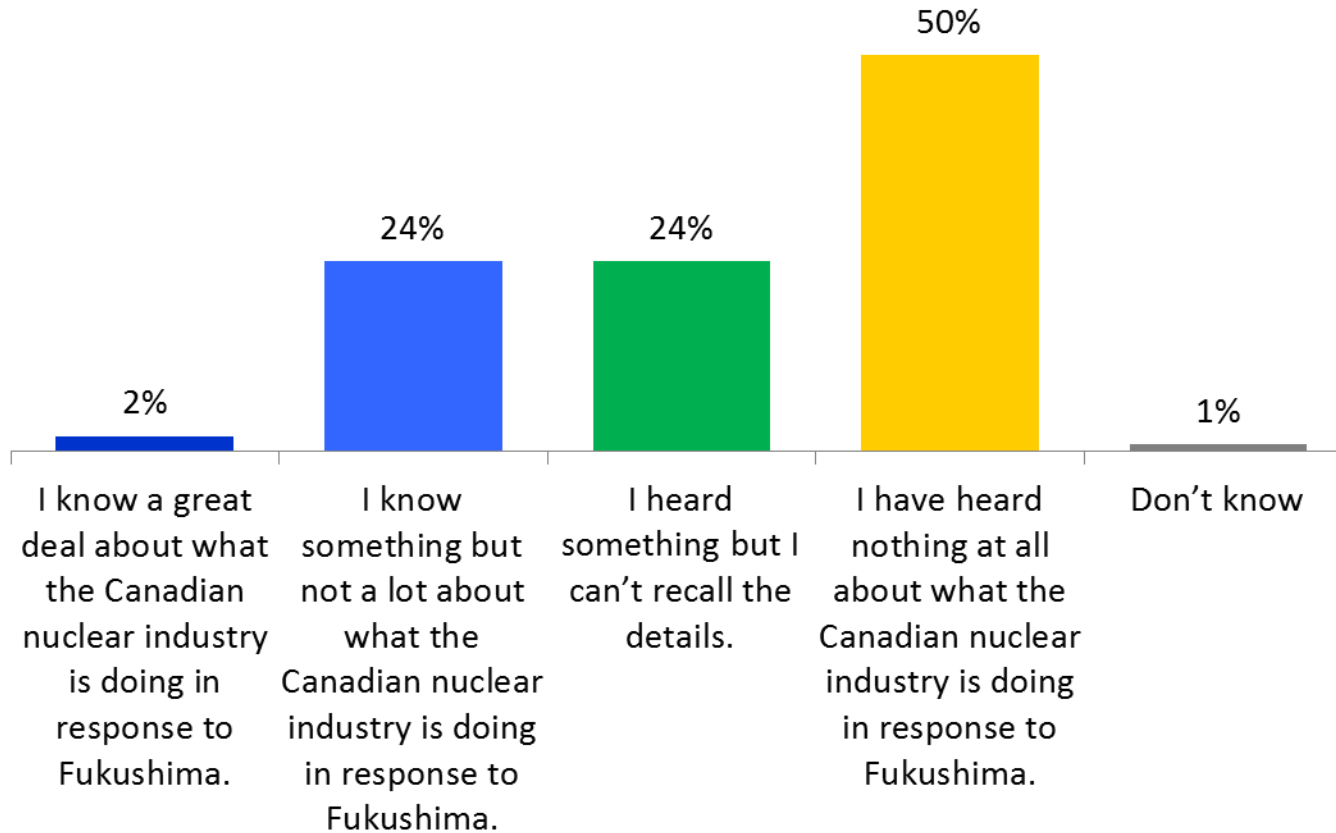
	%
Male	46%
Female	38%
Moms with kids	33%
18-44	32%
45-54	38%
55-64	57%
65+	58%
Ontario	40%
Quebec	53%
Climate change natural	43%
Human induced	46%
Climate change confused	35%

n=1012

# Few claim they know what Canadian industry is doing after Fukushima; half have heard nothing.



How much have you heard about what, if anything, the Canadian nuclear industry is doing to learn from the problems at Fukushima?



Percentage who said  
"Heard nothing at all"

	%
Male	49%
Female	51%
Moms with kids	53%
18-44	56%
45-54	50%
55-64	40%
65+	44%
BC	61%
Alberta	54%
Prairies	49%
Ontario	54%
Quebec	33%
Atlantic	58%

n=1012

# Majority view Fukushima situation as 'systematic' as opposed to a unique event

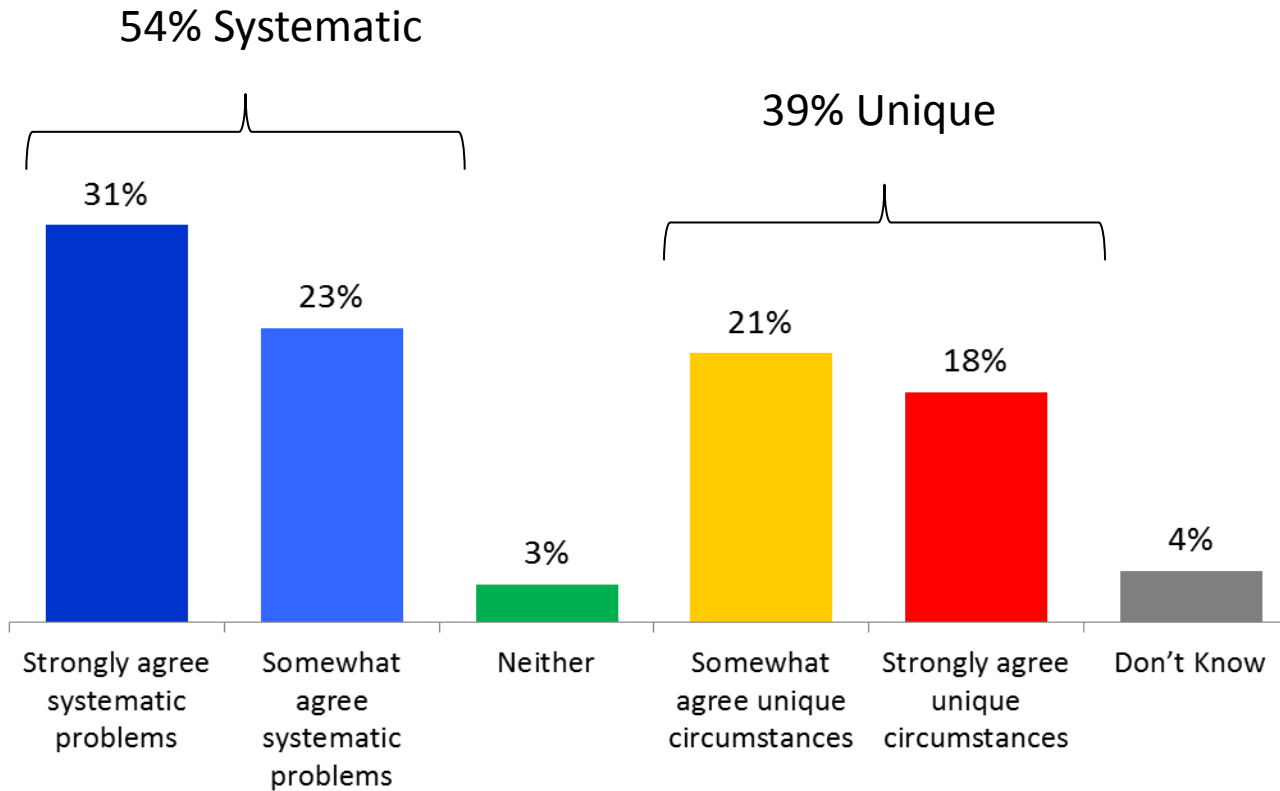


Which statement comes closer to your own view?

**The situation at Fukushima shows systematic problems with nuclear power OR**

**The situation at Fukushima was a unique set of circumstances that are unlikely to be repeated anywhere else?**

And do you strongly agree with that point of view or just somewhat agree with that point of view?



Percentage who said  
"Strongly agree  
systematic problems"

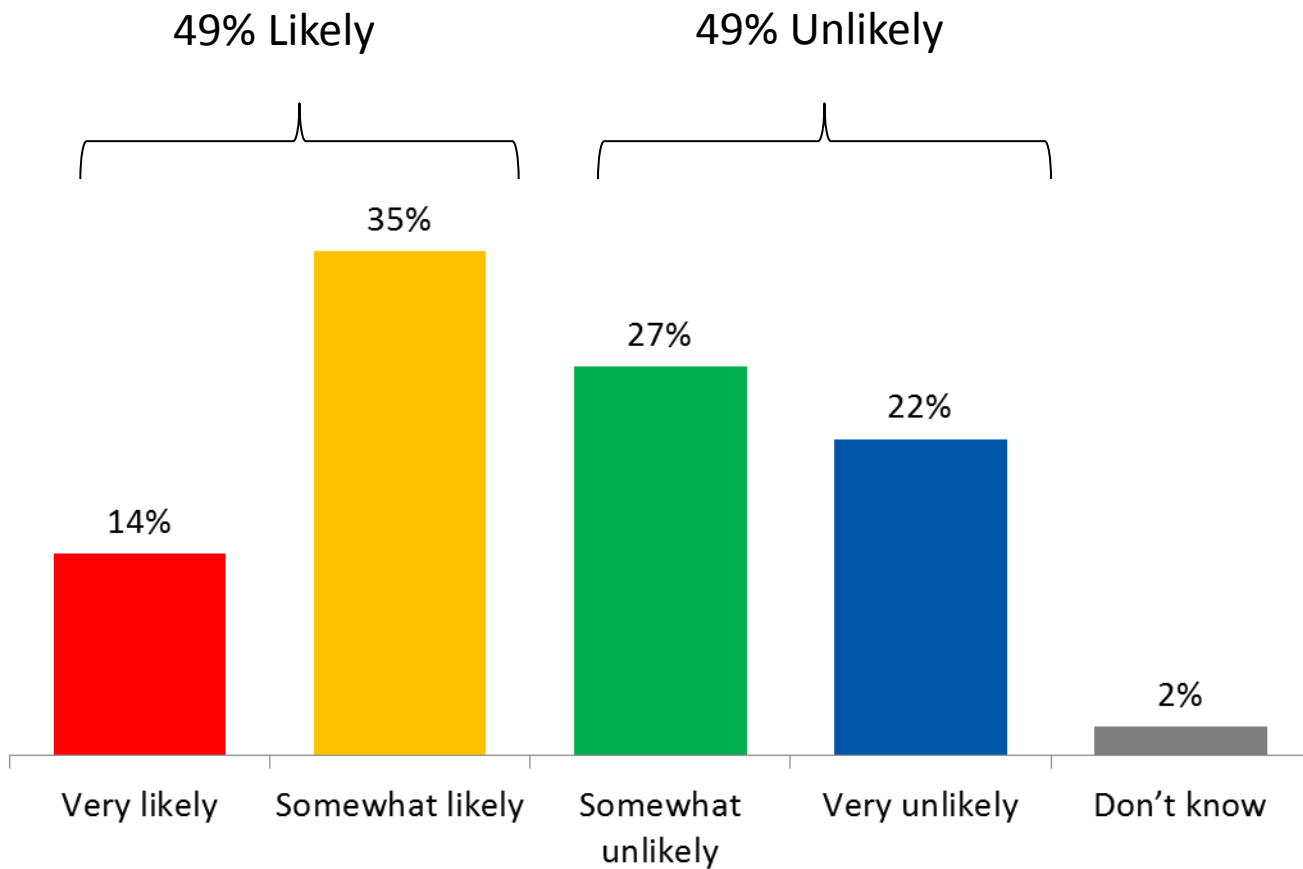
	%
Male	28%
Female	34%
Moms with kids	30%
18-44	27%
45-54	35%
55-64	37%
65+	33%
BC	40%
Alberta	29%
Prairies	35%
Ontario	31%
Quebec	28%
Atlantic	28%

