



Canadian Nuclear Association
Association nucléaire canadienne



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Purpose & Methodology

- The research program tracks overall support for and attitudes toward nuclear energy in Canada since the February 2005 benchmark.
- The survey was conducted by telephone January 17-28, 2008.
- The total sample is 2,187, resulting in a margin of error of +/-2.07%.
Oversampling was conducted in Alberta, Saskatchewan, Ontario, Quebec and New Brunswick. The regional sub-samples and associated margins of error are:

	N	+/-%, 95% of the time
National	2187	2.07
BC	261	6.05
AB	205	6.84
SK/MB	230	6.45
(SK)	(161)	7.72
ON	752	3.56
QC	499	4.38
ATL	240	6.32
(NB)	(138)	8.34



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Key Themes

- **Energy as a top of mind concern among Canadians has increased significantly from last year.**
- **Confidence in energy supply is the lowest today since tracking began in 2005, dropping significantly in British Columbia and the Prairie provinces (led by Saskatchewan).**
- **Nationally, support for nuclear energy continues to increase. Similarly, support for upgrading/refurbishing and new builds is also up.**
- **One-third of Canadians feel they will face an electricity shortage in their community in the near future; just less than one-half feel this will happen within the next 5 years.**
- **In Ontario, more than half feel the government is moving too slowly in building new nuclear power plants.**



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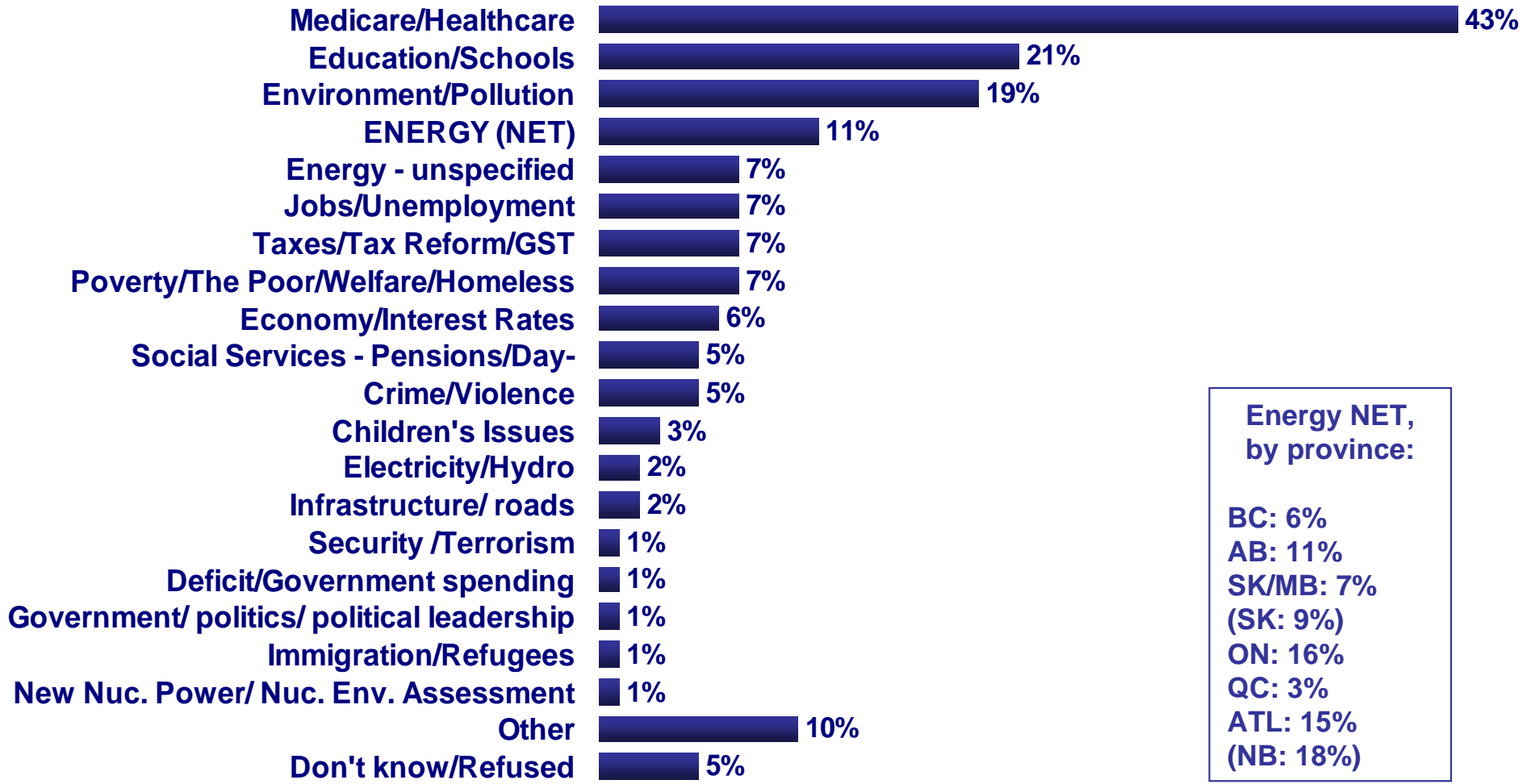
Energy As An Issue



Energy As A Provincial Issue

One-in-ten (11%) Canadians cite energy as the issue that should receive the most attention from the provincial government, an increase of 8 points from the previous year.

Total Mentions



Energy NET, by province:

BC: 6%
 AB: 11%
 SK/MB: 7%
 (SK: 9%)
 ON: 16%
 QC: 3%
 ATL: 15%
 (NB: 18%)

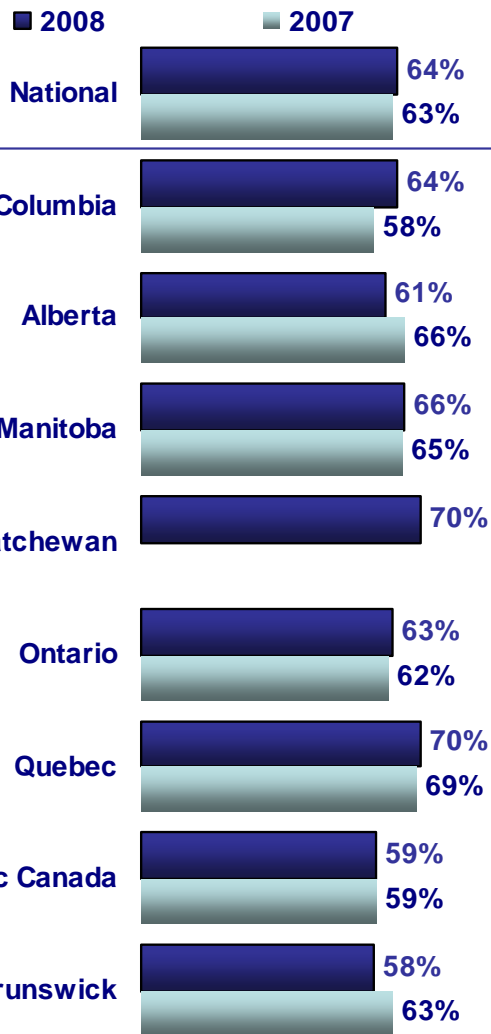




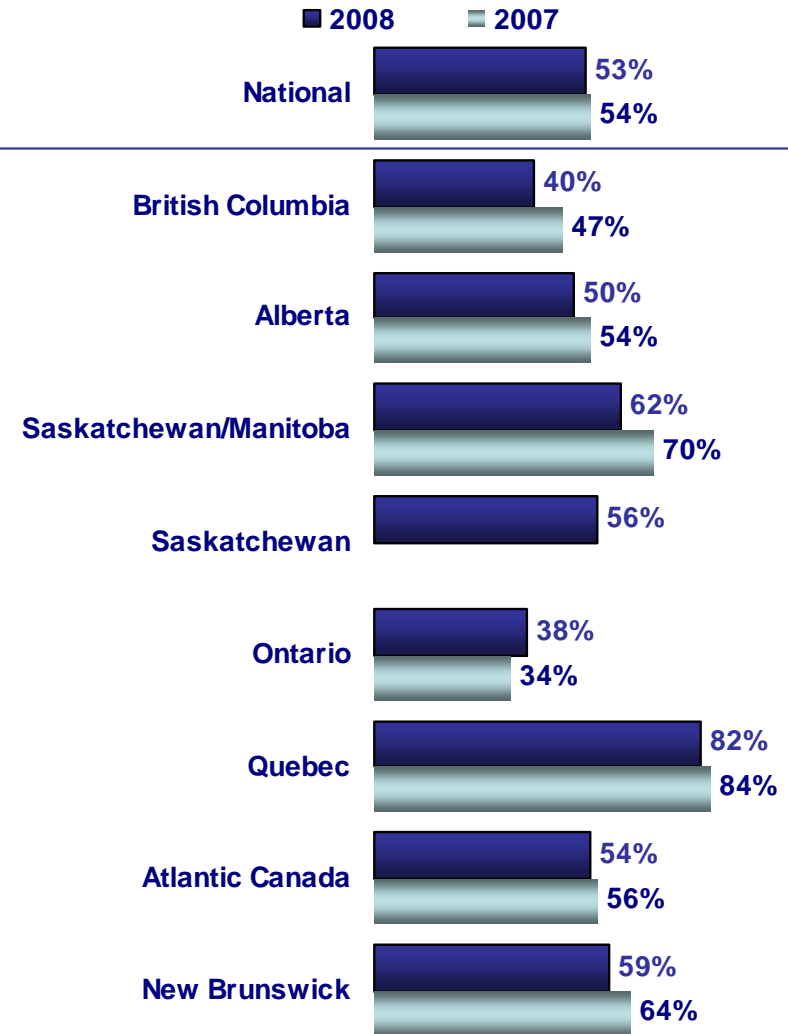
Conservation and Supply

One-half (53%) of Canadians fear there is not enough energy in their province; two-thirds (64%) do not think conservation efforts will be enough to ensure supply. Supply concerns continue to be most acute in Ontario and British Columbia.

