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Staying Ahead of the Curve – What Canadians Think About Nuclear

CNA Seminar, February 28, 2008, Ottawa

John Wright, Senior Vice President, Ipsos-Reid



Presentation Outline...

- Purpose & Methodology
- Key Theme
- Energy As A Provincial Issue
- Support For Nuclear Energy
- Focus on Ontario
- Chalk River Controversy & Confidence
- Conclusions





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Purpose & Methodology

- The research program **tracks** overall support for and attitudes toward nuclear energy in Canada since **February 2005** benchmark.
- This 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 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 Theme...

- **Confidence In Provincial Electricity Supply Continues To Drop For Most**
 - **To Historic Lows Across The Country**
 - **Quebec is Apparently Immune**

- **Support For Nuclear Power is UP**
 - **Up 7 Points In Last Two Years**
 - **Up 12 Points Since February 2005**

- **Tracking Shows Support For Nuclear Energy Continues To Increase In All Regions, With Exception Of Alberta (-2 Since '07)...**

- **41% Of Canadians Feel Nuclear Power Should Play *More* Of A Role In Their Province Over Next Decades**
 - **Only 2 Provinces/Regions Net *Less*...**

- **National Support for Refurbishing & New Build at Historic Levels**
 - **67% For Refurbish**
 - **48% For New**

- **Support For Refurbishing Continues To Rise In All Provinces**
 - **Particularly Ontario (+8), Alberta (+4) And Prairies (+14) (Led By Saskatchewan).**
 - **Even In Quebec, Where Support For Nuclear Lowest, Half (51%) Now Support Refurbishing**

- **On the Chalk River Controversy: total Unprompted (7%) and Prompted (17%) = 24% of All Canadians Recall Anything...76%: Nothing**
 - **Net negative reputation fallout for the industry: 7%**



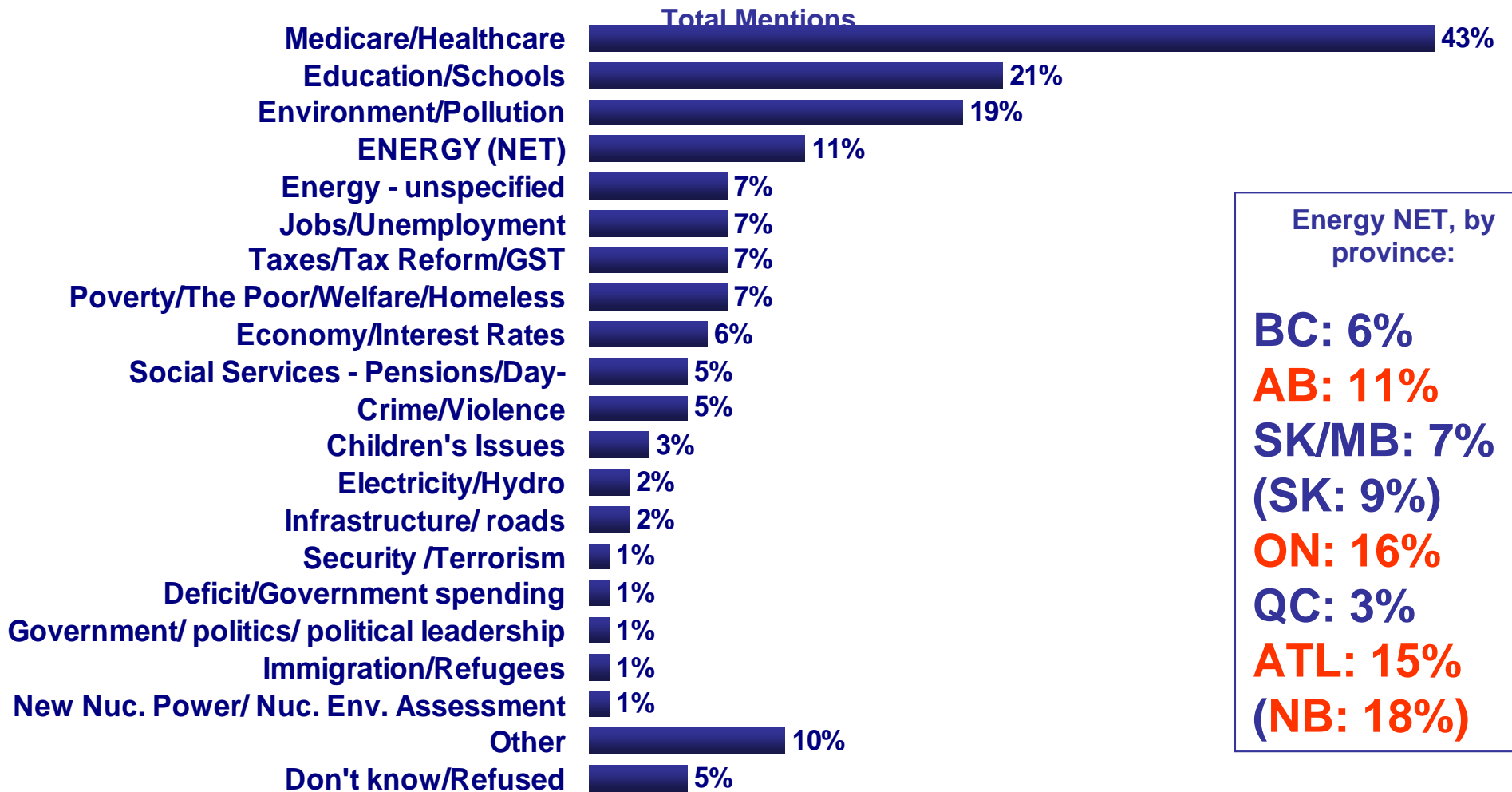
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Energy As A Provincial Issue...