n=1012

# Canadians evenly divided on whether Fukushima event could happen here



As you may know, some provinces generate much of their power with nuclear reactors. How likely do you think it is that something like Fukushima could happen in Canada?



Percentage who said "Likely"

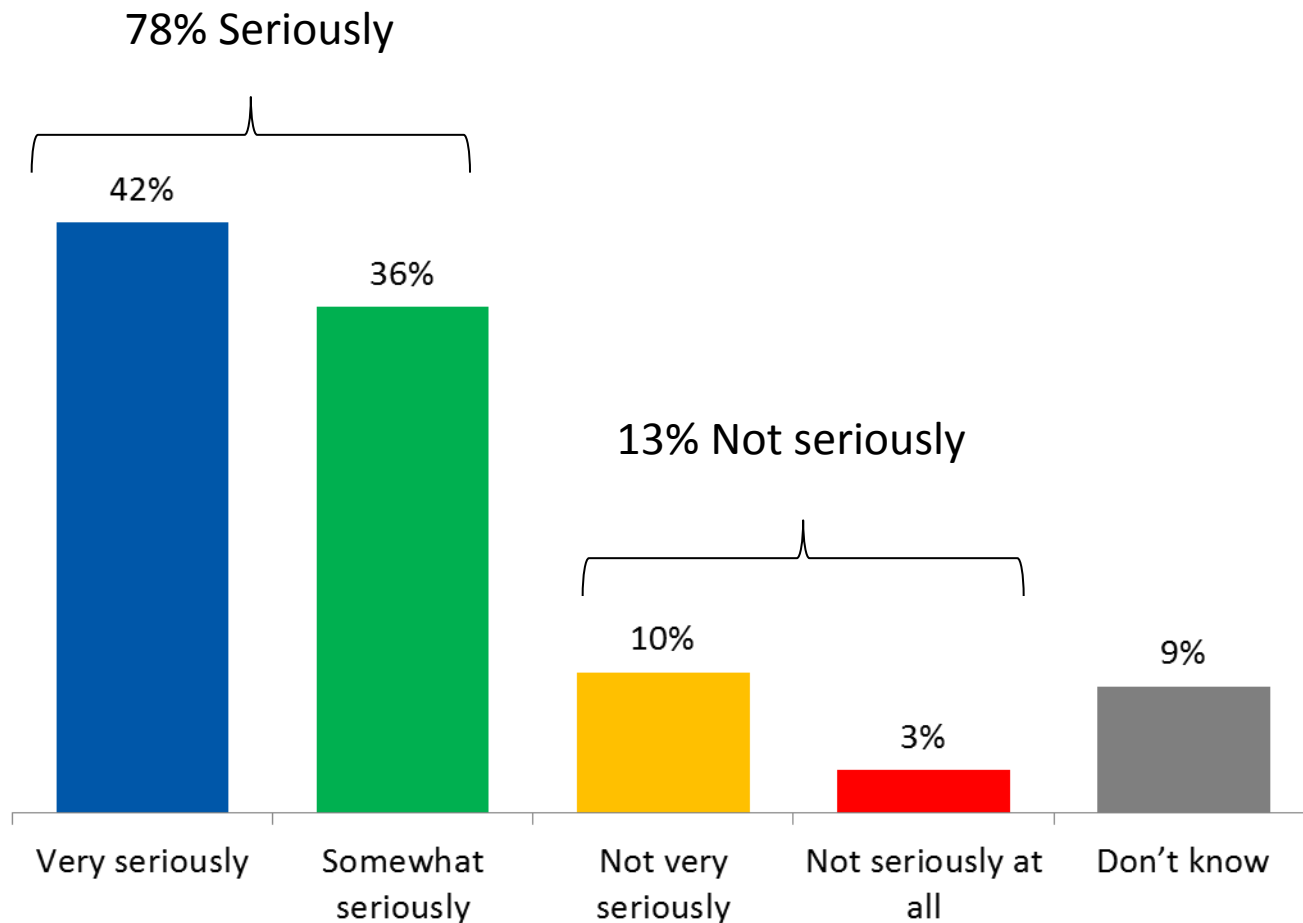
	%
Male	42%
Female	56%
Moms with kids	56%
<40K	58%
\$40K-\$60K	51%
\$60K-\$80K	42%
\$80K-\$100K	43%
>\$100K	37%
BC	60%
Alberta	45%
Prairies	56%
Ontario	42%
Quebec	52%
Atlantic	55%



n=1012

# Over two-thirds think nuclear plant companies are taking the events in Fukushima seriously

**Q** From what you have read, seen or heard, how seriously do you think the companies that operate Canadian nuclear power plants are taking the issue of the safety of nuclear power generation in Canada?



n=1012

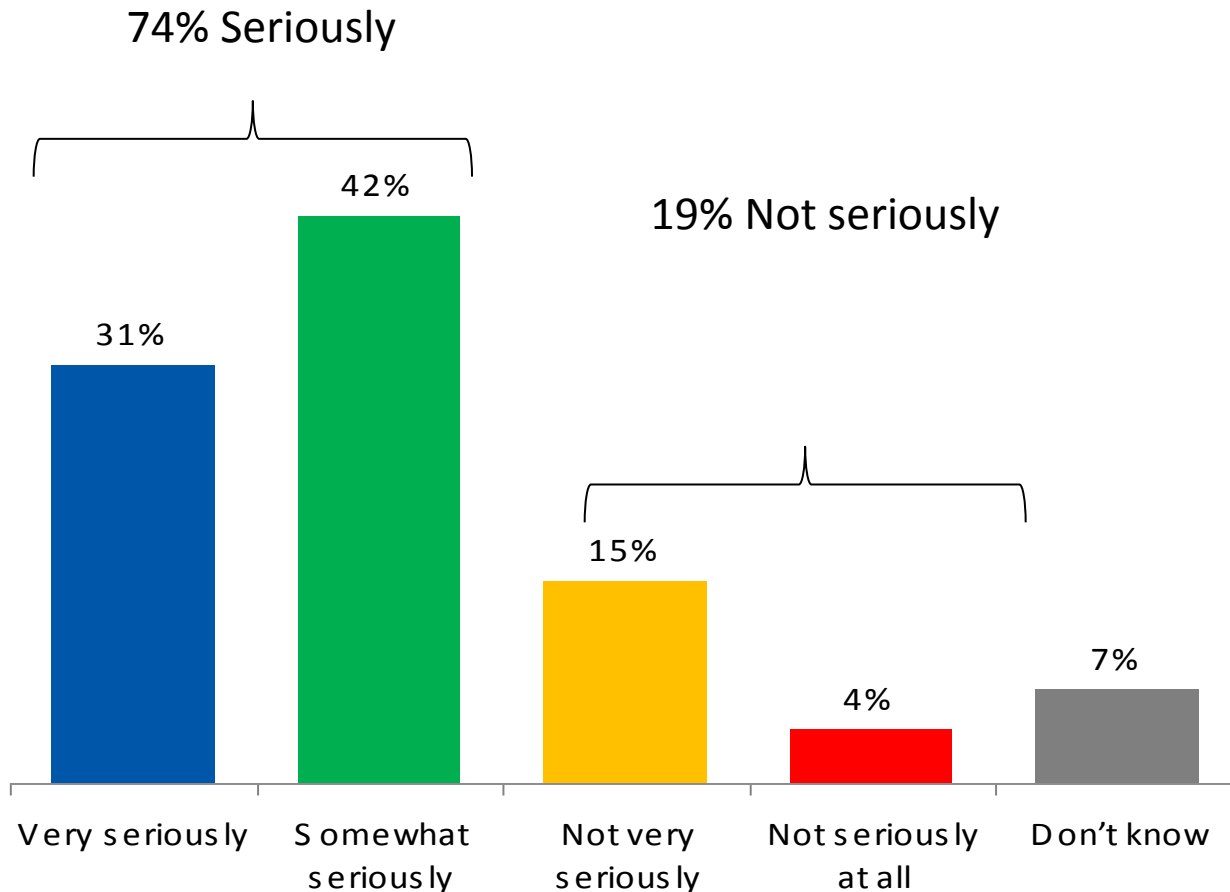
Percentage who said  
"Very Seriously"

	%
Single, no kids	36%
Single parent	41%
Couple with kids	47%
Couple no kids	46%
BC	51%
Alberta	39%
Prairies	38%
Ontario	47%
Quebec	34%
Atlantic	37%
<40K	34%
\$40K-\$60K	42%
\$60K-\$80K	41%
\$80K-\$100K	56%
>\$100K	49%

# Almost three-quarters agree regulatory agencies take nuclear safety seriously



And from what you have read, seen or heard, how seriously do you think the government agencies that regulate Canadian nuclear power plants are taking the issue of the safety of nuclear power generation in Canada?