Conservation Efforts Won't Offset Demand



Have Enough Electricity in My Province

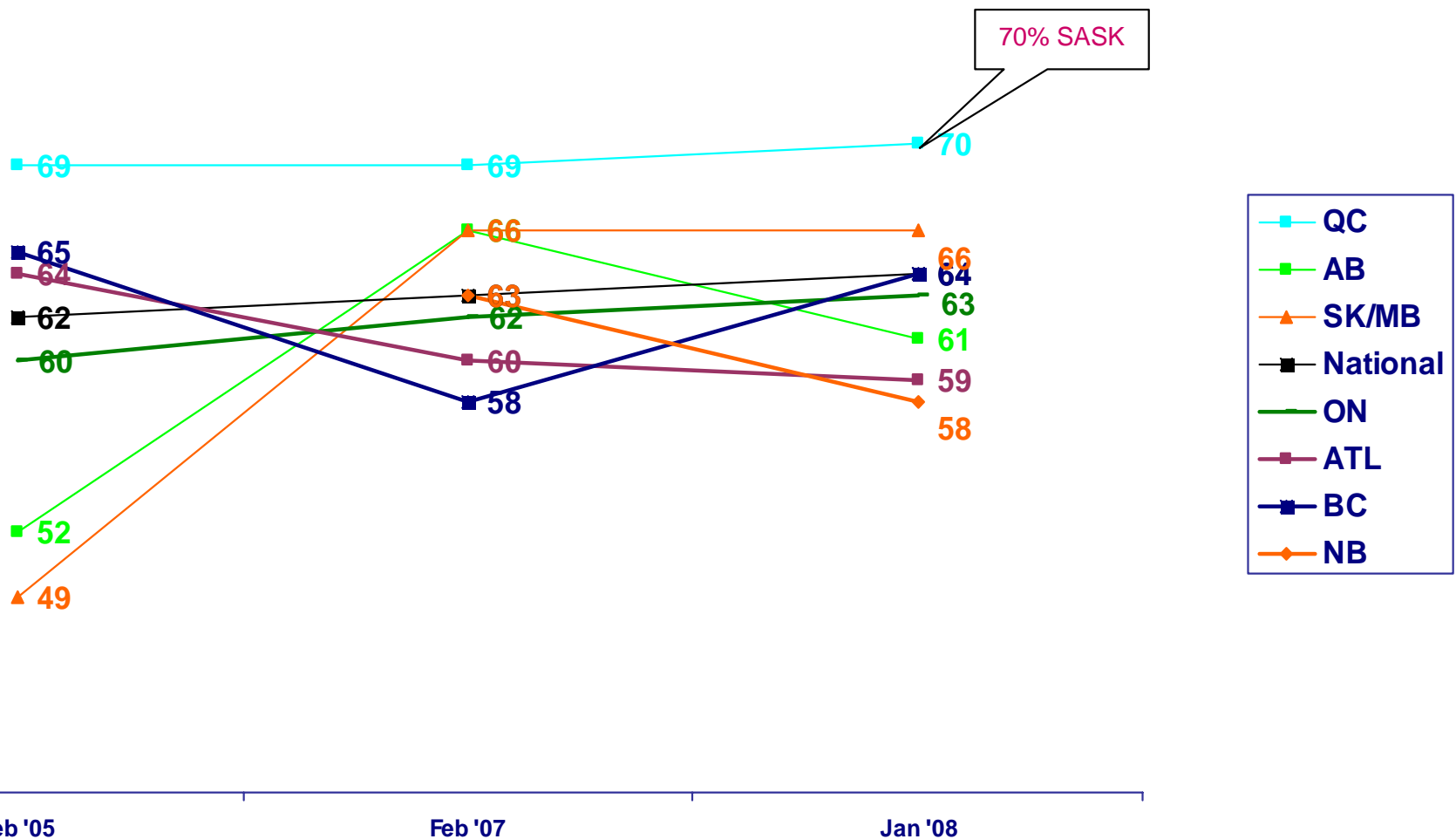




Conservation Tracking

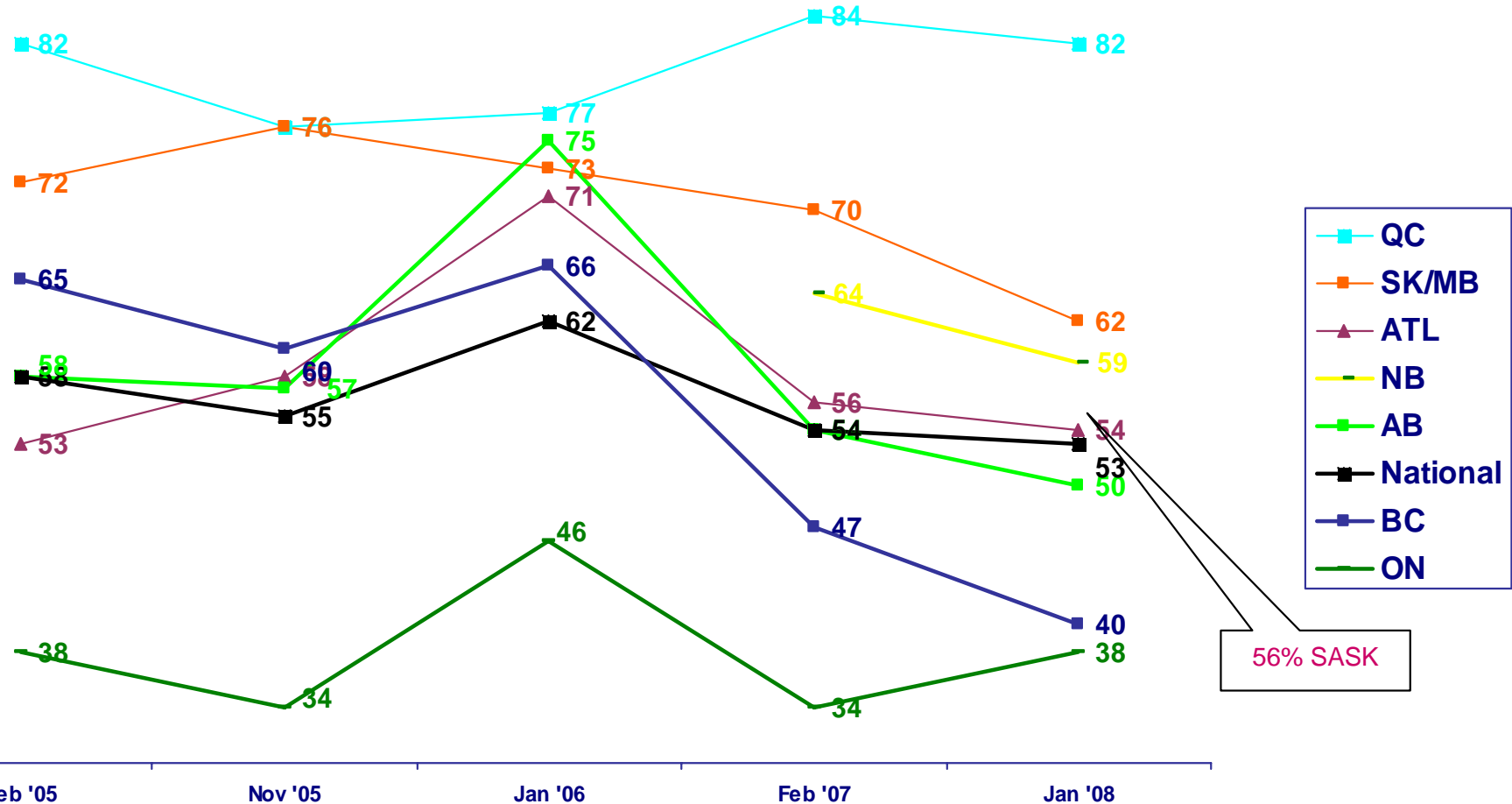
In the past year, more British Columbians are concerned that conservation efforts will not be enough to offset demand (+ 6 points).

Conservation won't offset demand



Confidence in electricity supply continues to drop to historic lows across the country, with the exception of Ontario where confidence has slightly improved (+ 4 points), but remains the lowest overall.

Have enough electricity in my province



56% SASK





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Nuclear Support Tracking



National Support for Nuclear vs. Other Energy Sources

Just under one-half (47%) of Canadians support nuclear energy.

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

Total Support vs. Oppose

Solar Power Jan. '08



96% vs. 3%

Wind Power Jan. '08



93% vs. 6%

Hydroelectric Power Jan. '08



89% vs. 8%

Natural Gas Jan. '08



72% vs. 27%

▶ Nuclear Energy Jan. '08



47% vs. 51%

Coal Jan. '08



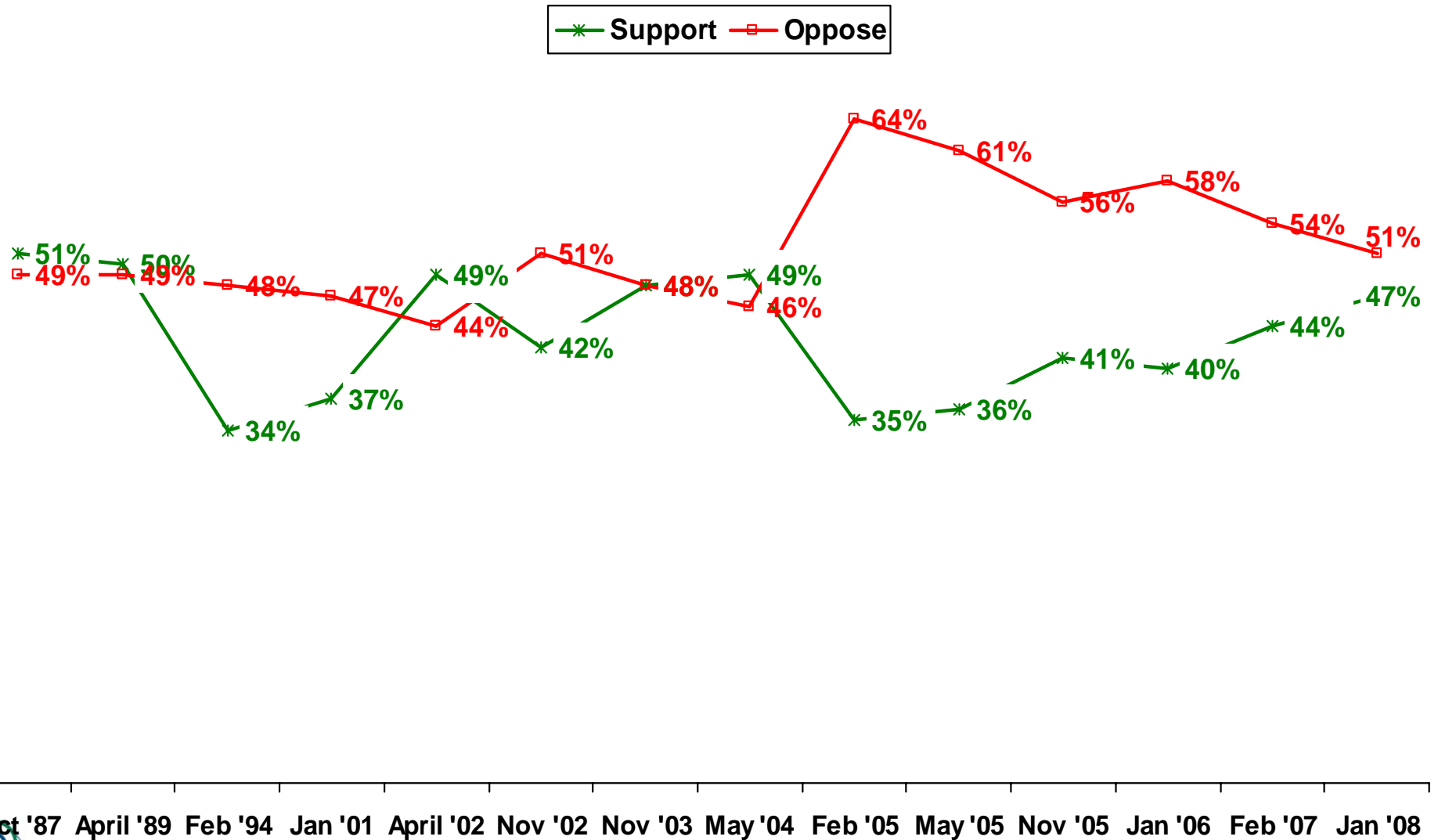
22% vs. 77%





National Support for Nuclear Tracking

Support for nuclear power is up nominally in the last two years (+7 points). Since February 2005, support has increased significantly (+12 points).