11% of Canadians Cite Energy As Top Issue For Their Provincial Government...+8 Points Over Last Year...Atlantic Canada, Ontario And Alberta Fueling Disparate Views... Nuclear, As A Specific Item: 1%



Energy NET, by province:

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





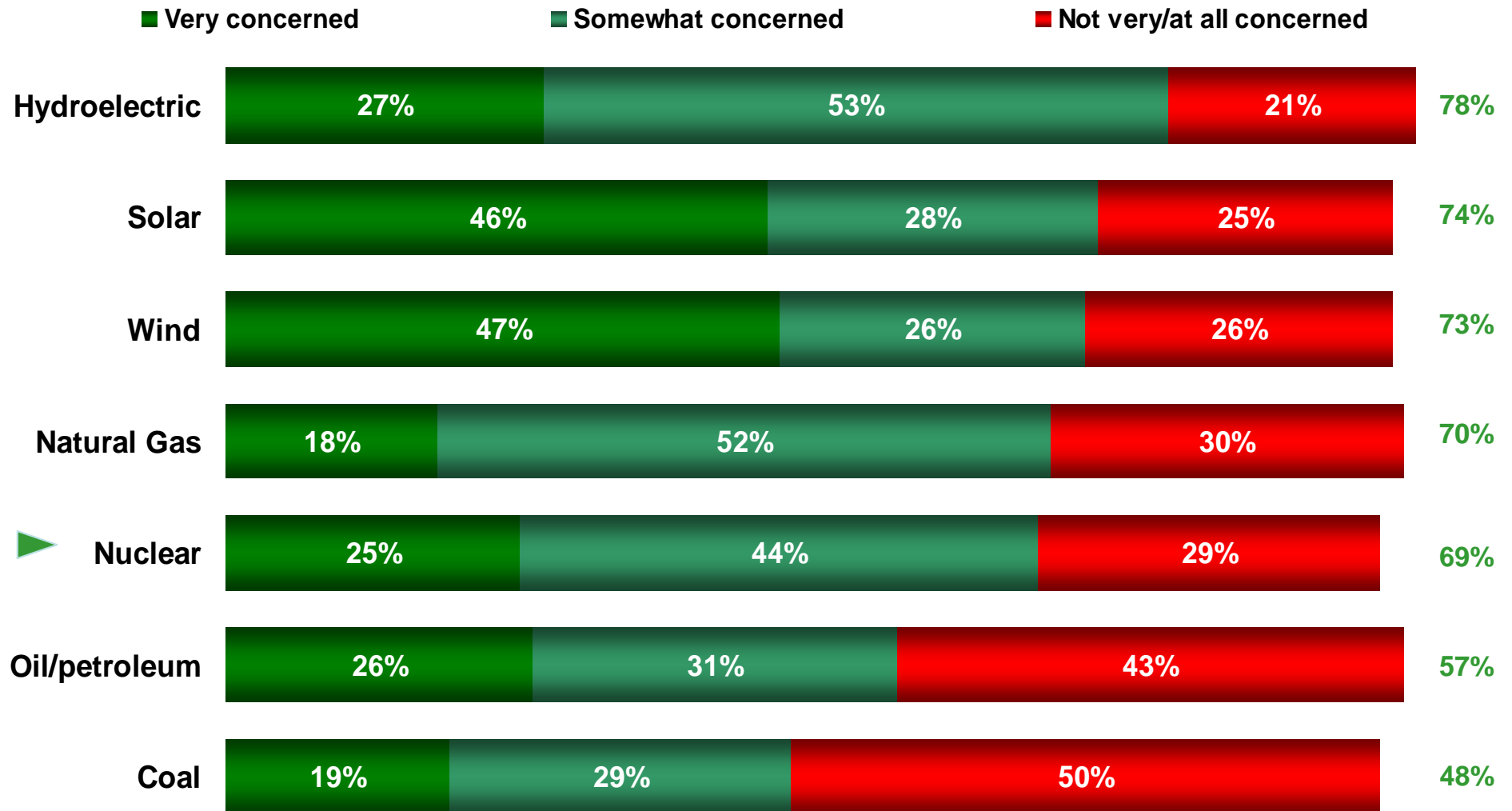
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Nuclear & The Environment...