Percentage who said  
"Very Seriously"

	%
Male	36%
Female	27%
Moms with kids	33%
Ends meet very diff.	19%
Somewhat difficult	31%
Not very difficult	30%
Ends meet not diff.	42%
Liberal	36%
Conservative	42%
BLOC	24%
NDP	23%
Other	23%
None/DK	26%

n=1012

# Benchmark Attitudes

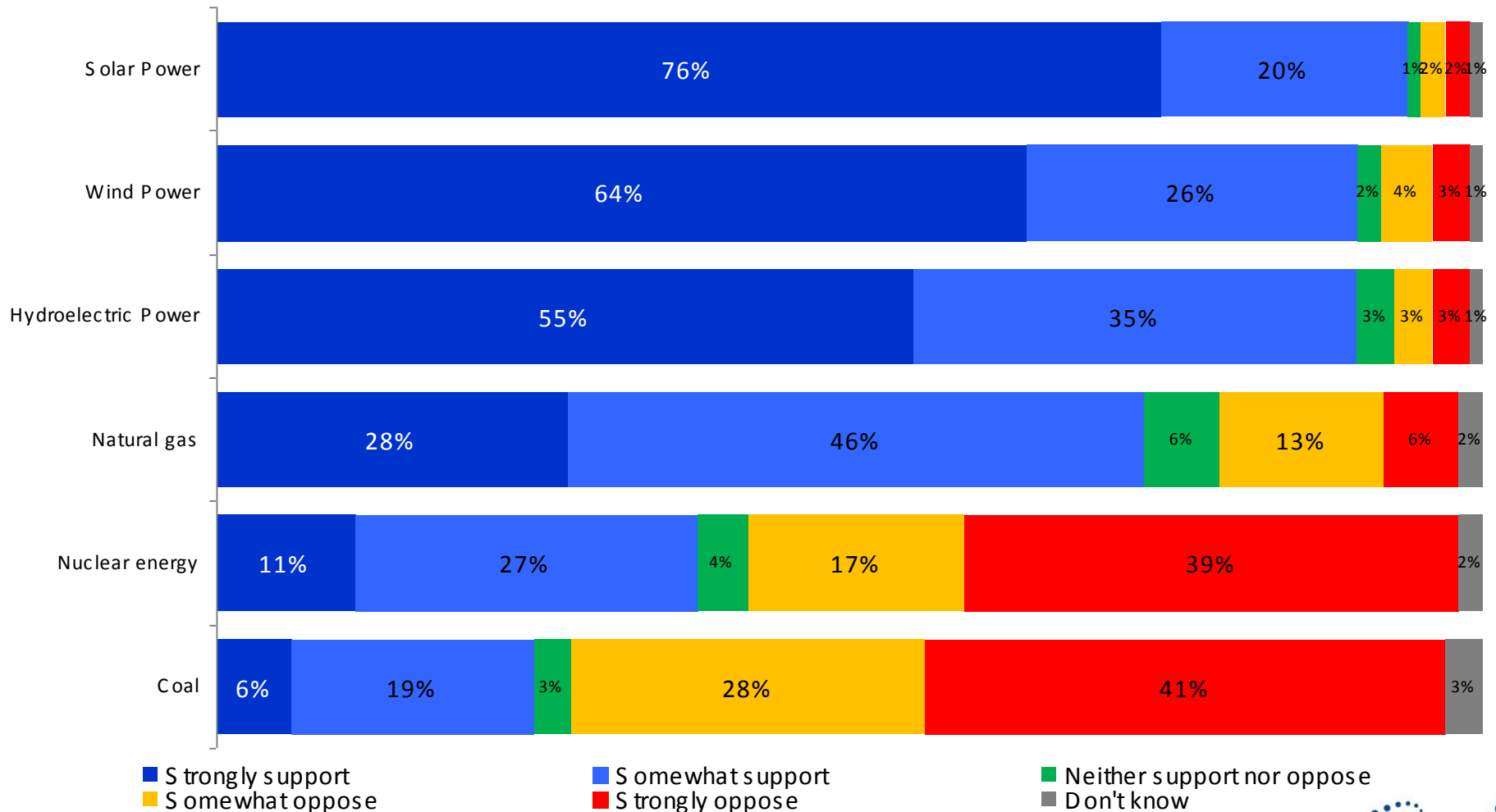
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# Support highest for wind and solar power; Nuclear preferred to coal



I am now 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.



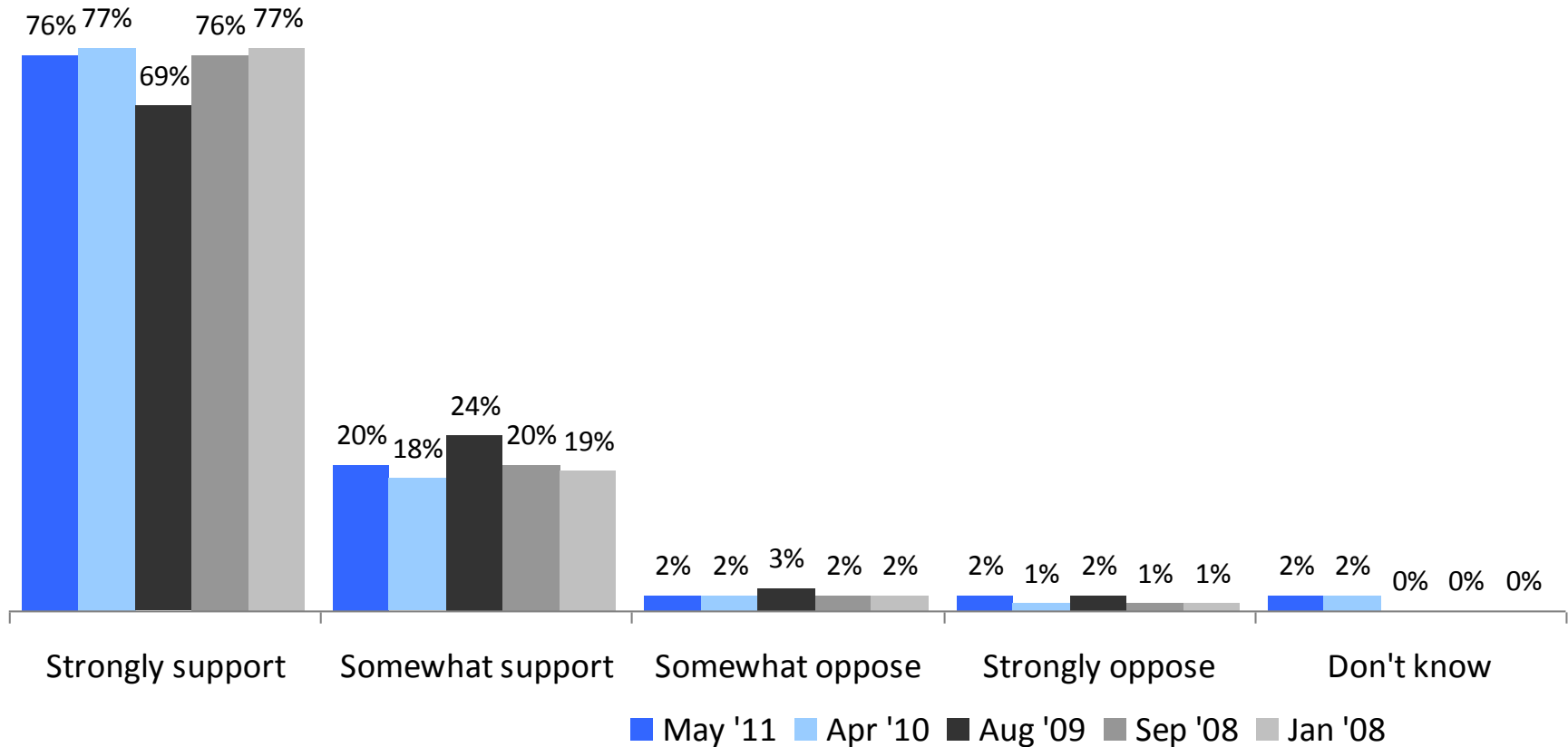
n=1012

# Support for Solar stable



I am now 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.

## Solar power

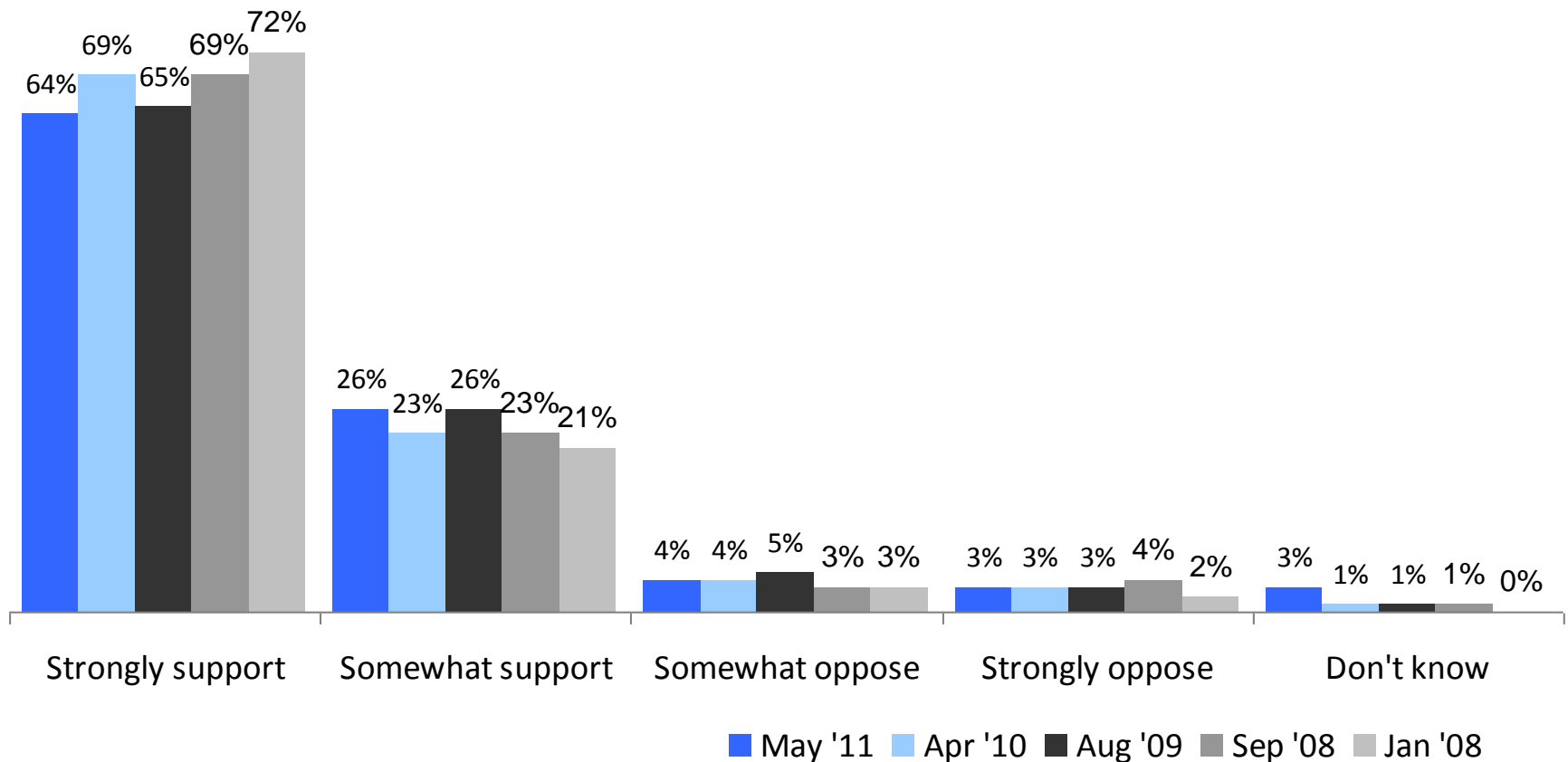


## Support for wind down from initial levels but still strong

Q

I am now 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.