Oct '87 April '89 Feb '94 Jan '01 April '02 Nov '02 Nov '03 May '04 Feb '05 May '05 Nov '05 Jan '06 Feb '07 Jan '08

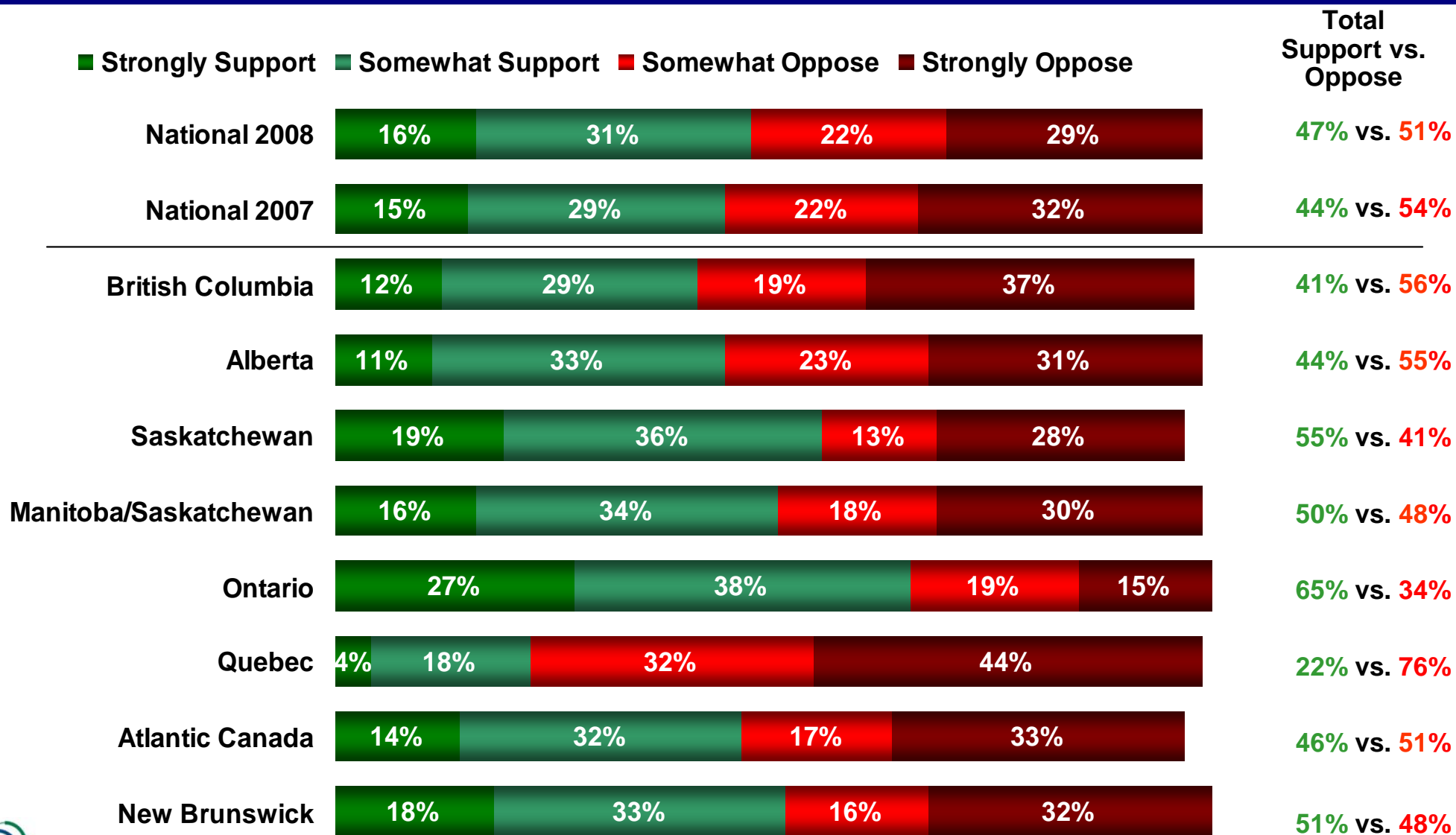


I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: Jan 08 N=2187 Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000



Regional Support for Nuclear

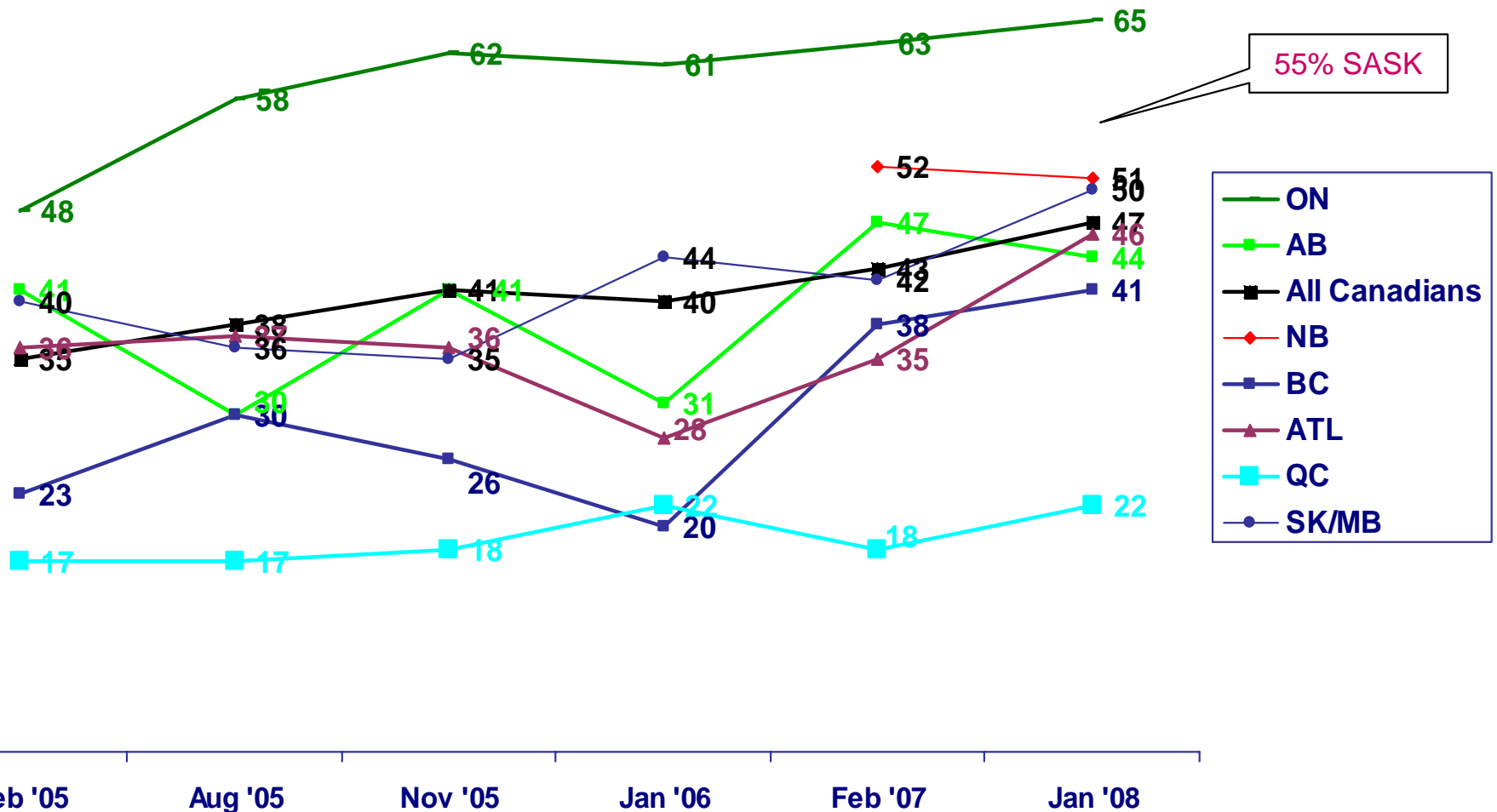
Support for nuclear energy is highest in Ontario (65%) and Saskatchewan (55%) and lowest in Quebec (22%).





Regional Support for Nuclear, Tracking

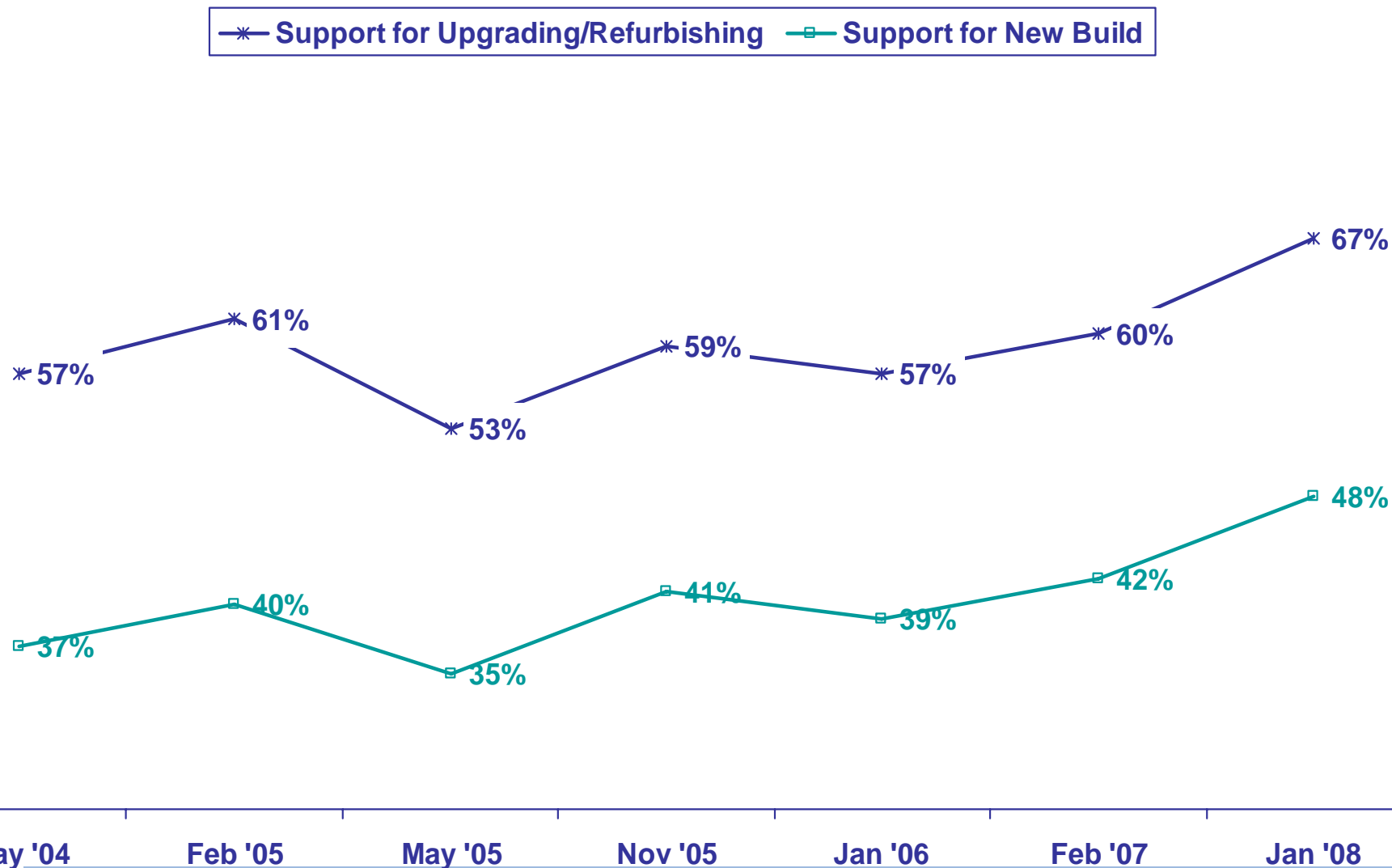
Support for nuclear energy continues to increase in all regions, with the exception of Alberta.





National Support for Refurbishing & New Build Tracking

Canadians continue to be more likely to support upgrading and refurbishing than building new facilities (67% vs. 48%); support for both has increased since the previous year (upgrading/refurbishing +7 and new build +6).