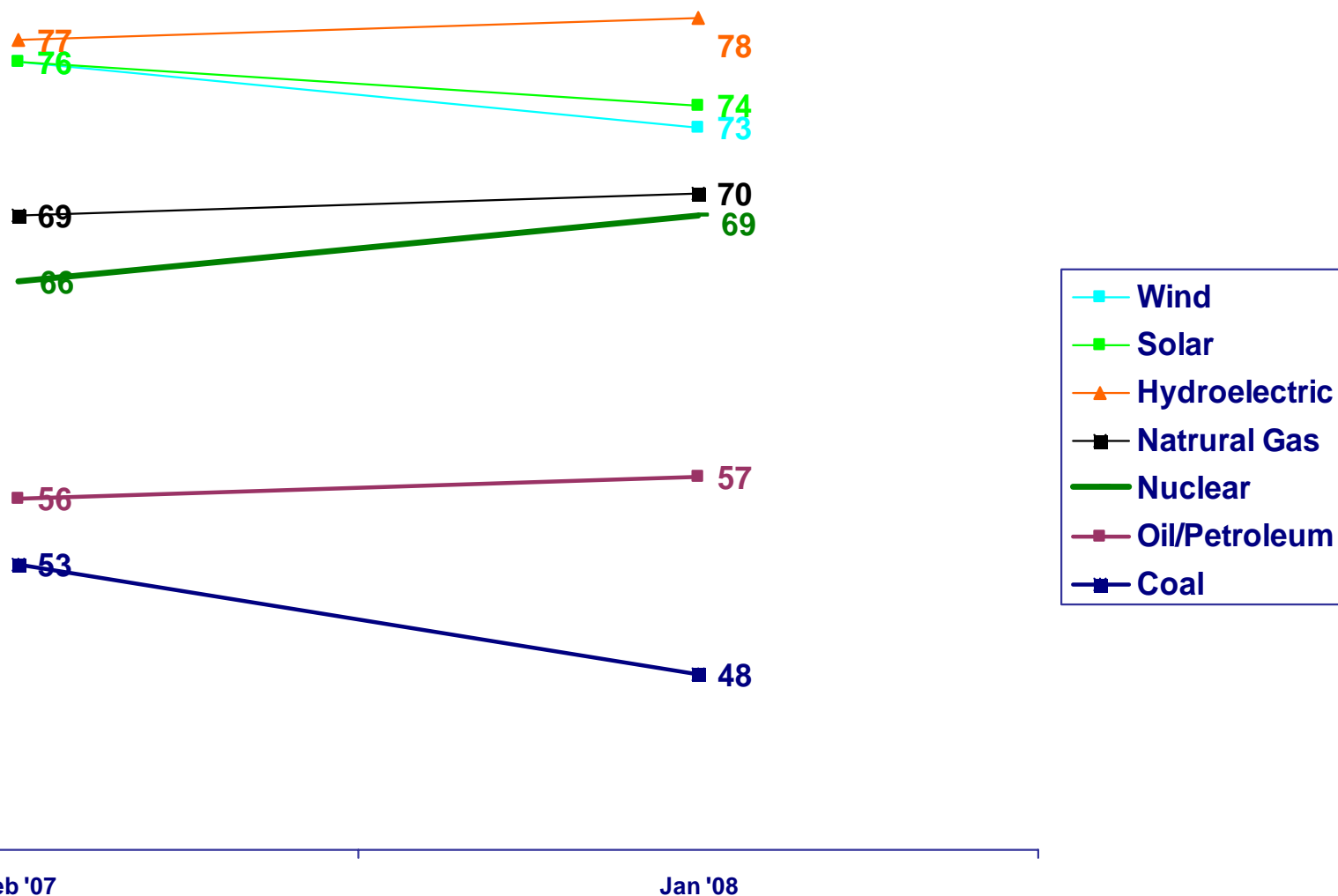


7 In 10 (69%) Say Nuclear Industry Is Concerned About Environment...Effectively Tied With Natural Gas –But With More Agreement *Intensity*...





And More People Today Feel The Nuclear Industry Is Concerned With The Environment (+3 Points) Than Last Year...Less So for Wind, Solar, Coal...





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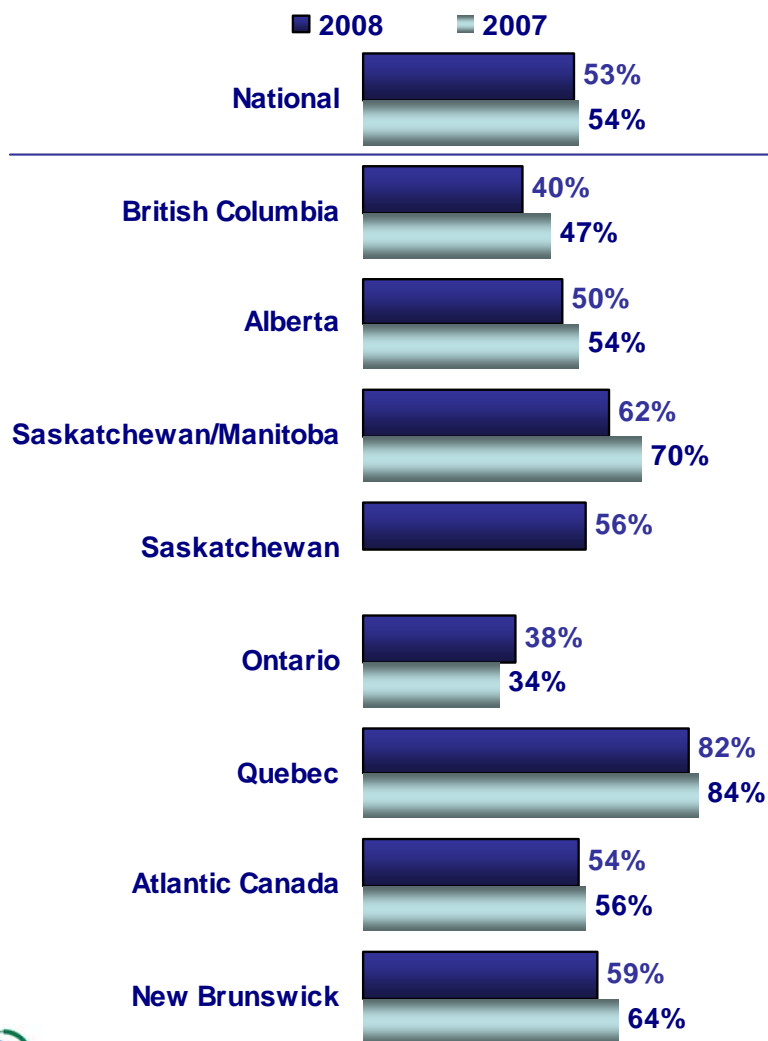
The Fundamental Question:

