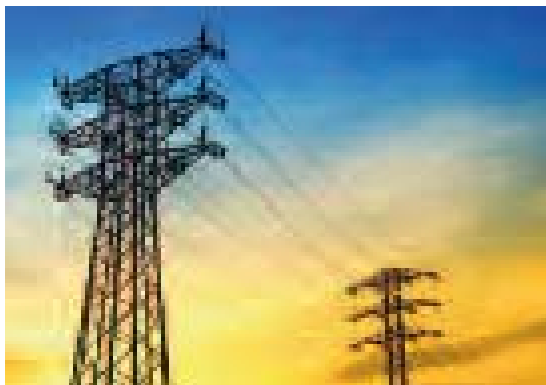




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Issues Tracking Report
April 2010



<u>Topic</u>	<u>Slide</u>
Purpose and Methodology	3
Energy as an Issue	5
Nuclear Support Tracking	11
Refurbishment and New Build Support Tracking	19
Attitudes Towards Nuclear Power	25
Urgency	33
Attitudes and Opinions of the Industry	36



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Purpose & Methodology



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 April 6th to April 8th, 2010.
- The total sample is 1,158 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	1158	2.9
BC	127	8.7
AB	100	9.8
SK/MB	140	8.3
(SK)	(105)	9.6
ON	401	4.9
QC	240	6.3
ATL	150	8.0
(NB)	(102)	9.6



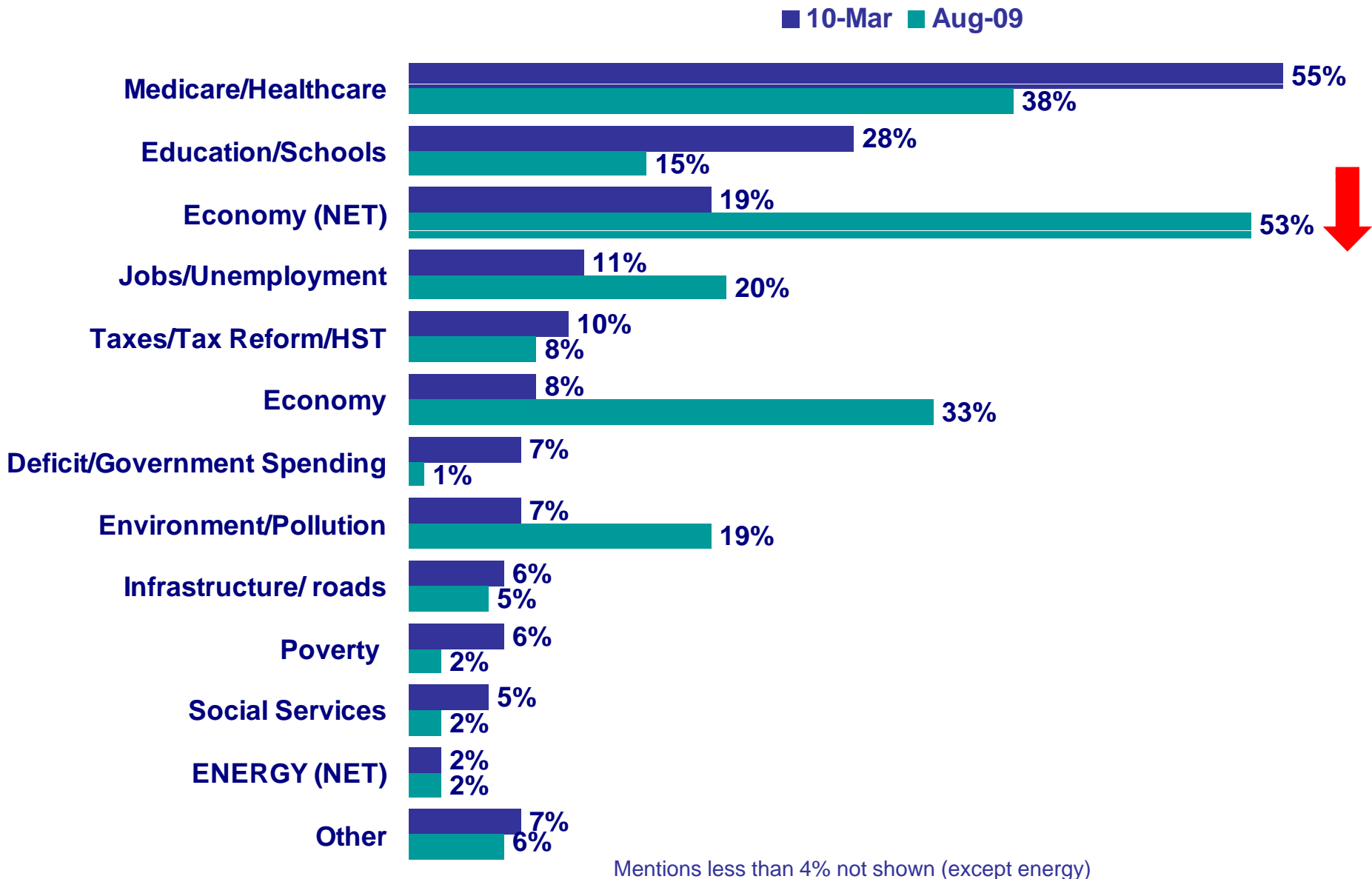
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Energy As An Issue





Attention has Dropped on the Economy (53% to 19%), Health Care Rises to Most Important Issue (again). Energy Off the Radar for Most...



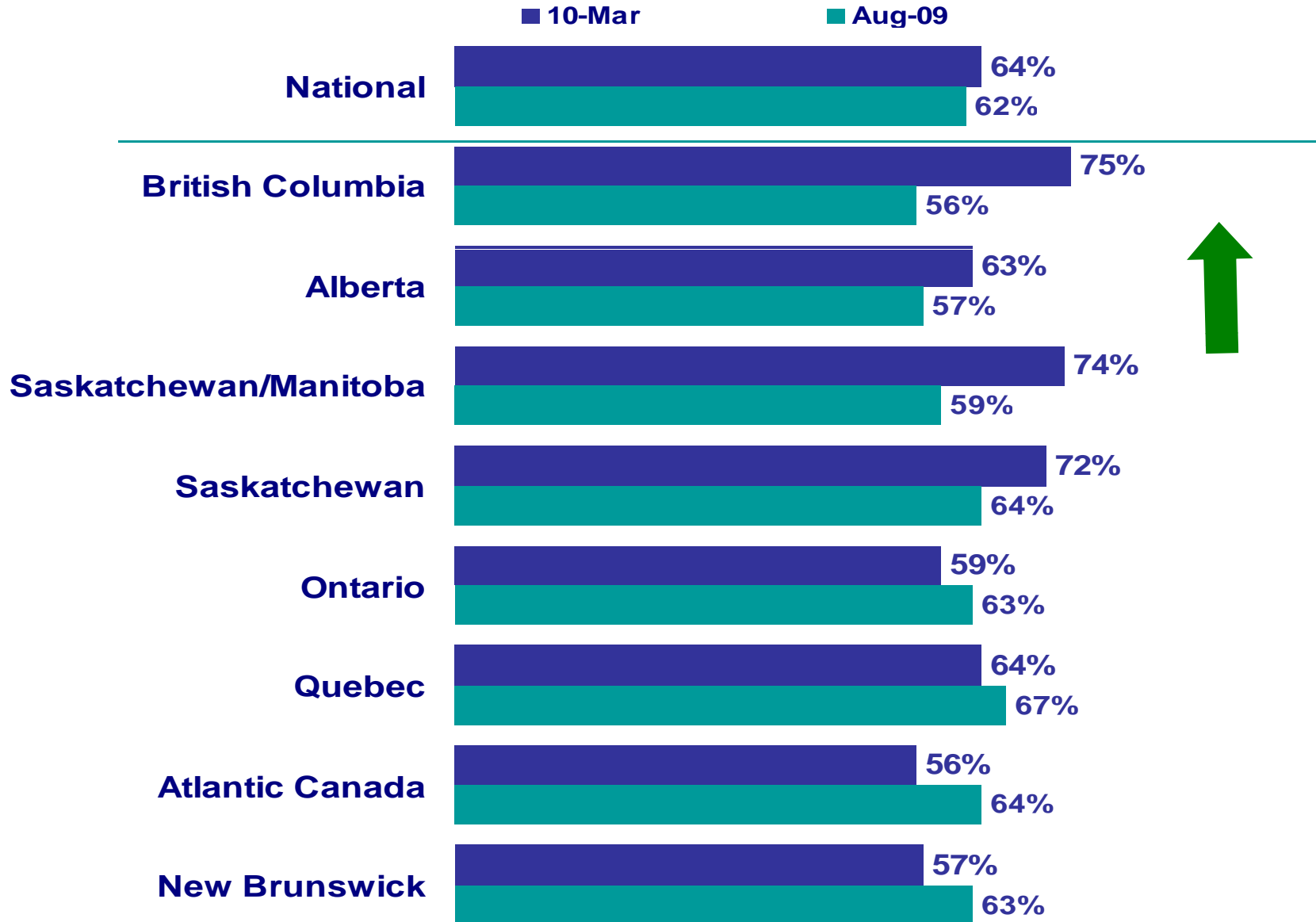
Mentions less than 4% not shown (except energy)



Now, thinking of the issues presently confronting the province of (PROVINCE) and people like yourself, which one do you feel should receive the greatest attention from the provincial government, that is the one thing they should give top priority to? Base: Mar 2010 n=1,158; Aug 2009 n=1,156; Jan 2009 N=2200, Sep 2008 N=1285.

Significantly More in BC (+19) and Slightly More in SK (+8) and AB (+6) have Less Confidence in Conservation Efforts...

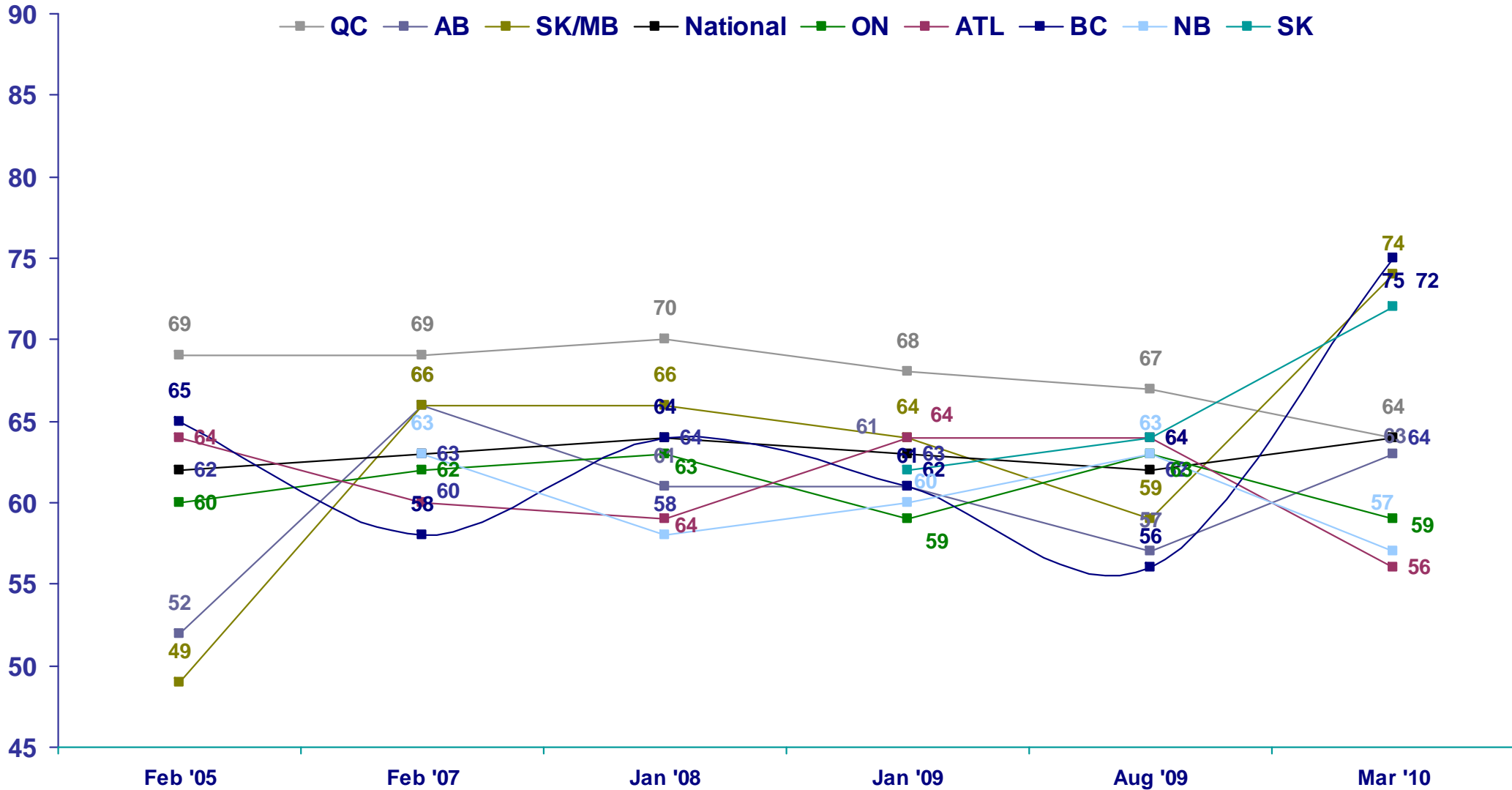
Conservation Efforts Won't Offset Demand



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 ? Base: Mar 2010 N=1,158; Aug 2009 N=1,156; Jan 2009 N=2200, Sep 2008 N=1285, Jan 2008 N=2187

Lack of Confidence in Conservation at Historic Highs in Western Canada... Confidence Stable on Other Regions...