May '04

Feb '05

May '05

Nov '05

Jan '06

Feb '07

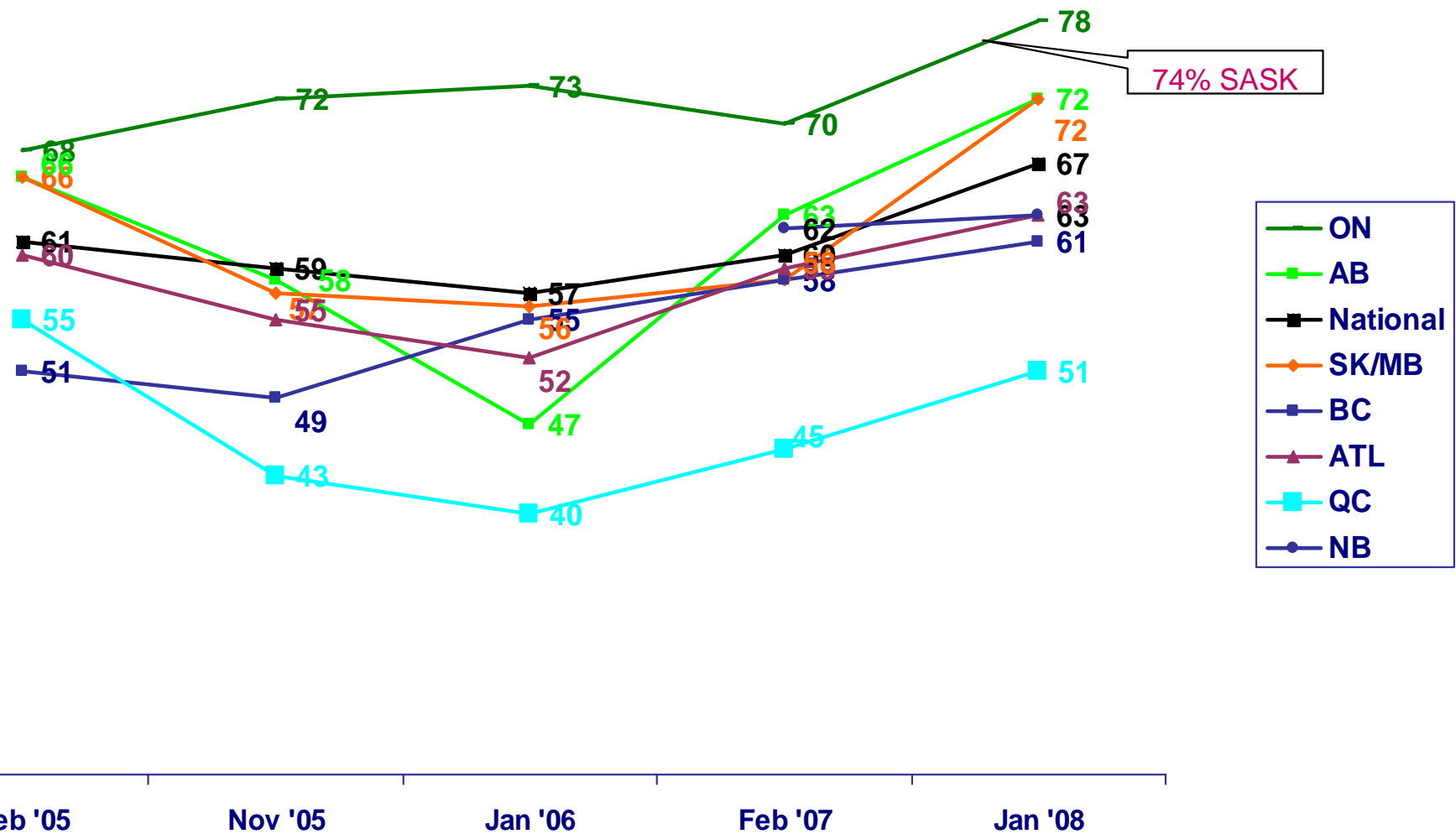
Jan '08

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 08 N=2187 Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000 16



Support for Refurbishing by Region, Tracking

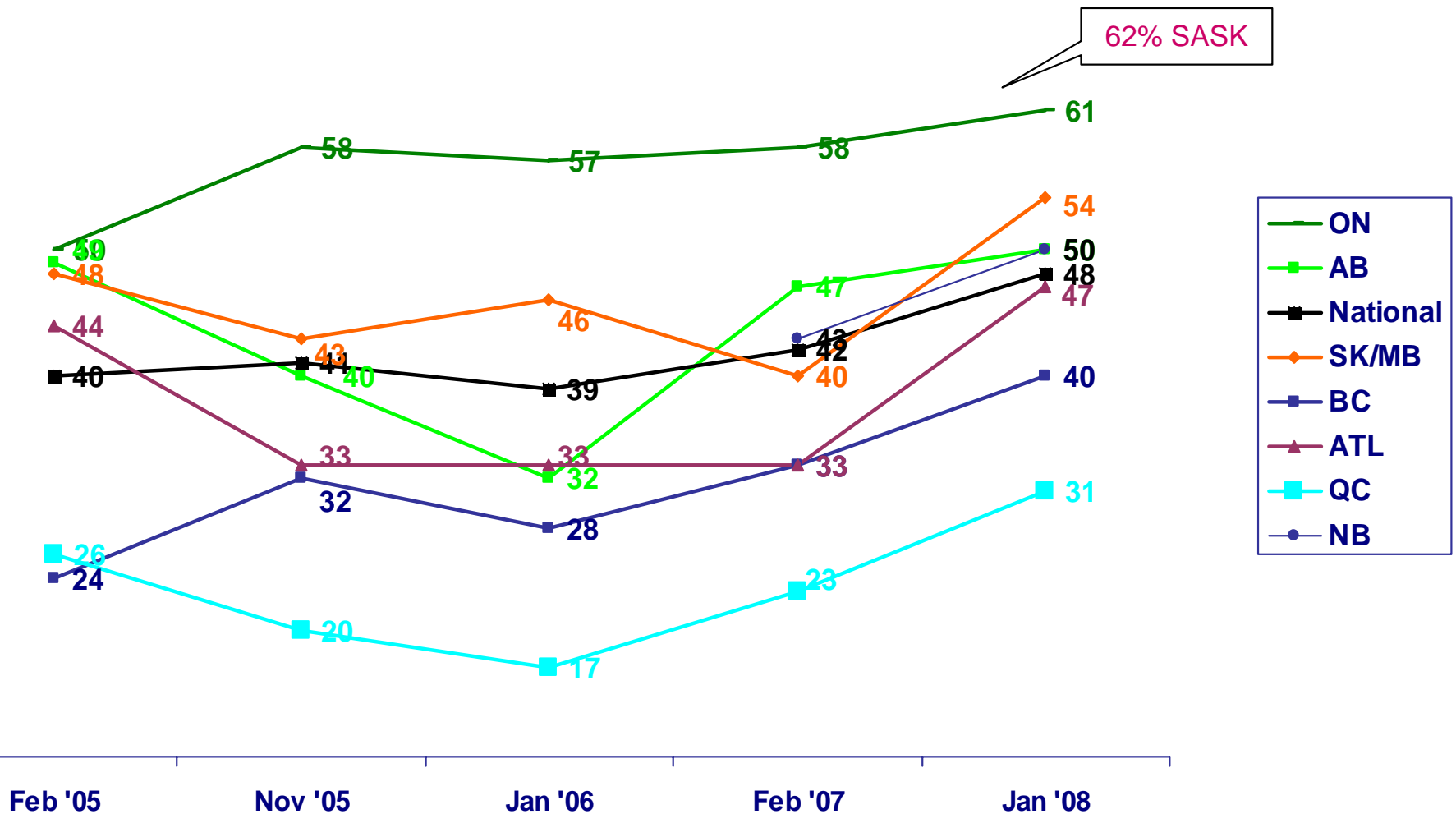
Support for refurbishing continues to rise in all provinces, particularly in Ontario (+8 points), Alberta (+4 points) and the Prairie provinces (+14 points) (led by Saskatchewan). Even in Quebec, where support for nuclear energy is comparatively low, one-half (51%) of residents now support refurbishing.





Support for New Builds by Region, Tracking

Similarly, support for building new nuclear power plants also continues to increase across the country, namely in the Prairie provinces (+14 points) (led by Saskatchewan), the Atlantic provinces (led by New Brunswick) (+14 points), British Columbia (+7 points), and Quebec (+8 points).





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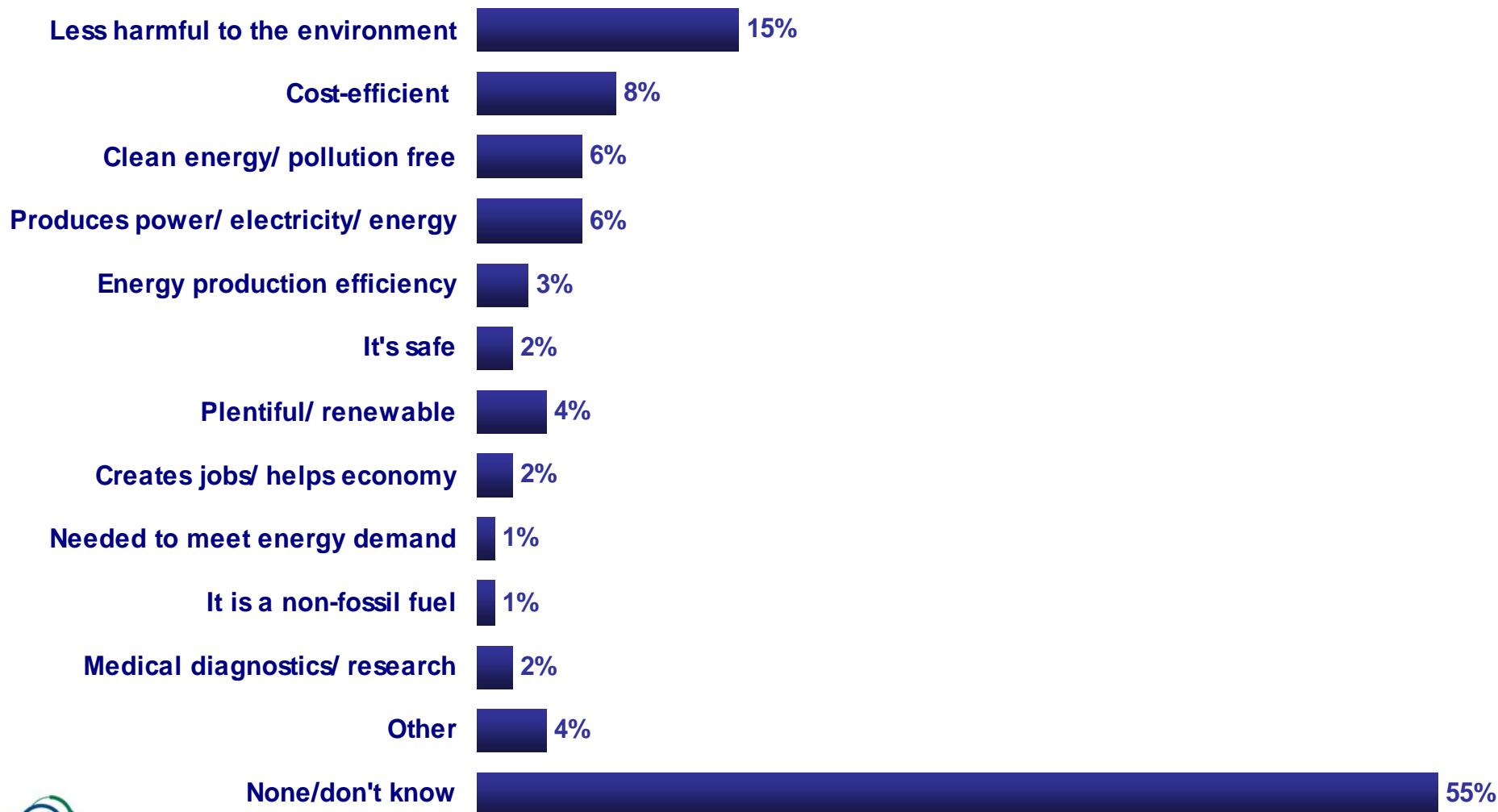


Attitudes Toward Nuclear



Top-of-Mind Benefits of Nuclear Power

More than one-half (55%) of Canadians cannot mention any top of mind benefits to nuclear power. Among Canadians who see a top of mind benefit to nuclear power, one-in-five (21%) see it as an environmentally-friendly (15%) and clean (6%) source of electricity.

