



Canadian Nuclear Association
Association nucléaire canadienne

Canadian Nuclear Association

Annual Summer Tracking Report
September 2009





Presentation Outline

Purpose and Methodology

Key Themes

Energy as an Issue

Nuclear Support Tracking

Attitudes Towards Nuclear Power

Urgency

Provincial issues





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Purpose & Methodology



9/28/2009

Nobody's Unpredictable



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 from August 18th to August 20th, 2009.
- The total sample is 1,156 resulting in a margin of error of +/-2.9%. Oversampling was conducted in Saskatchewan and New Brunswick. The regional sub-samples and associated margins of error are:

	N	+/-%, 95% of the time
National	1156	2.9
BC	131	8.6
AB	104	9.6
SK/MB	140	8.3
(SK)	(105)	9.6
ON	380	5.0
QC	251	6.2
ATL	150	8.0
(NB)	(102)	9.6





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Key Themes



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Key Themes

- **Support for nuclear energy has weakened across the country since January 2009 and is now back to levels seen in 2007.**
- **This has also translated into a slight decrease in support for new builds and refurbishment.**
- **Energy as a provincial issue of importance has fallen off the radar for most Canadians.**
- **Only about one-in-ten of those who can recall hearing something about nuclear energy in the past 12 months can recall hearing something specifically about the medical isotope situation.**



- In Ontario, the decision by the government to delay the selection of a vendor to build a new nuclear facility has led more Ontarians to say the government should ‘just get on with it’ and build a new nuclear power facility now, up 14 points since January 2009.
- In Saskatchewan, support for a new facility that would produce medical isotopes is strong (67% total support), as is the notion that the province should become a leader in the disposal and storage of nuclear waste.





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Energy As An Issue

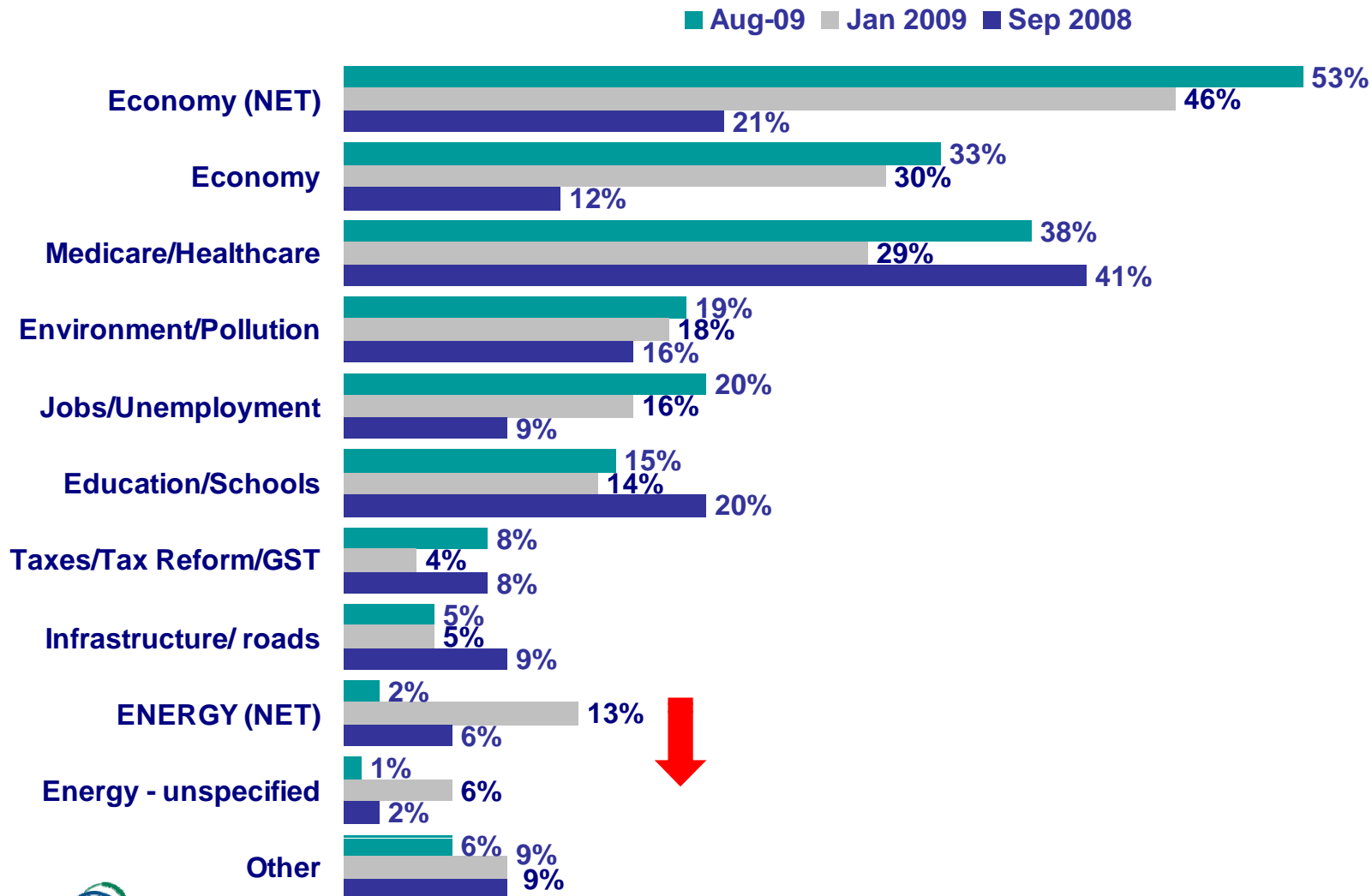


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Energy No Longer An Issue of Importance, Down 11 Points to Only 2% ...



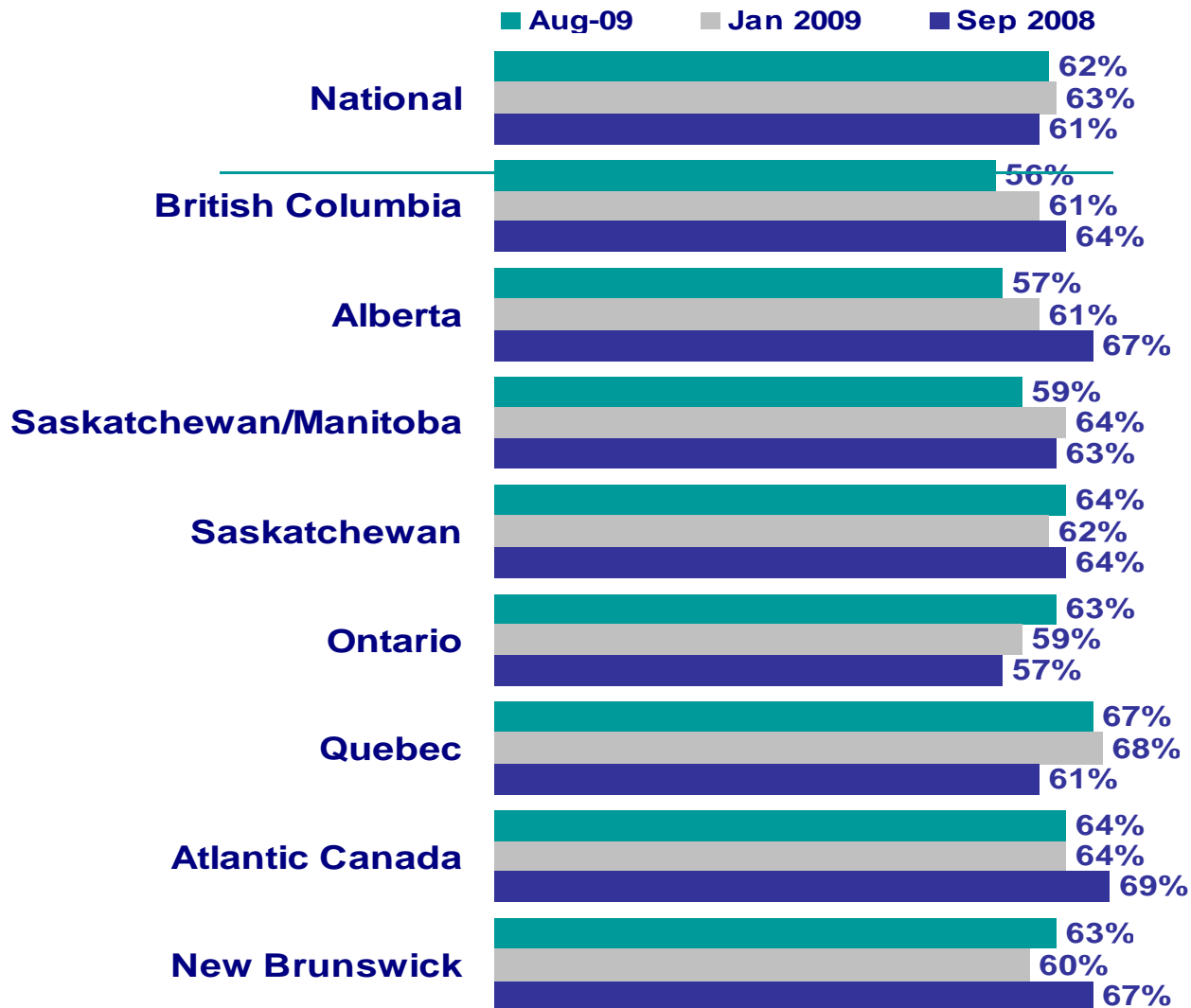
Mentions less than 3% not shown (except energy)





More Ontarians (63%, +4 points) Say Conservation Efforts Will Not Be Enough to Offset Future Electricity Demand...Alberta (-4)/BC (-4) Down...

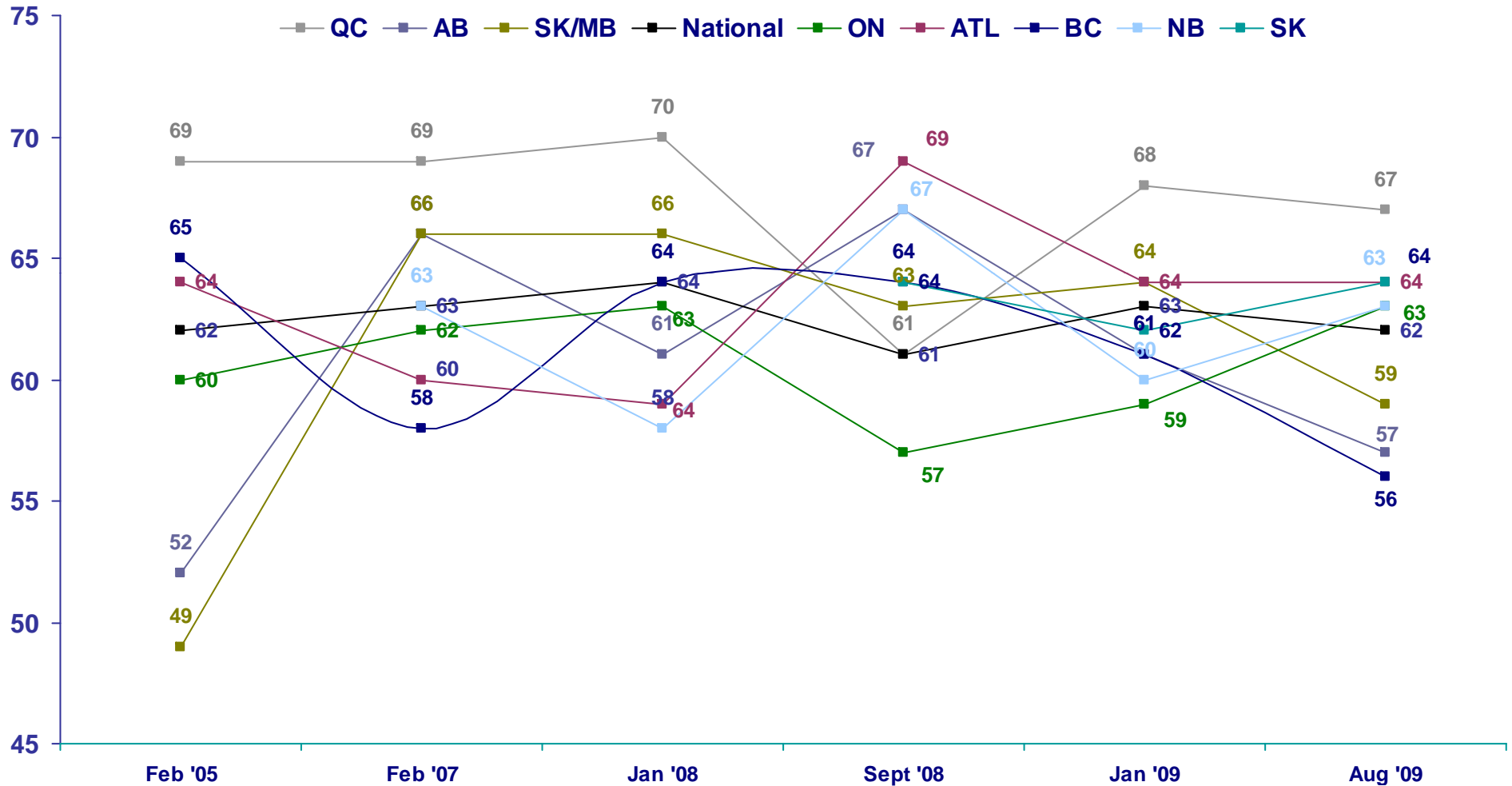
Conservation Efforts Won't Offset Demand





Fewer in BC (-5 points) and Alberta (-4 points) say Conservation Will Not Offset Demand