***Do We Have Confidence in the
Electrical Supply For Our Future
Needs?***

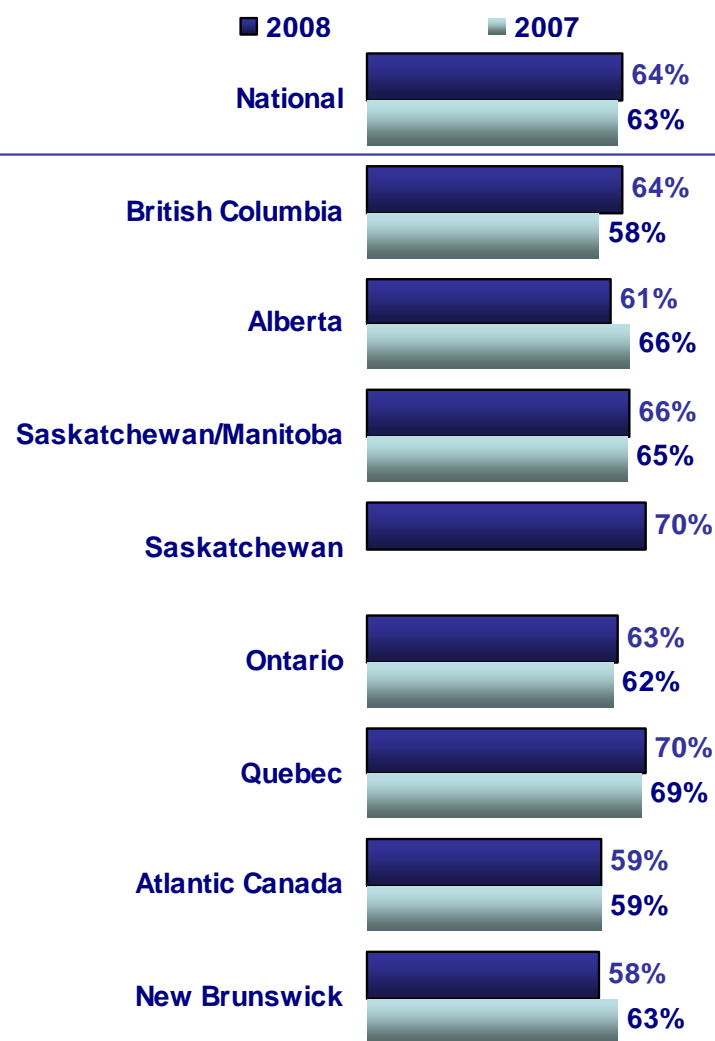


Half (53%) Fear *Not Enough* Electricity In Their Province, Confidence Least In Ontario (38%) And BC (40%)...Two-thirds (64%) Don't Think Conservation Efforts Will Offset Demand...

Have Enough Electricity in My Province



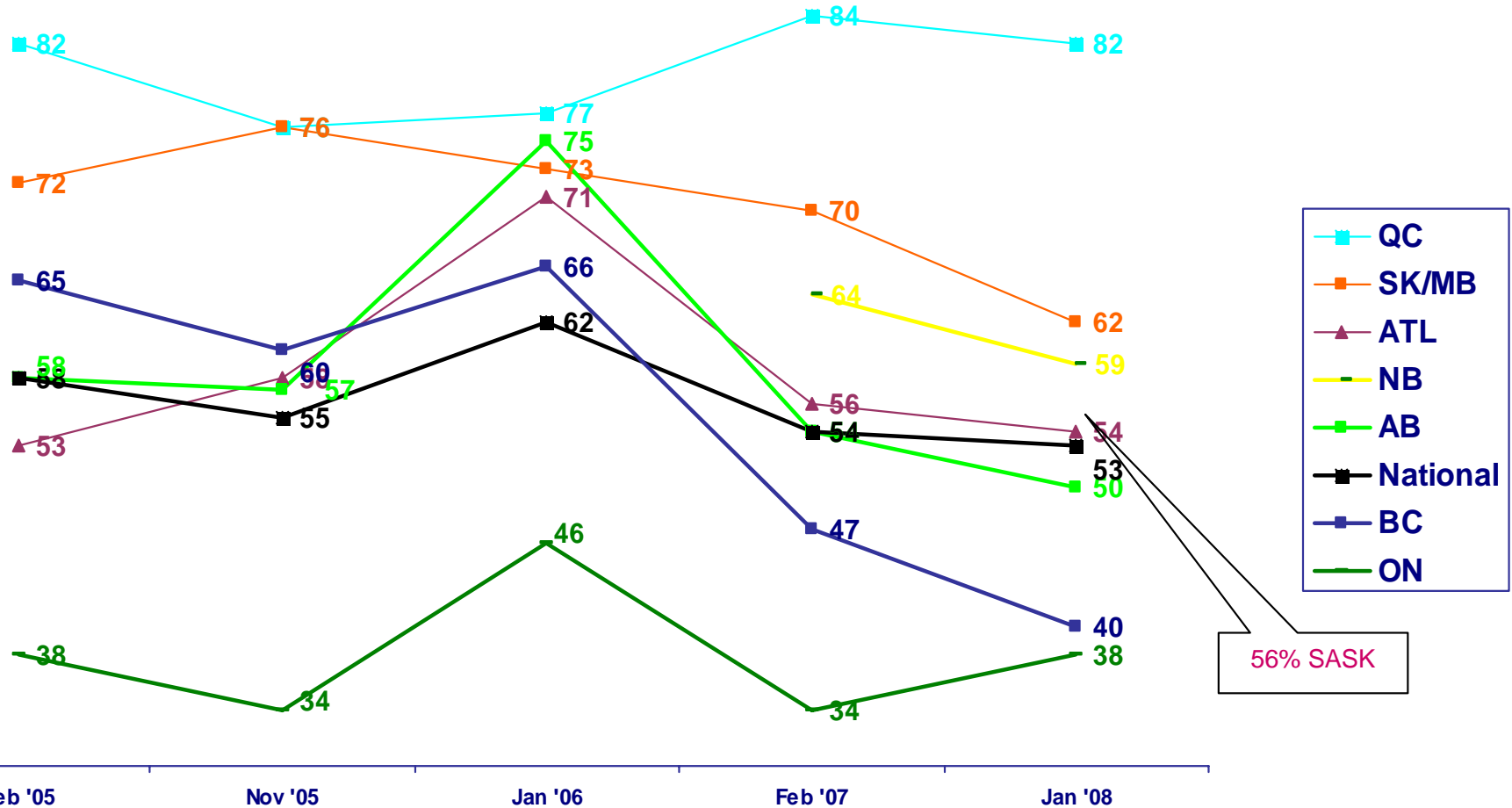
Conservation Efforts Won't Offset Demand





Confidence In Provincial Electricity Supply Continues To Drop For Most Provinces, Regions To Historic Lows Across The Country...Quebec, Apparently Immune...