### Wind Power

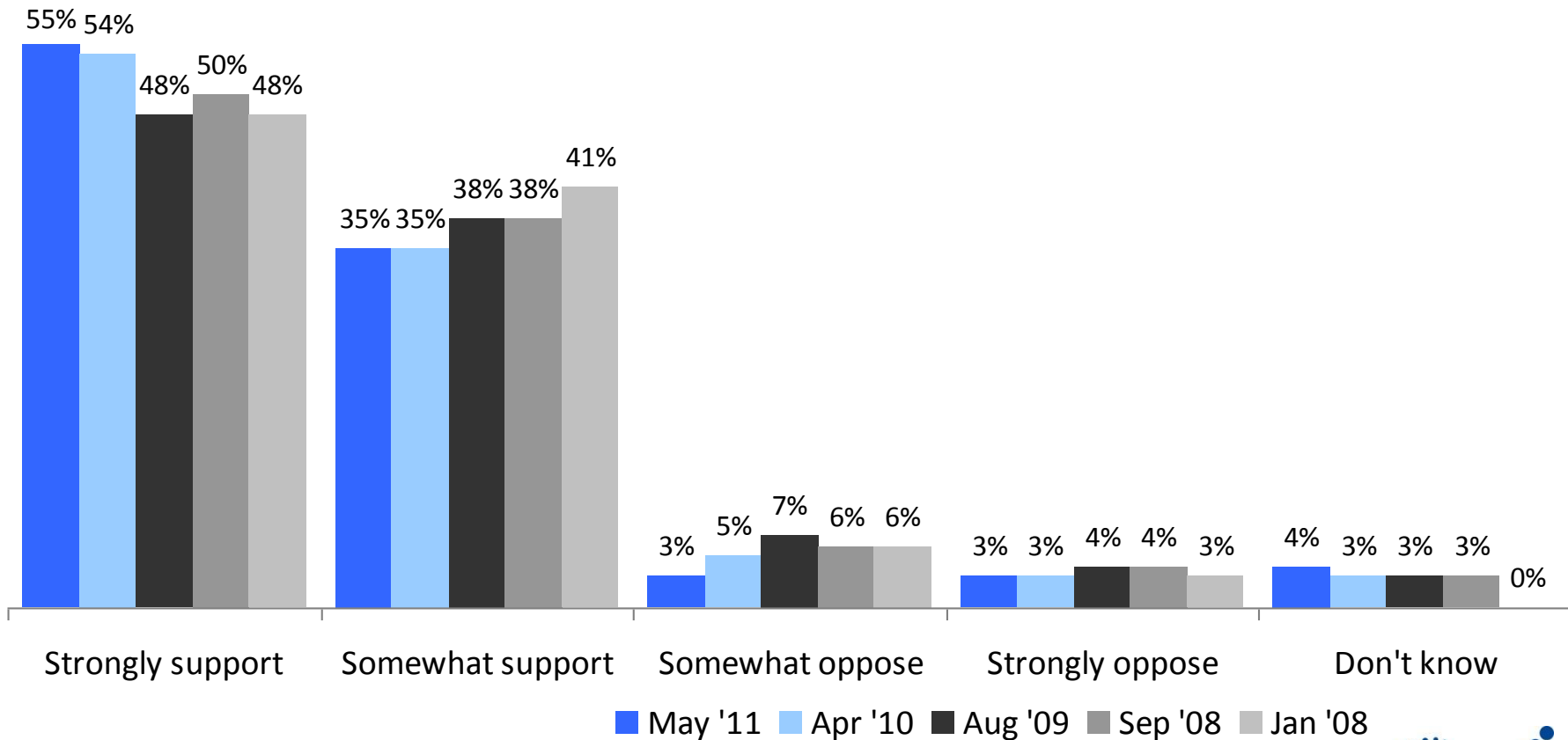


# Support for Hydro growing



I am now 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.

## Hydroelectric Power

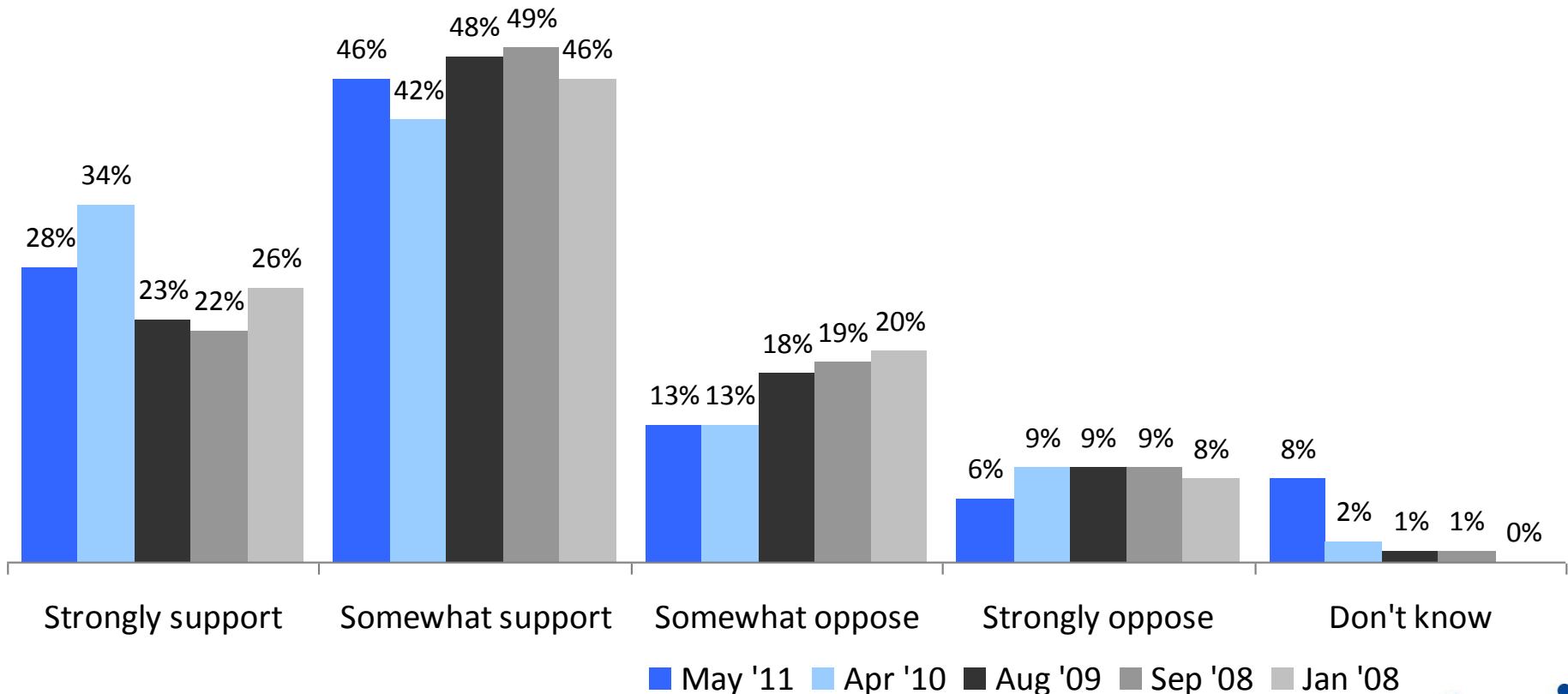


## Opposition to natural gas down from initial levels



I am now 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.