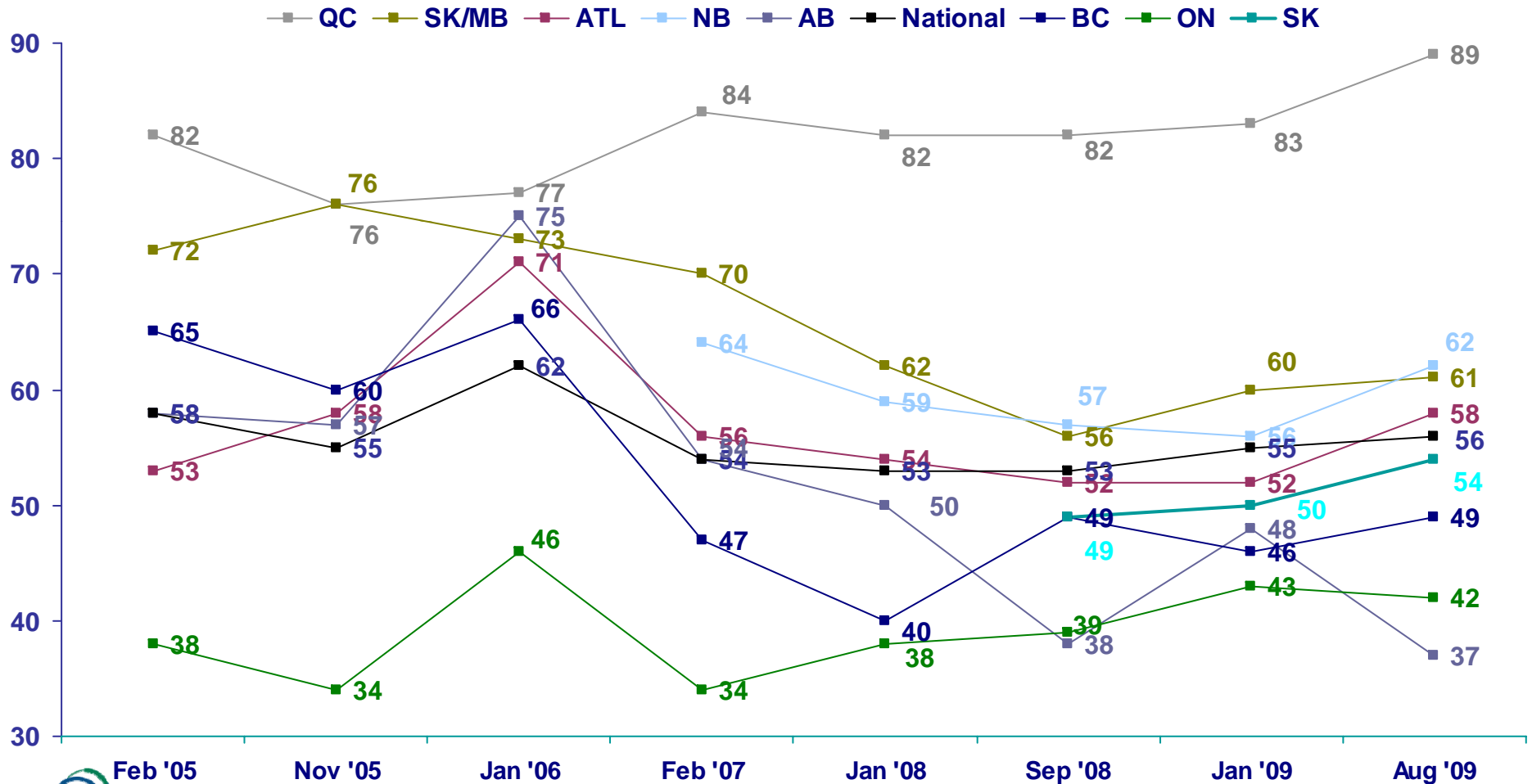
Conservation Won't Offset Demand





Confidence in Supply Improves in Quebec (+6 points), New Brunswick (+6 points), and Saskatchewan (+4 points)...

Have Enough Electricity In My Province





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Nuclear Support Tracking

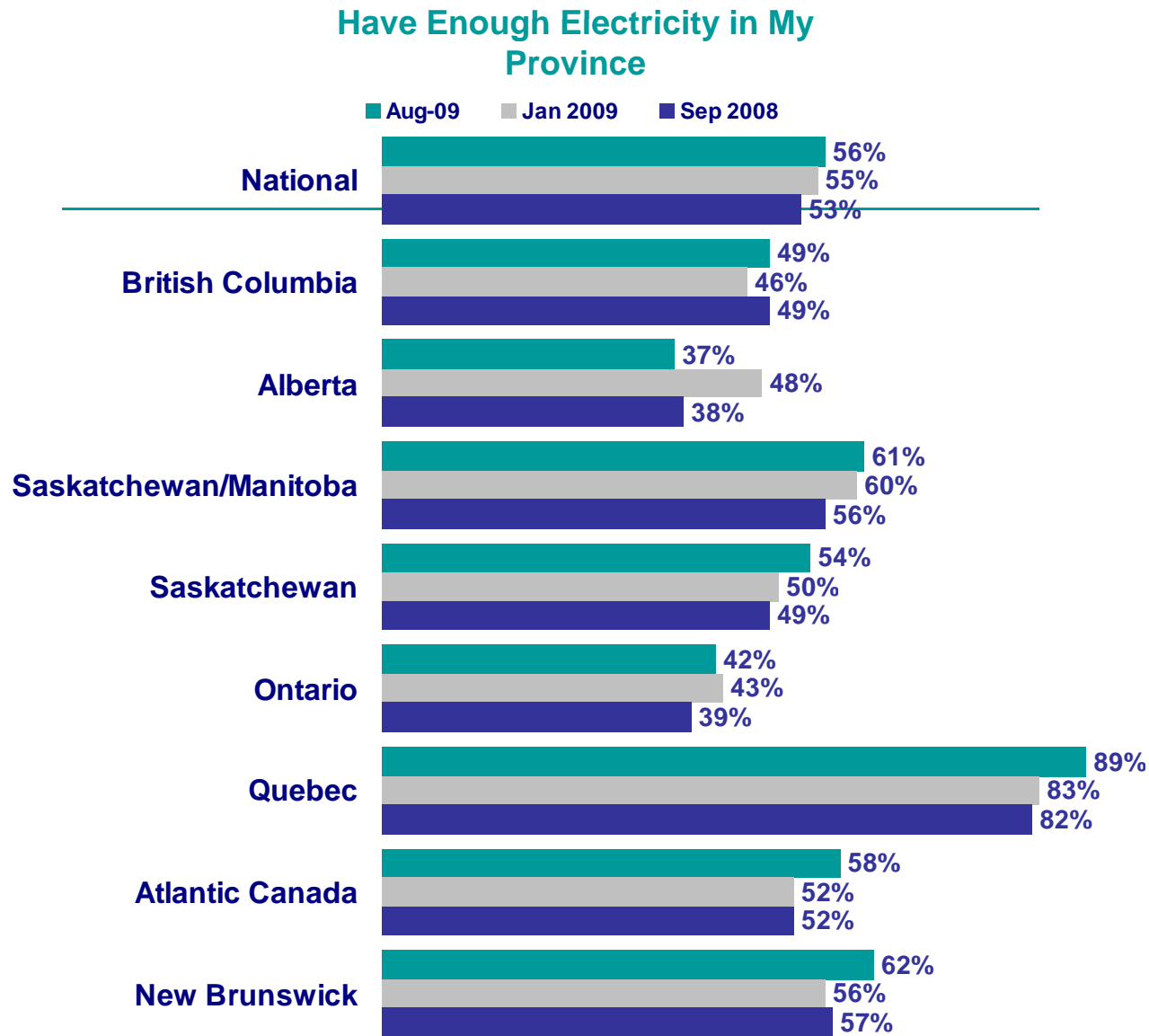


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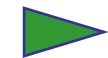
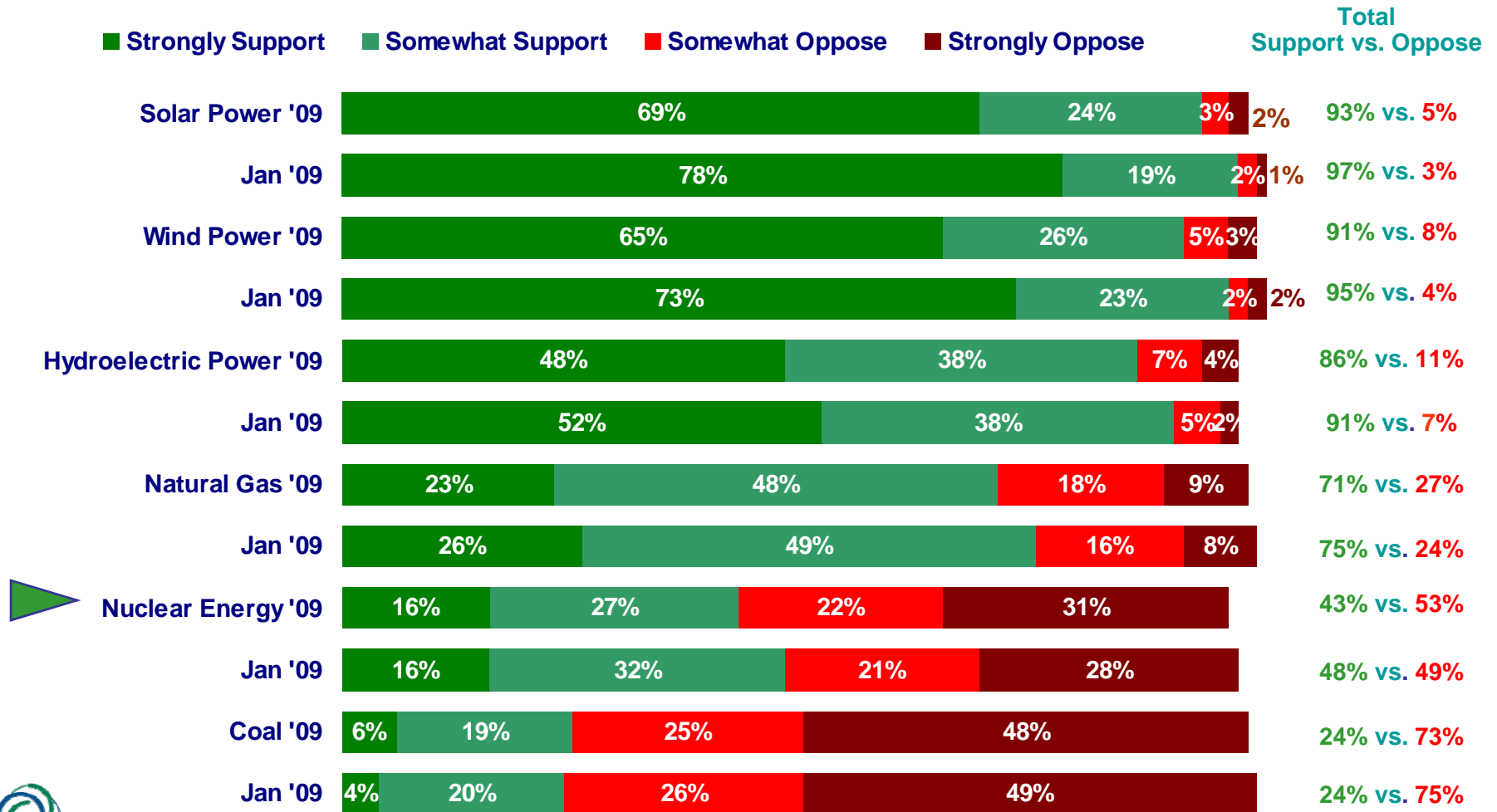


Confidence in Electricity Supply Lowest in Alberta (-11 points) and Ontario (-1 point)...