% Who Agree - Have Enough Electricity In My Province



56% SASK



Feb '05

Nov '05

Jan '06

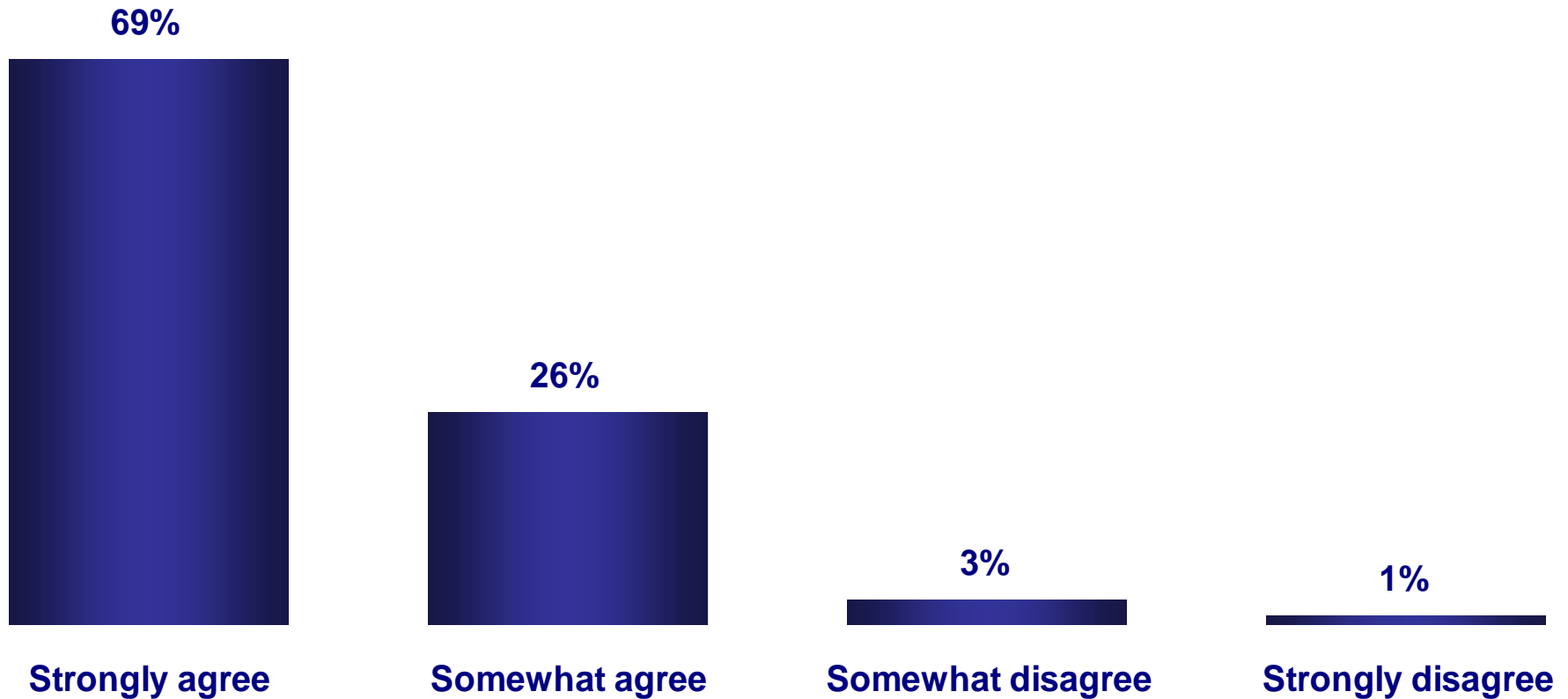
Feb '07

Jan '08

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



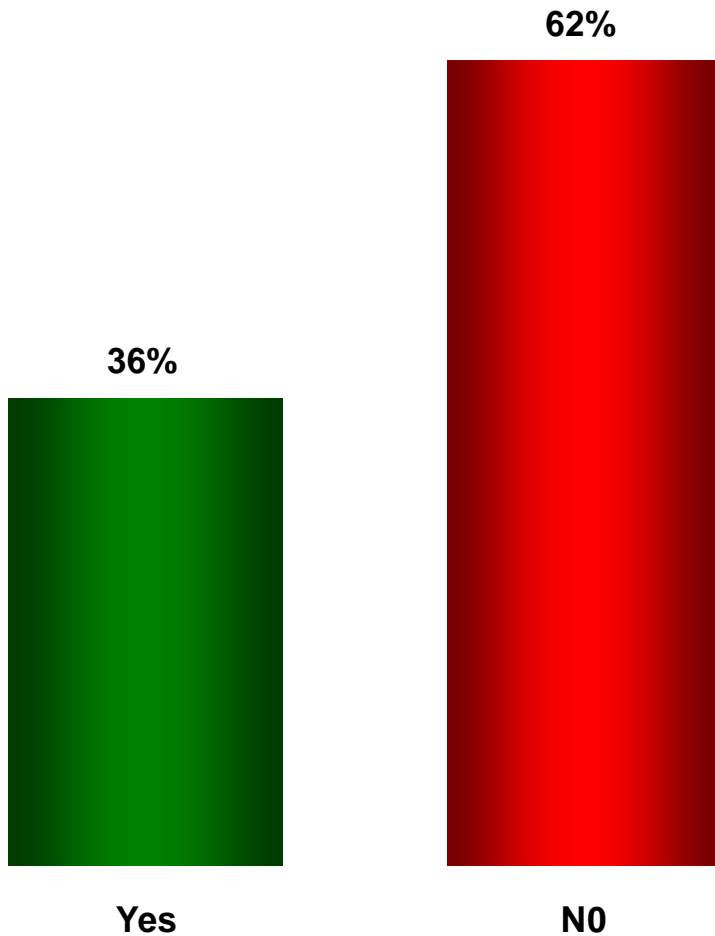
Almost All (95%) Canadians Either Strongly (69%) Or Somewhat (26%) Agree That Government Needs To Do More Now To Ensure Adequate Supply Of Electricity For The Future...