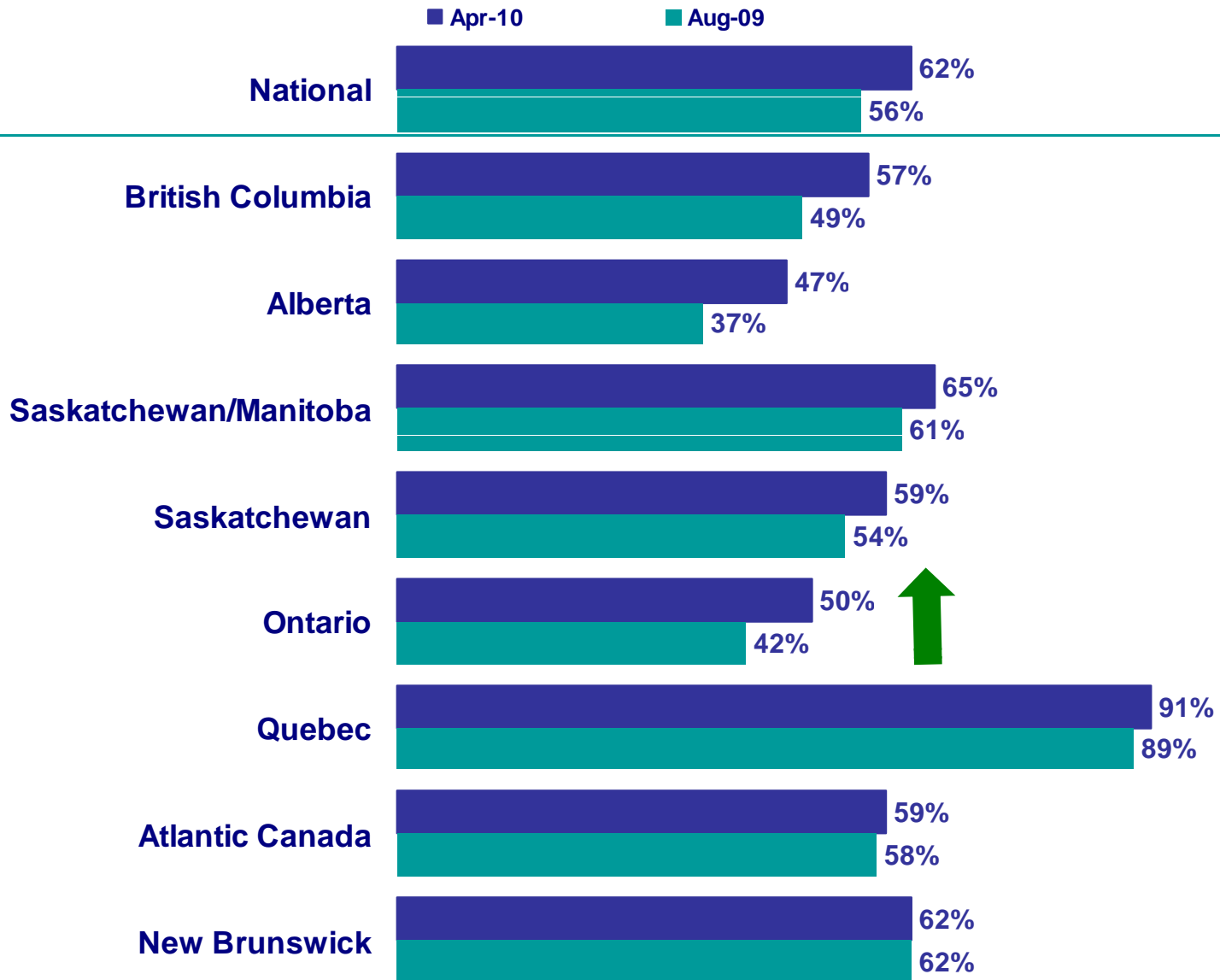
Conservation Won't Offset Demand



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? Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Feb 05 N=1820

Confidence in Electricity Supply Has Increased in Almost All Regions of the Country, Largest Gains in AB (+10) and ON/BC (+8)...

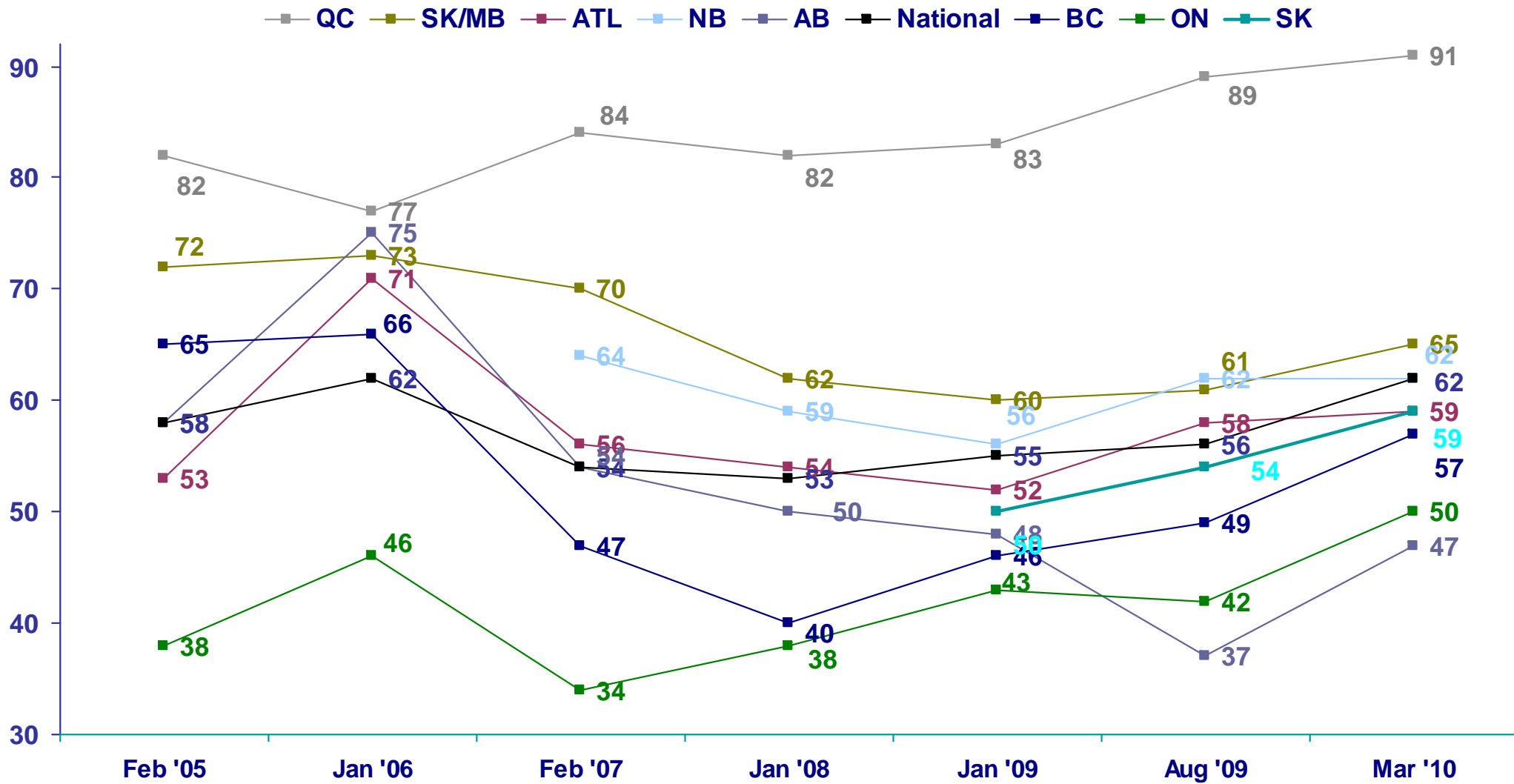
Have Enough Electricity in My Province



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 ? Base: Aug 2009 N=1,156; Jan 2009 N=2200, Sep 2008 N=1285, Jan 2008 N=2187

The Trend Points To Increasing Confidence, But Not As High As Levels Seen in 2006...

Have Enough Electricity In My Province



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? Base: Mar 10 N=1,158; 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



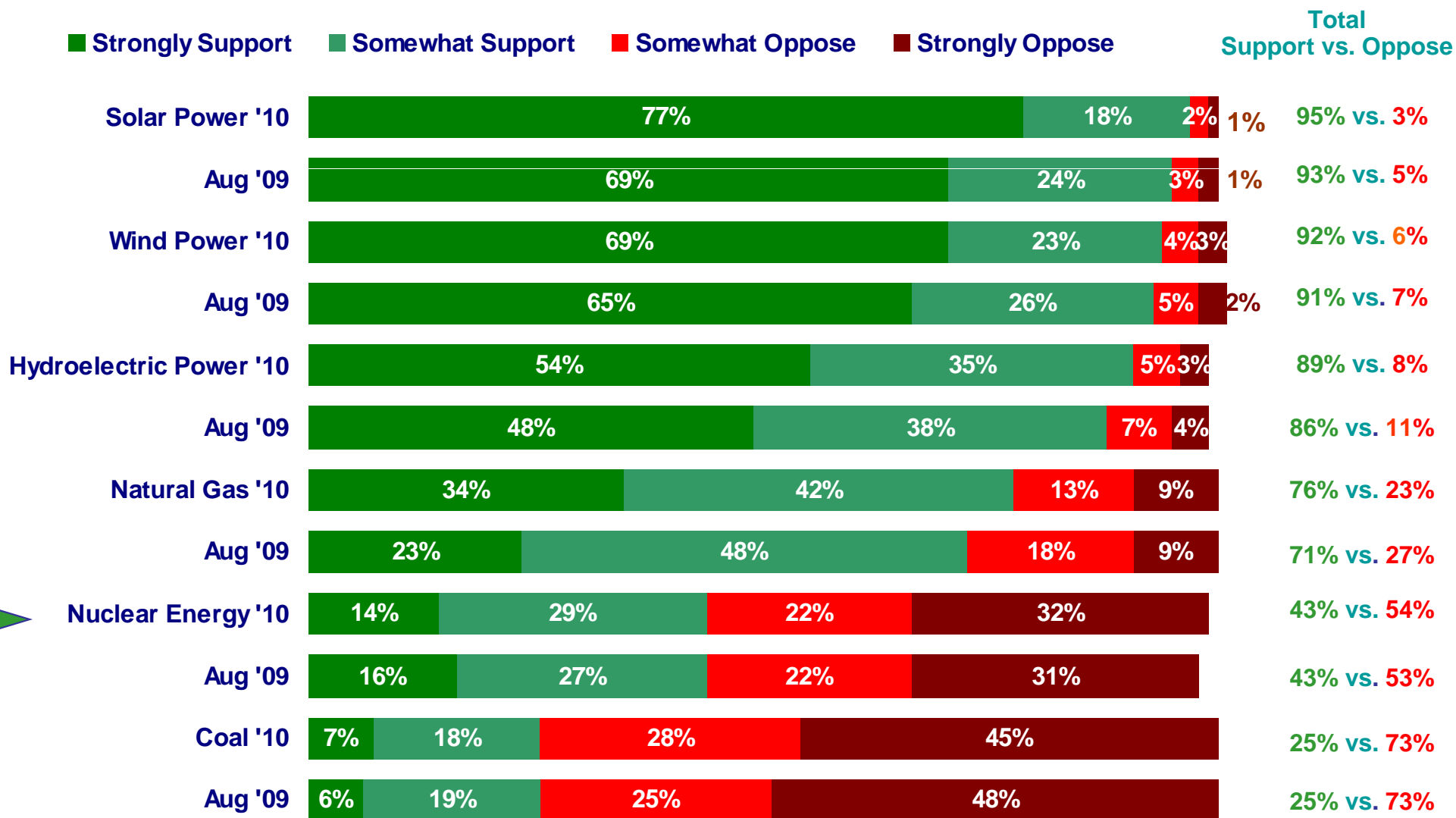
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Nuclear Support Tracking