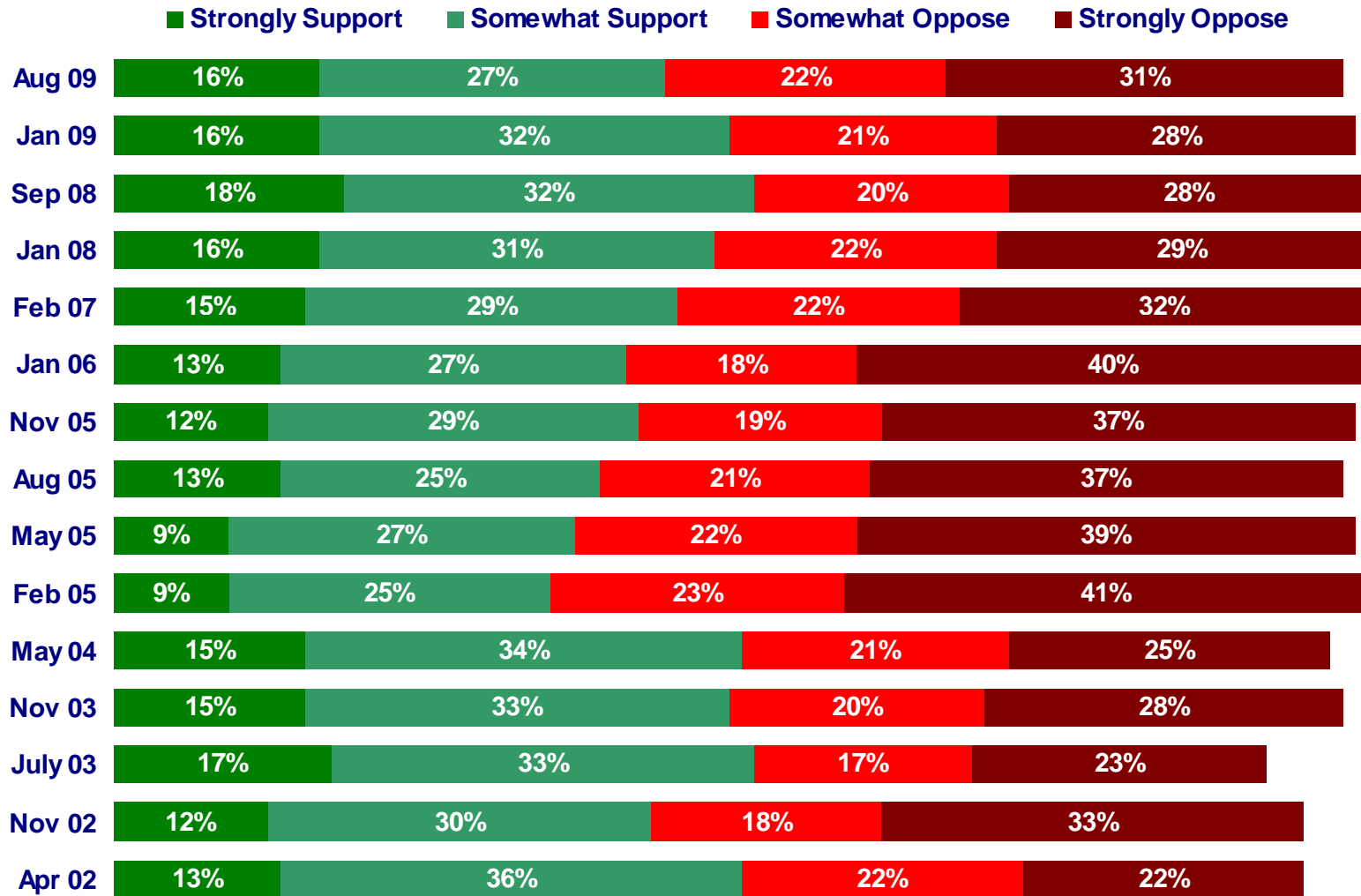


Nationally, Support for Nuclear Energy Down 5 Points Since Jan '09. Support for Other Sources Also Down...



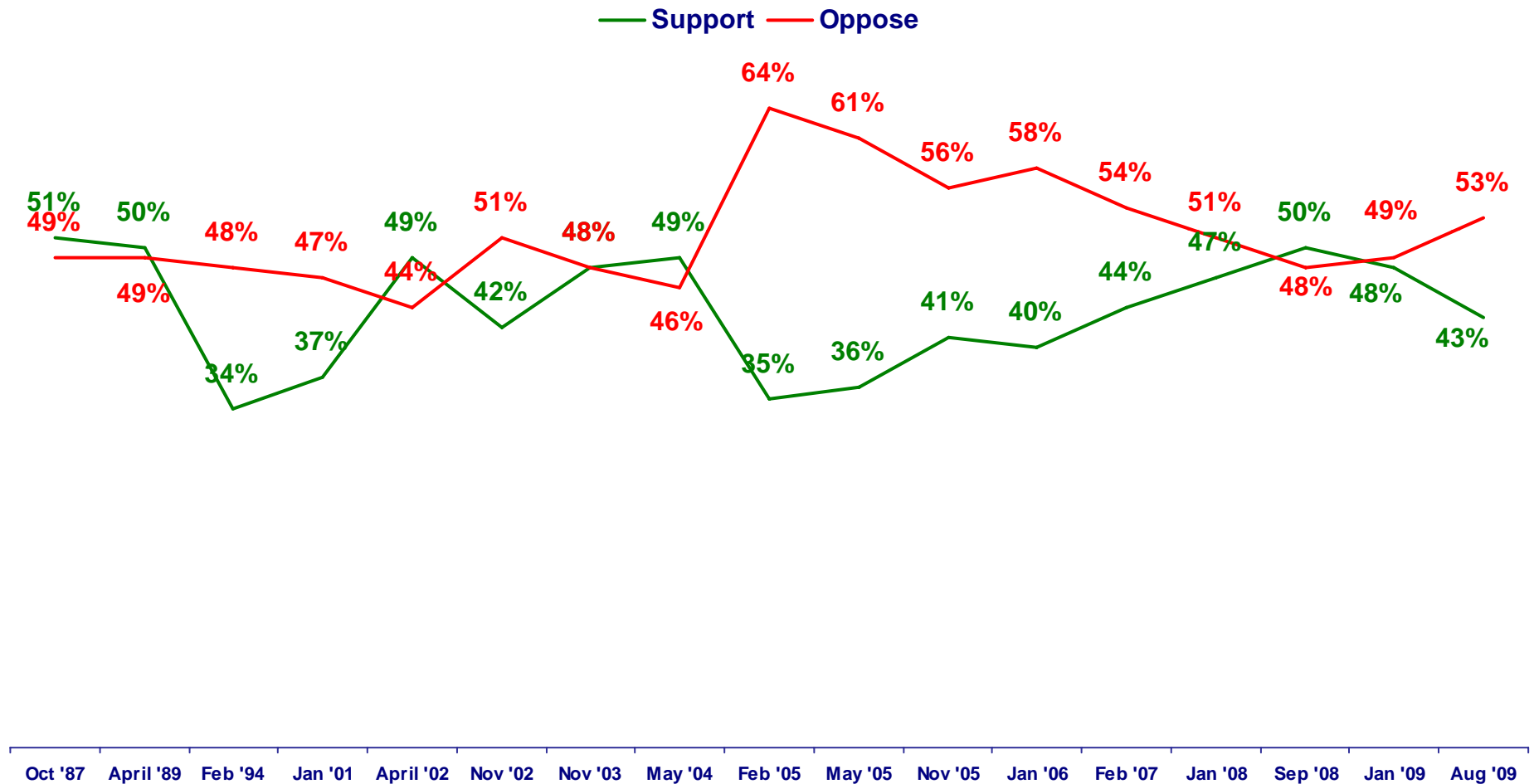


National Intensity of Support for Nuclear Energy Stable, Soft Support Down 5 Points...





Nationally, Support for Nuclear Energy Back to 2007 Levels as Opposition Rises (+4) and Support Drops (-5)...

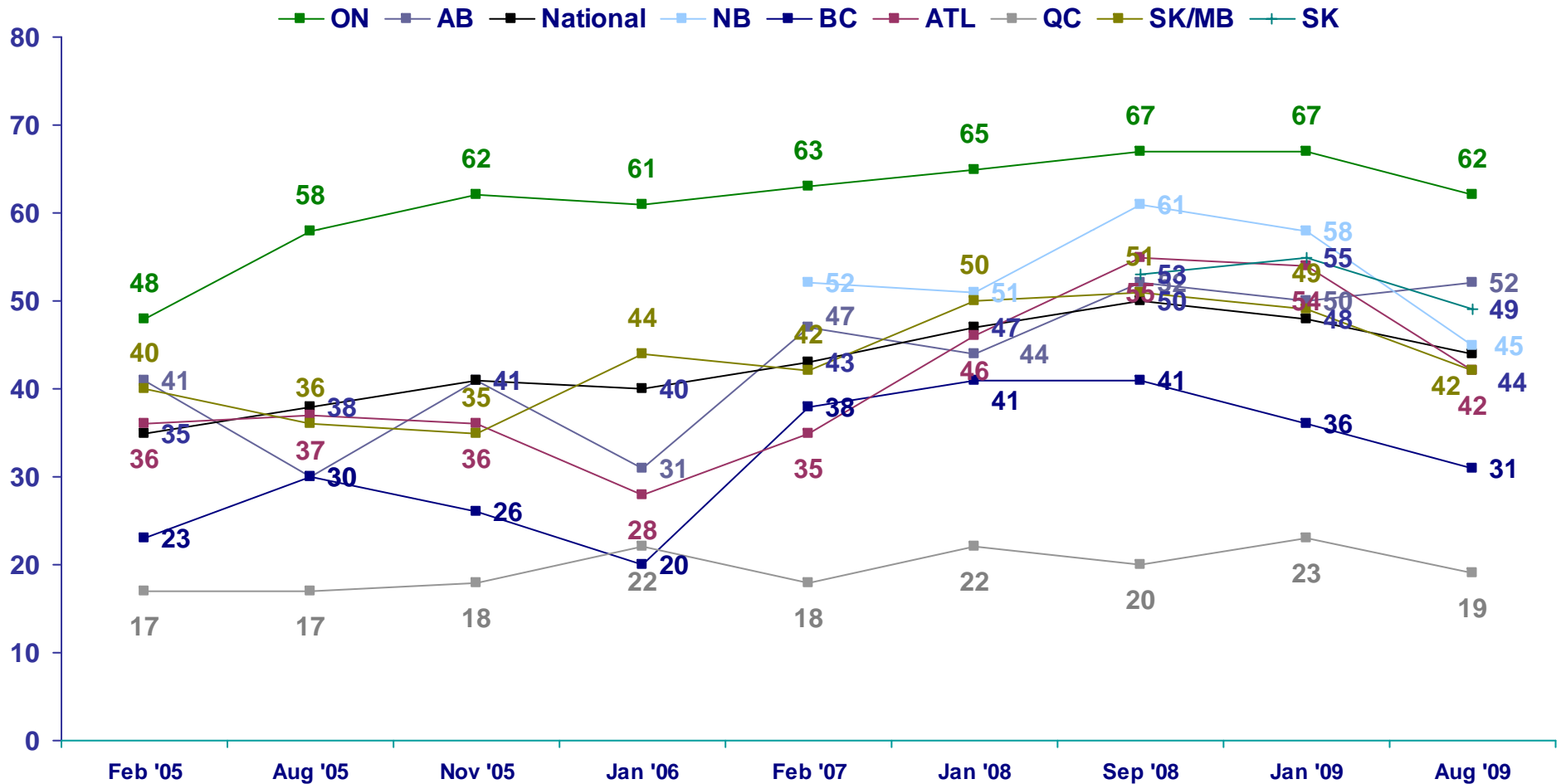


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I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000

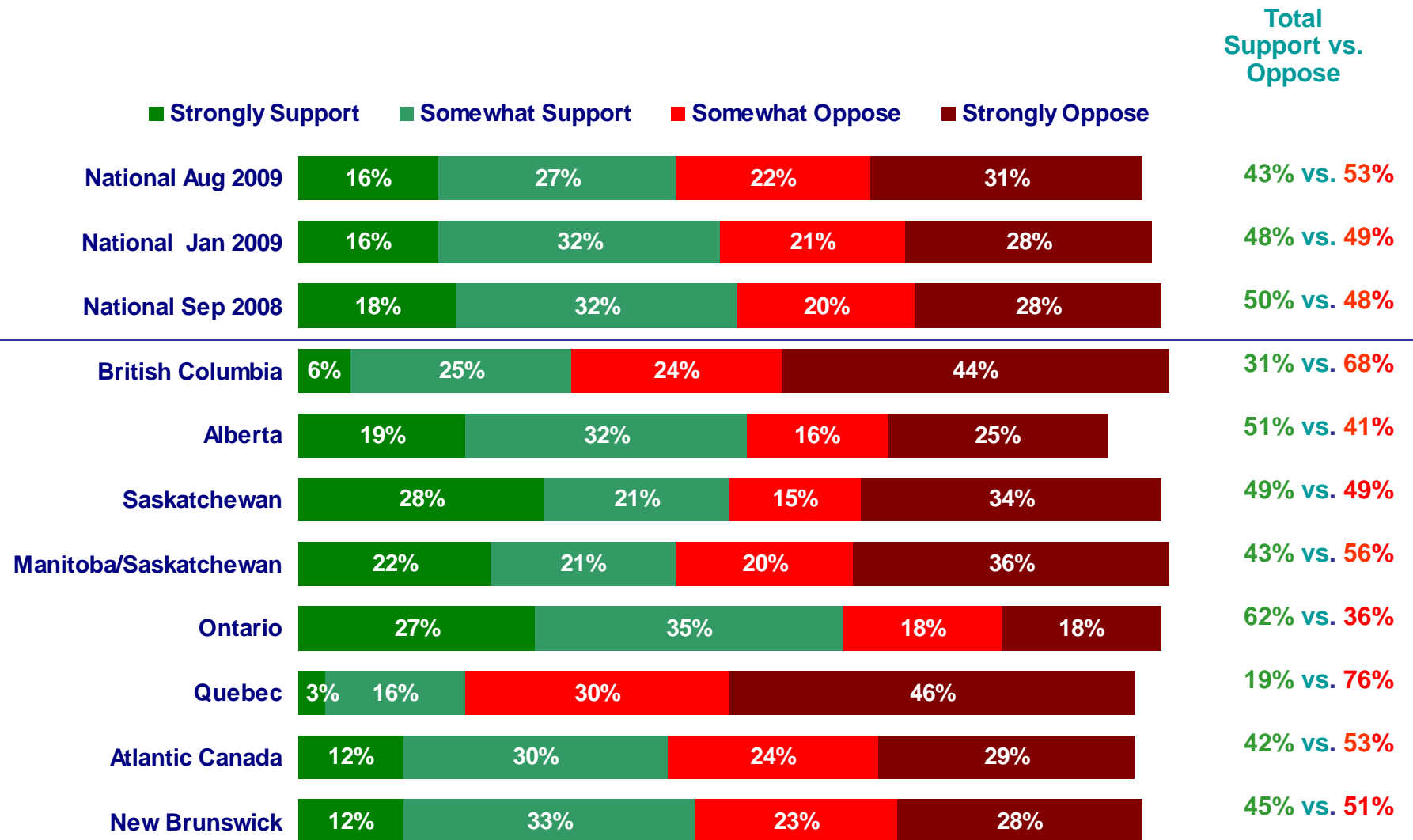


Support for Nuclear Energy Down in New Brunswick (-13 points), Sask. (-6 points), and Ontario (-5 points). Stable in Alberta (+1 point)