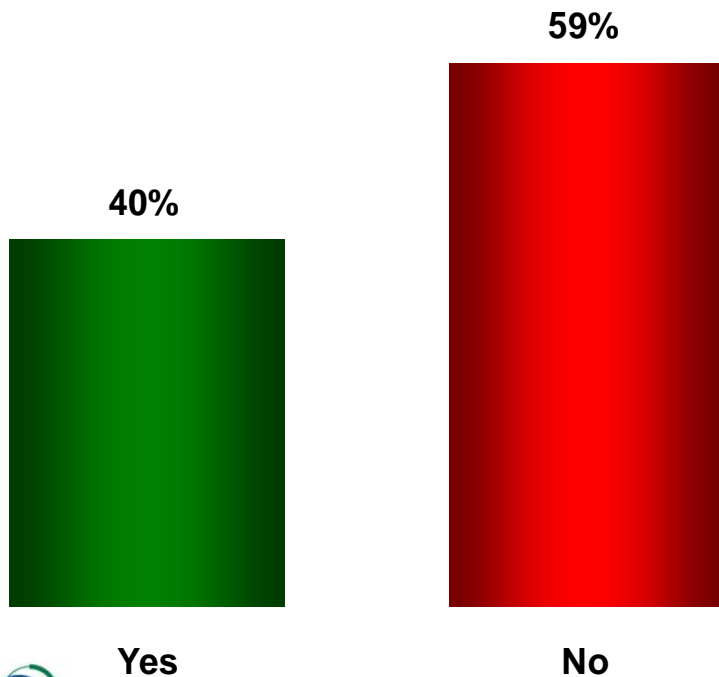




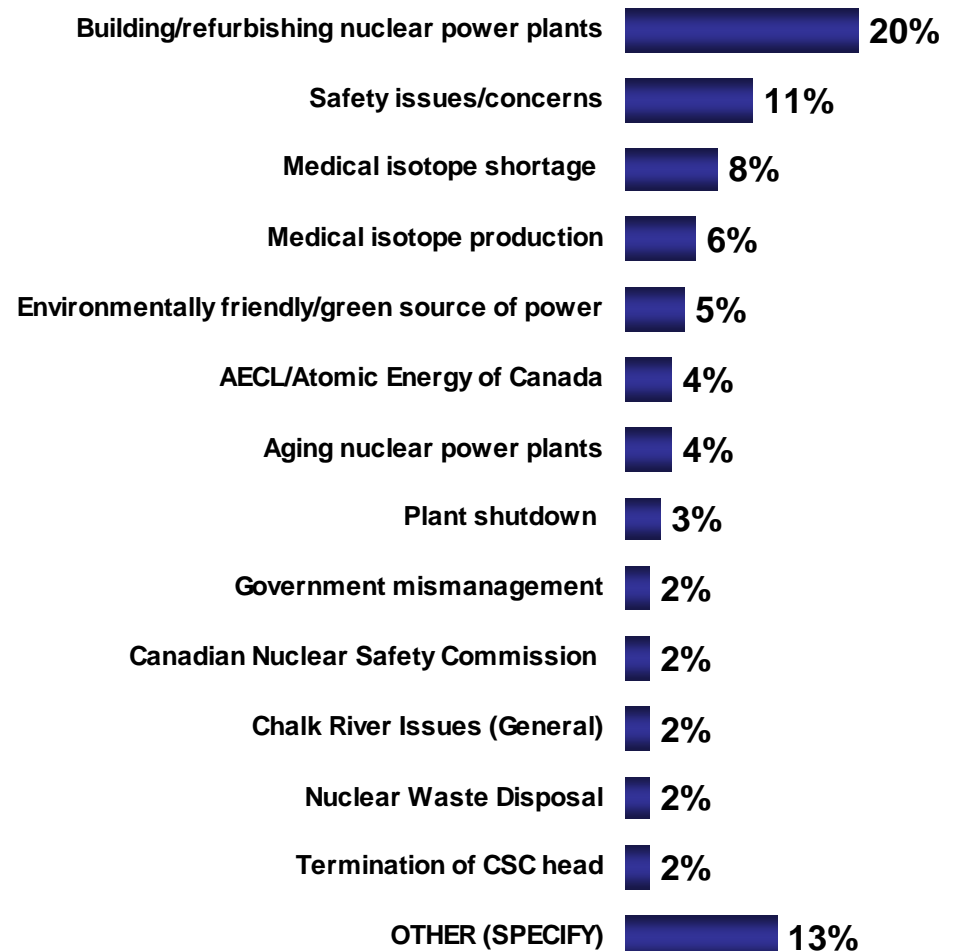
Read, Seen, Or Heard Anything Recently About Nuclear Power?

Among Canadians who have recently heard something about nuclear power, the building or refurbishment of nuclear power plants is the single issue most recalled (20%). Approximately one-in-five (22%) can recall an issue directly associated with the recent closure of the Chalk River facility.

Read, Seen or Heard Anything Recently About Nuclear Power



What Has Been Read, Seen or Heard Recently About Nuclear Power

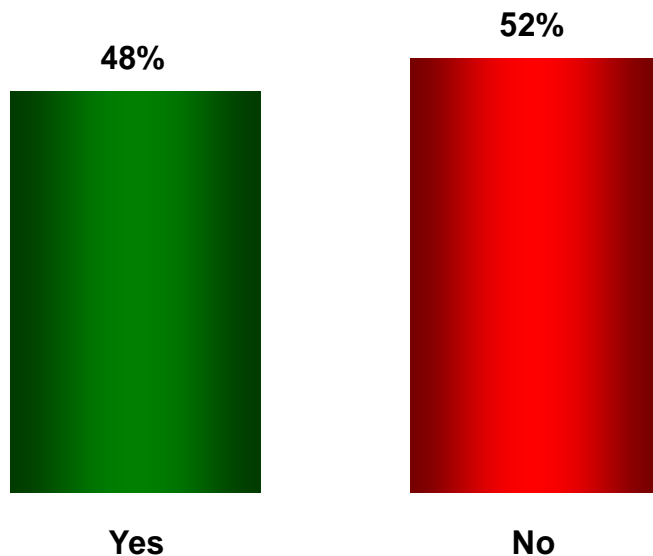




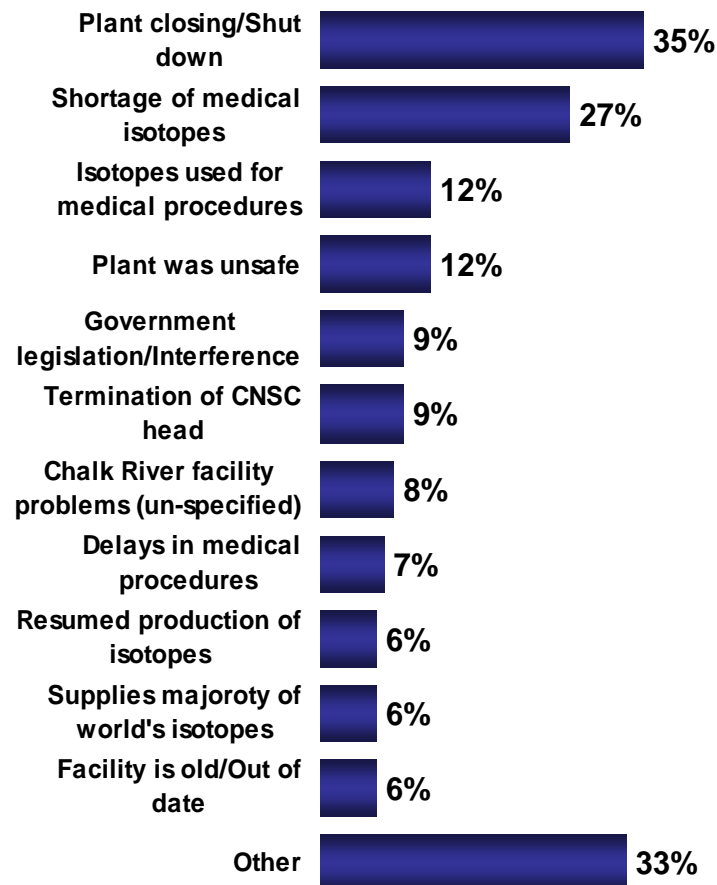
Medical Isotope Production

Among those that recall reading, seeing, or hearing anything about the production of medical isotopes, most recall the closure of the Chalk River Facility (35%) or the shortage of medical isotopes that occurred as a result (27%).

Read, Seen or Heard Anything About the Recent Circumstances Surrounding the Production of Medical Isotopes Through Nuclear Technology in Canada



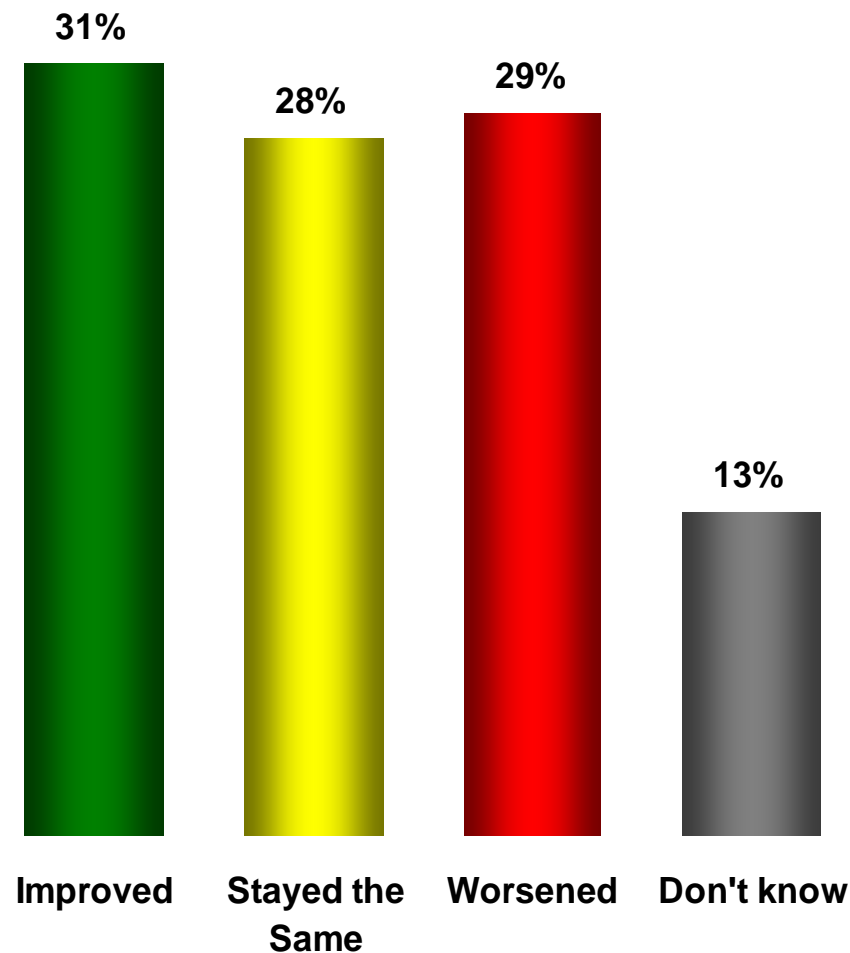
What can be recalled?





Confidence in Canadian Nuclear Industry

A majority (59%) of Canadians feel their confidence in the nuclear industry has improved (31%) or stayed the same (28%) in the past 12 months. Three-in-ten (29%) feel their confidence has worsened in the past 12 months.