### Natural Gas

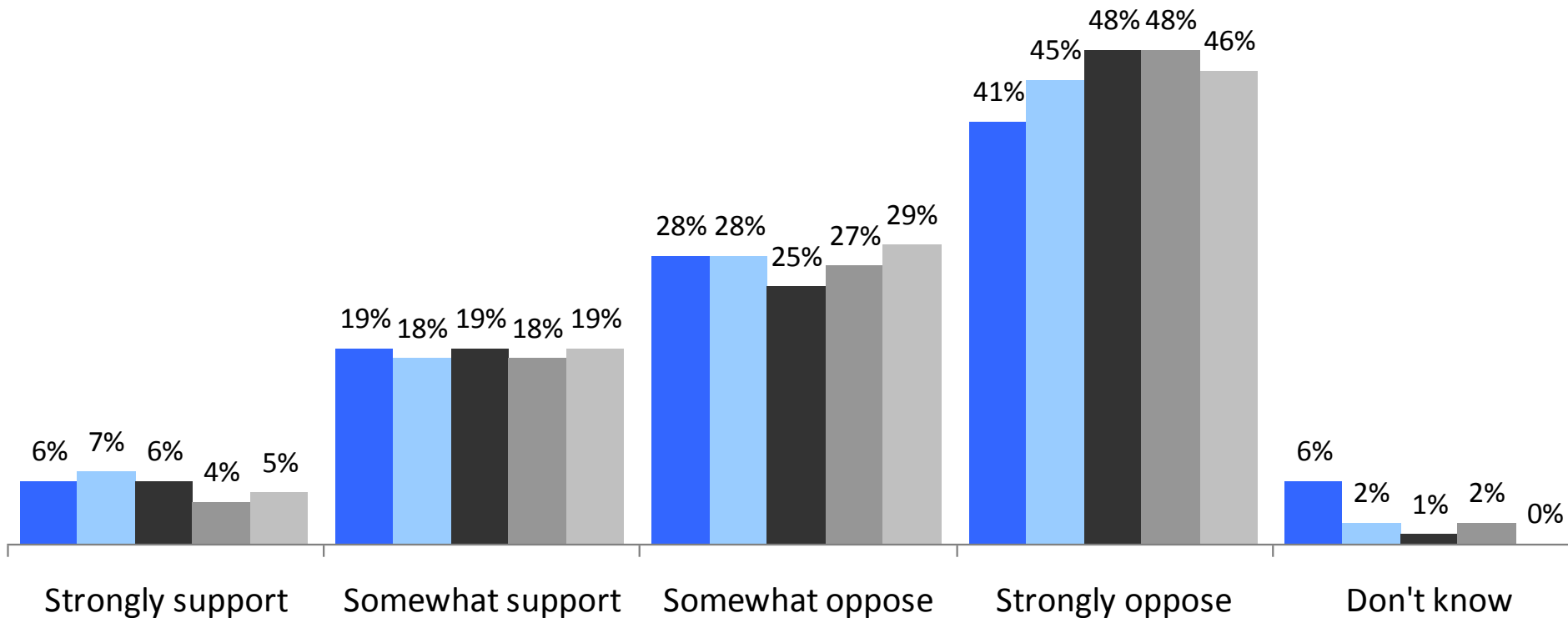


## Opposition to coal moving within margin of error



I am now 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.

### Coal



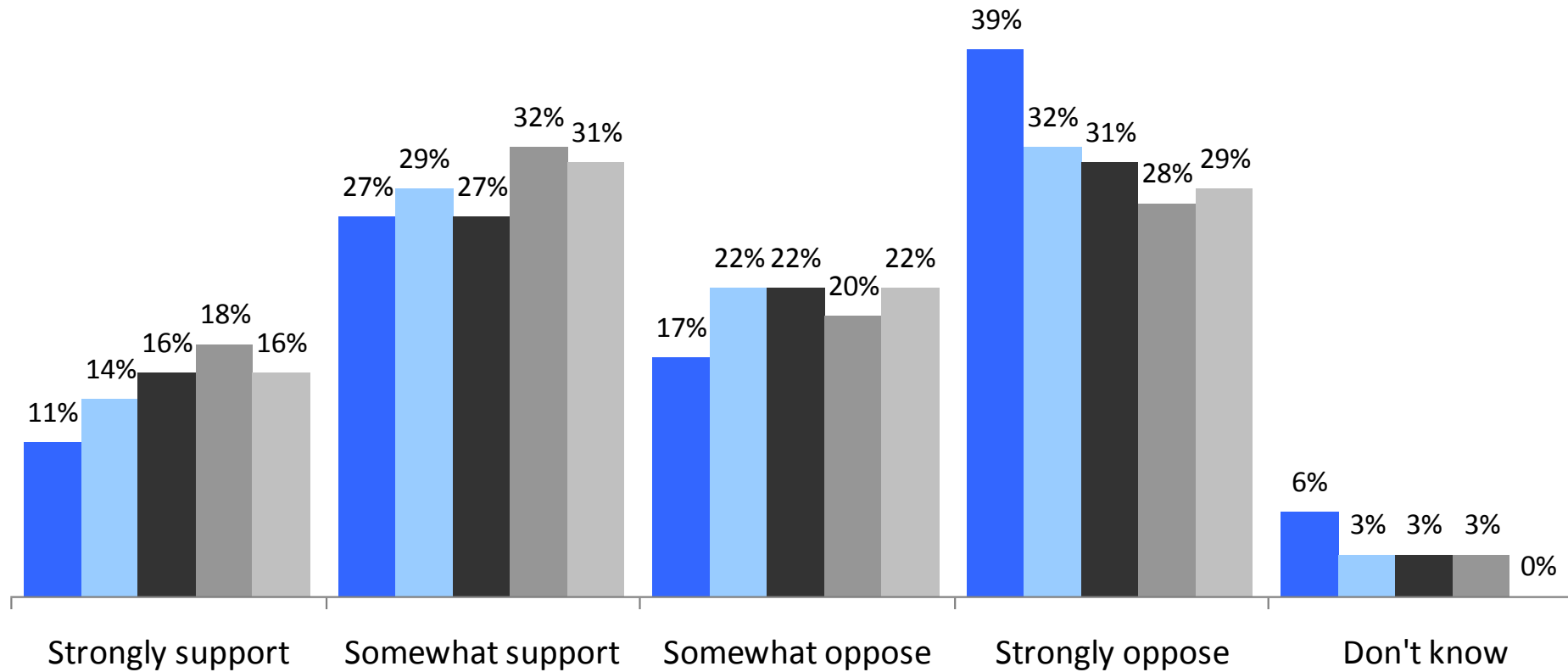
■ May '11 ■ Apr '10 ■ Aug '09 ■ Sep '08 ■ Jan '08

# Support for nuclear energy down five points year over year



I am now 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.

## Nuclear Energy



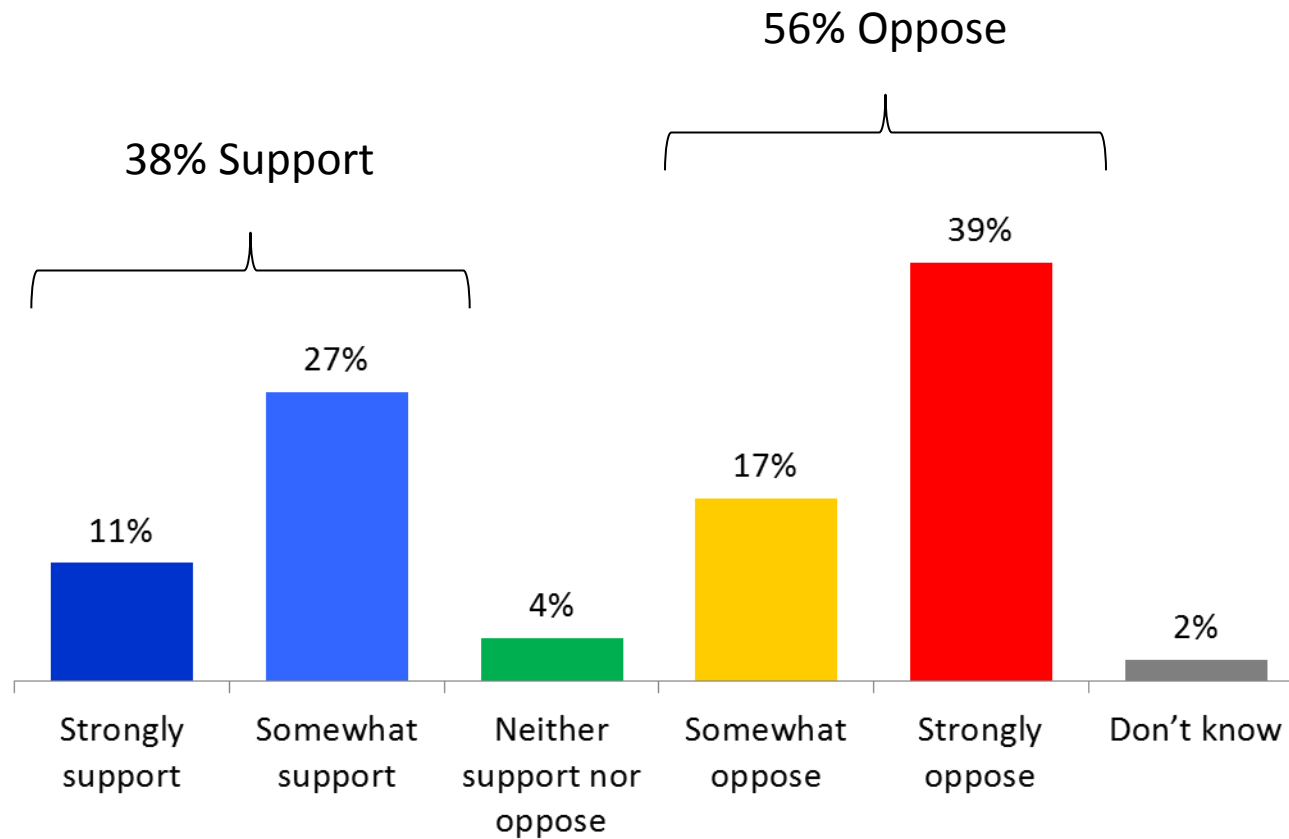
■ May '11 ■ Apr '10 ■ Aug '09 ■ Sep '08 ■ Jan '08

# Just over half oppose nuclear energy generally

Q

I am now 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.