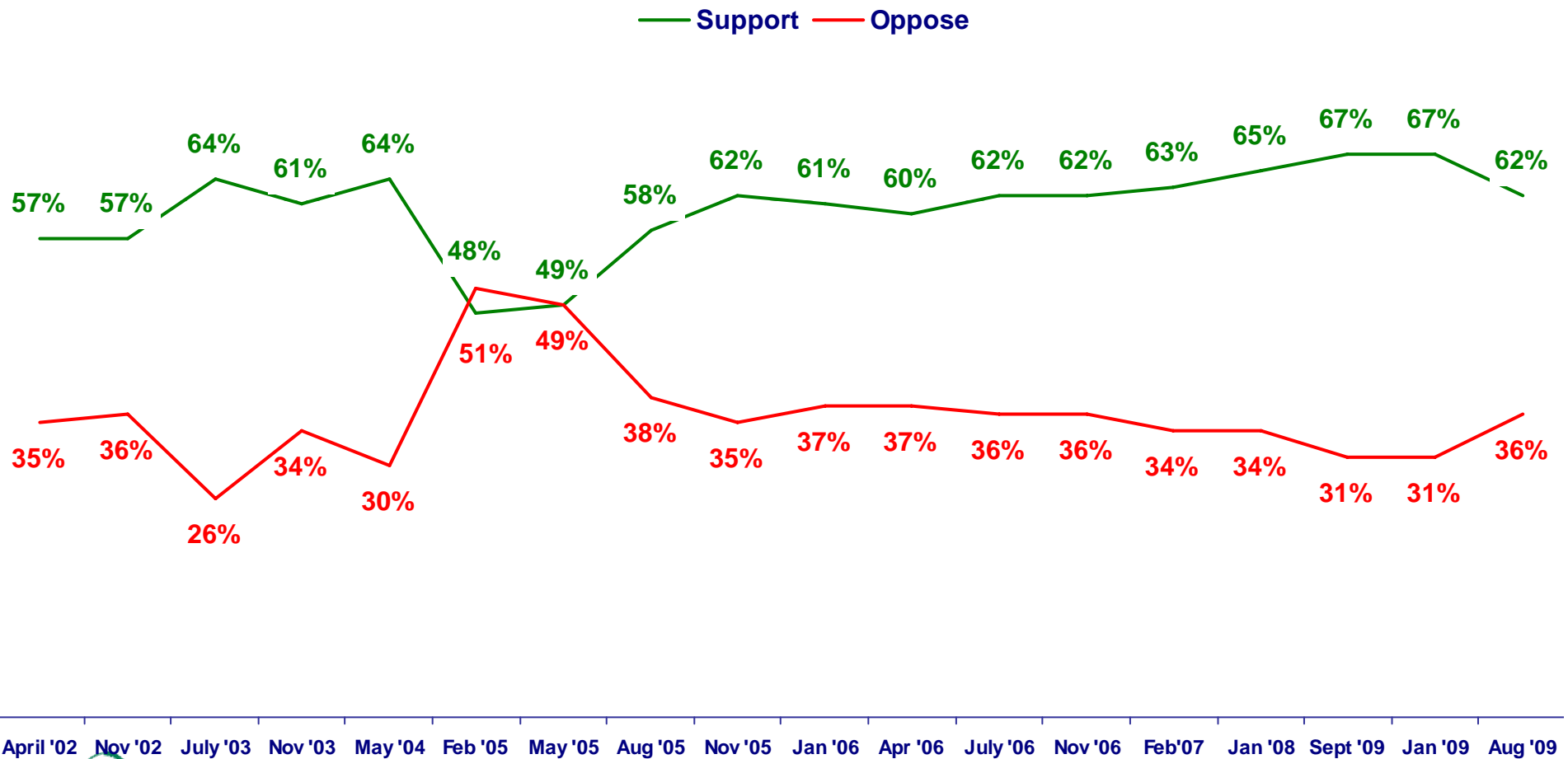


Support for Nuclear Energy Continues to be Strongest in Ontario (62%), followed by Alberta (51%), Sask. (49%), and NB (45%)



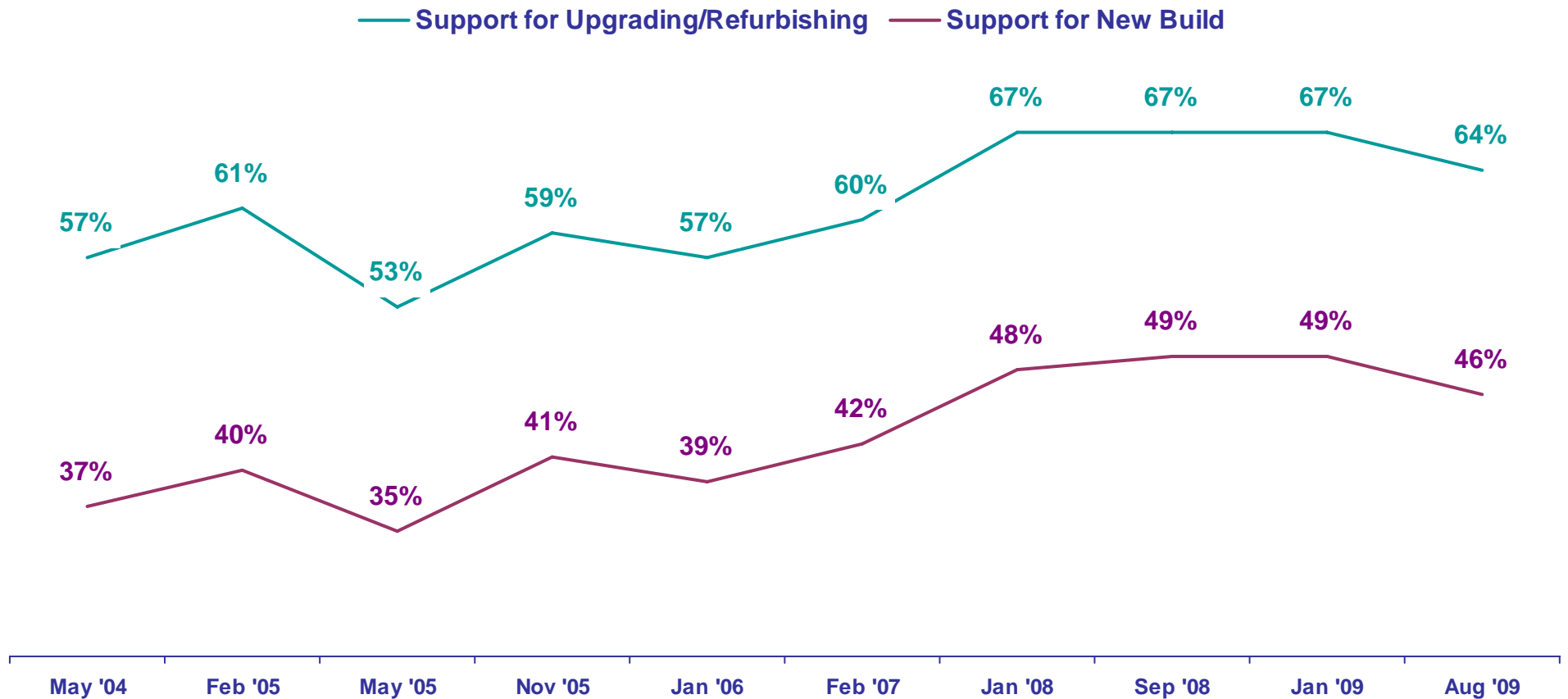


In Ontario, Support For Nuclear Energy is 62%, Down to Fall of 2005 Levels...





Nationally, Support for Refurbishing & New Build is Down by 3 Points, Respectively...



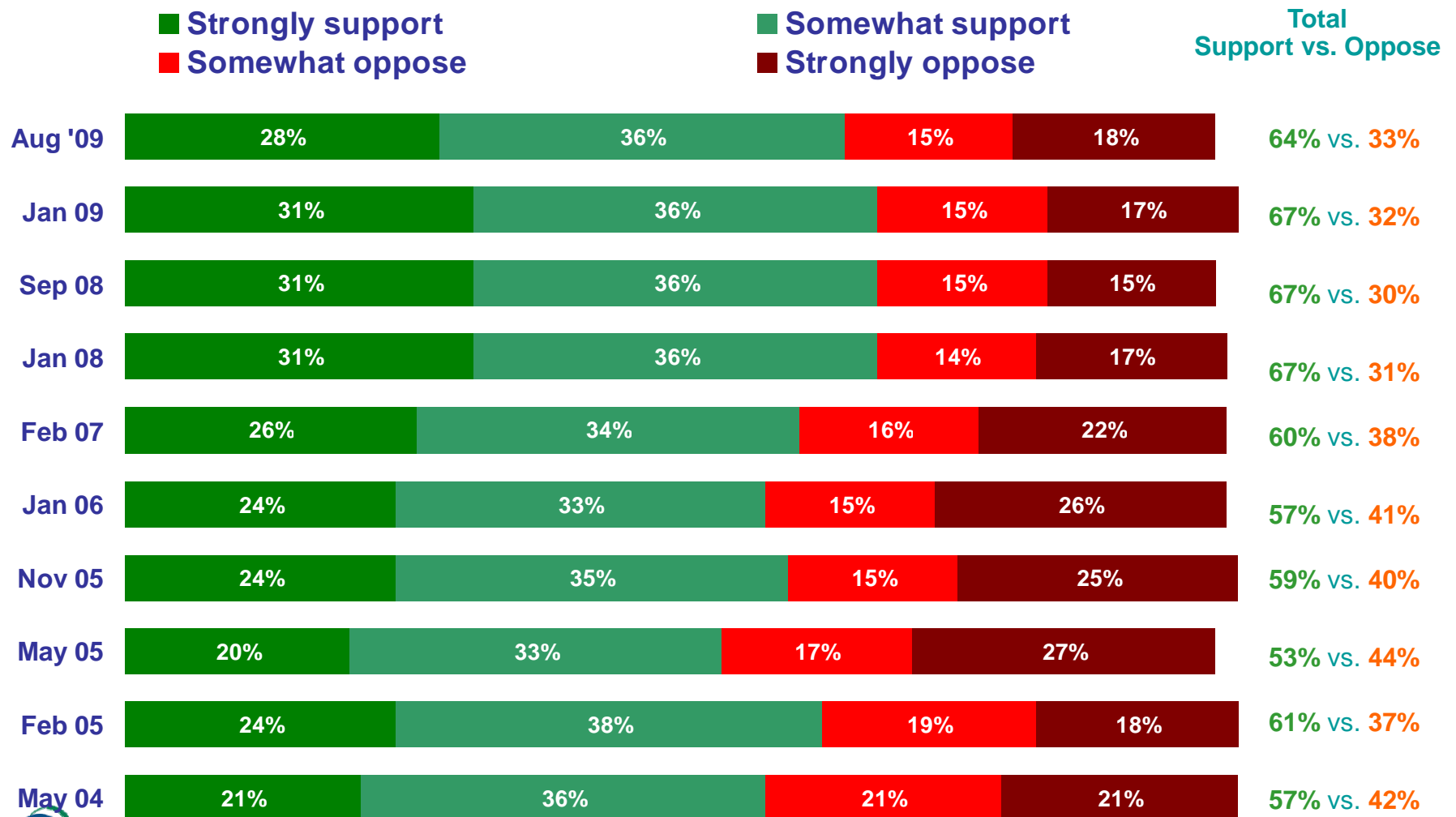
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Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Aug -0 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Jan 2006 N=1000, Nov 05 N=1000