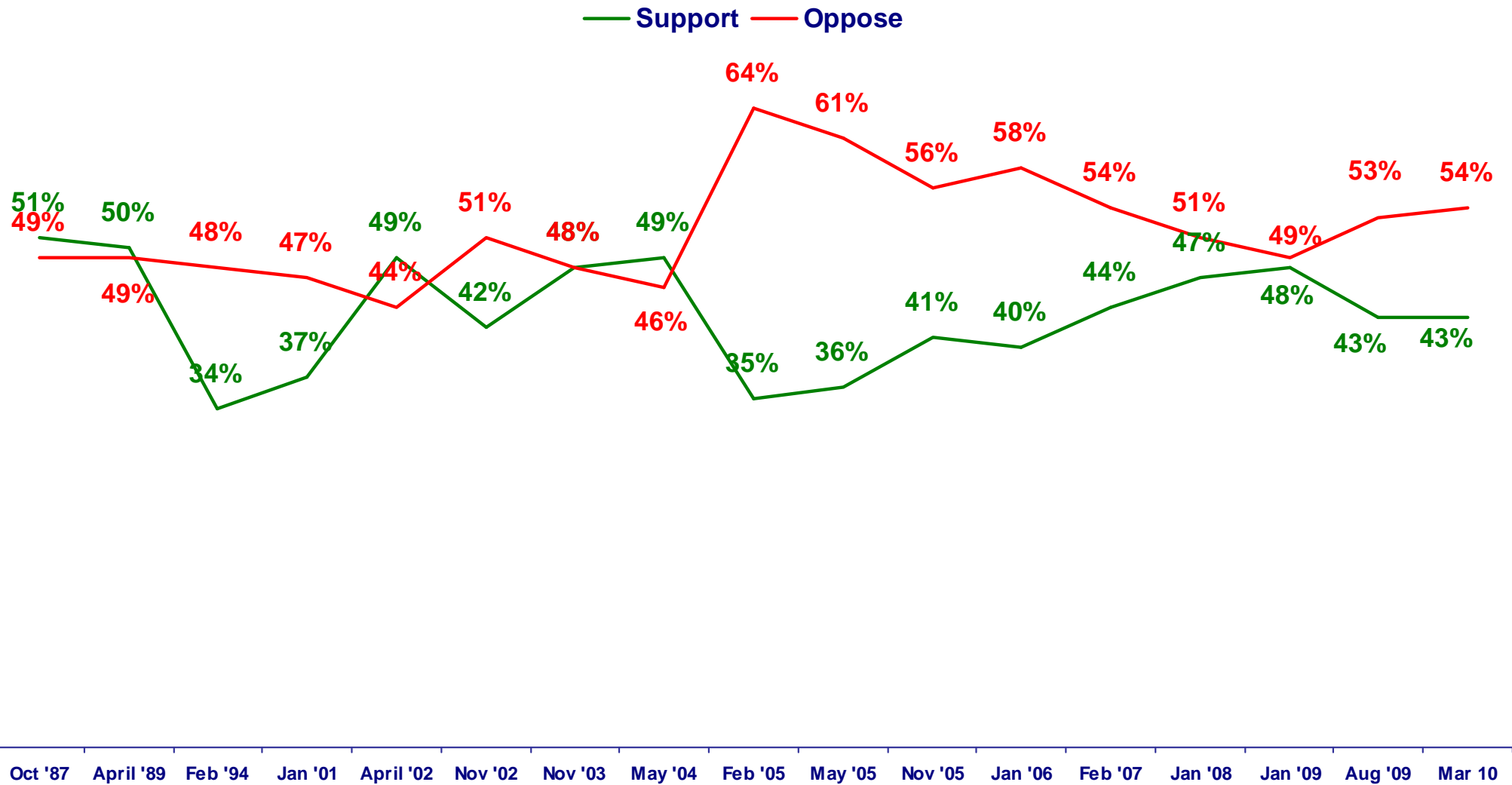
Nationally, Support for Nuclear Energy Is Unchanged at 43%, Strong Support for Renewable and Natural Gas has Increased...



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. How about . . . Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123

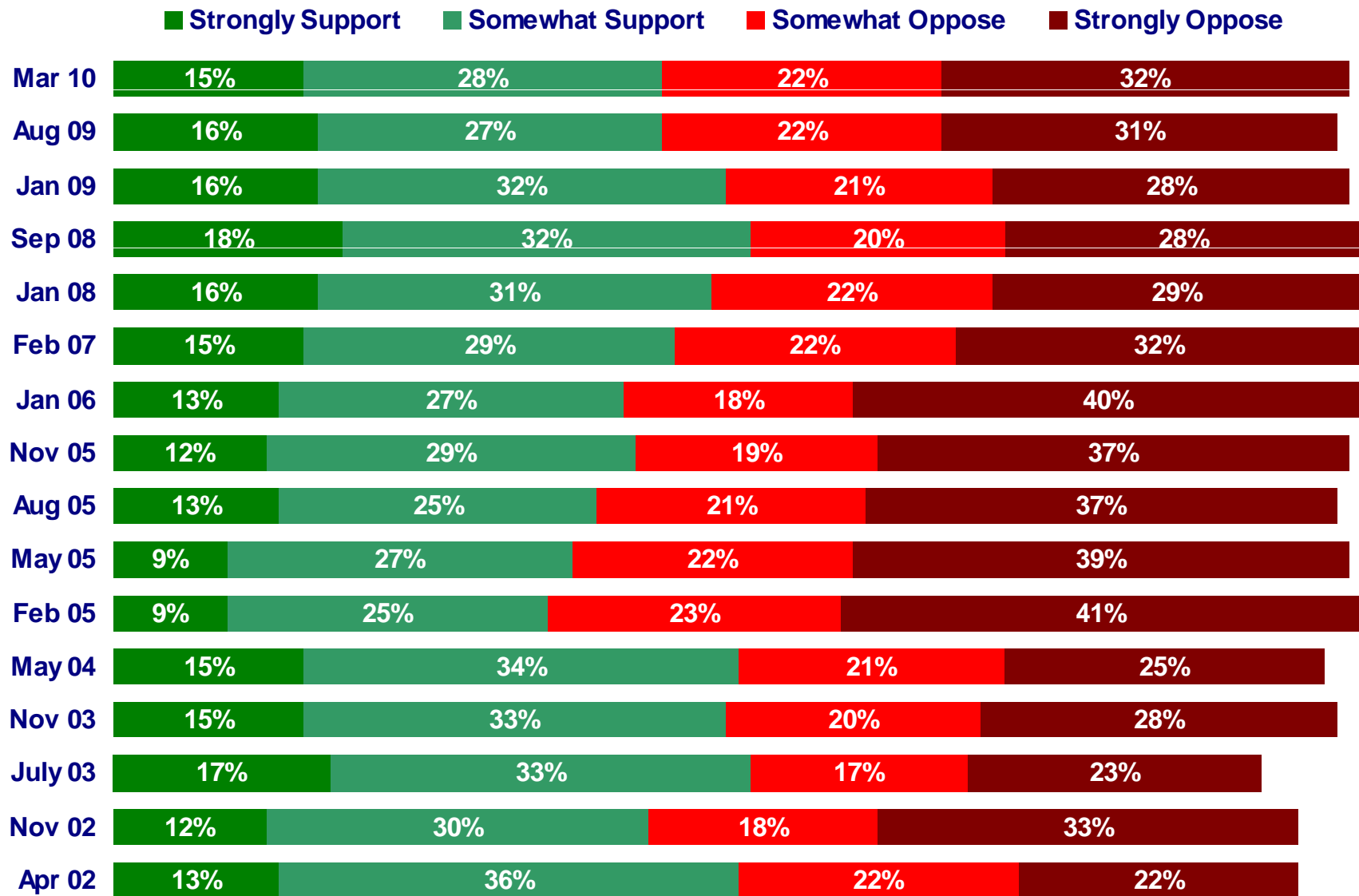


Nationally, Support for Nuclear Energy Stable After Drop in Summer of 2009...



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

Nationally, Support (43%) and Opposition (54%) for Nuclear Energy Are At Identical Numbers to February 2007 Levels...



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: Mar 10 N=1,158; 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



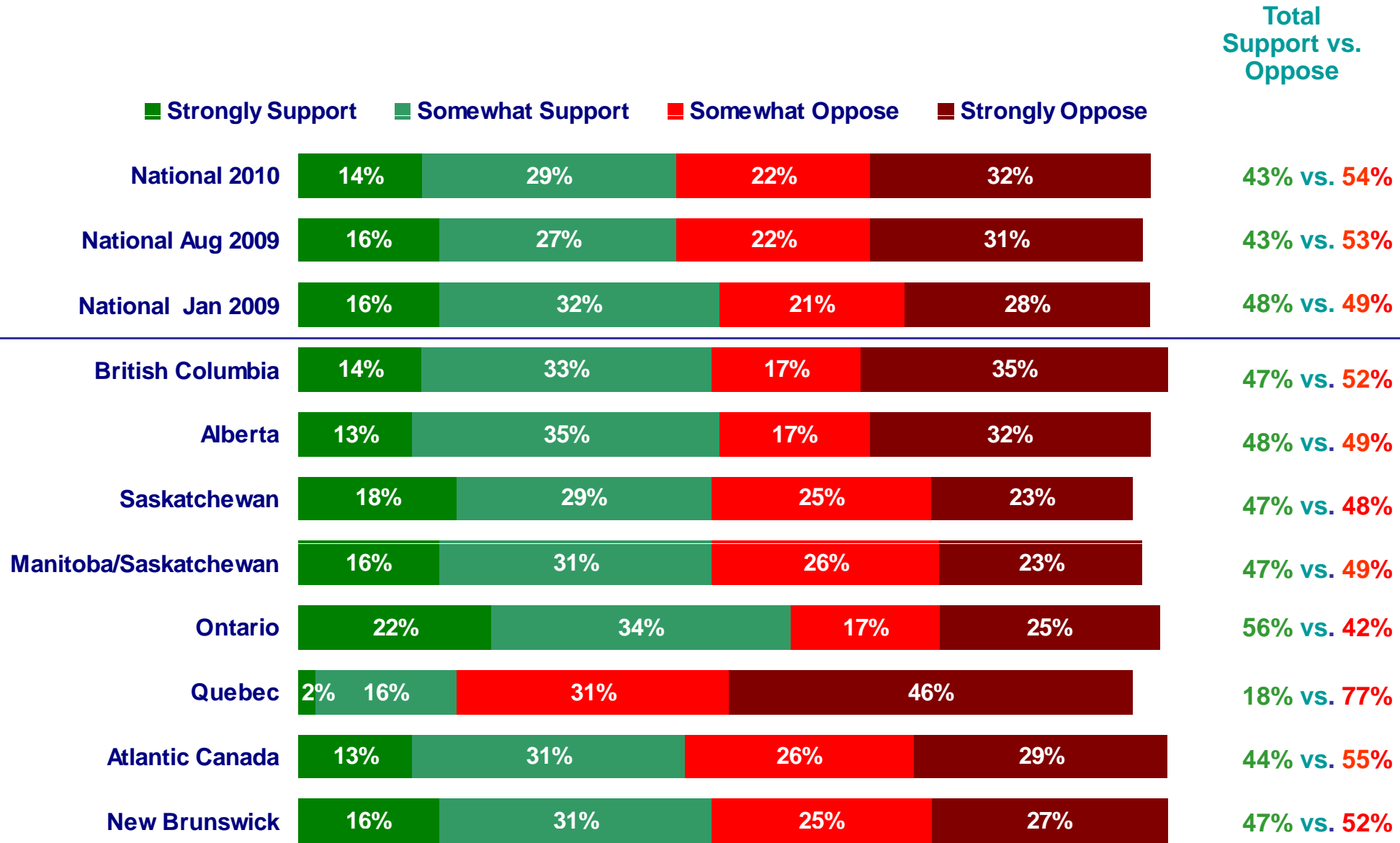
National Support for Nuclear: Men, Higher Educated/Income vs. Opposing Women, Lower Educated/Income...

	Gender		Education				Income		
	Men	Women	Less than High School	High School	College/ Tech	Uni. Grad	Less than 30K	30K to 60K	60K+
Strongly Support	20%	8%	9%	12%	15%	20%	8%	11%	21%
Somewhat Support	26%	32%	21%	22%	33%	40%	23%	27%	33%
Somewhat Oppose	19%	24%	25%	25%	20%	18%	22%	26%	19%
Strongly Oppose	33%	32%	40%	37%	31%	21%	43%	34%	27%
Support (strongly + somewhat)	46%	41%	31%	34%	48%	60%	31%	38%	54%
Oppose (strongly + somewhat)	53%	55%	64%	61%	51%	39%	65%	60%	45%





Ontario Continues to Provide Highest Level of Support for Nuclear, Rest of the Country Levelling Out At Just Under 50% Support...