## Nuclear energy



## Percentage who said "Support"

	%
Male	45%
Female	32%
<40K	31%
\$40K-\$60K	36%
\$60K-\$80K	38%
\$80K-\$100K	49%
>\$100K	49%
BC	33%
Alberta	46%
Prairies	37%
Ontario	53%
Quebec	17%
Atlantic	31%
Moms with kids	32%

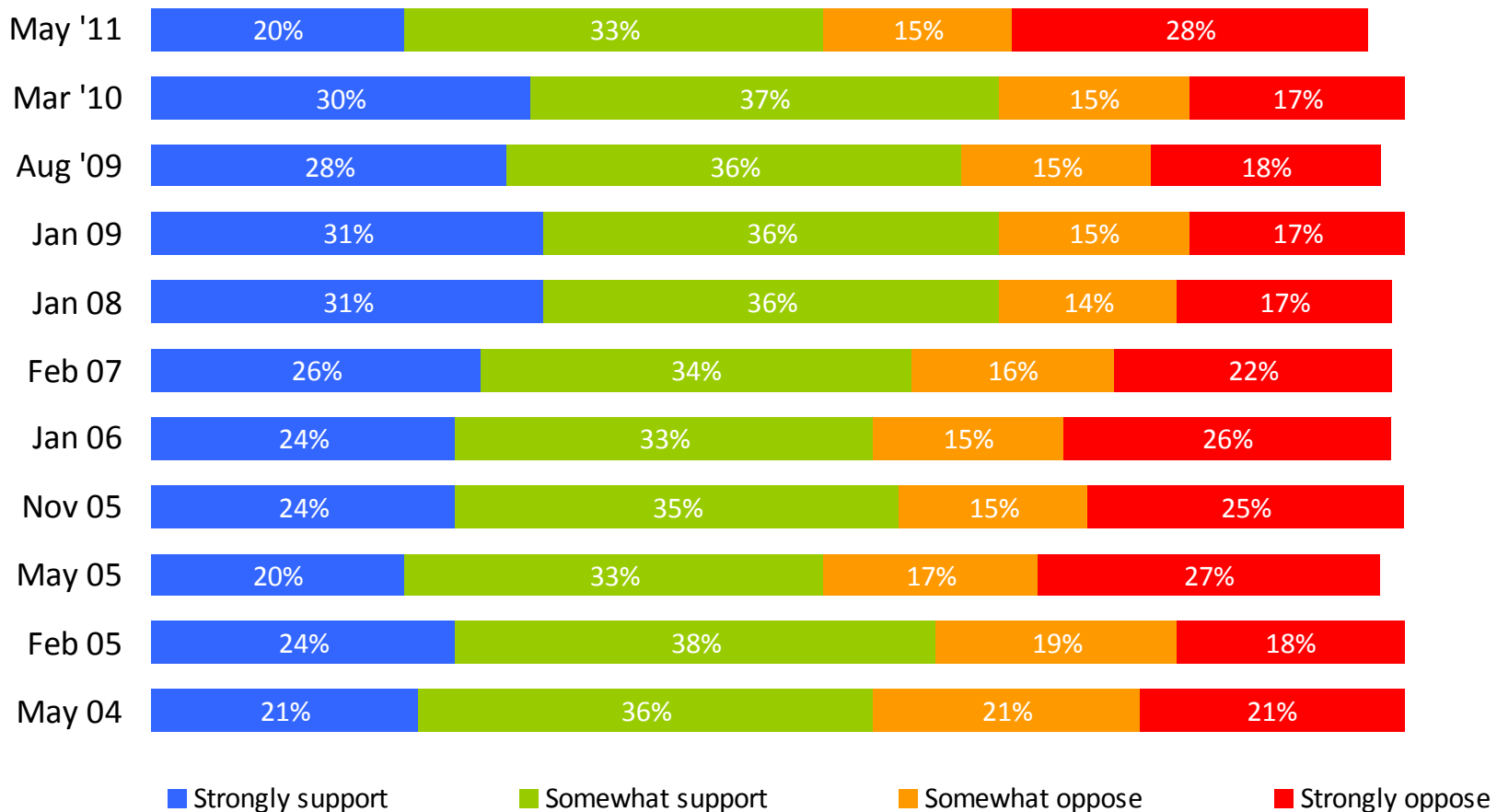
n=1012

# Strong support down 10 points, strong opposition up 11 points

Q

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

## Upgrading and refurbishing existing nuclear power plants

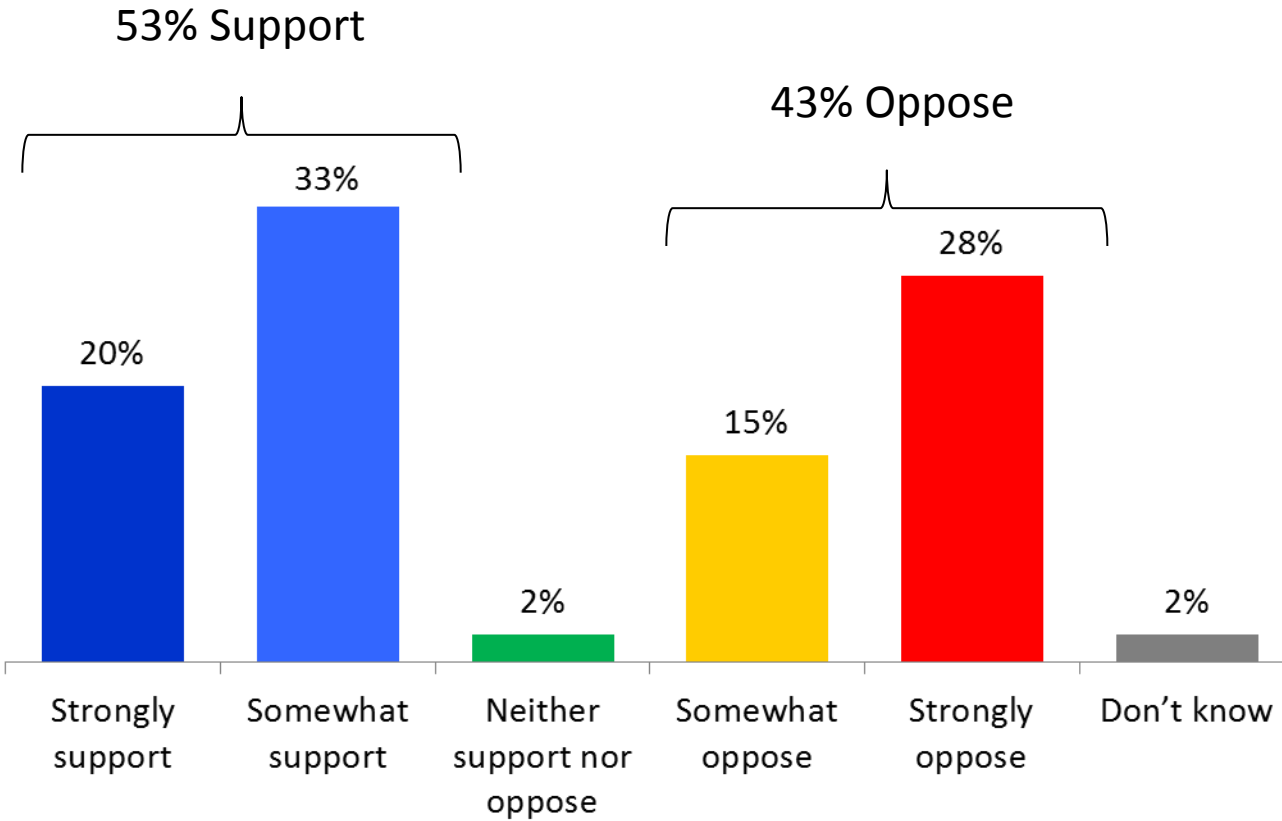


# Just over half support upgrading and refurbishing existing nuclear plants



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.

## Upgrading and refurbishing existing nuclear power plants



## Percentage who said "Support"

	%
<40K	45%
\$40K-\$60K	49%
\$60K-\$80K	55%
\$80K-\$100K	59%
>\$100K	60%
Fukushima likely here	37%
Fukushima not likely	69%
Climate change natural	60%
Human induced	48%
Climate change confused	59%
Male	57%
Female	49%