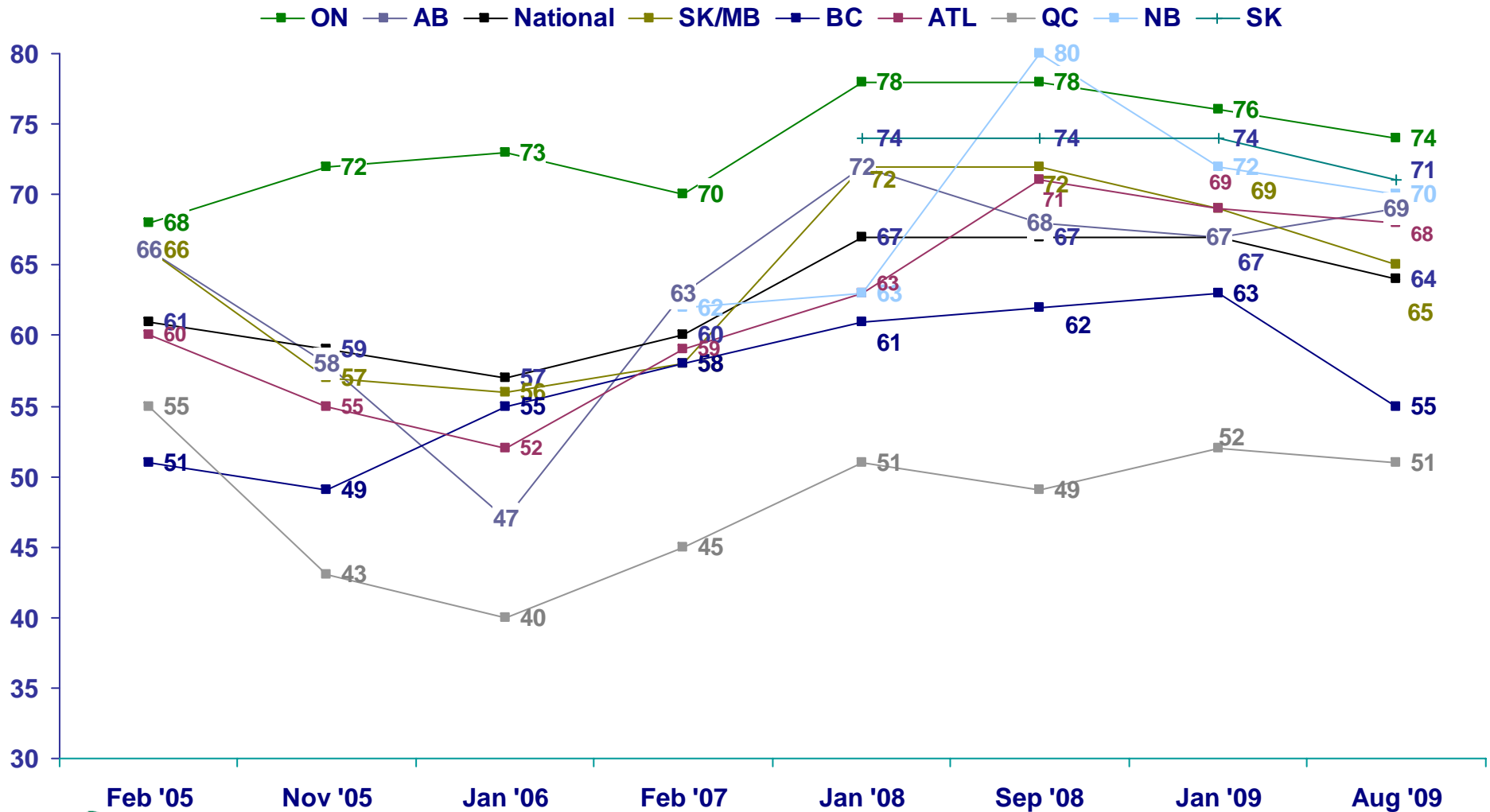
Nationally, Intensity of Support for Refurbishing Remains Stable, Strong Support Down Slightly by 3 Points...

Upgrading And Refurbishing Existing Nuclear Power Plants





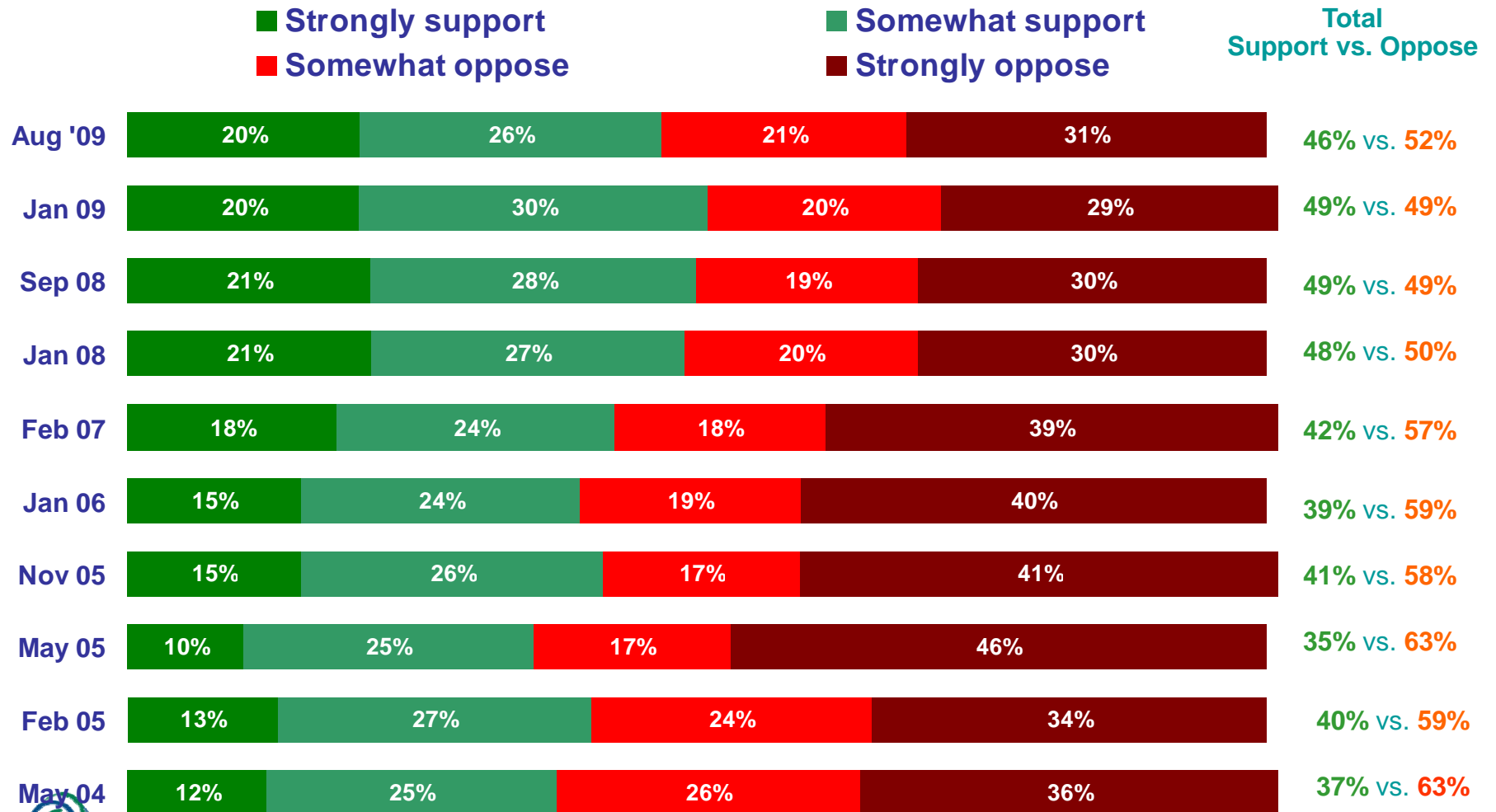
Support for Refurbishment Down in All Regions (-2 in Ontario), With the Exception of Alberta (+3 points)...





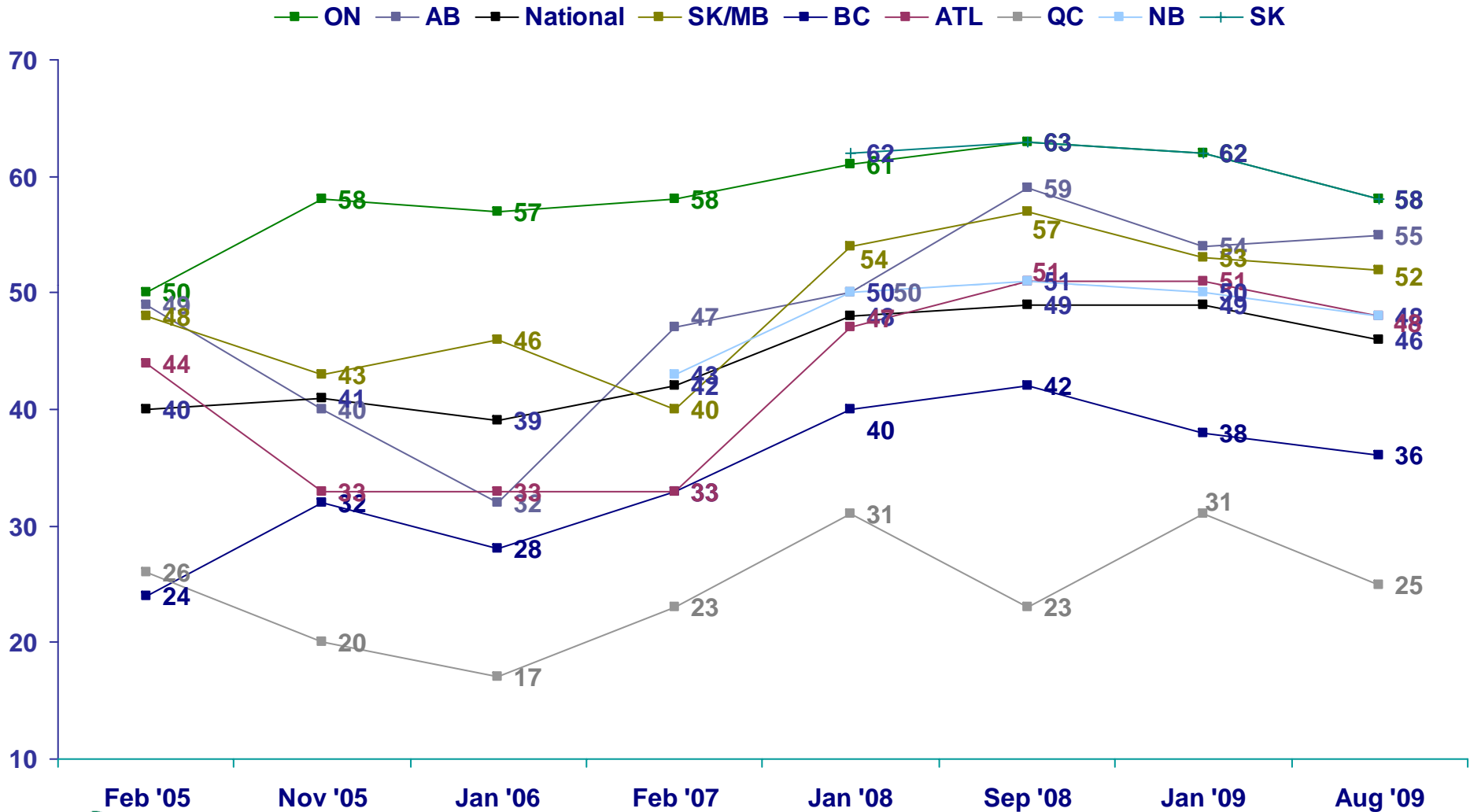
Nationally, Intensity of Support for New Build Also Stable, Soft Support Down Slightly by 4 Points

Building New Nuclear Power Plants





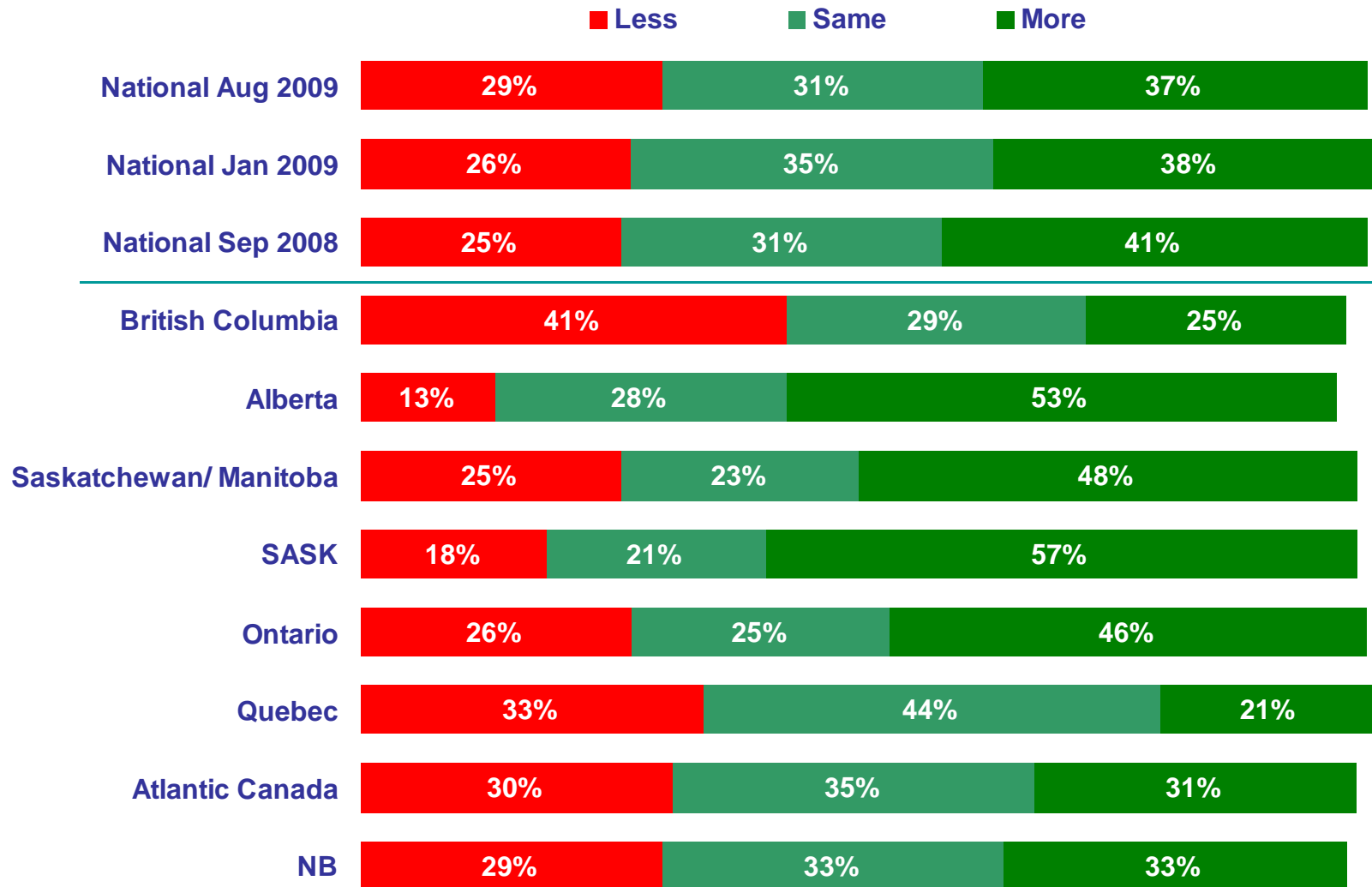
Support for New Builds Also Down Slightly Across the Country, Down 4 Points in Ontario and in Sask.