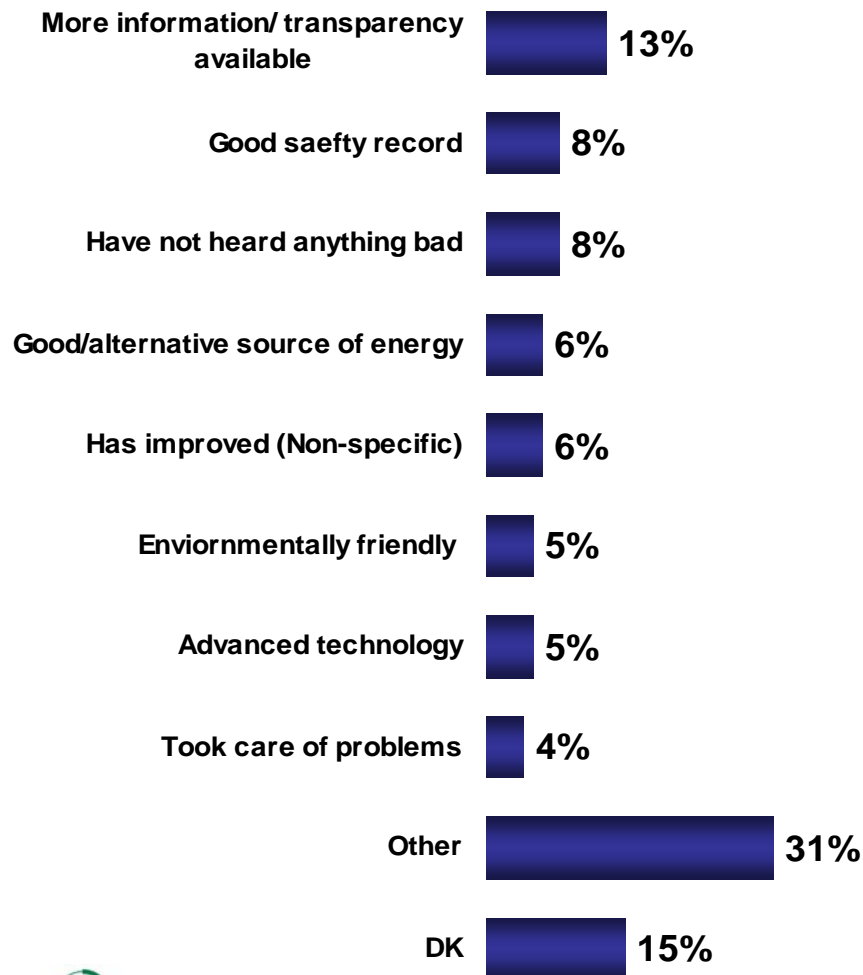




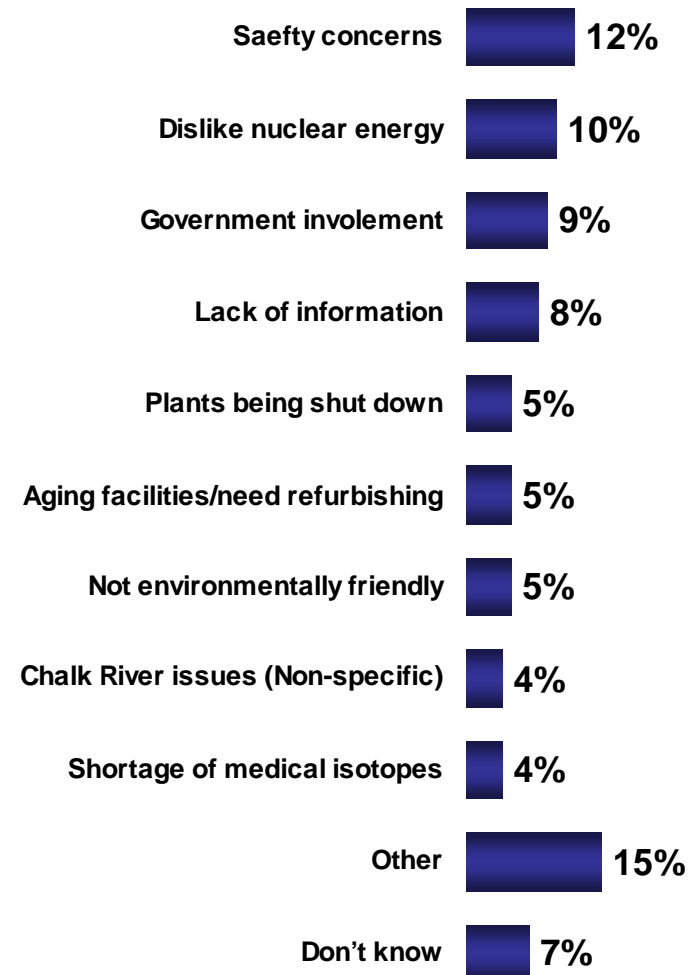
Confidence In Canadian Nuclear Industry: Reasons

Canadians cite more information and transparency, good safety record, and no bad news for their increased confidence. While safety concerns, dislike for nuclear energy, and government involvement are cited as reasons for worsened confidence.

Reasons for Improved Confidence



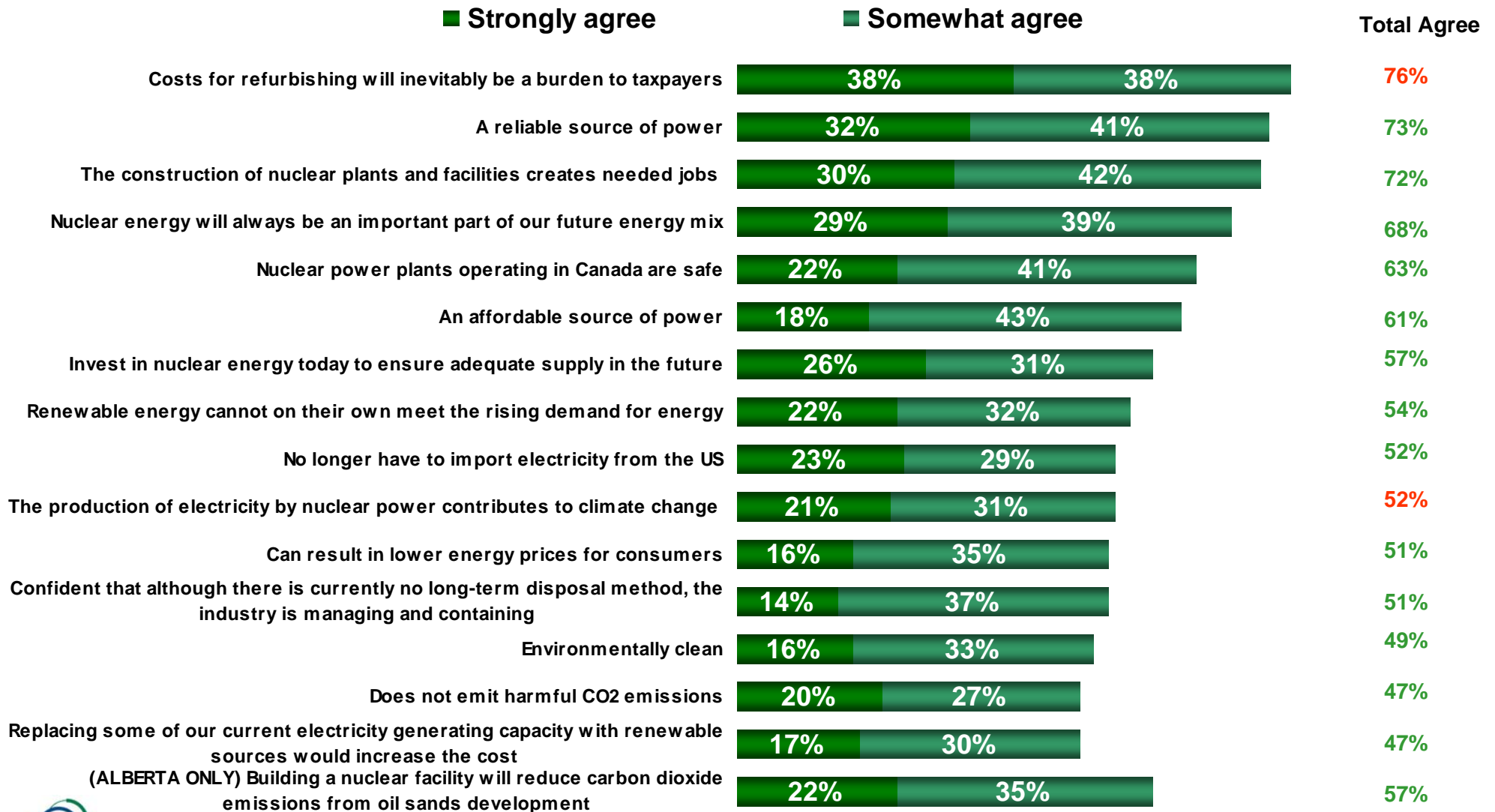
Reasons for Worsened Confidence





National Attitudes Towards Nuclear

Reliability, job creation, future energy mix, safety and affordability receive the highest levels of agreement among Canadians.





Regional Attitudes Toward Nuclear

Some regional variation in specific attitudes toward nuclear, but the ordering of the attributes is generally consistent.

	Nat'l %	BC %	AB %	SK %	SK/MB %	ON %	QC %	Atl %	NB %
Costs for refurbishing will inevitably be a burden to taxpayers	76	77	69	68	71	77	77	83	82
A reliable source of power	73	68	74	75	72	84	57	80	85
Construction of nuclear plants creates needed jobs	72	66	74	78	75	83	54	76	76
Nuclear energy will always be an important part of our future energy mix	68	62	68	77	70	79	52	73	76
Nuclear power plants operating in Canada are safe	63	59	58	65	63	71	56	61	67
An affordable source of power	61	58	64	70	68	71	41	65	64
Invest in nuclear today to ensure adequate supply	57	53	56	64	56	71	38	57	62
Renewable sources of energy cannot on their own meet the rising demand for energy	54	49	49	56	51	66	44	45	47
No longer have to import electricity from US	52	44	56	61	52	65	35	50	48
The production of electricity from nuclear power contributes to climate change	52	53	53	47	50	48	57	61	63





Regional Attitudes Toward Nuclear

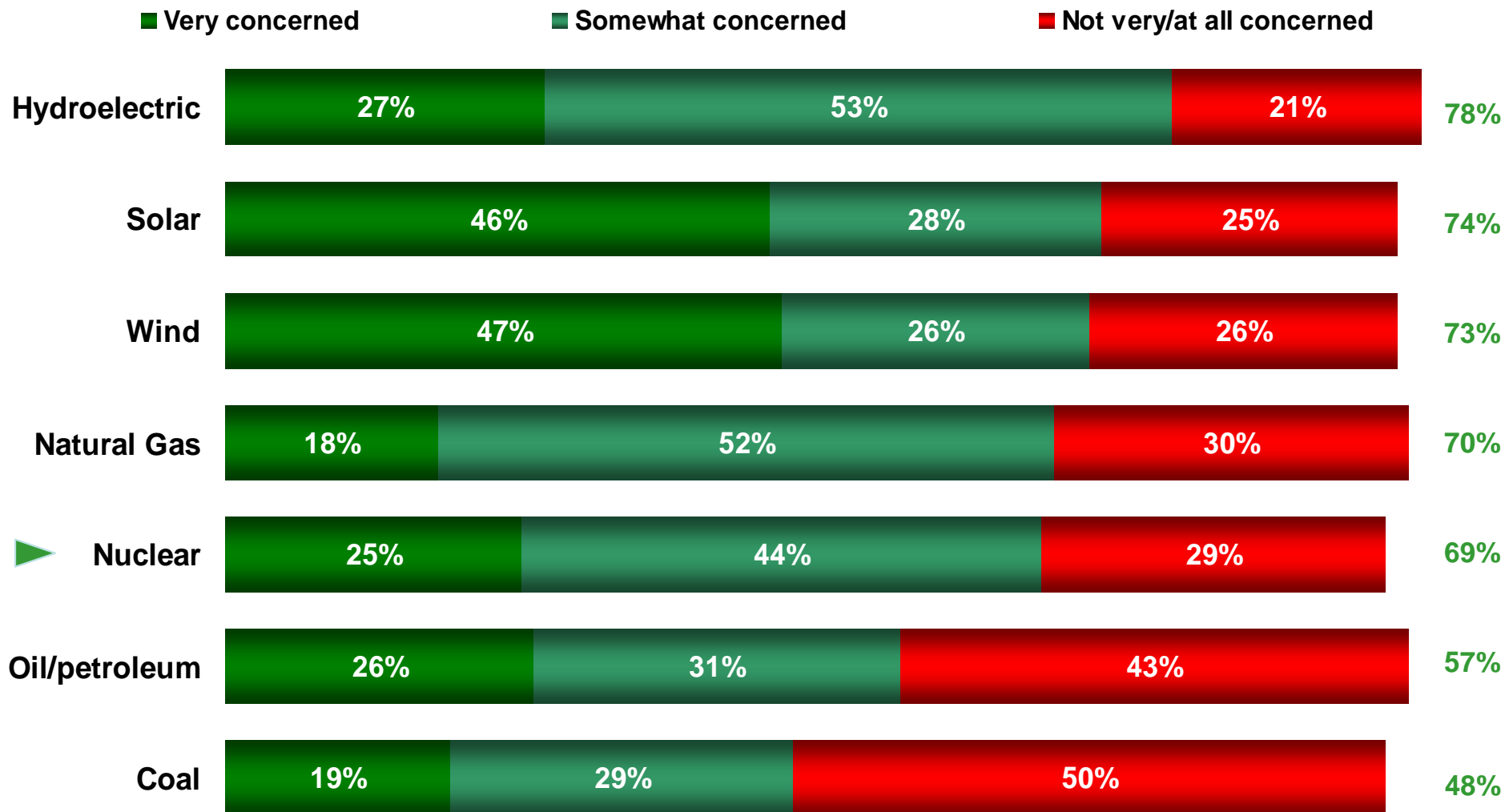
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	Nat'l %	BC %	AB %	SK %	SK/MB %	ON %	QC %	Atl %	NB %
Can result in lower energy prices for consumers	51	53	53	60	59	58	35	55	60
Confident that although there is currently no long-term disposal method, the industry is managing and containing waste at secured sites	51	50	49	57	54	58	41	55	59
Environmentally clean	49	46	43	61	53	58	36	53	57
Does not emit harmful CO2 emissions	47	43	47	56	52	53	36	56	49
Replacing some of our current electricity generating capacity renewable sources would increase the cost	47	47	43	52	50	50	39	51	47
(ALBERTA ONLY) Building a nuclear facility will reduce carbon dioxide emissions from oil sands development	57	-	57	-	-	-	-	-	-