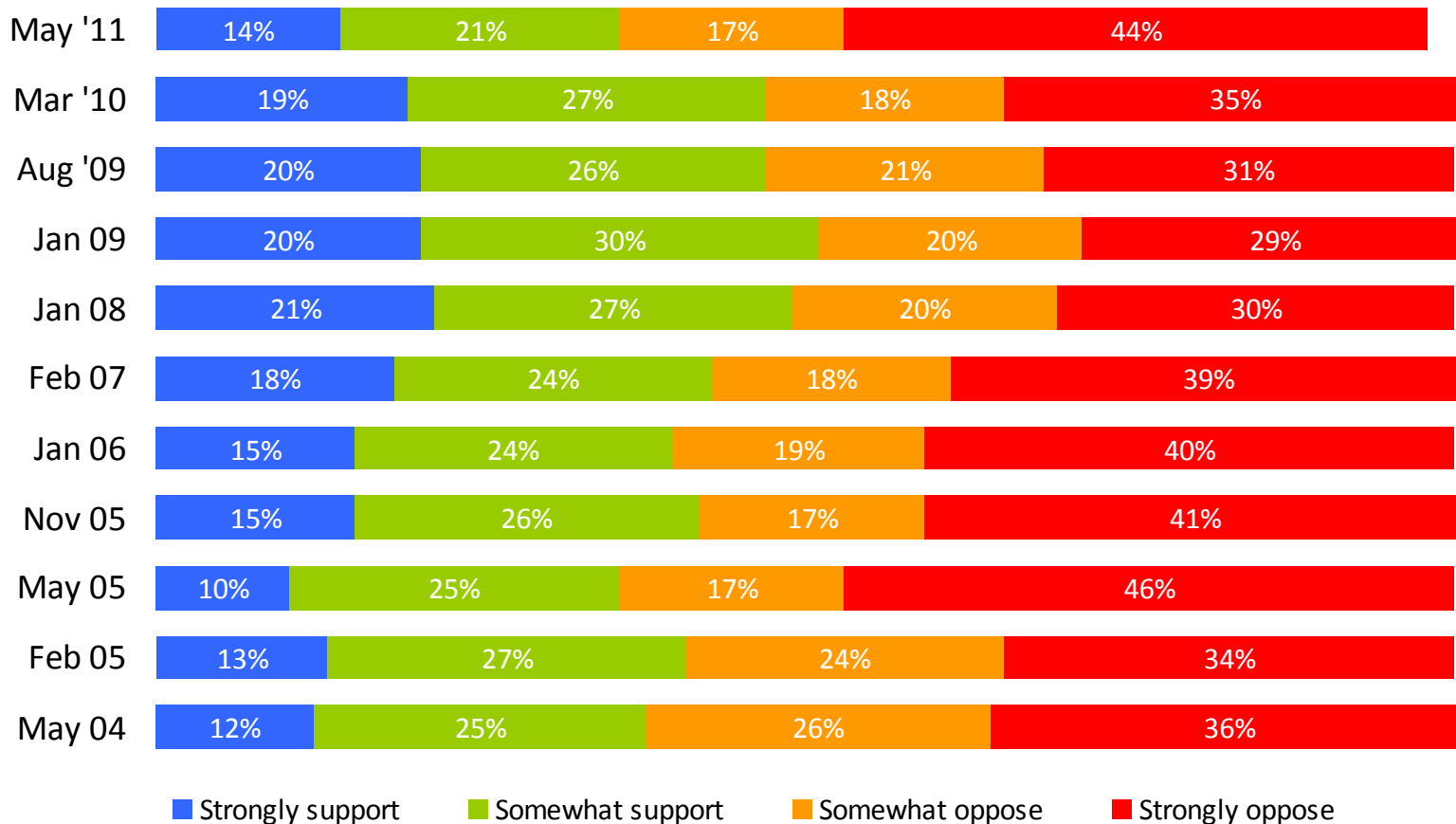
n=1012

## Strong opposition up 9 points, just below record high

Q

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

### Building new nuclear power plants

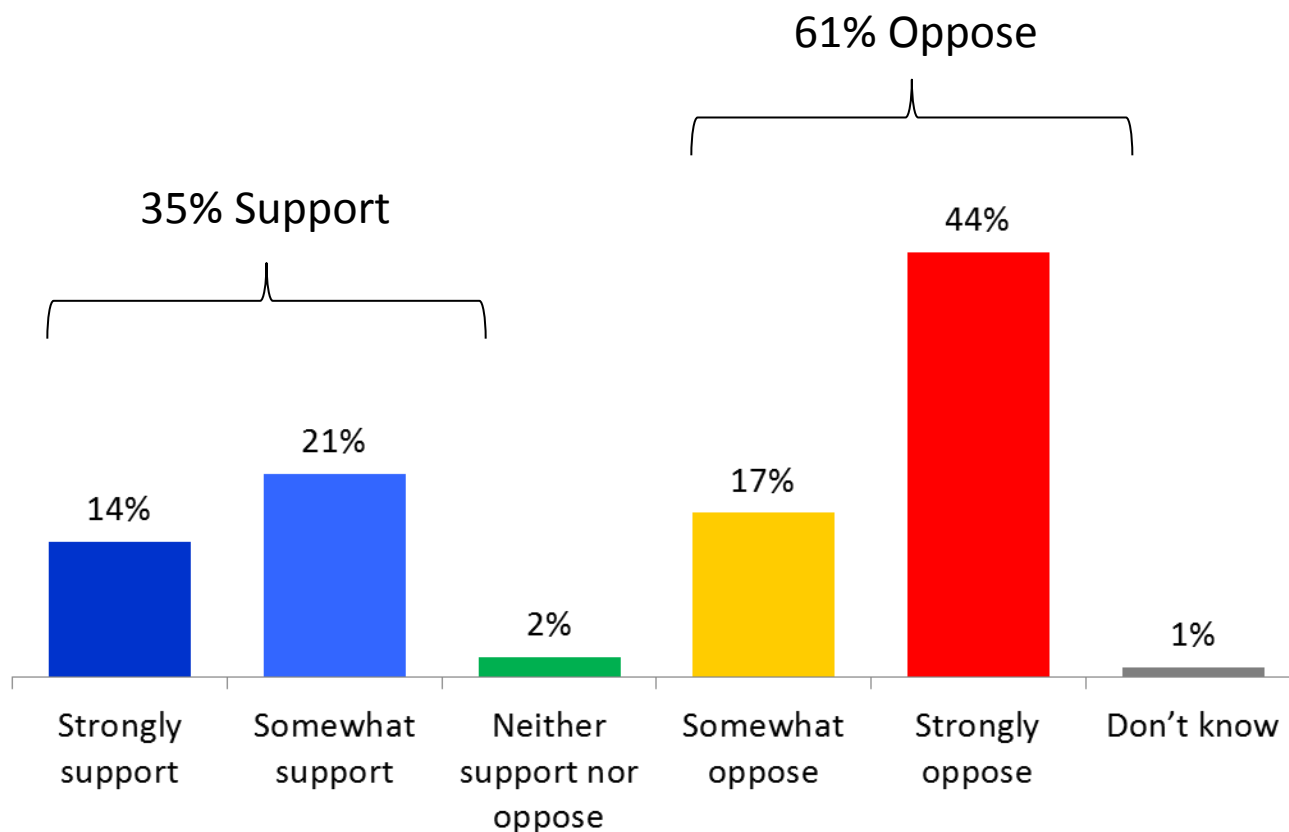


# Just over one third support new nuclear power plants, with strong opposition

Q

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:

## Building new nuclear power plants



## Percentage who said "Support"

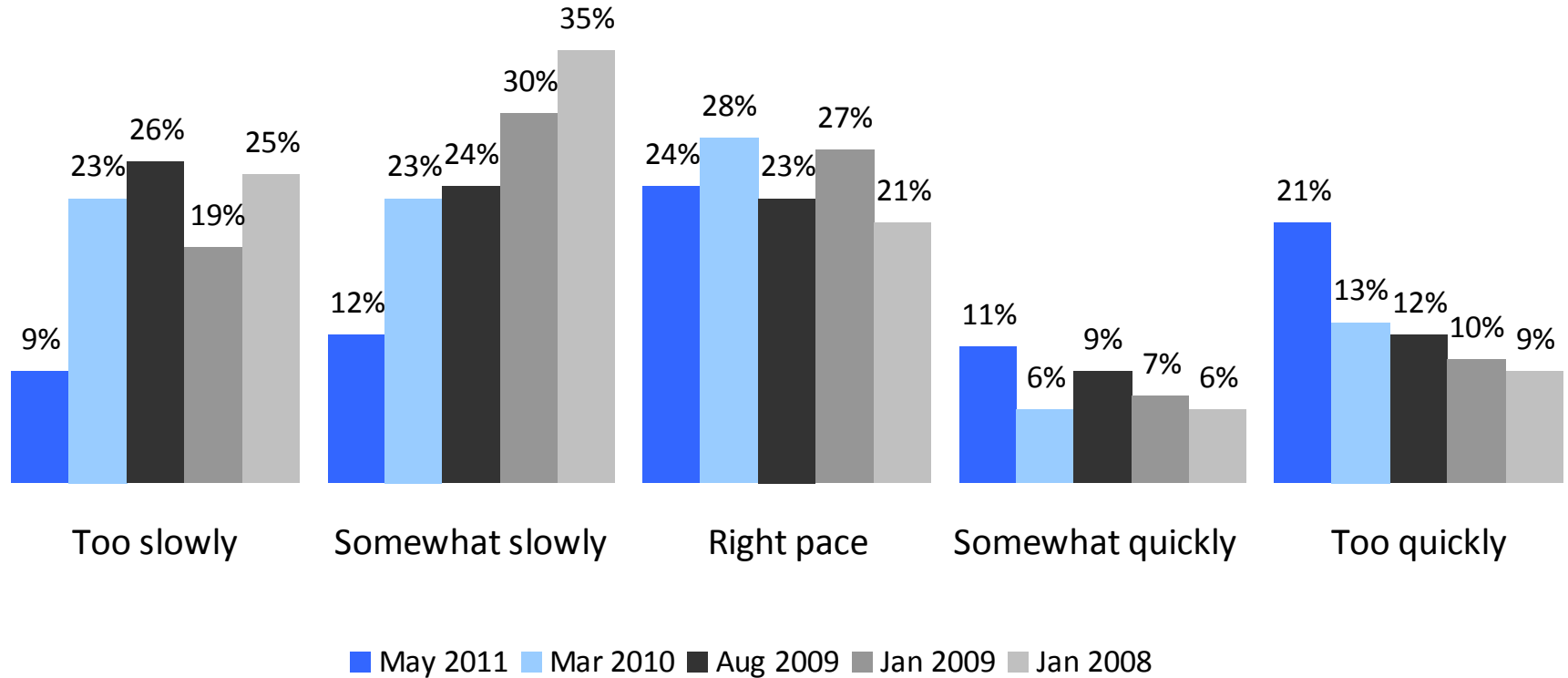
	%
BC	32%
Alberta	48%
Prairies	32%
Ontario	50%
Quebec	13%
Atlantic	28%
Fukushima systematic	20%
Neither	39%
Fukushima unique	58%
Fukushima likely here	20%
Fukushima not likely	53%
Moms with kids	26%

n=1012

## Concern over slow pace plummets

Q

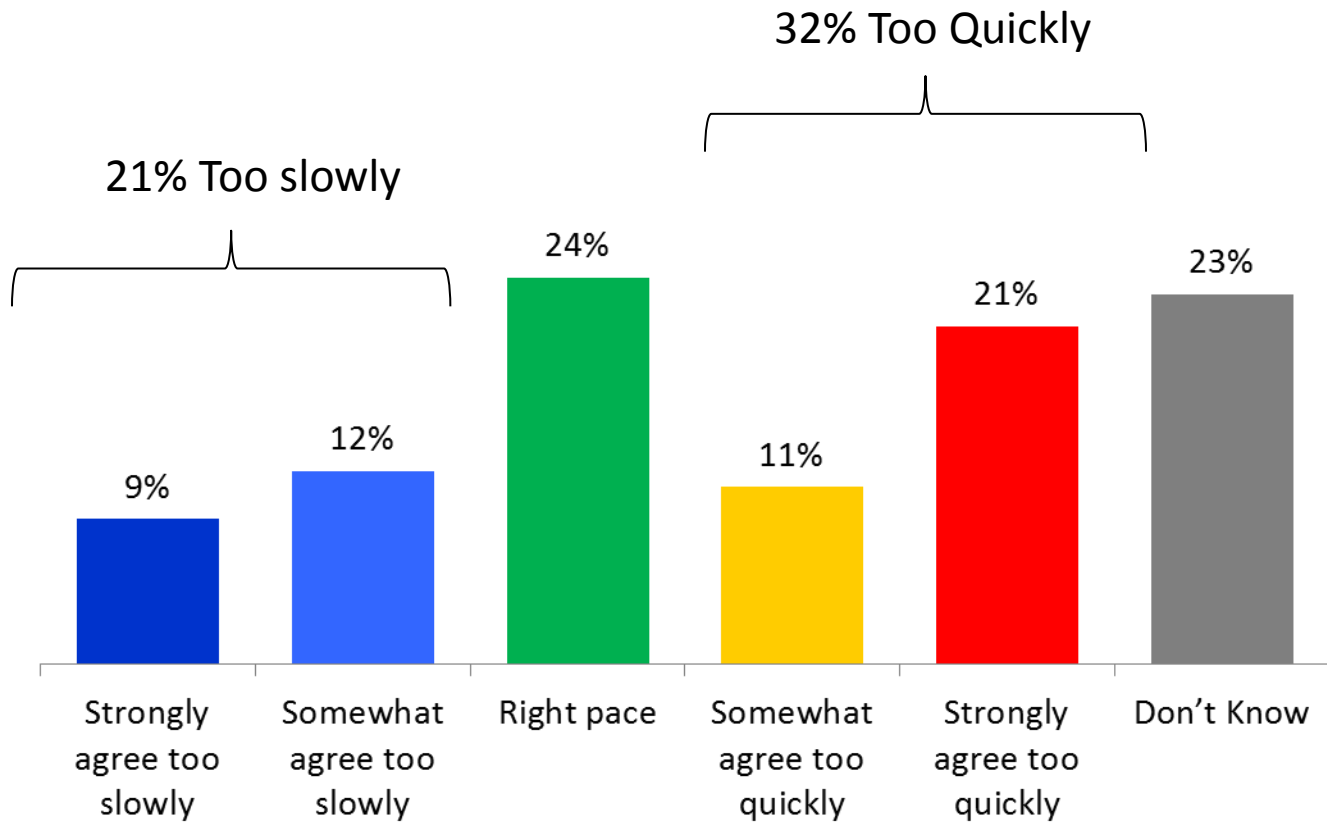
As you may know, the government of Ontario has approved the replacement and refurbishment of existing nuclear power plants. Based on what you have read, seen, or heard, do you feel the government is moving too slowly, at the right pace, or too quickly in building new nuclear power plants? (IF TOO SLOWLY OR TOO QUICKLY: Do you feel strongly it is moving too slowly/quickly or just somewhat that way?)