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: Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000



Most (68%) Continue to Prefer Same/More of Role for Nuclear Energy...





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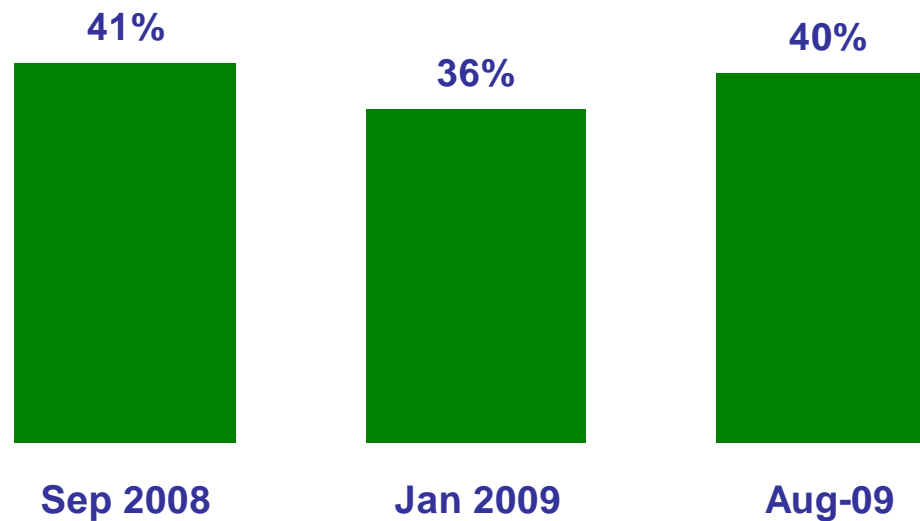
Attitudes Toward Nuclear





Four in Ten Canadians Can Recall Hearing, Reading, or Seeing Something About Nuclear Power Over the Past Year...

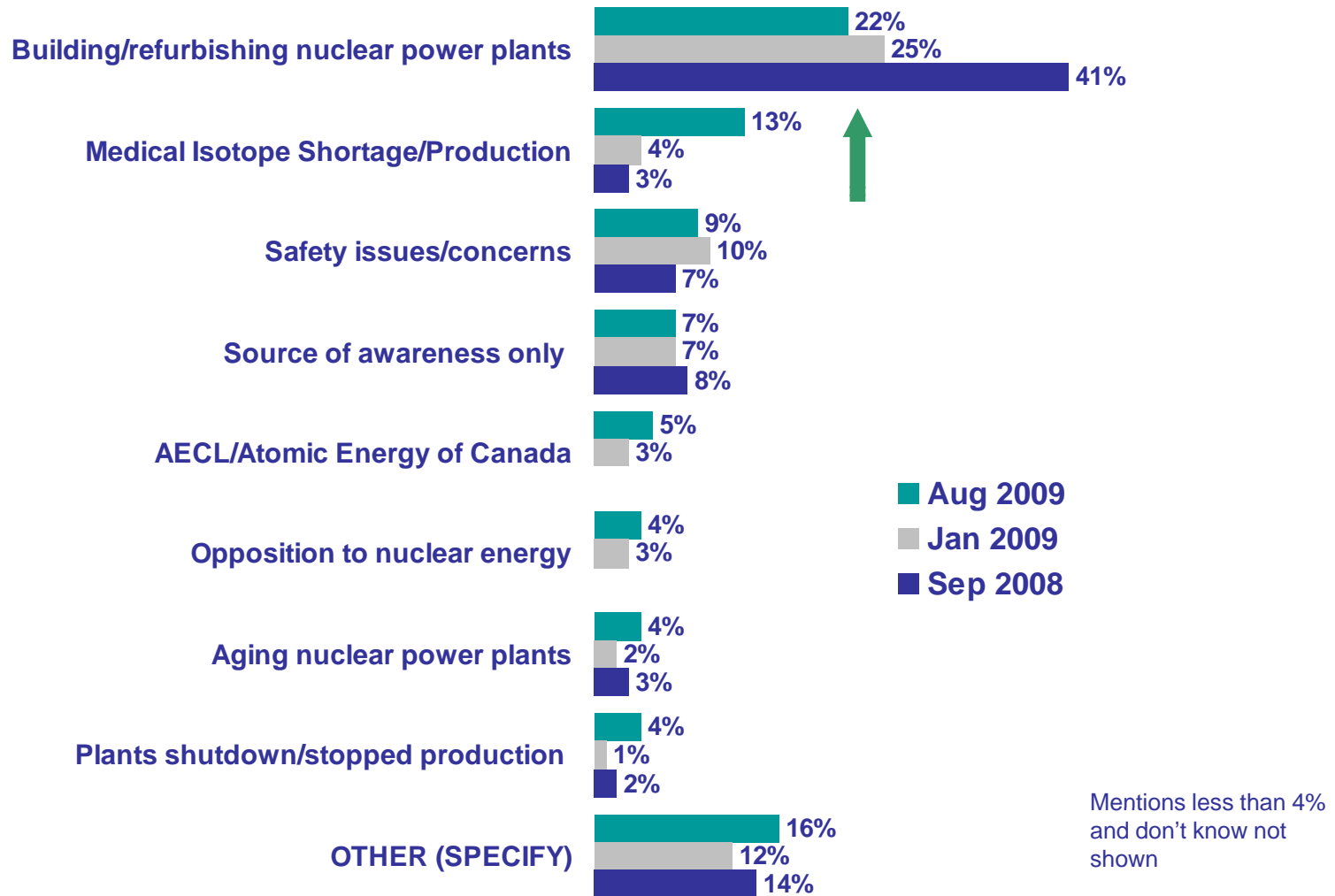
Read, Seen or Heard Anything Recently About Nuclear Power





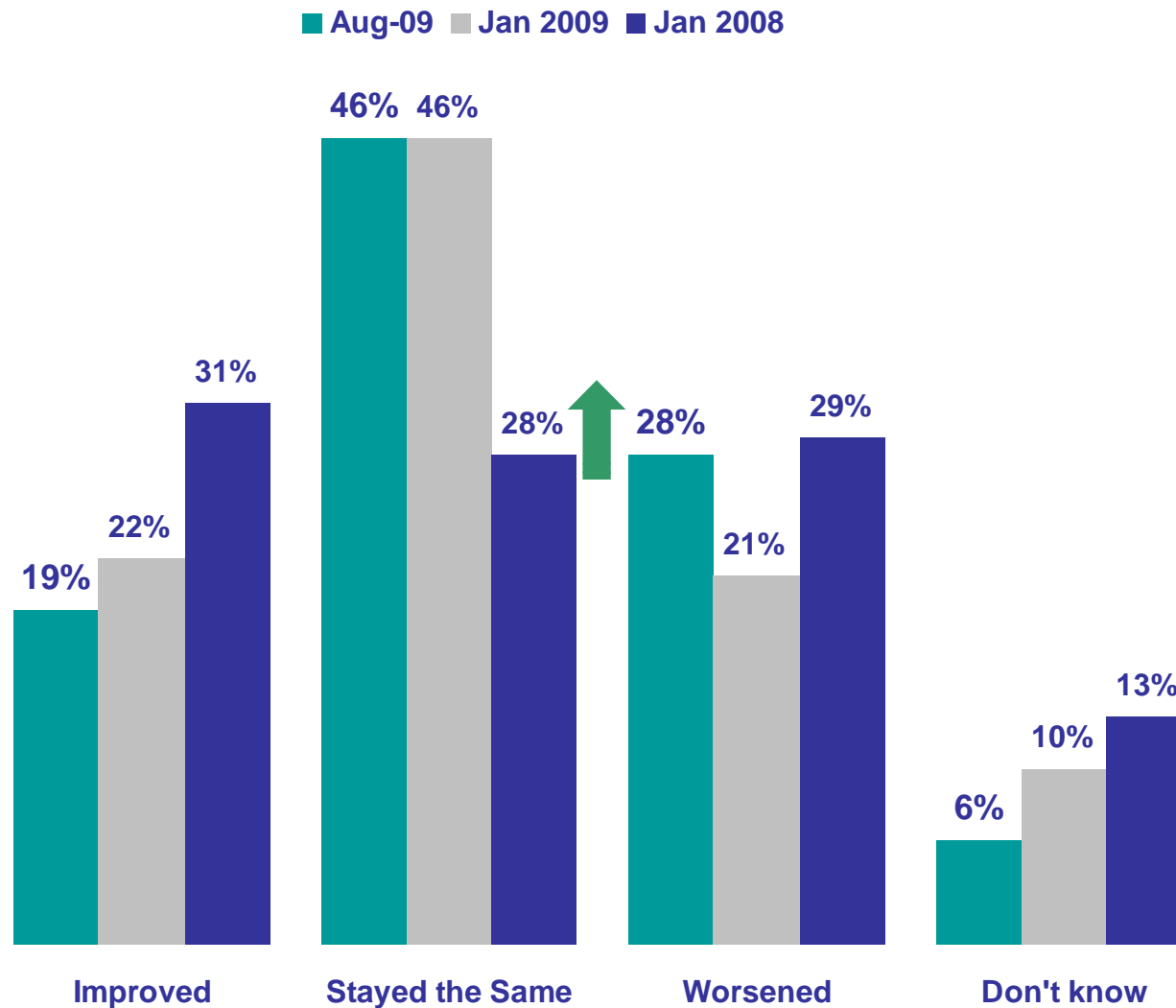
Only 13% Can Specifically Recall Something About Medical Isotopes, Up 9 Points Since January...

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



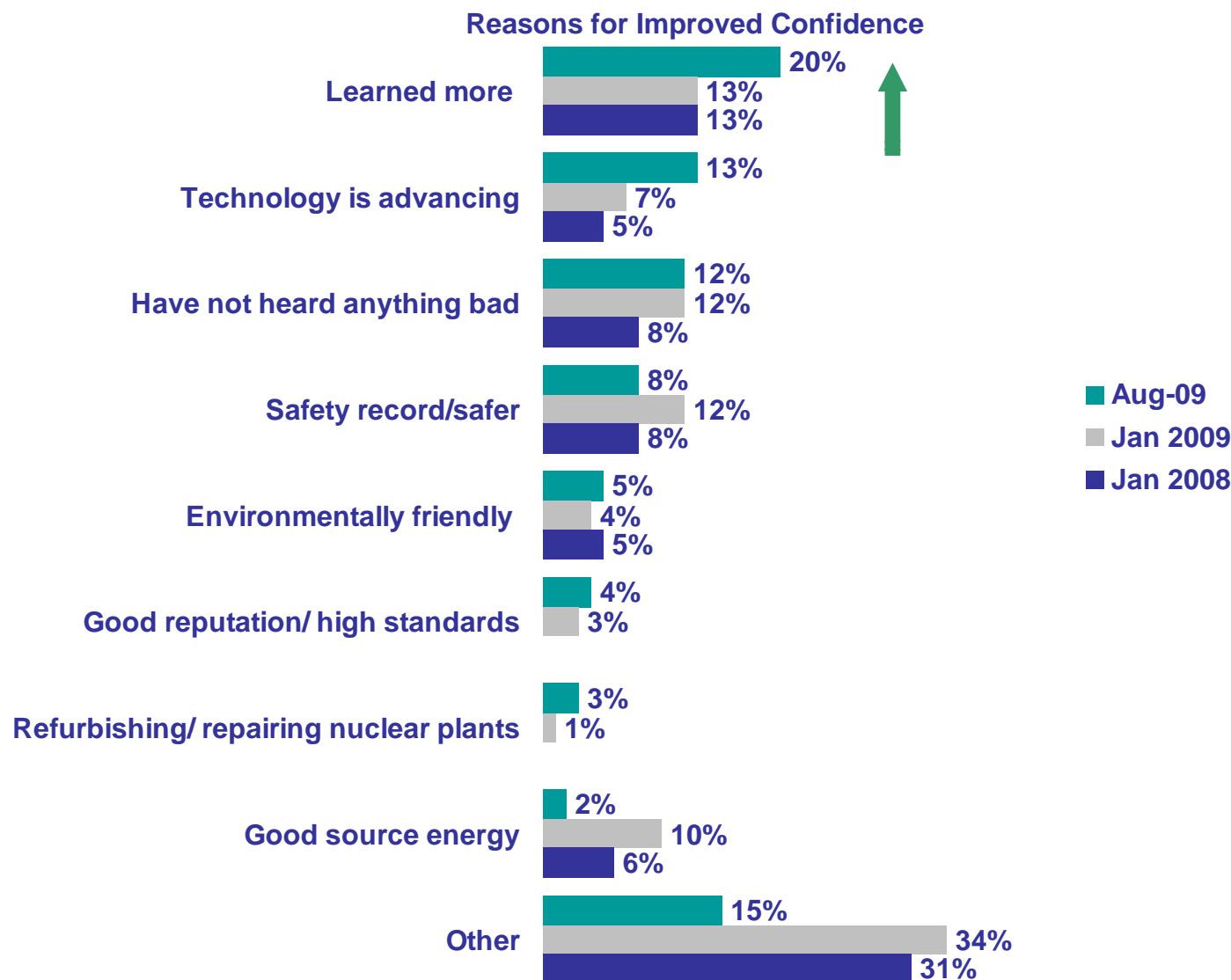


Confidence in the Industry Has Taken A Bit of a Hit... More Say Their Confidence Has Worsened (+7)... “Improved” Falls (-3)...