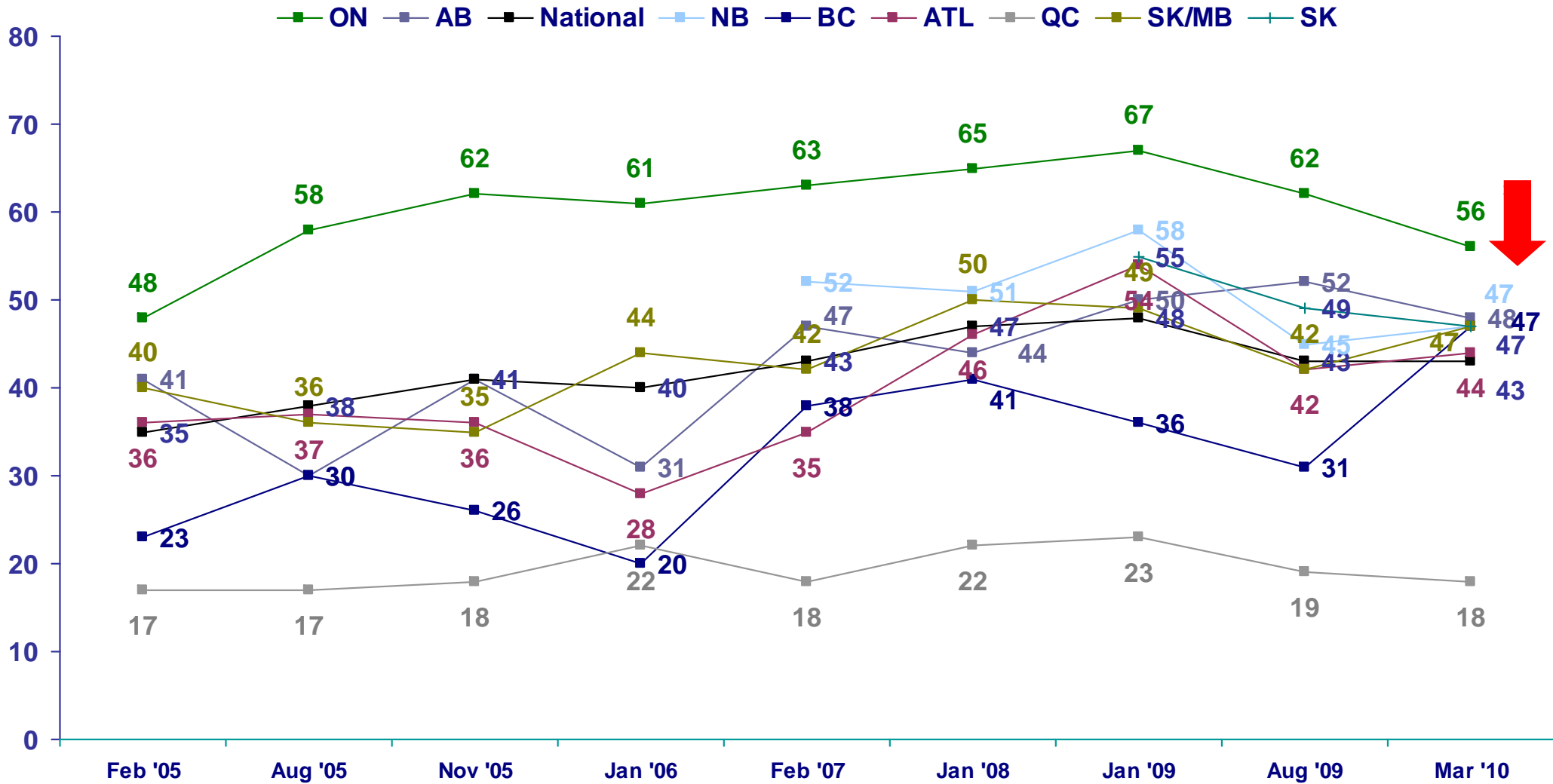


I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000





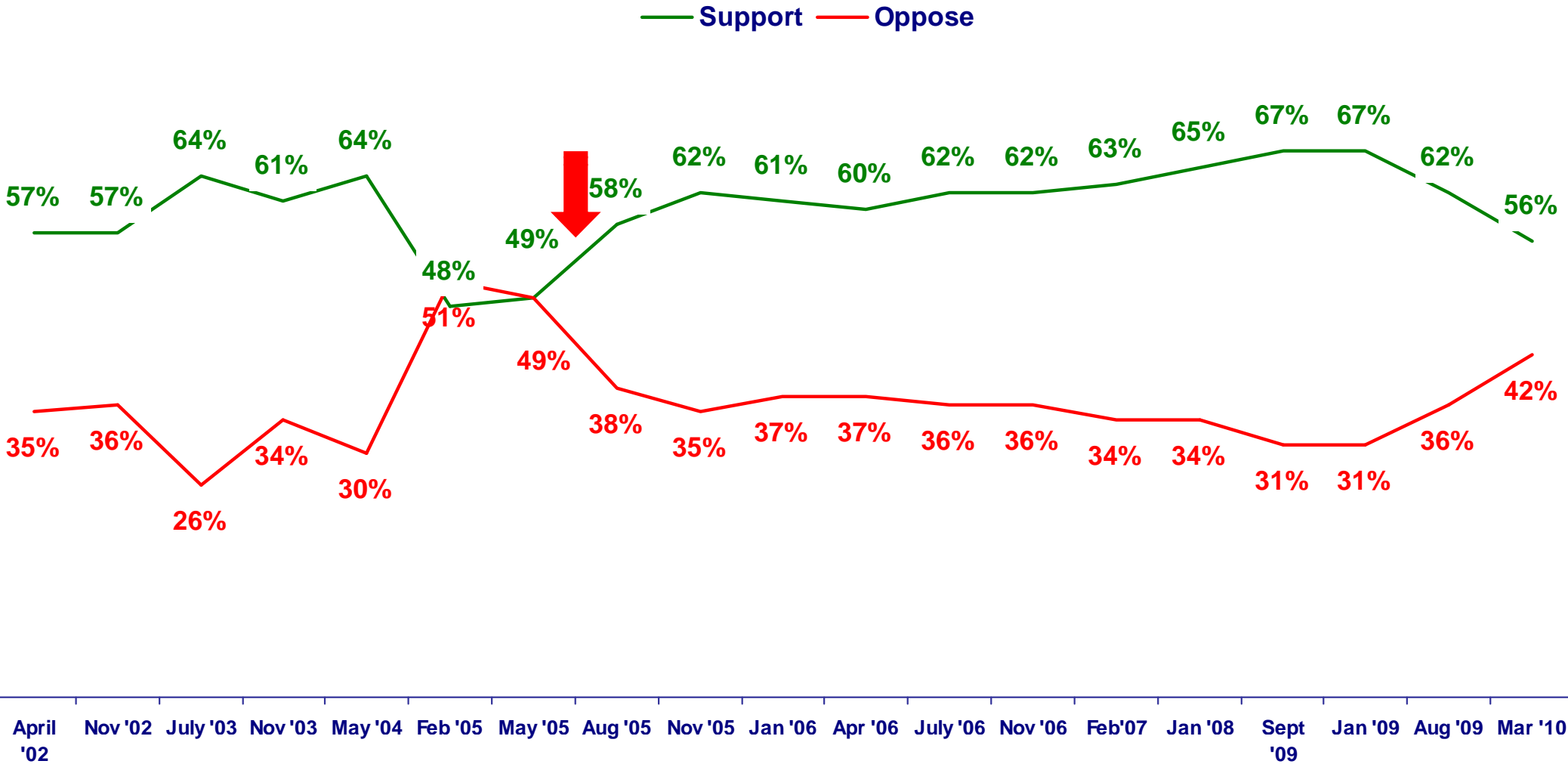
But, Support for Nuclear Energy Down in Ontario (- 6 points). Up Significantly in BC (+16 points) Since August of Last Year...



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: Mar 10 N=1,158; 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



In Ontario Support For Nuclear Energy is Back to Spring of 2005 Levels...



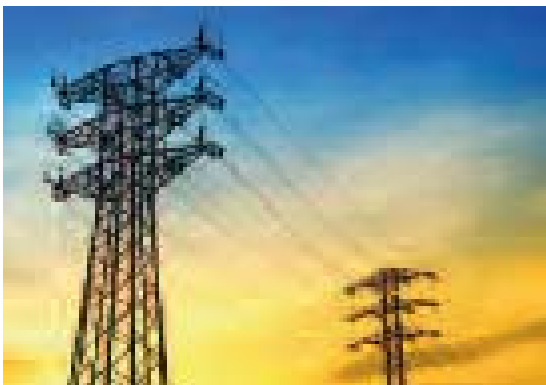
I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: Mar 10 N=1,158; Jan 09 N=760, Jan 08 N=752, Feb 07 N=771, Nov 06 N=1006, July 06 N=1006, Apr 06 N=800, Jan 06 N=1001, Nov 05 N=1000





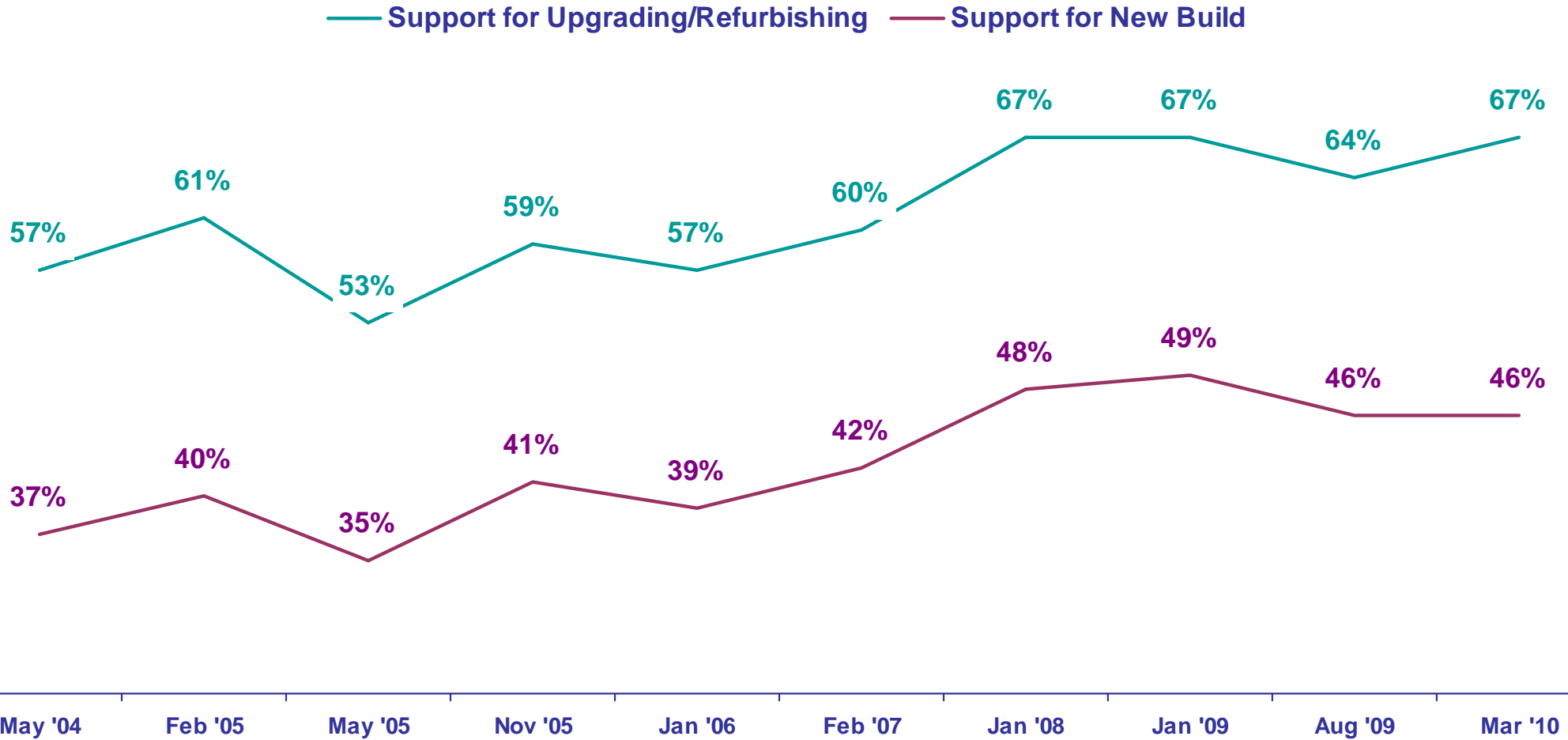
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Refurbishment and New Build Support Tracking





Nationally, Support for Refurbishing has Slightly Increased (+3, to 67%), Support for New Build is Stable (at 46%)...

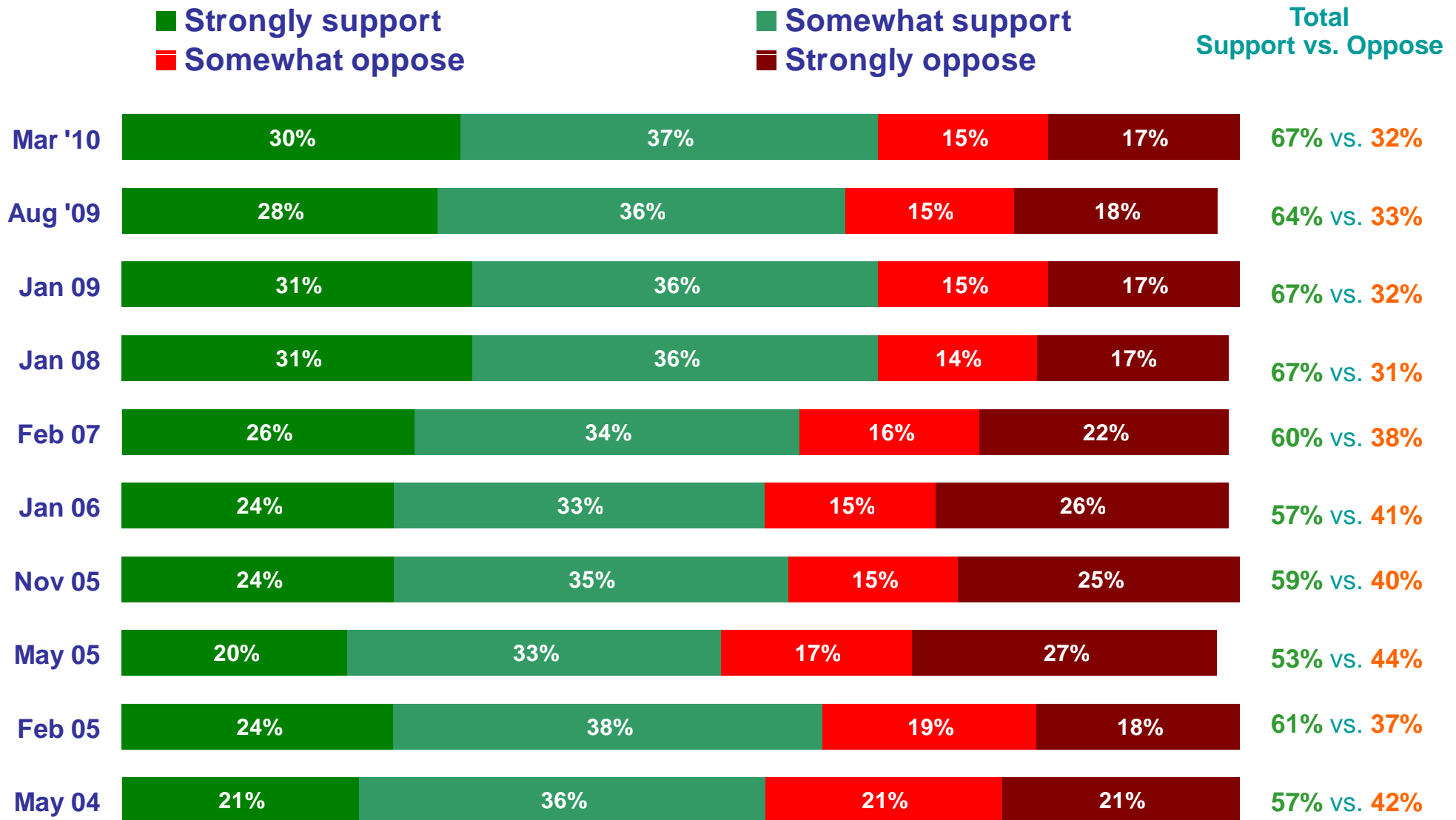


Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Mar 10 N=1,158 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