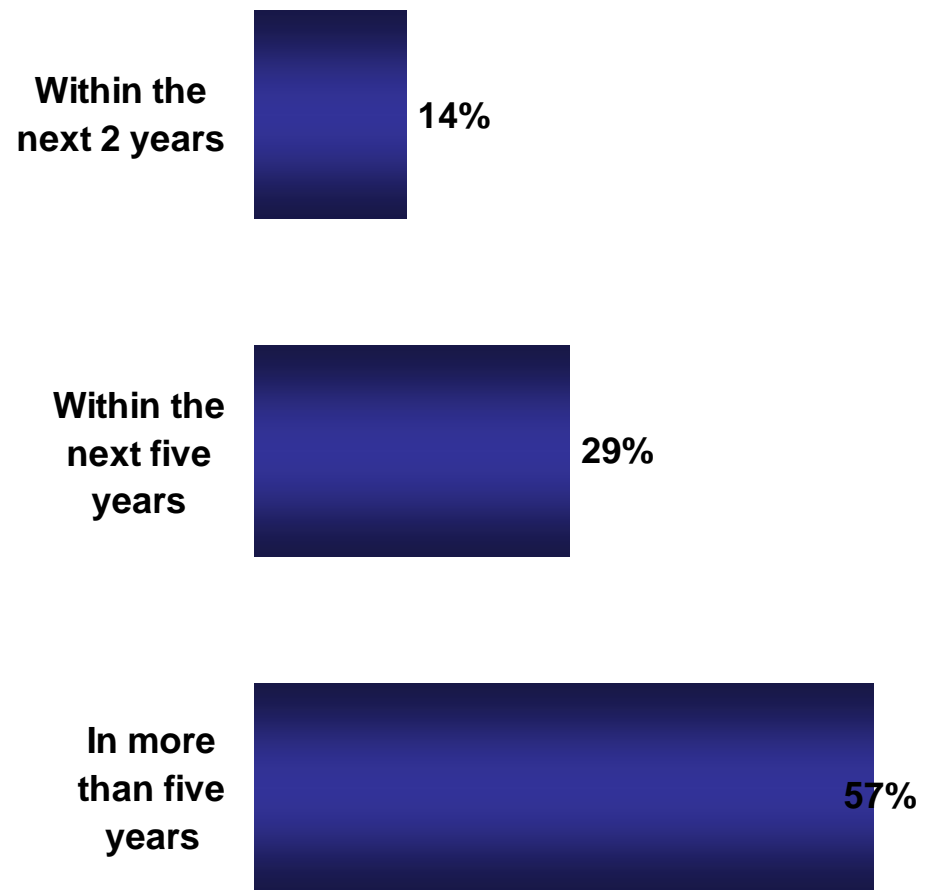
36% Believe They'll Face A Community Electricity Shortage In Near Future: 15% Feel It Will Happen Within The Next Five Years...

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



When Will Shortage of Electricity Occur

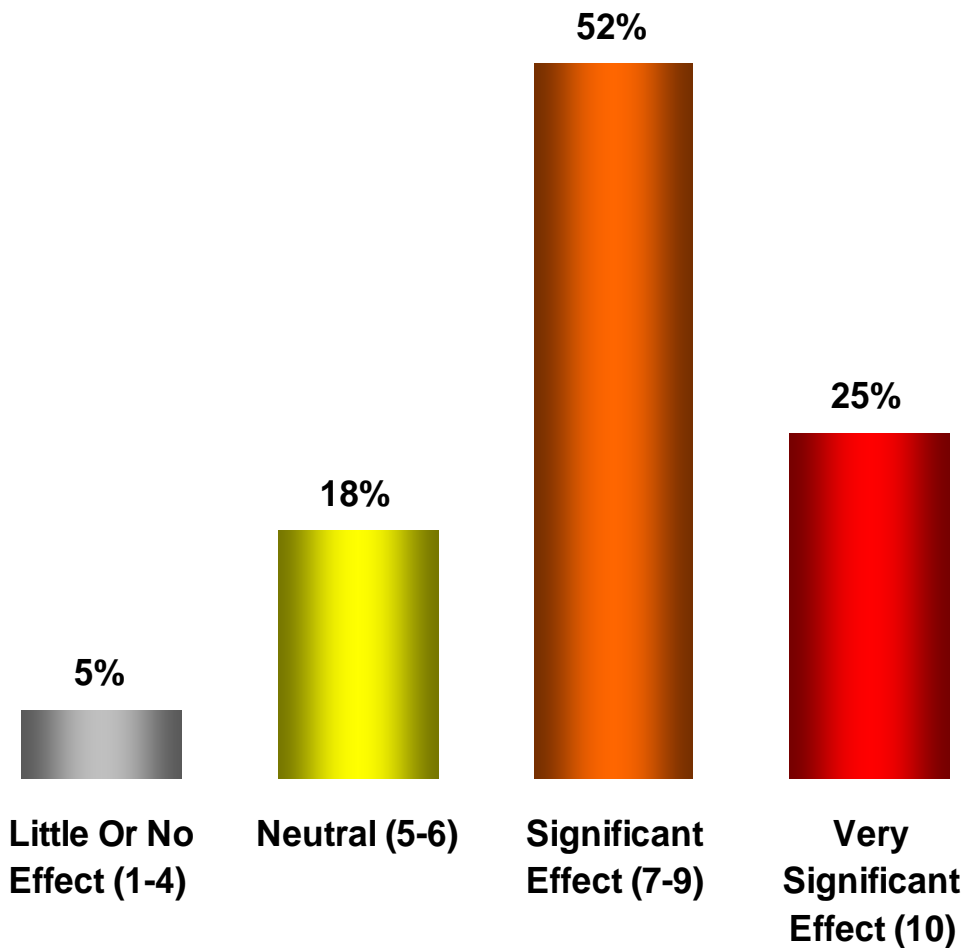
Net of 15% Within 5 years = $36 \times .43$