For the 19% “Improved”, Learning More (+7 points)/Advanced Technological Aspects of Nuclear Power (+6) as Top Reasons...

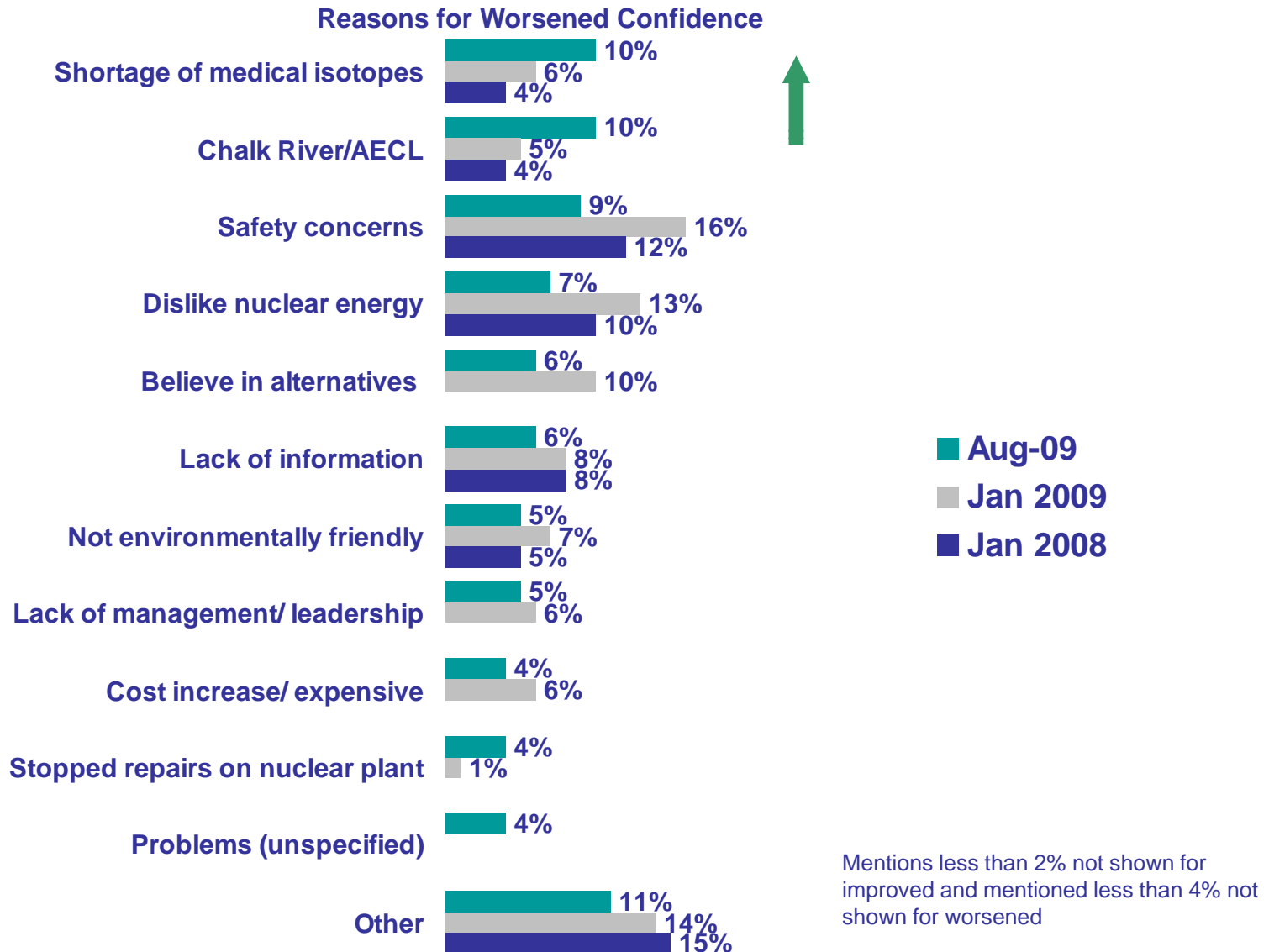


Mentions less than 2% not shown



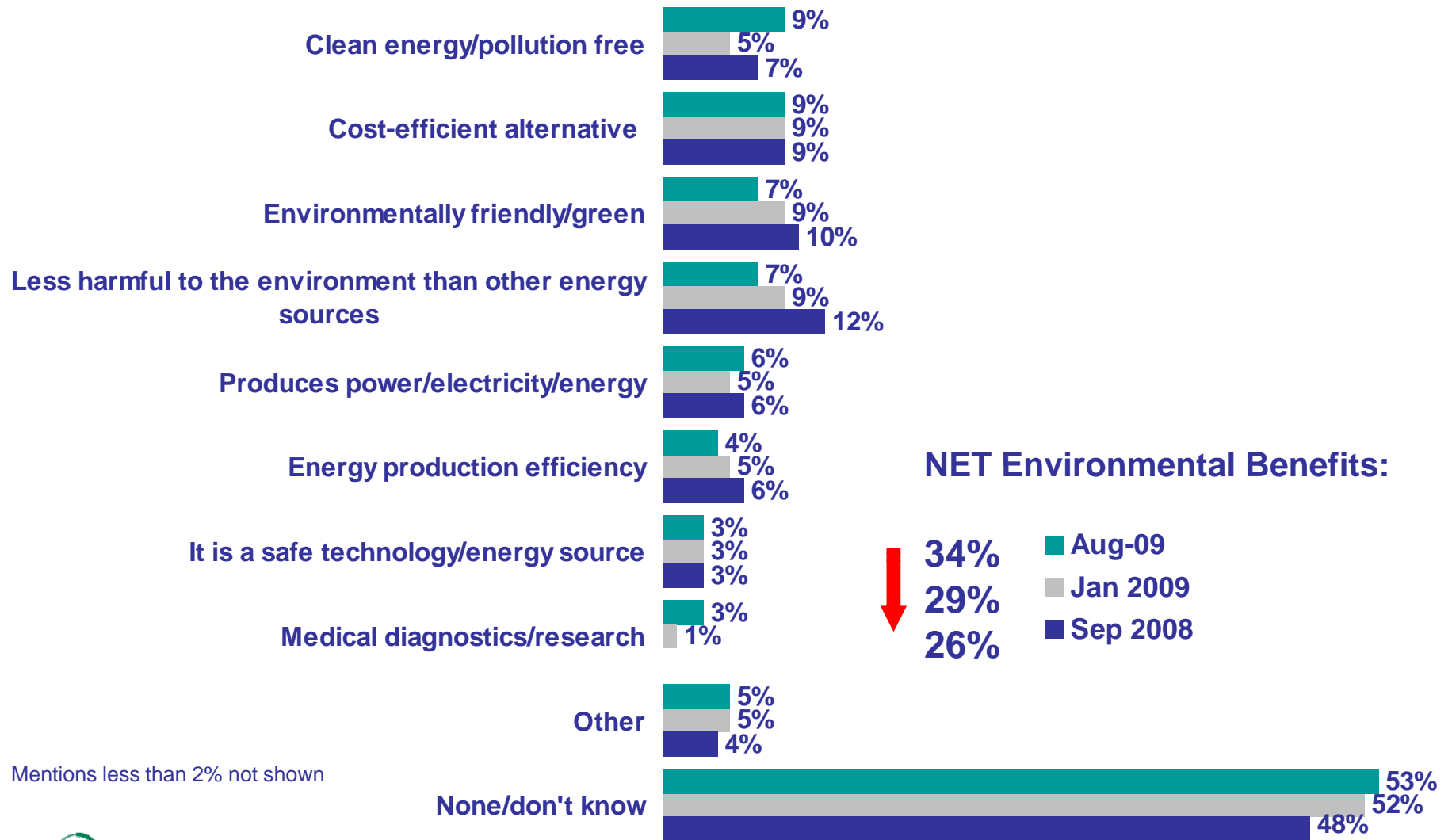


For the 28% “Worse”, Shortage of Isotopes (+4) and Chalk River/AECL (+5) Fuel Worsened Confidence...





Environment Slowly Becoming Less of a Top of Mind Benefit, NET Mentions Down 8 Points Since Sept 08





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Urgency

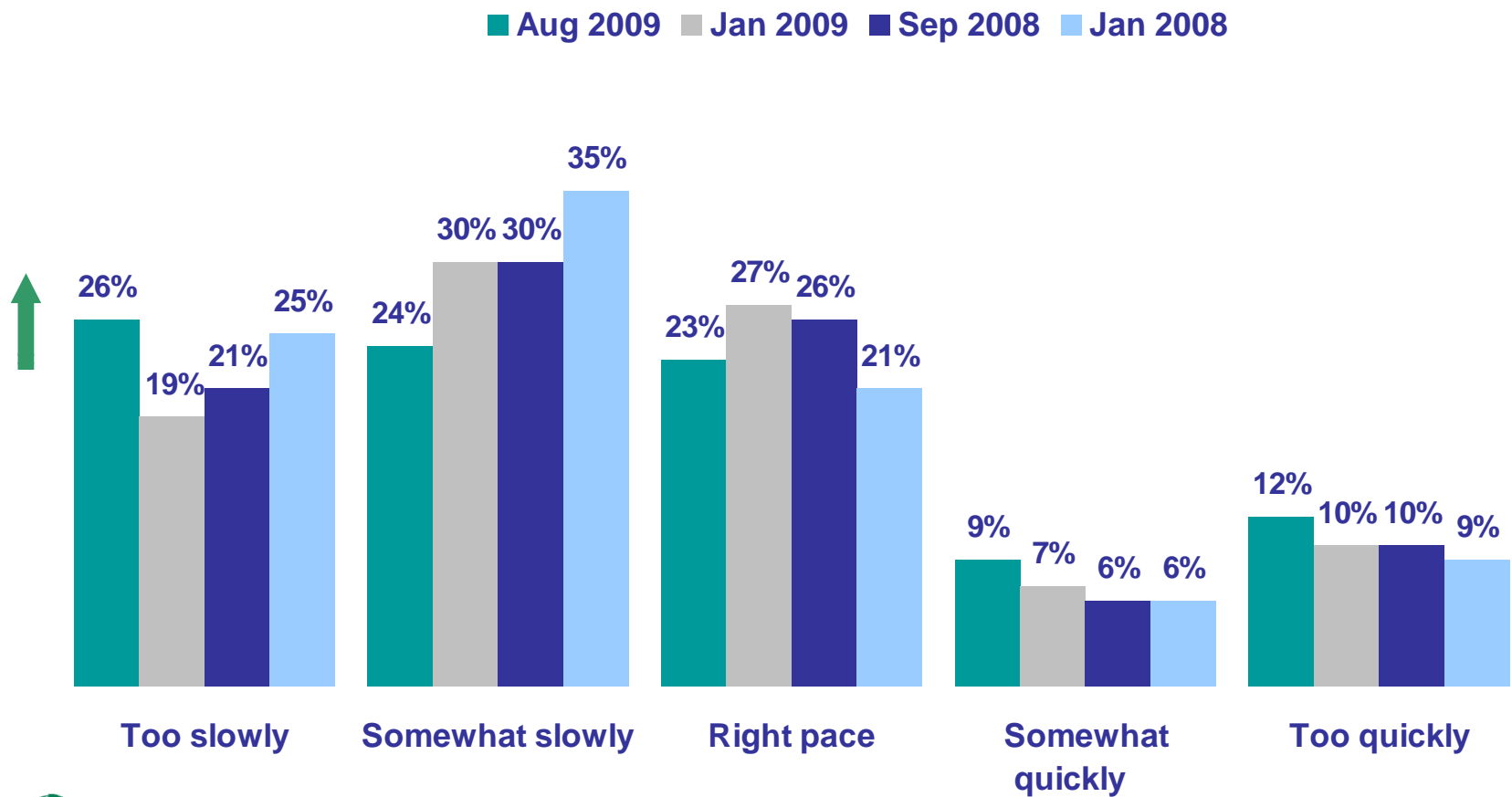


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In Ontario, More Say the Government is Moving Too Slowly in Building a New Nuclear Power Plant (+7 points)