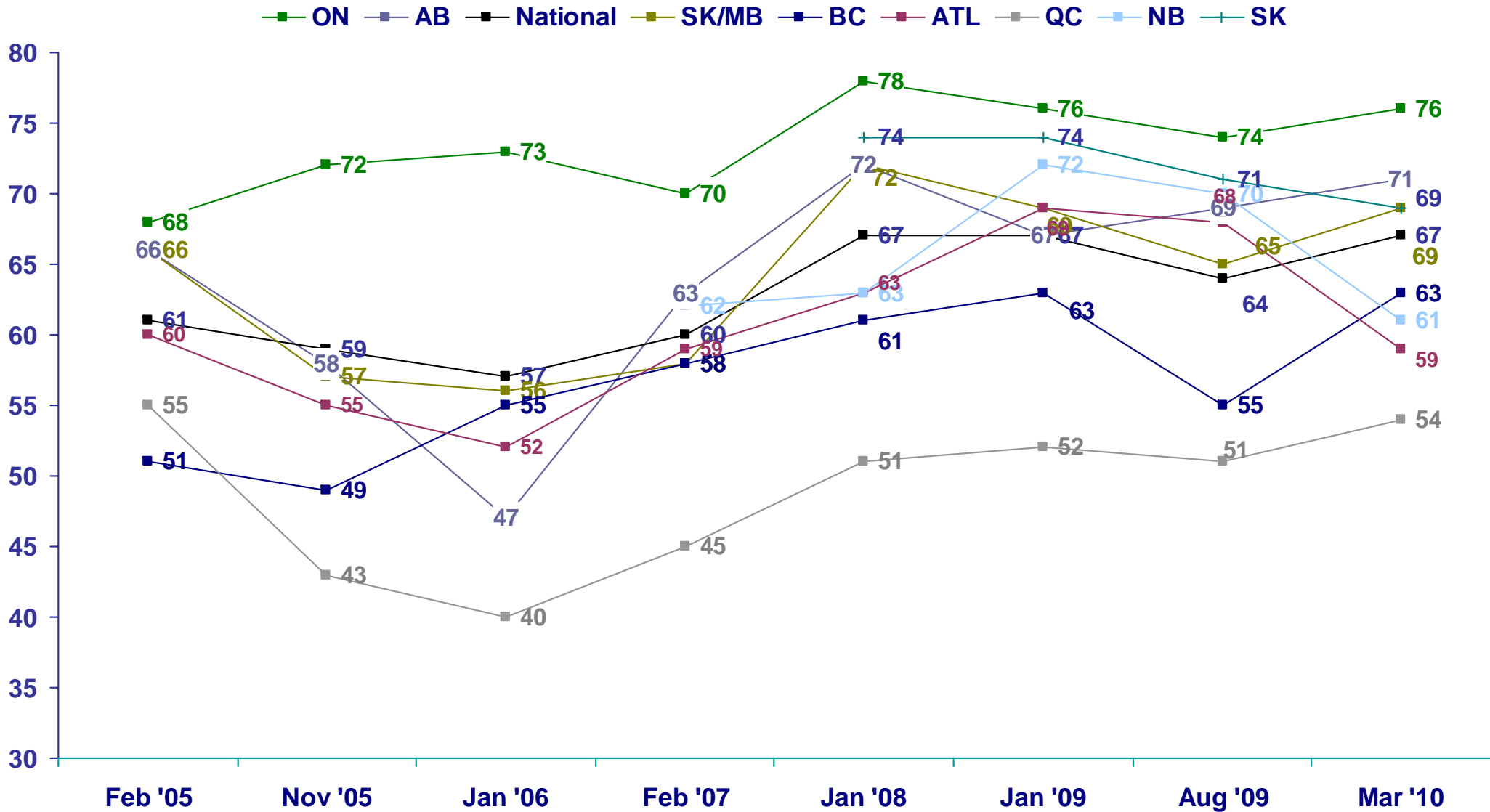
Nationally, Intensity of Support for Refurbishing Very Consistent since January, 2008...

Upgrading And Refurbishing Existing Nuclear Power 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 [ROTATE OPTIONS] And how about...Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000

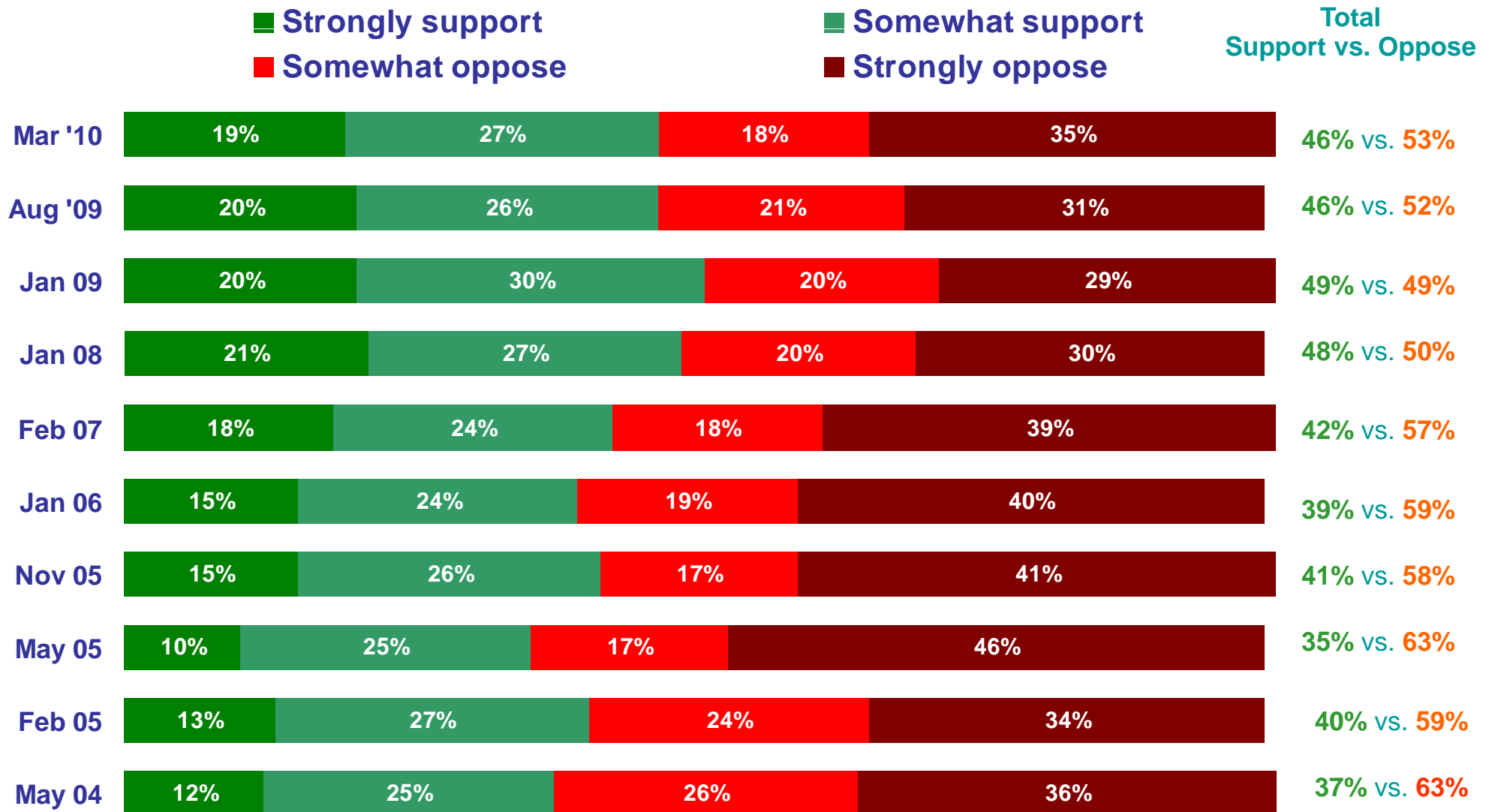
Support for Refurbishment Stable or Up in Most Regions, Exception in NB (down 9 points since August 2009)...



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: Mar 10 N=1,158; 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

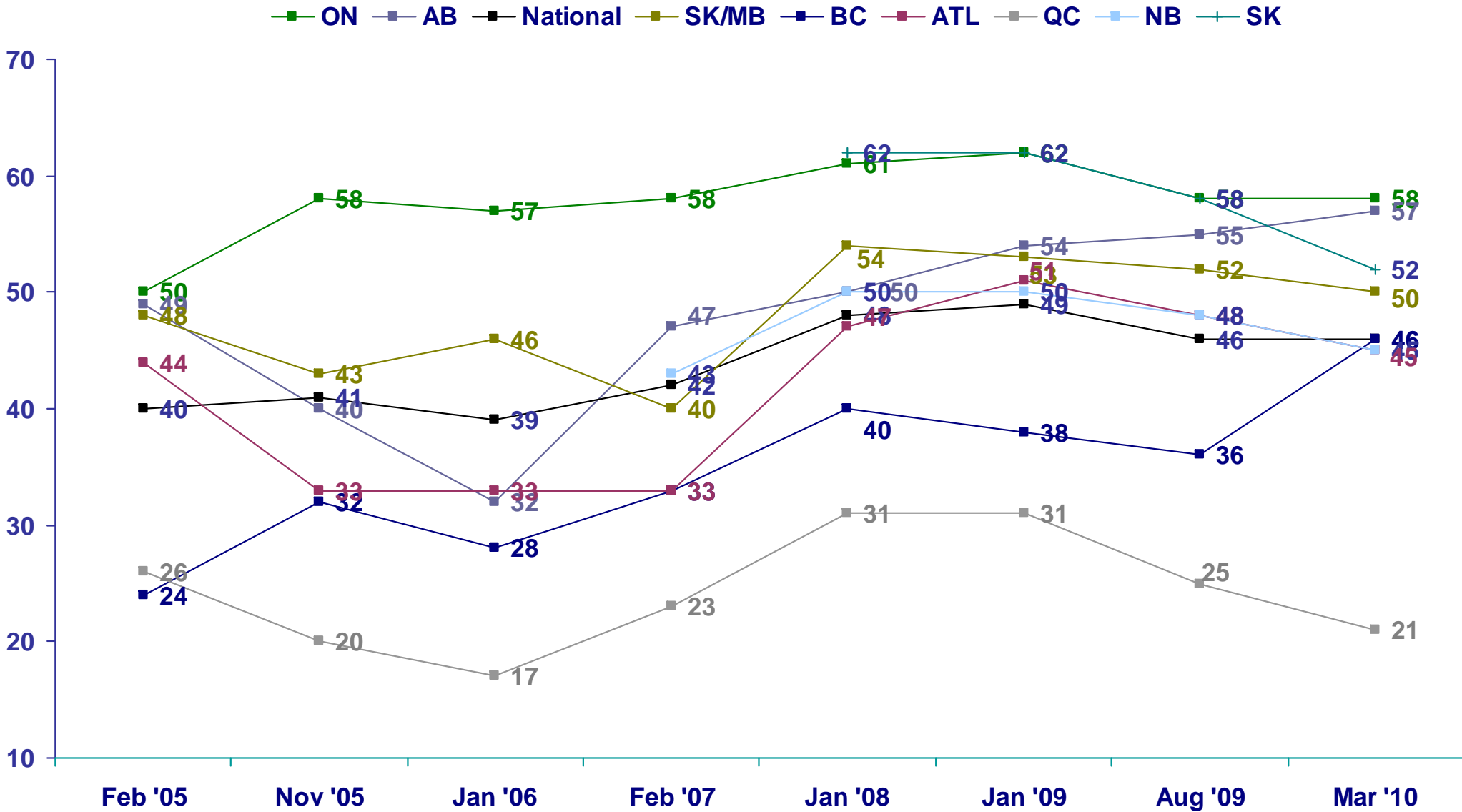
Strong Opposition to New Build has Increased Very Slightly, Overall Support Stable...

Building New Nuclear Power 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 [ROTATE OPTIONS] And how about...Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Feb 07 N=2123, Jan 06 N=1000, Nov 05 N=1000

Support for New Build In Ontario Unchanged at 58%, Up 10 Points in BC...