Perceived Environmental Concern of Industries

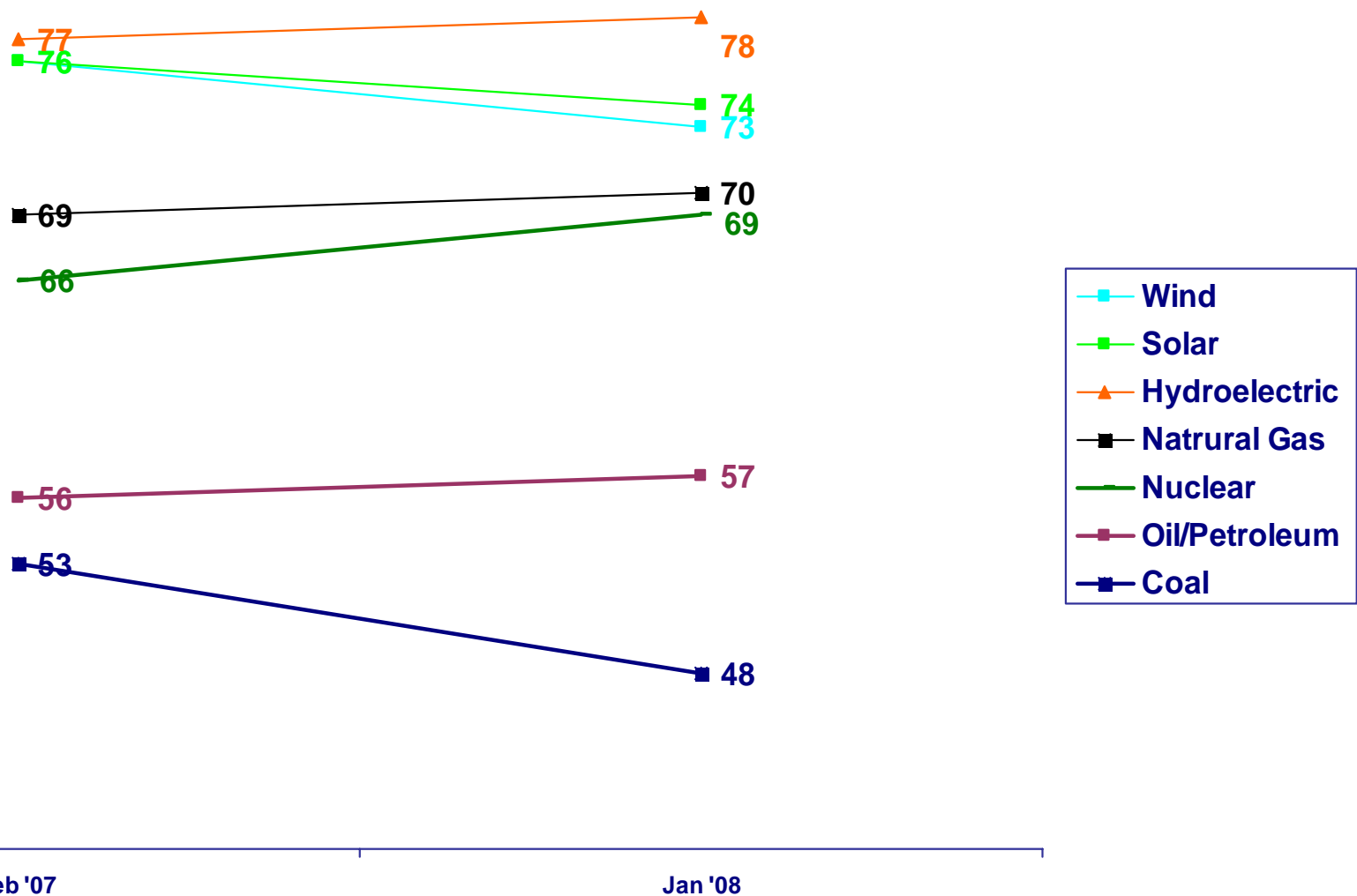
Overall, the nuclear industry compares generally favourably to other forms of electricity generation concerning the environment.





Perceived Environmental Concern of Industries, Tracking

More people today feel the nuclear industry is concerned with the environment (+3 points) than in the year previous.





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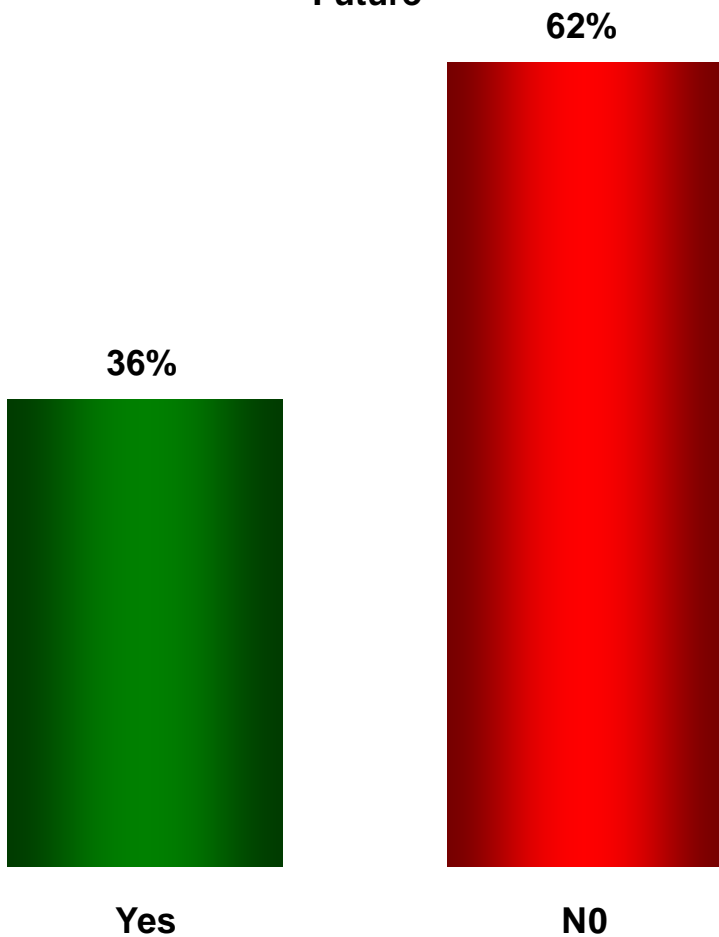
Keeping Pace



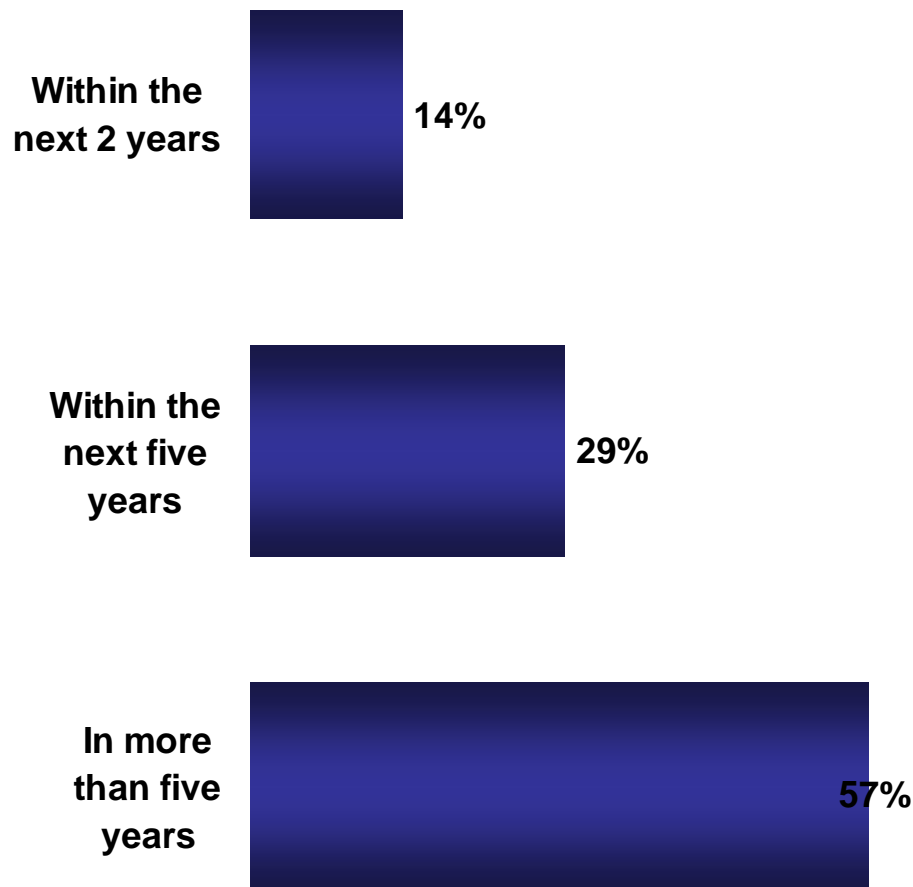
Electricity Shortage In Their Community

Among those who feel they will face an electricity shortage in their community (36%), less than one-half (43%) feel it will happen within the next five years.

People and Businesses in Community Will Face an Electricity Shortage in the Near Future