# Canadians uncertain on whether government is moving too fast or too slow on new nuclear plants



As you may know, the government of Ontario has approved the replacement and refurbishment of existing nuclear power plants. Based on what you have read, seen, or heard, do you feel the government is moving too slowly, at the right pace, or too quickly in building new nuclear power plants? (IF TOO SLOWLY OR TOO QUICKLY: Do you feel strongly it is moving too slowly/quickly or just somewhat that way?)



n=1012

Percentage who said "Too slowly"

	%
Male	25%
Female	17%
BC	13%
Alberta	27%
Prairies	23%
Ontario	26%
Quebec	12%
Atlantic	19%
Fukushima systematic	13%
Neither	26%
Fukushima unique	31%
Support nuclear	36%
Neither nuclear	17%
Oppose nuclear	10%



# Underlying Beliefs

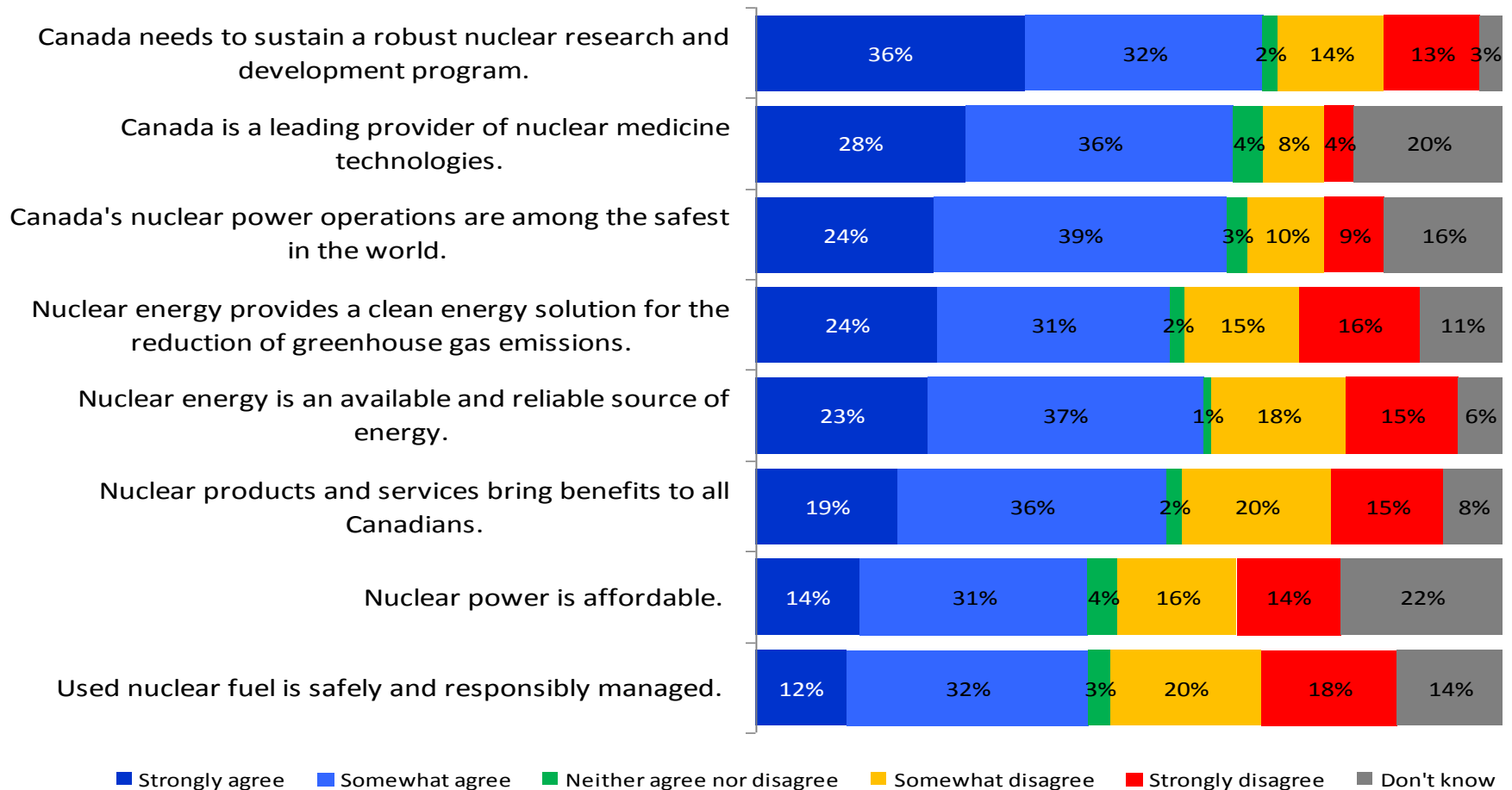
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# Strong agreement Canada needs nuclear research; less agreement on affordability & used fuel storage

Q

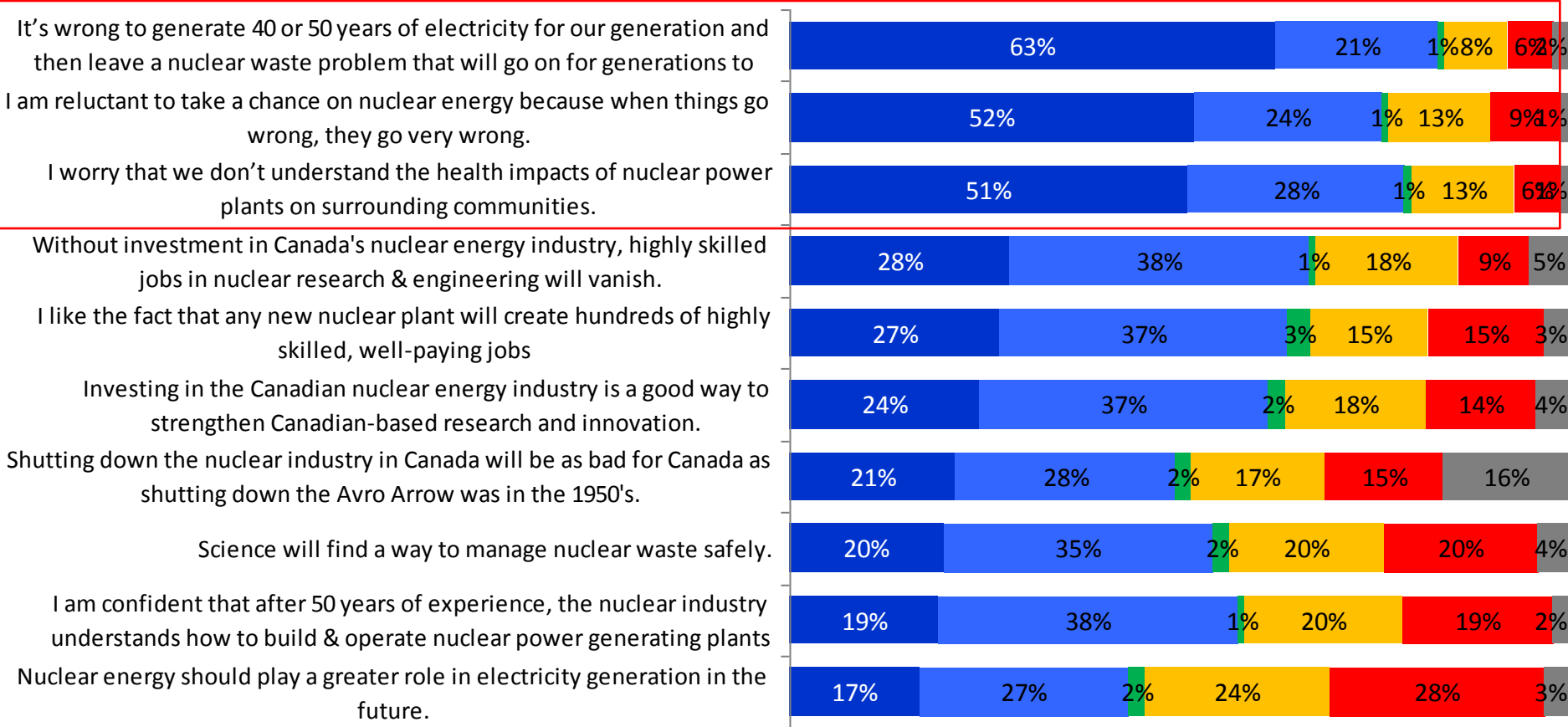
Now I am going to read some statements about nuclear energy. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements:



n=1012

# Very strong agreement on Nuclear negatives; top concern is leaving waste to future generations

**Q** Now I am going to read some statements about nuclear energy. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements:



■ Strongly agree 
 ■ Somewhat agree 
 ■ Neither agree nor disagree 
 ■ Somewhat disagree 
 ■ Strongly disagree 
 ■ Don't know



n=1012

# Summary

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- Fukushima matters.
  - People are paying attention and many feel it raises concerns for Canada.
  - Operators get the benefit of the doubt in their response.
- Fukushima has caused the least problem in Ontario where we find majorities supporting nuclear power on all three key ‘ballot’ questions.
- Beliefs tend to come down to a couple distinct but separate dimensions which really come down to negative and positive feelings.
- Many people agree with both positive and negative nuclear statements.
- The challenge for the nuclear industry is to help people manage that conflict





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