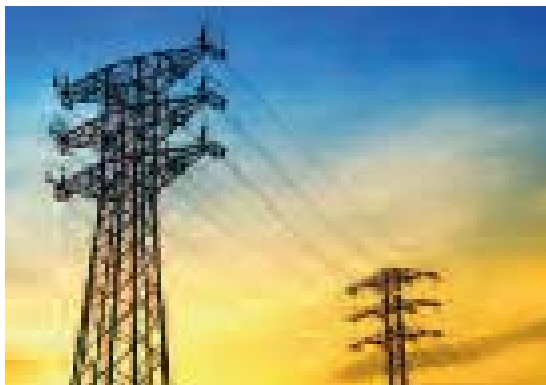


Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Mar 10 N=1,158; 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



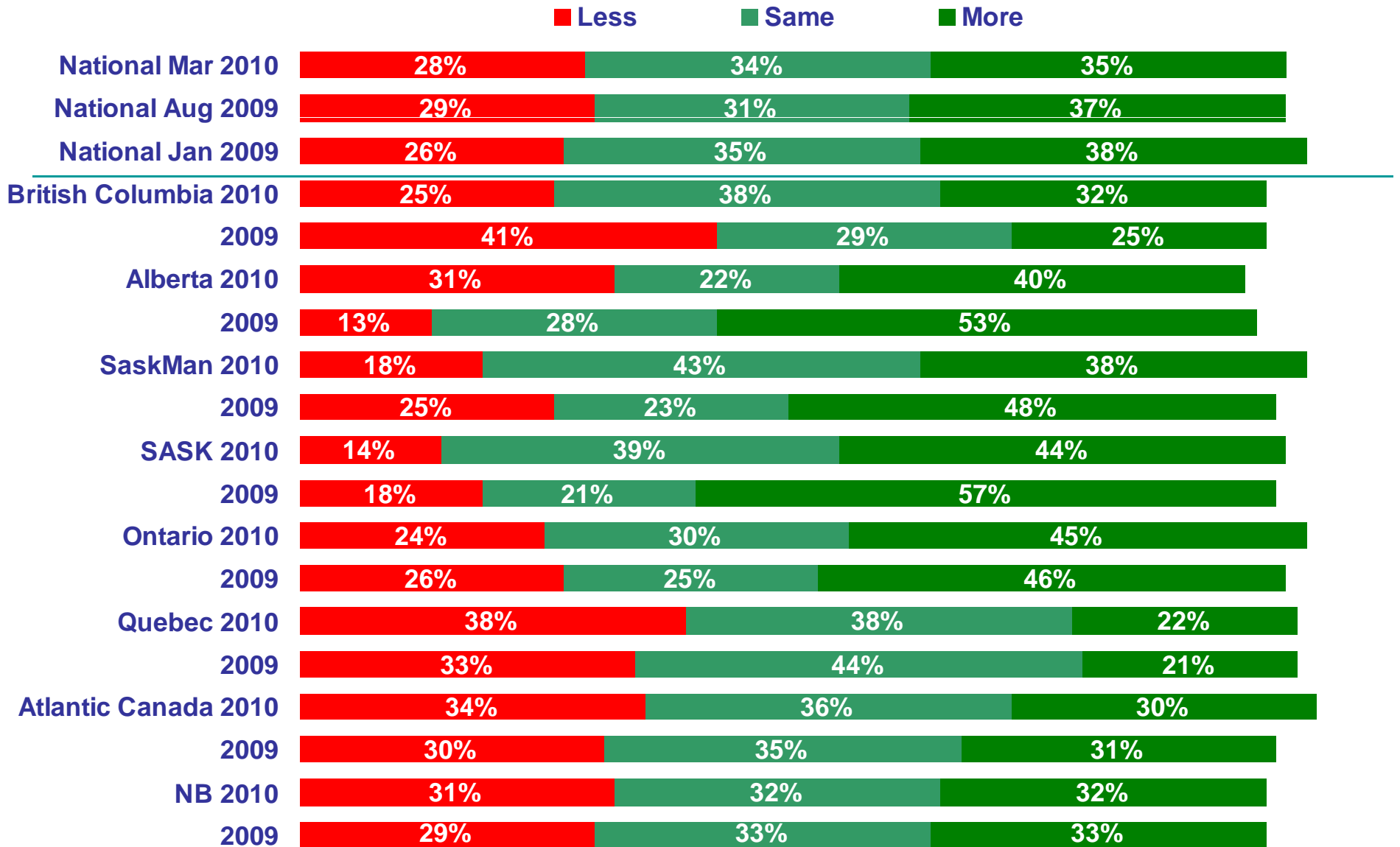
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Attitudes Toward Nuclear





In 2010 40% of Albertans Want More of A Role for Nuclear, Down by 13% (from 53%) Since 2009, Ontario and NB Stable...

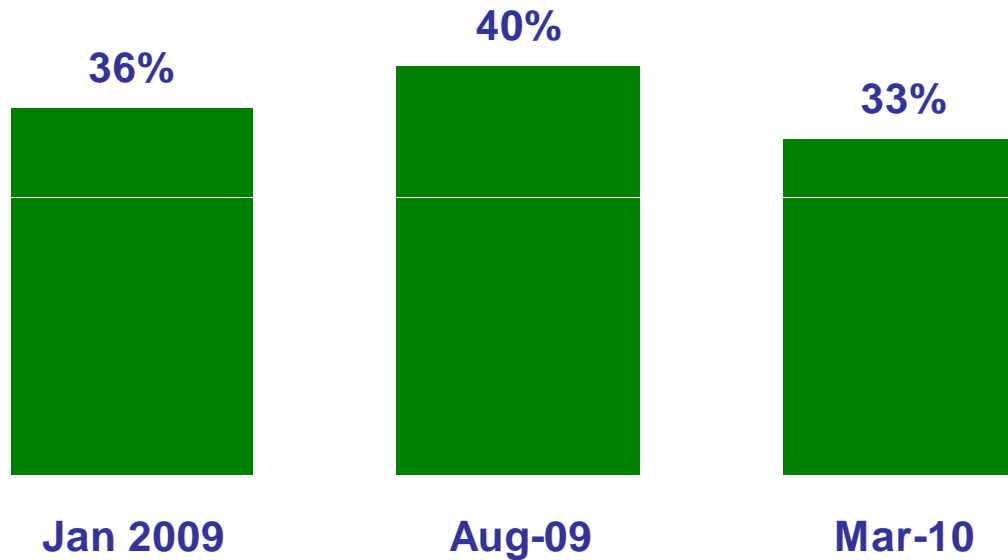


Today, the largest fuel sources for electricity production in Canada are hydro, coal, and nuclear. Over the next 25 years, the demand for electricity on average is expected to increase by almost 40%. What role do you believe that nuclear power should play in [insert province] for the next few decades...more than it is today, less than it is today, or the same as today? Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 2009 N=2200, Sep 2008 N=1285, Jan 2008 N=2123



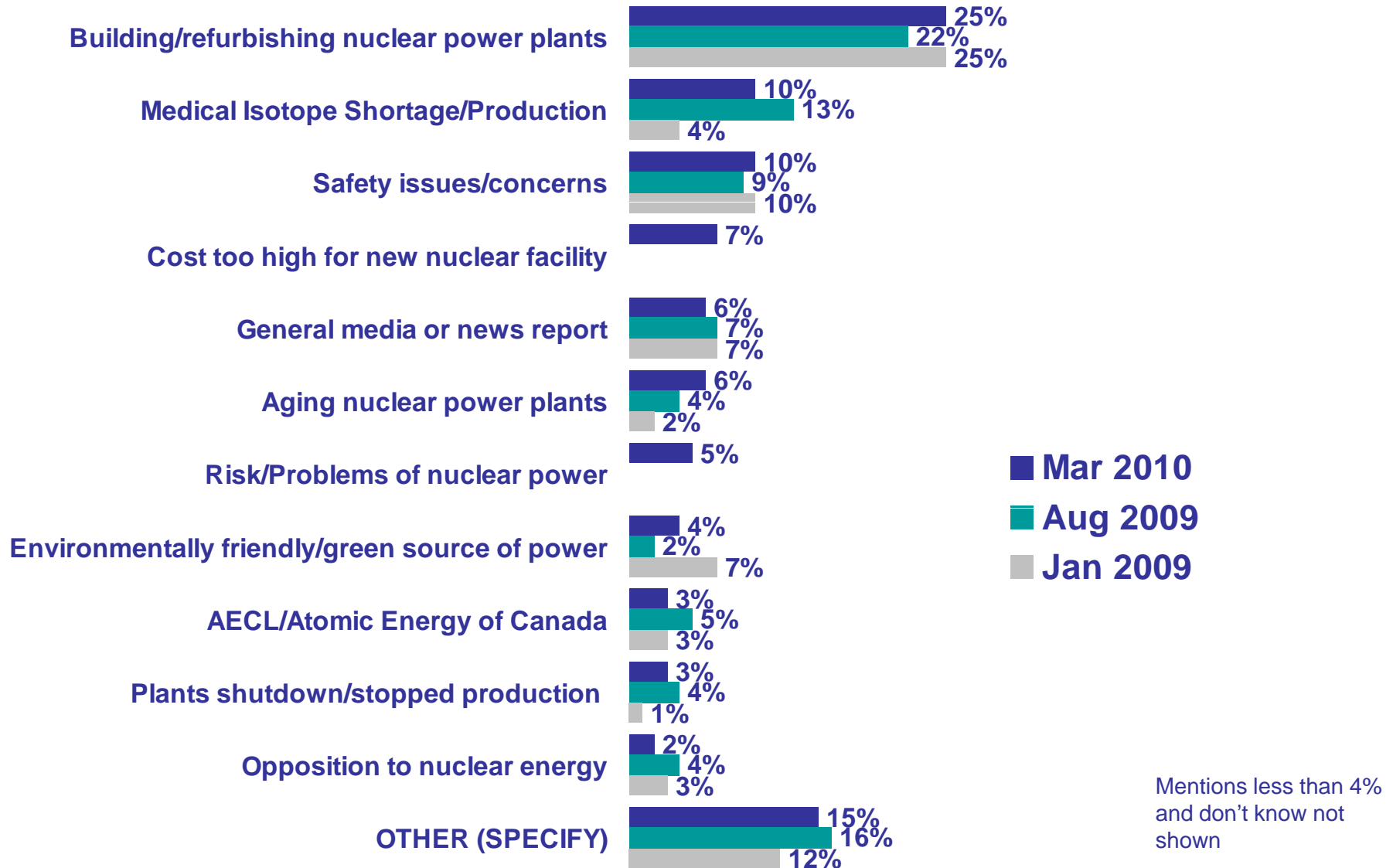
Only One-Third of Canadians Recall Hearing, Reading, or Seeing Something About Nuclear Power Over the Past Year...

Read, Seen or Heard Anything Recently About Nuclear Power

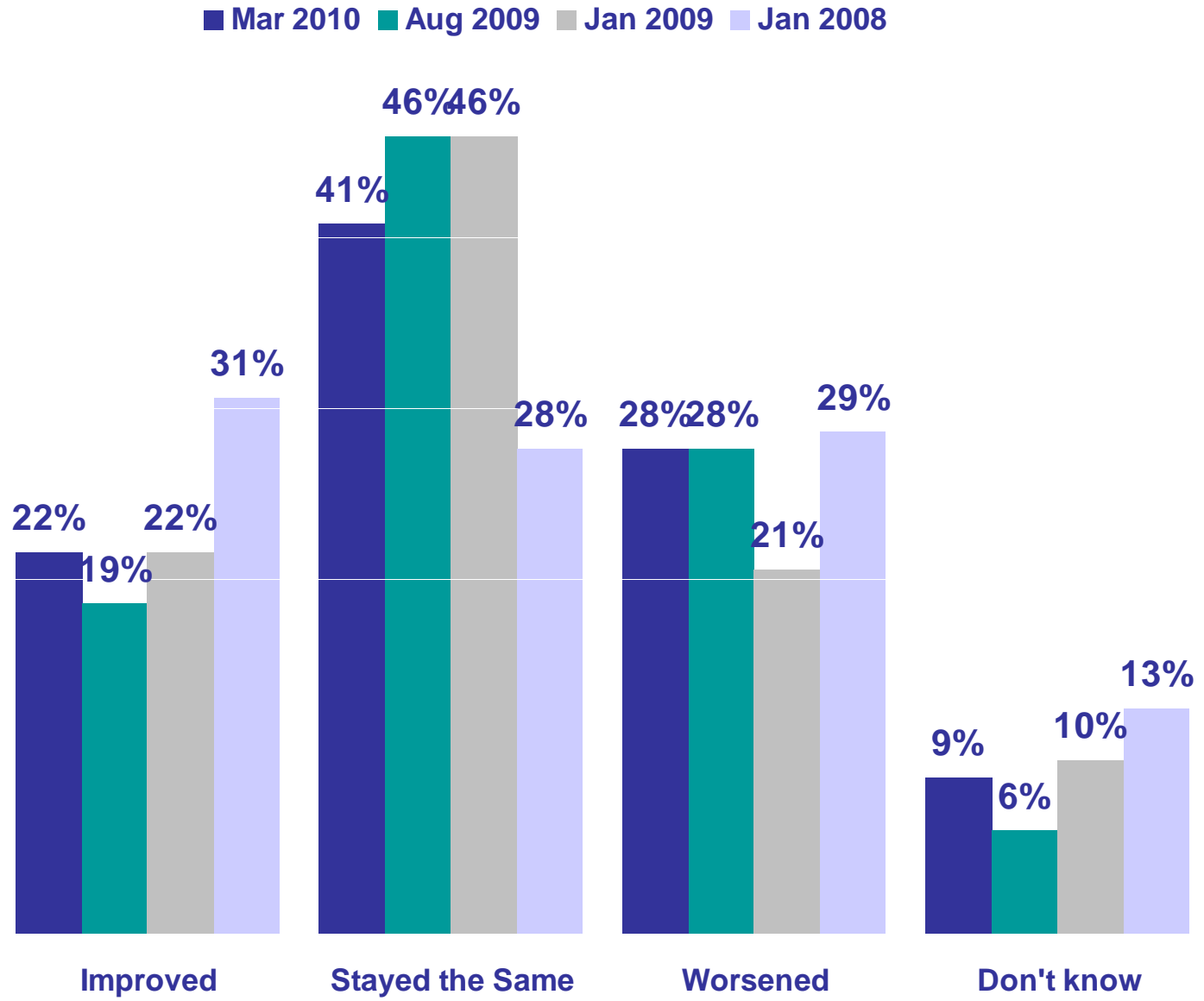


Although Top Issues Consistent, New Areas of Concern Could Be High Costs with Building New (7%) and Risks (5%)...