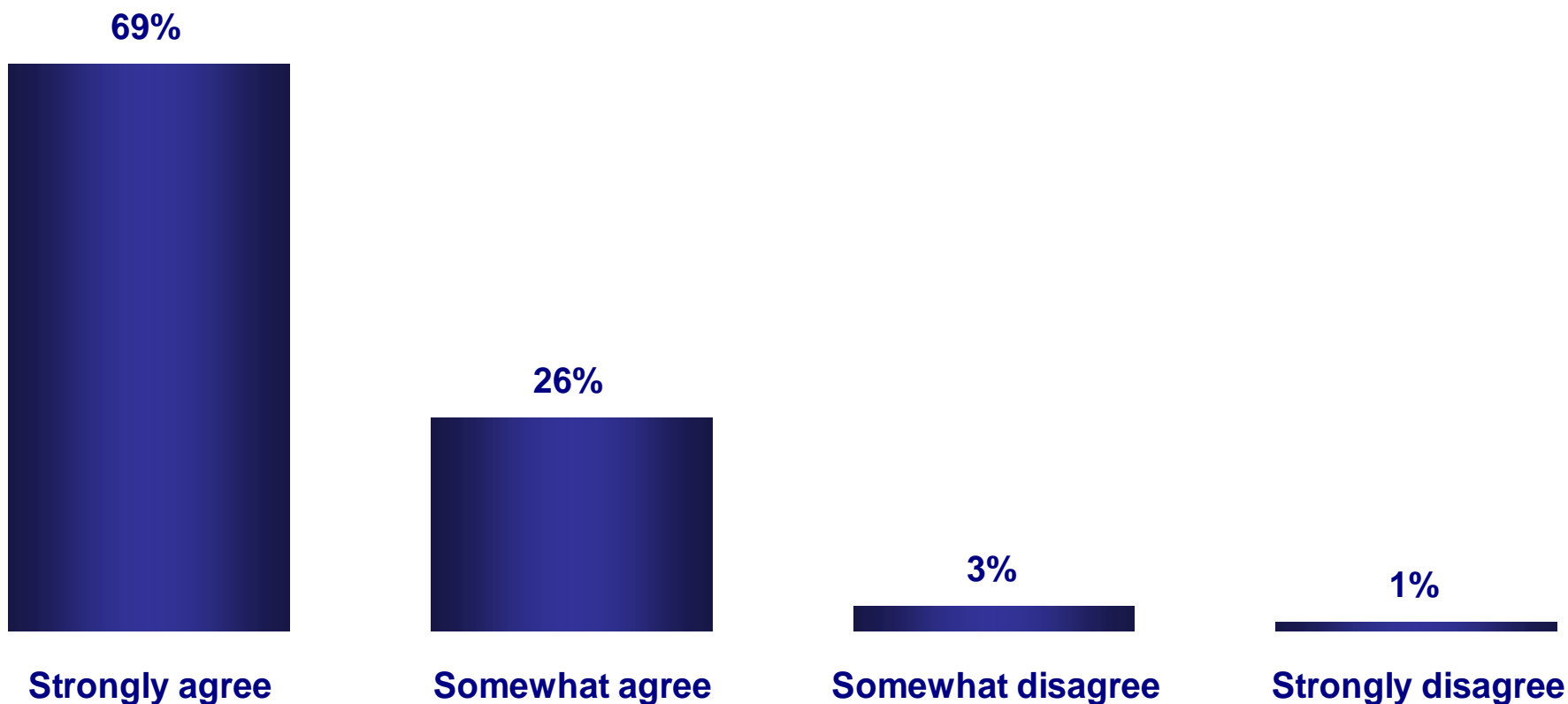
When Will Shortage of Electricity Occur





Government's Role To Ensure Adequate Supply Of Electricity

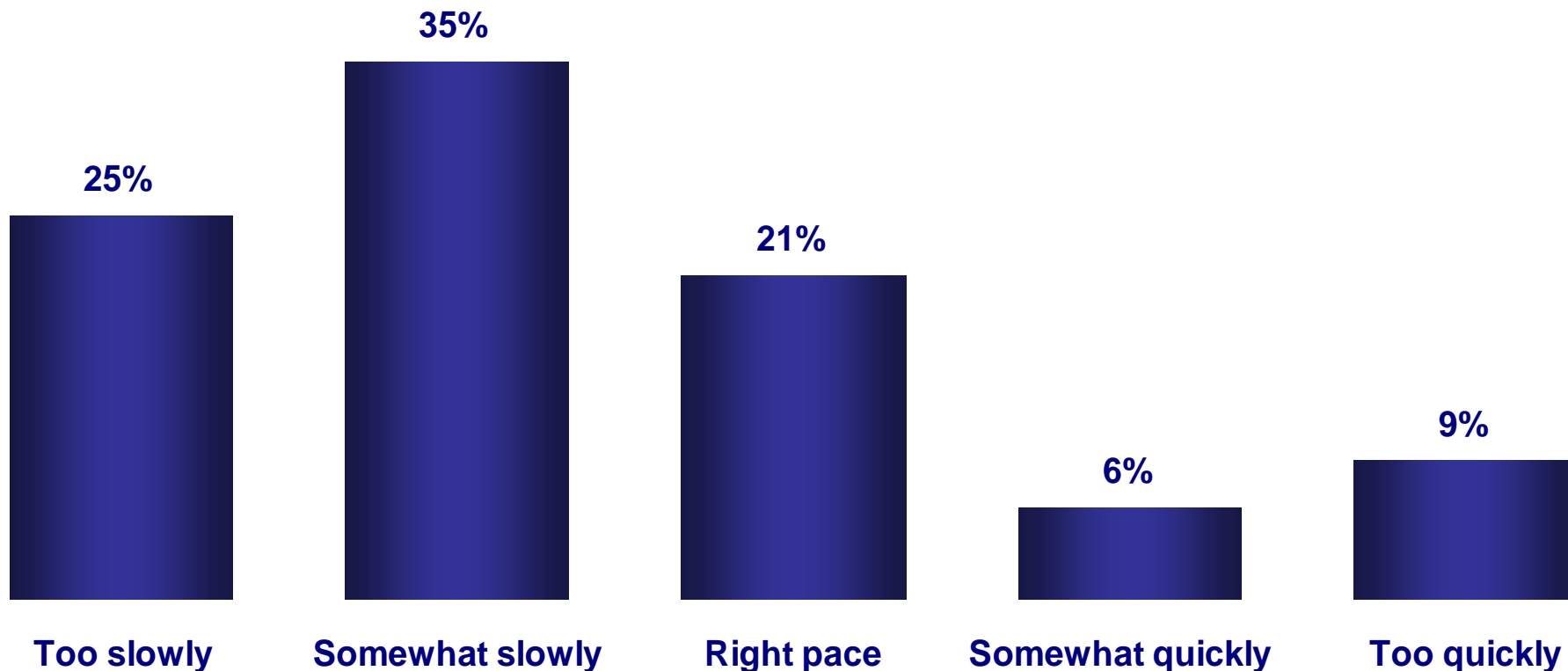
Almost all (95%) Canadians either strongly agree (69%) or somewhat agree (26%) that the government needs to do more now to ensure we have an adequate supply of electricity for the future.





Pace Of Building New Nuclear Power Plants

In Ontario, a majority (60%) feel the government is moving either too slowly (25%) or somewhat slowly (35%) in building new nuclear power facilities.





Building New Nuclear Power Plants

A majority (52%) of Ontarians believe we should move forward and get on with it (23%) or start the process (29%) and build new nuclear power plants now; only one-in-ten (12%) feel the we should not build nuclear plants now.

I feel we should get on with it and build new nuclear power plants to ensure we have an adequate and reliable source of power for the future



I feel we should start the process of building new nuclear power plants sooner rather than later



I feel we should be cautious and re-evaluate the need for new nuclear power plants



I feel we should not build new nuclear power plants now

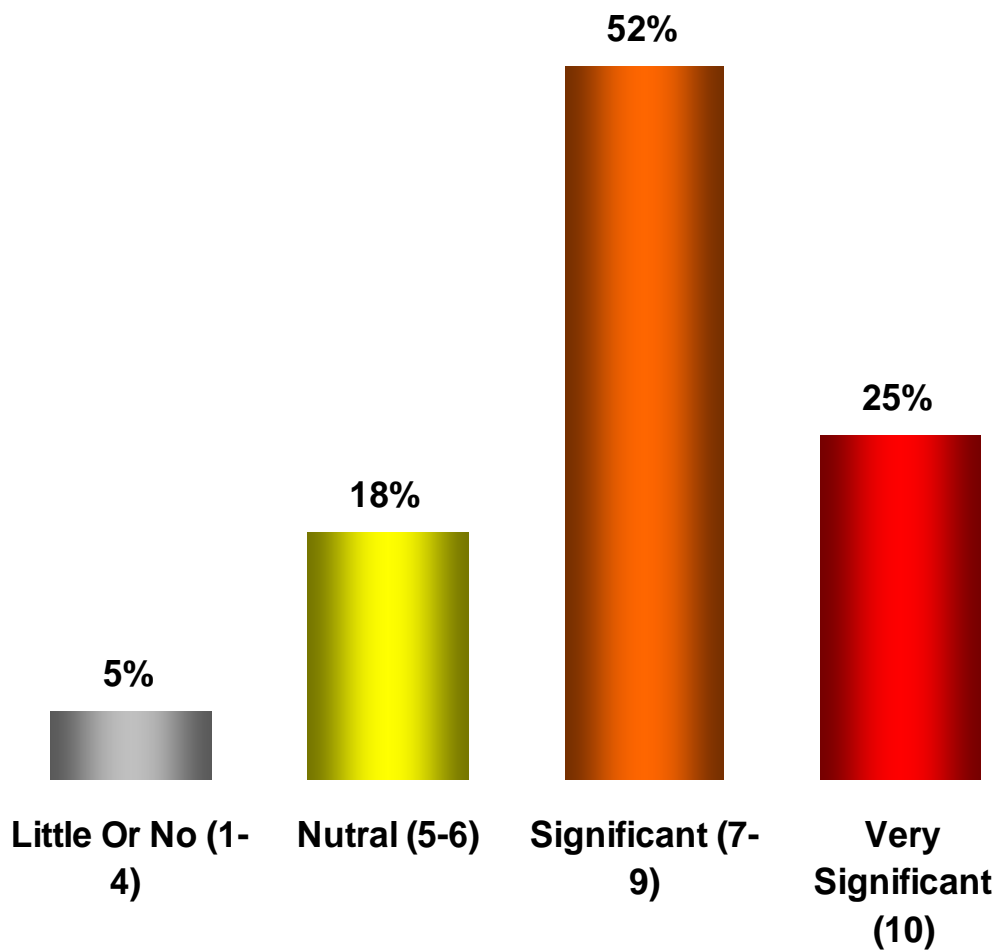




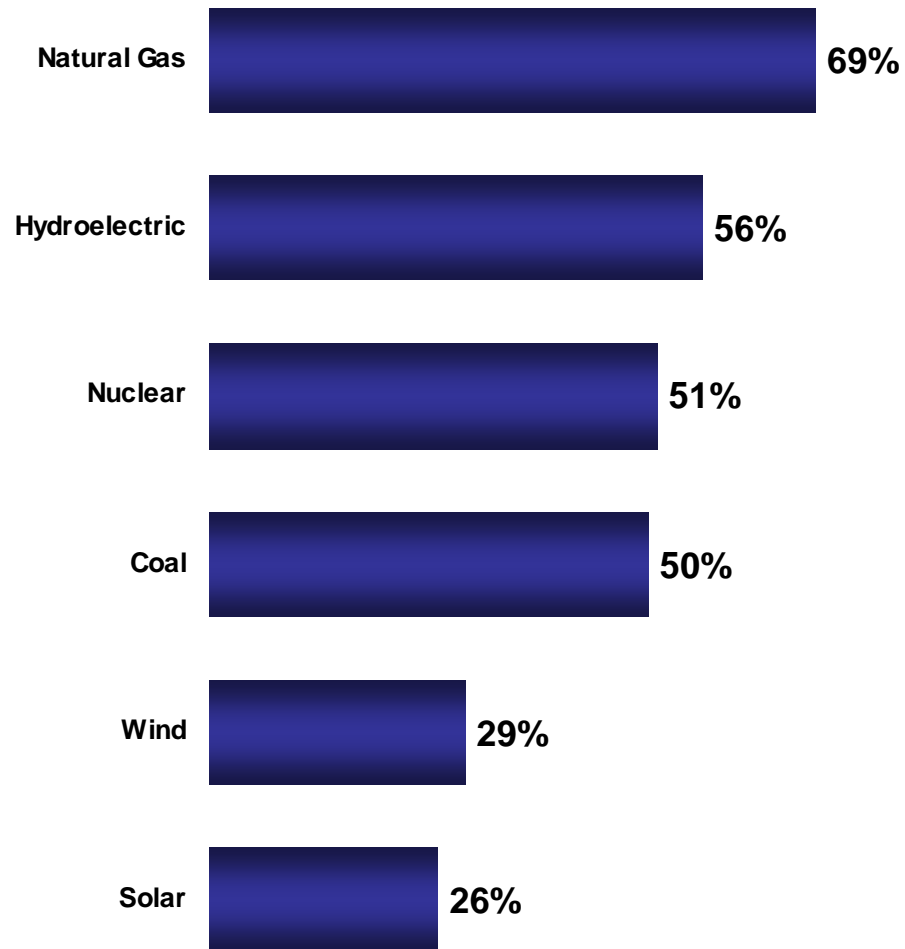
Rising Energy Costs and Electricity Generation

Two-thirds (77%) of Canadians feel rising energy costs will have a significant effect on the cost of electricity, namely the cost of electricity generated by natural gas (69%).

Affect of rising energy costs on electricity



Method of generation





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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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