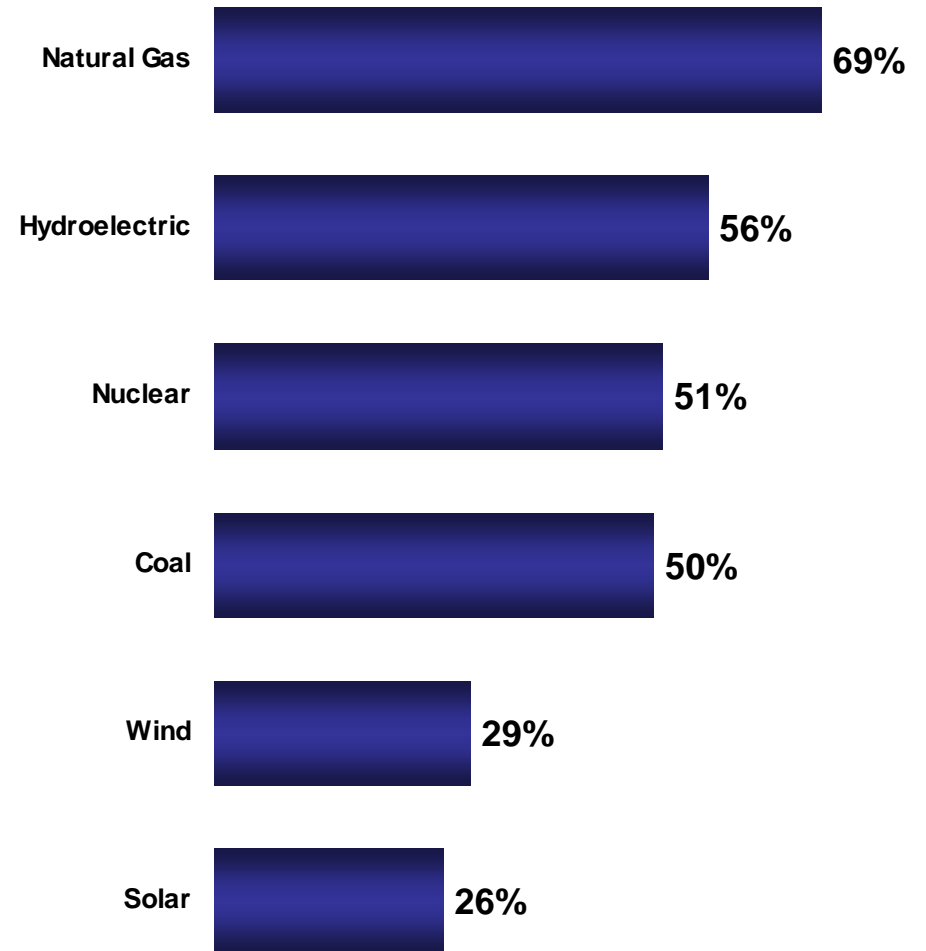


8 in 10 (77%) Canadians Feel Rising Energy Costs Will Have A Significant Effect On The Cost Of Electricity... Highest Being The Cost Of Electricity Generated By Natural Gas (69%)...

Effect of rising energy costs on electricity



Method of generation





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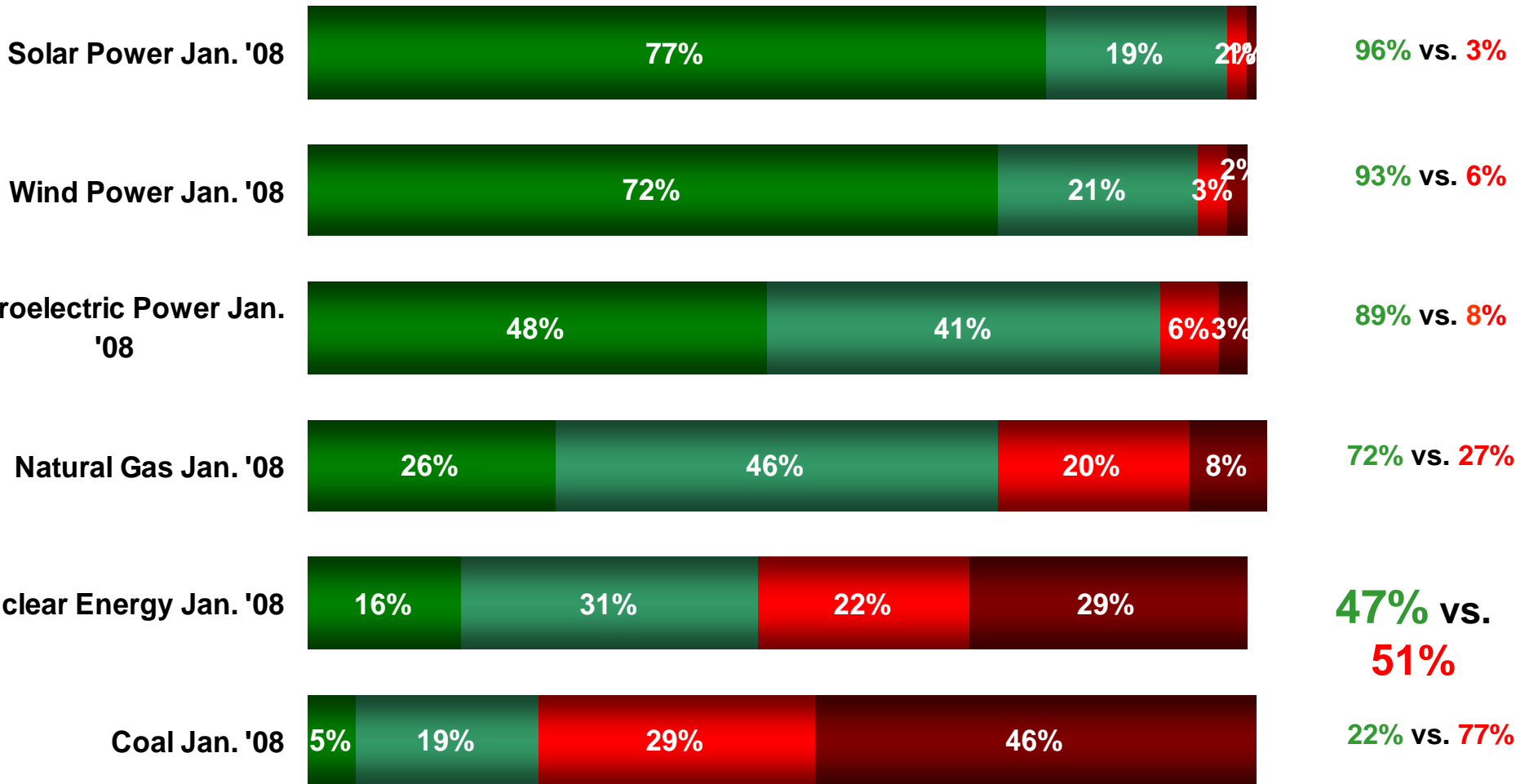
Support For Nuclear Energy...



National Support for Nuclear (47%) vs. Other Energy Sources...Nuclear +3 points (44%) In A Year...