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



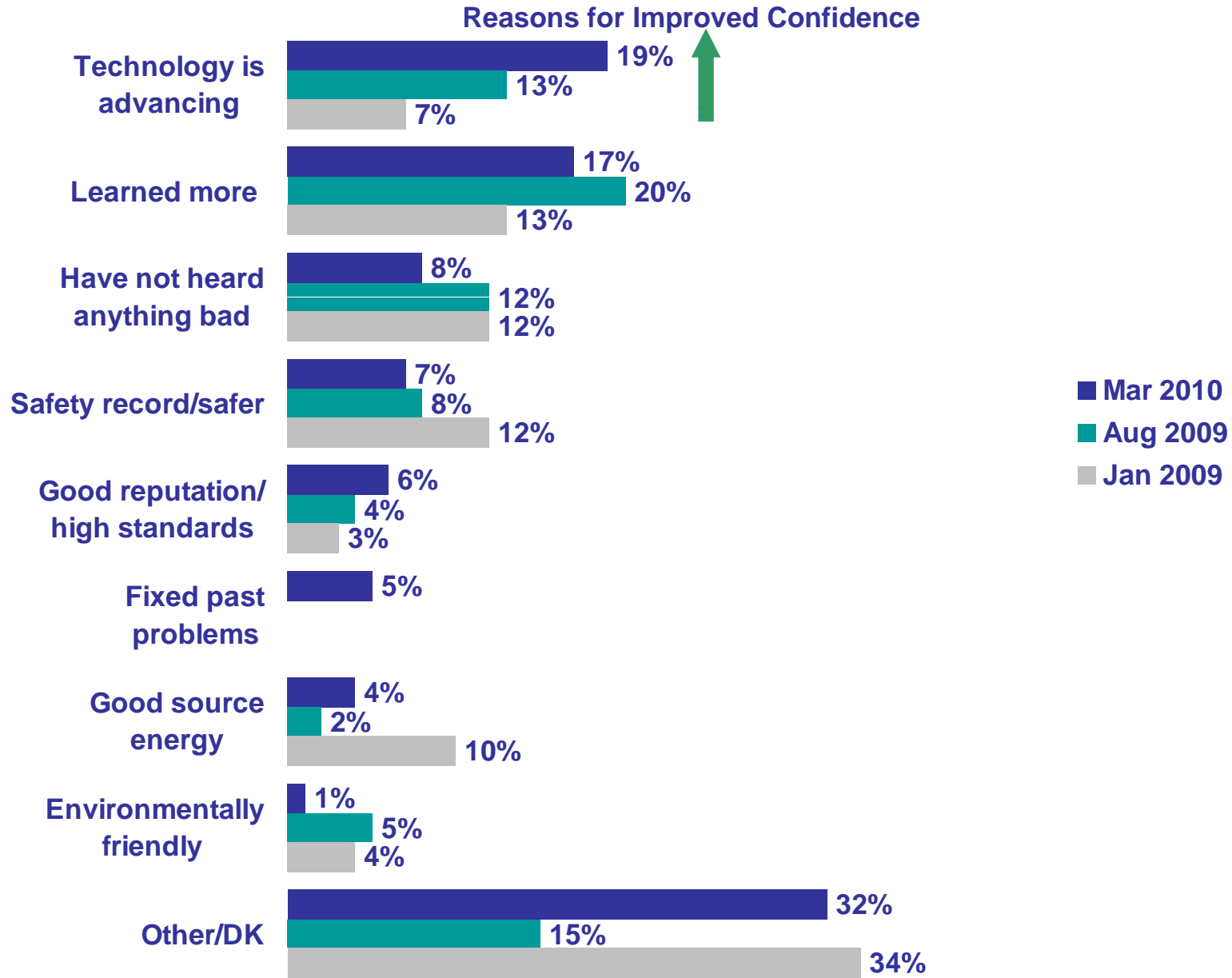
Confidence in the Canadian Nuclear Industry has Remained Stable at 46%...



Would you say that your confidence in the Canadian nuclear industry has improved or worsened in the past 12 months? Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 2009 N=2200, Jan 2008 N=2187



Advancing Technology (+6% to 19%) and 'Learning More About It' (17%) are Cited as Primary Reasons for Increased Confidence in Nuclear Industry

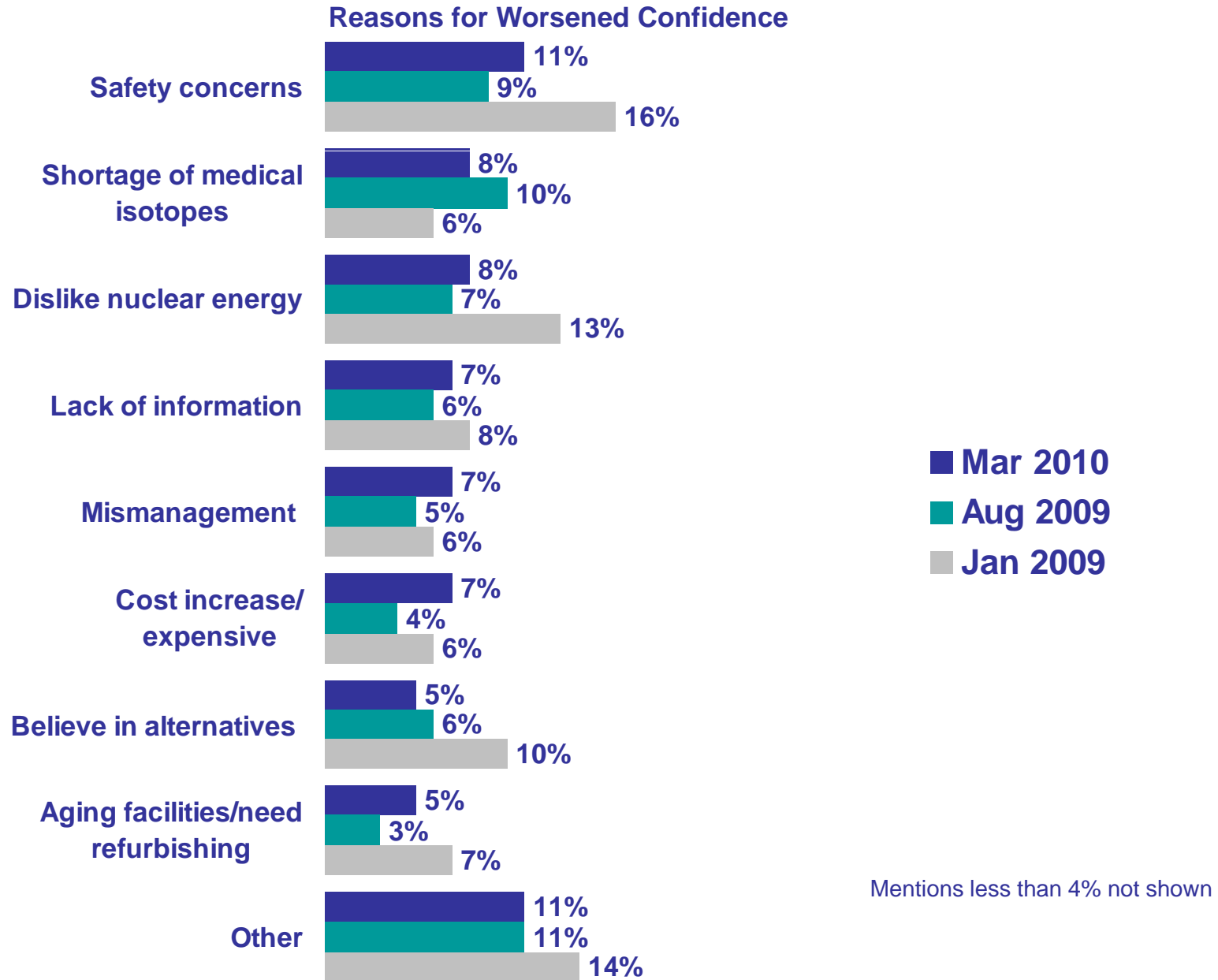


Mentions less than 2% not shown

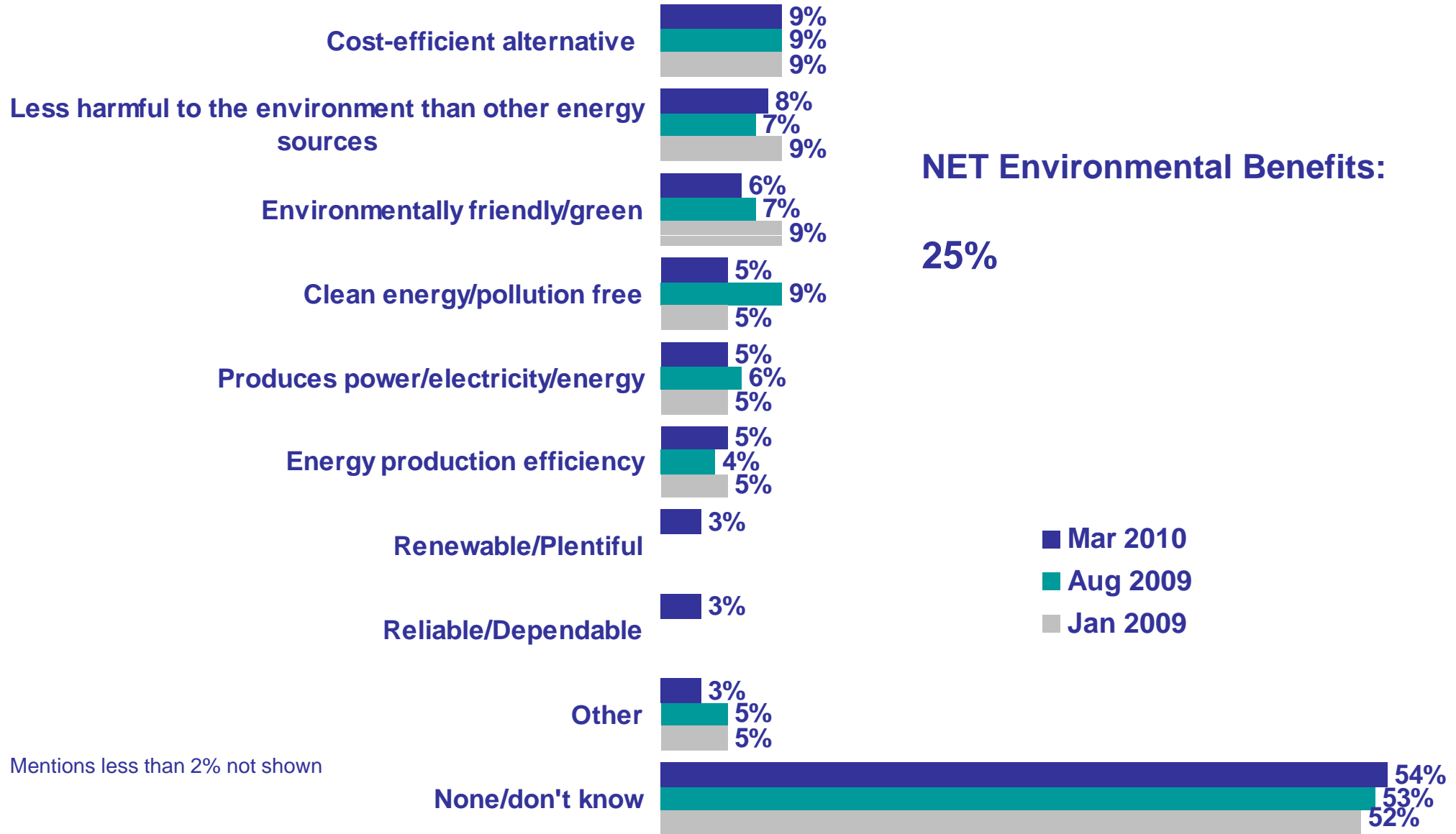
Why would you say [improved]? Base: Mar 2010 n=258; Aug 2009 n=202; Jan 2009 N=493, Jan 2008 N= 647 Why would you say [worsened]? Base: Aug 2009 n=344; Jan 2009 N=467, Jan 2008 N=658



No Single Issue Stands Alone for 'Worsened' Confidence, Safety Concerns Slightly Higher...



One-quarter (25%) of Canadians Cite an Environmental Benefit with Nuclear Power...