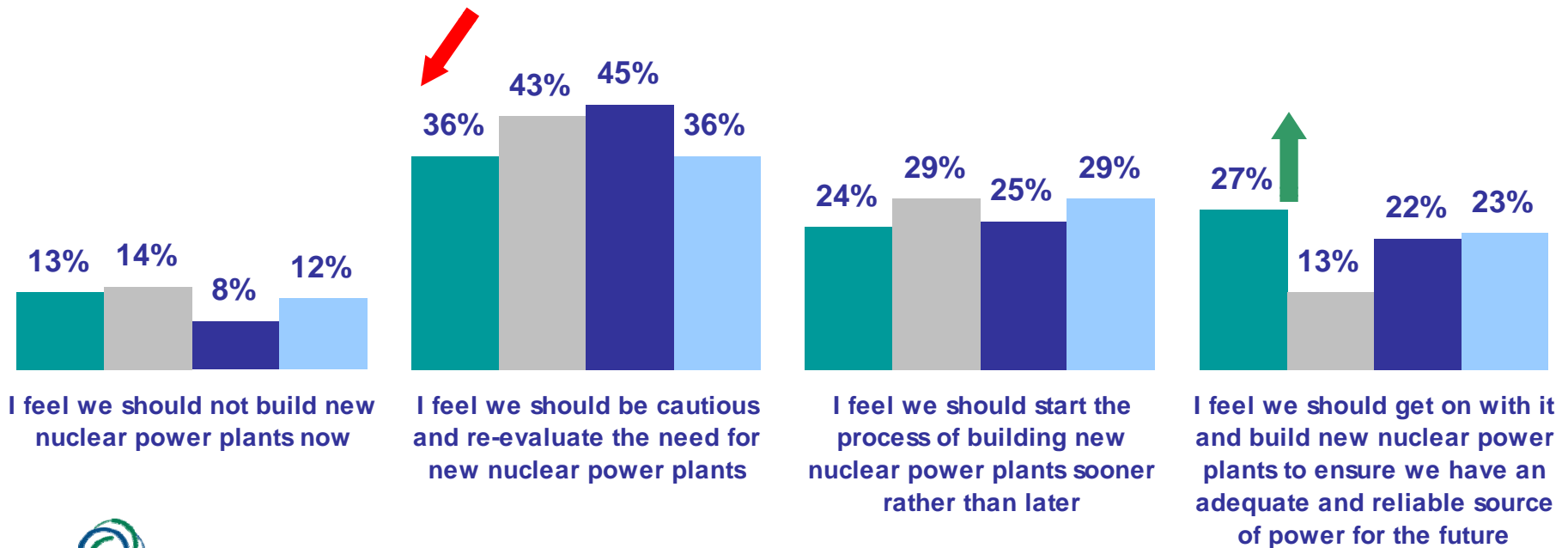
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As you may know, the government of Ontario has approved the replacement and refurbishment of existing nuclear power plants. Based on what you have read, seen, or heard do you feel the government is moving too slowly, somewhat slowly, at the right pace, somewhat quickly, or too quickly in building new nuclear power plants? Base: Aug 09 N=380; Jan 2009 N=760, Sep 2008 N=492 Jan 2008 N=752



In Fact, More Ontarians Also Say The Province Should ‘Just Get On With It’ and Build New Plants Now (+14 Points)

■ Aug 2009 ■ Jan 2009 ■ Sep 2008 ■ Jan 2008



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Please tell me which of the following statements are closer to your view. Please select only one. Base: Jan 2009 N=760, Sep 2008 N=492, Jan 2008 N=752
Why would you say we should be cautious and re-evaluate the need for new nuclear power plants? Base: All who feel we should be cautious and re-evaluate the need for new nuclear power plants Aug 09 N=380; Jan 2009 N=326



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Provincial Issues

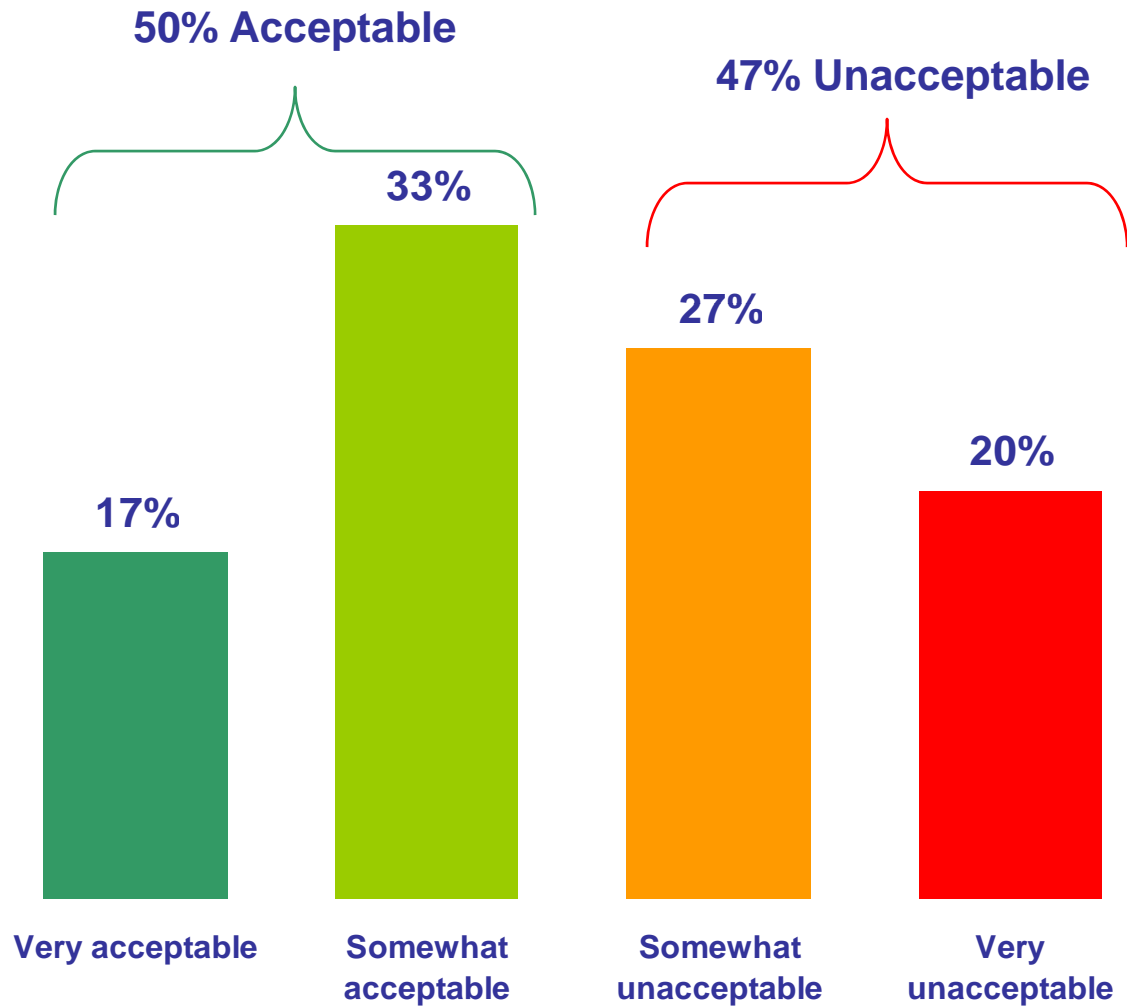


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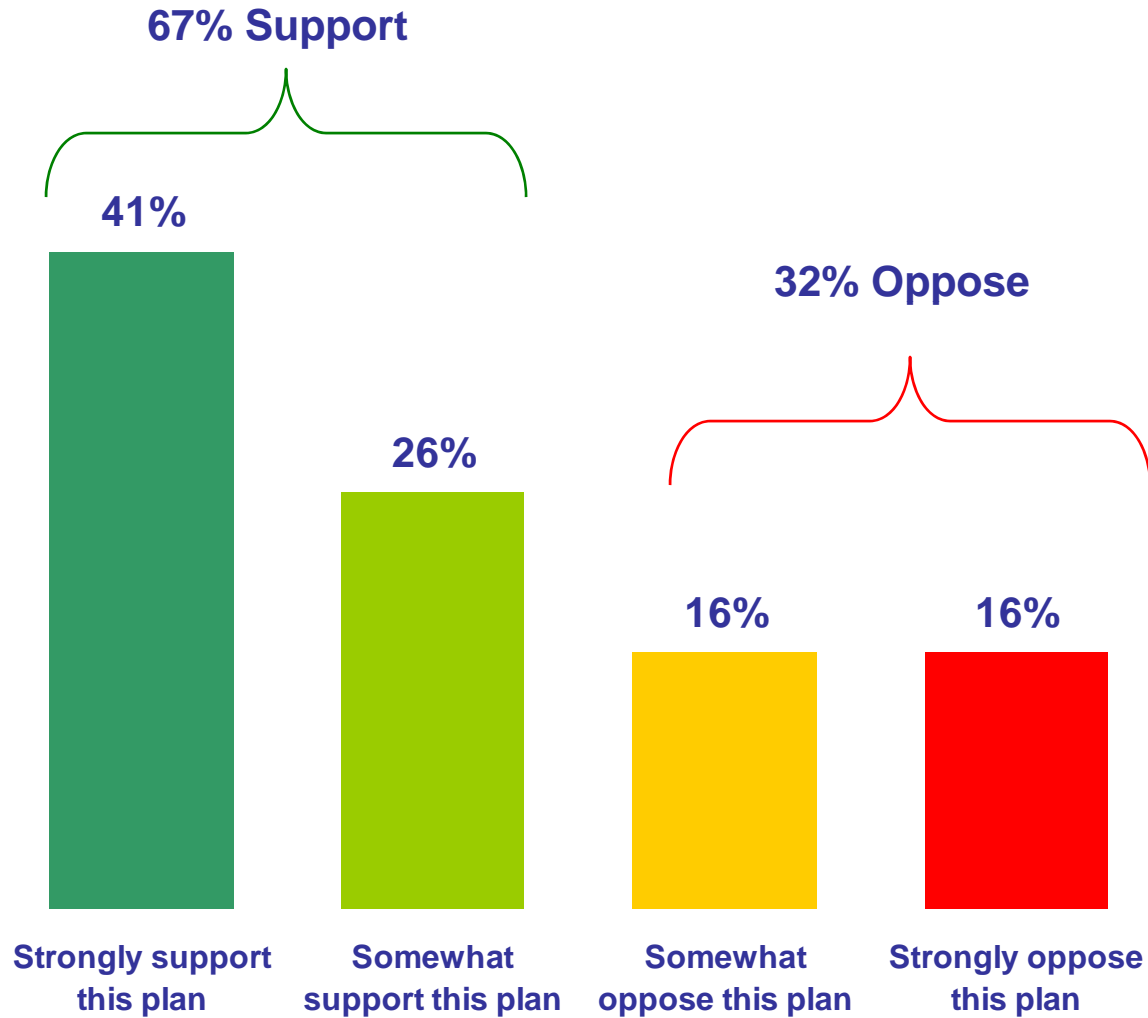


Ontarians Are Split over Acceptability of Delay To Select A Vendor To Build A New Nuclear Facility...



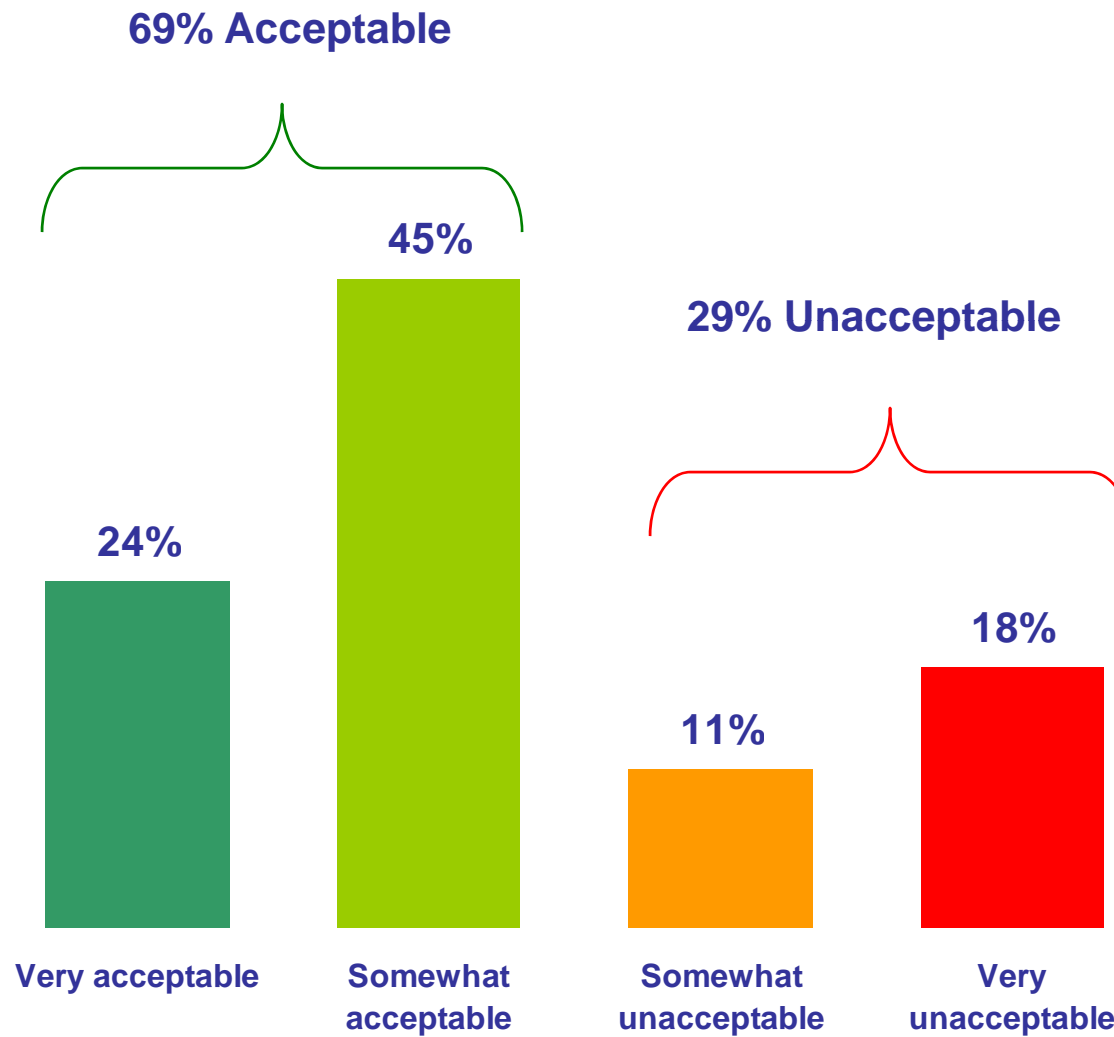


In Saskatchewan, Support for the Construction of an Isotope Facility is Very Strong...





Most in Saskatchewan Acceptable to Province Becoming Leader in Storage and Disposal of Nuclear Waste...





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For more information about the study,
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