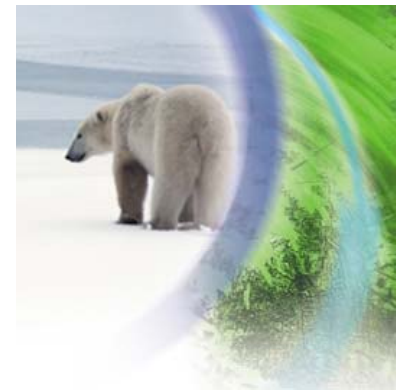
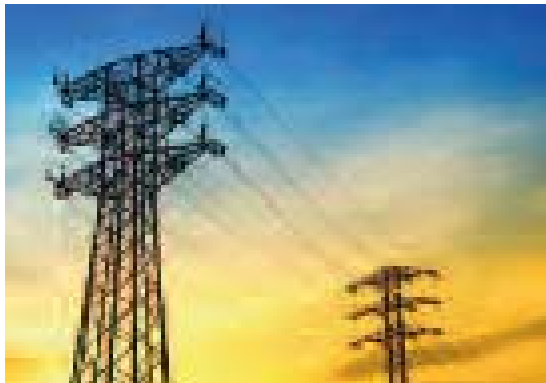


Considering all forms of electricity generation, what benefits, if any, do you associate with nuclear power? (2008 phrasing) What benefits, if any, do you associate with the generation of nuclear power? (Unaided) Base: Mar 10 N=1,158; Aug 09 N=1,156; Jan 09 N=2200, Sep 2008 N=1285, Jan 08 N=2187

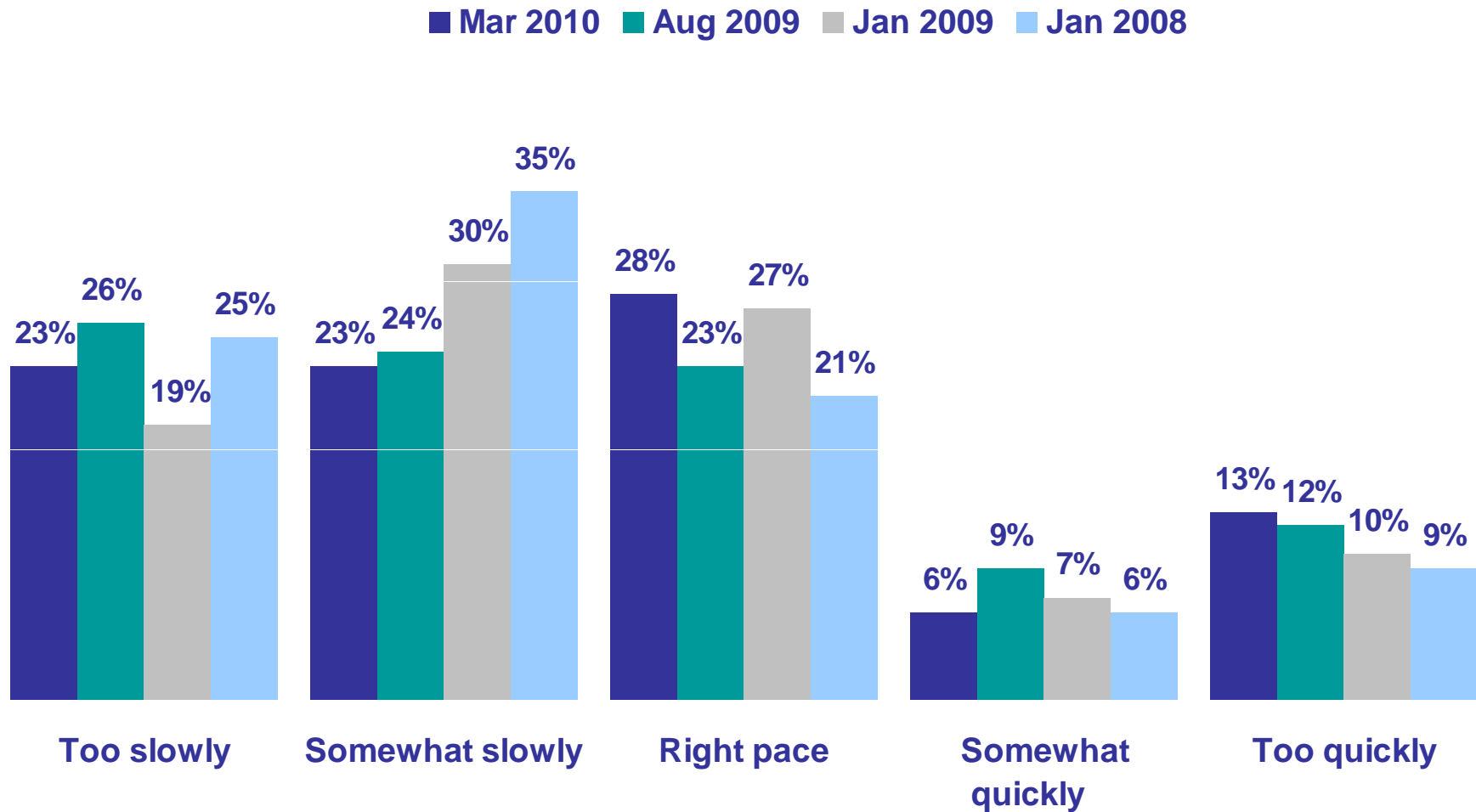


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Urgency



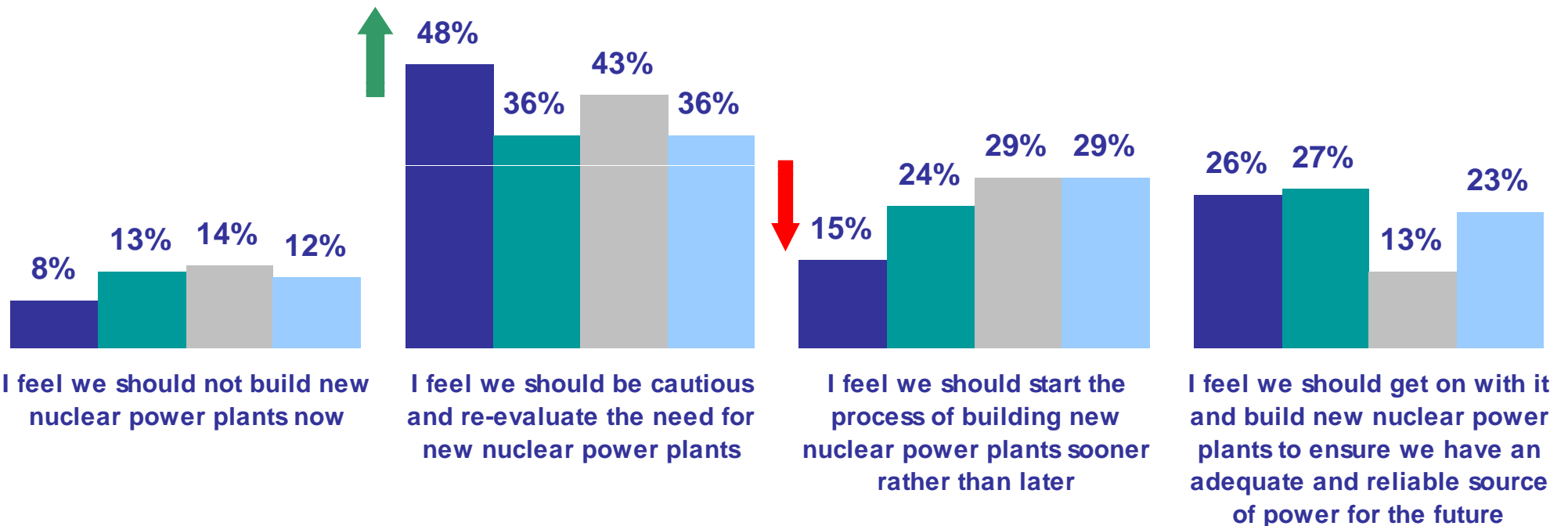
Although Slightly Decreasing, Just Under Half (46%) of Ontarians Believe the Government Moving Too Slowly in New Builds...



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: Mar 10 N=444; Aug 09 N=380; Jan 2009 N=760, Sep 2008 N=492 Jan 2008 N=752

However, More Ontarians Want to be 'Cautious' and 'Re-evaluate' the Need for New Builds, Half of Ontarians are Second Guessing...

■ Mar 2010 ■ Aug 2009 ■ Jan 2009 ■ Jan 2008



Please tell me which of the following statements are closer to your view. Please select only one. Base: Mar 2010 N=444; 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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Attitudes and Opinions of the Industry



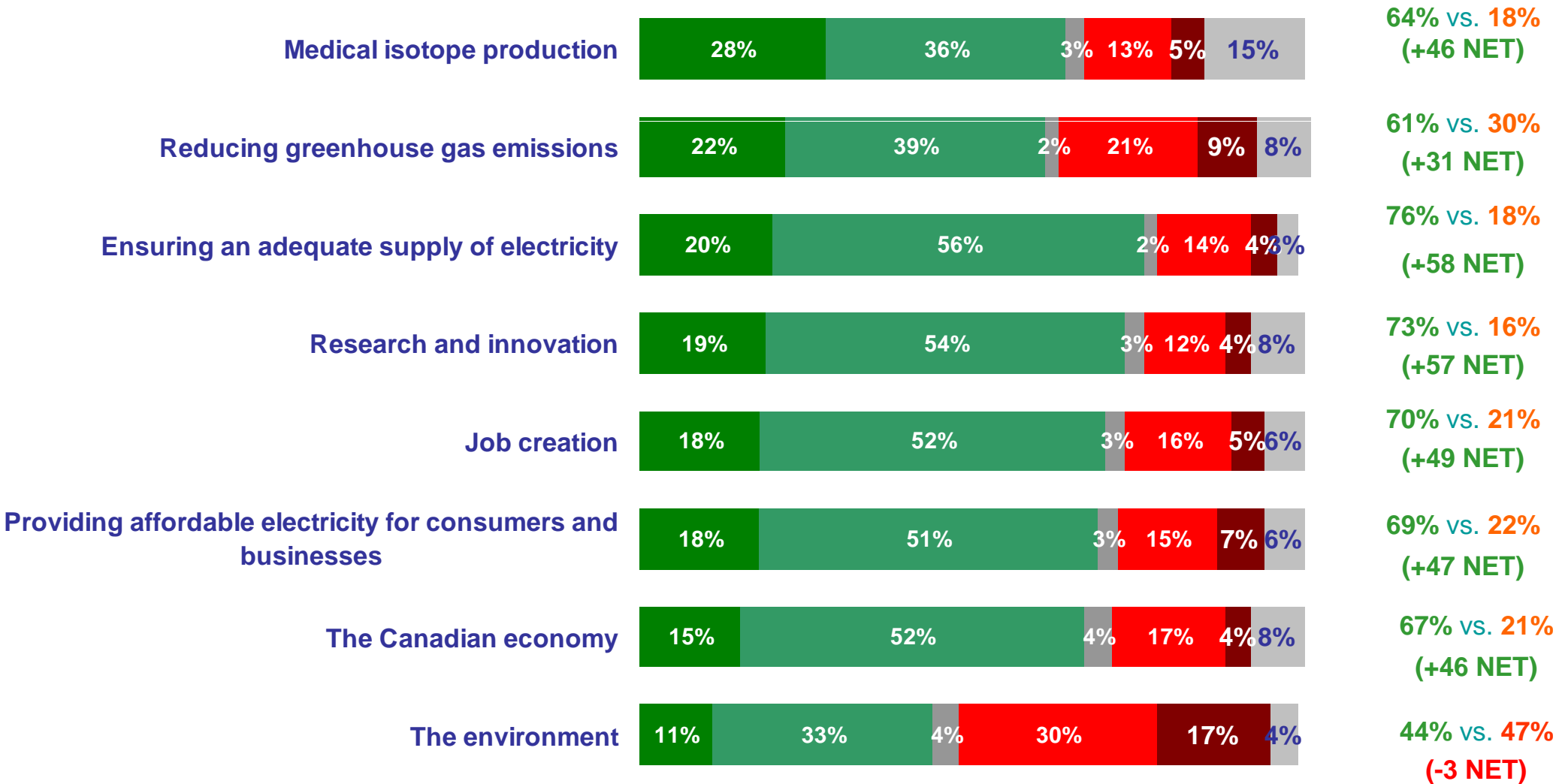


Regardless of Shut-Downs, 2/3rds of Canadians Agree Nuclear has a Positive Impact on Isotope Production...Six-In-Ten See Positive impact on Reducing Greenhouse Gases, But Are Split on the Environment...

■ A very positive impact
■ Neither a positive or negative impact
■ A very negative impact

■ A somewhat positive impact
■ A somewhat negative impact
■ Don't know/Refused

Total Positive vs. Negative



Overall, what kind of an impact would you say the Canadian nuclear industry has on... BASE: n=1158

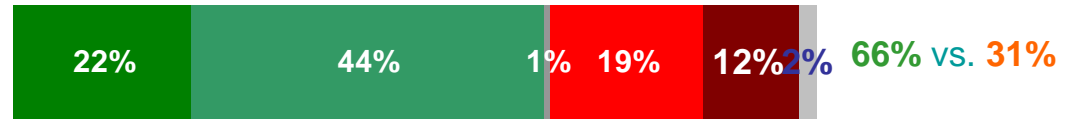




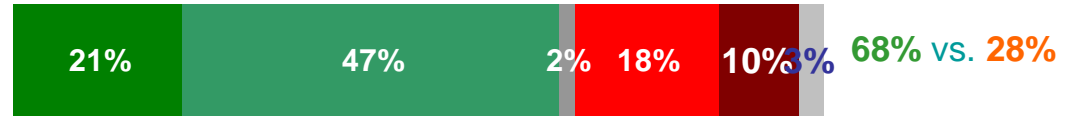
Only Three-in-ten Canadians Disagree that Investment in the Industry Strengthens Canadian Based R&D and that the Industry is Vital to Canada, Only about Half Believe Nuclear is a Clean Form of Generation...



Investing in the Canadian nuclear energy industry is a good way to strengthen Canadian-based research and innovation



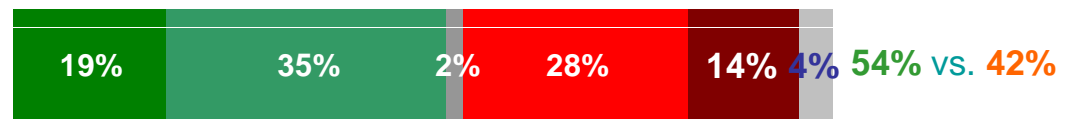
Canada's nuclear energy industry is vital to developing and promoting Canadian-based research and innovation



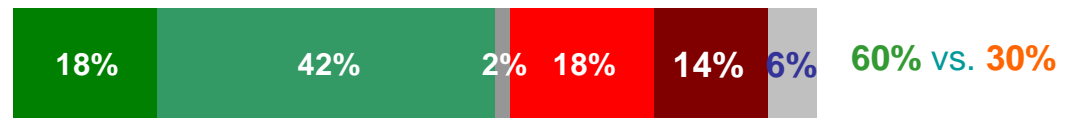
Nuclear energy should play a greater role in electricity generation in the future



Without investment in Canada's nuclear energy industry, highly skilled jobs in research and engineering will vanish



Nuclear energy is making a contribution to reducing greenhouse gases and preventing climate change



Nuclear energy is a clean form on electricity generation





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Ipsos Reid

For more information about the study,
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