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

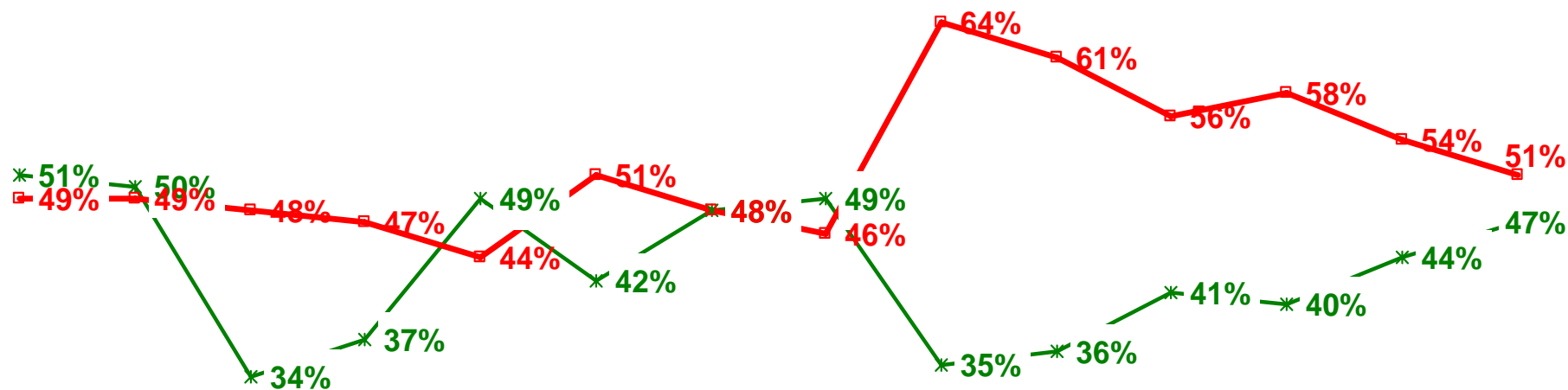
Total Support vs. Oppose





National Trend Line For Nuclear Power: *+7 Points In Last Two Years...+ 12 Points Since February 2005...*

—*— Support —□— Oppose

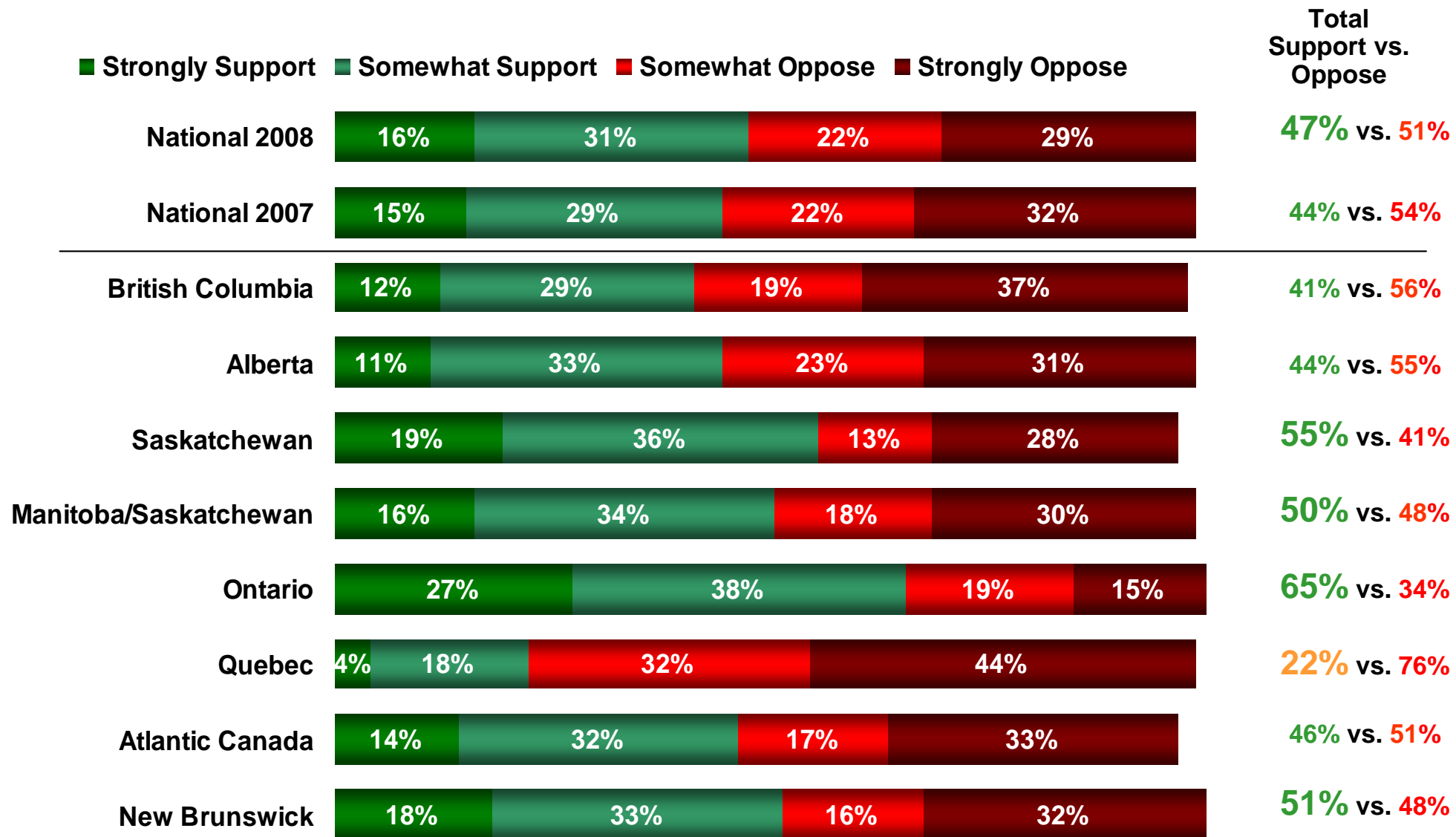


Oct '87 April '89 Feb '94 Jan '01 April '02 Nov '02 Nov '03 May '04 Feb '05 May '05 Nov '05 Jan '06 Feb '07 Jan '08



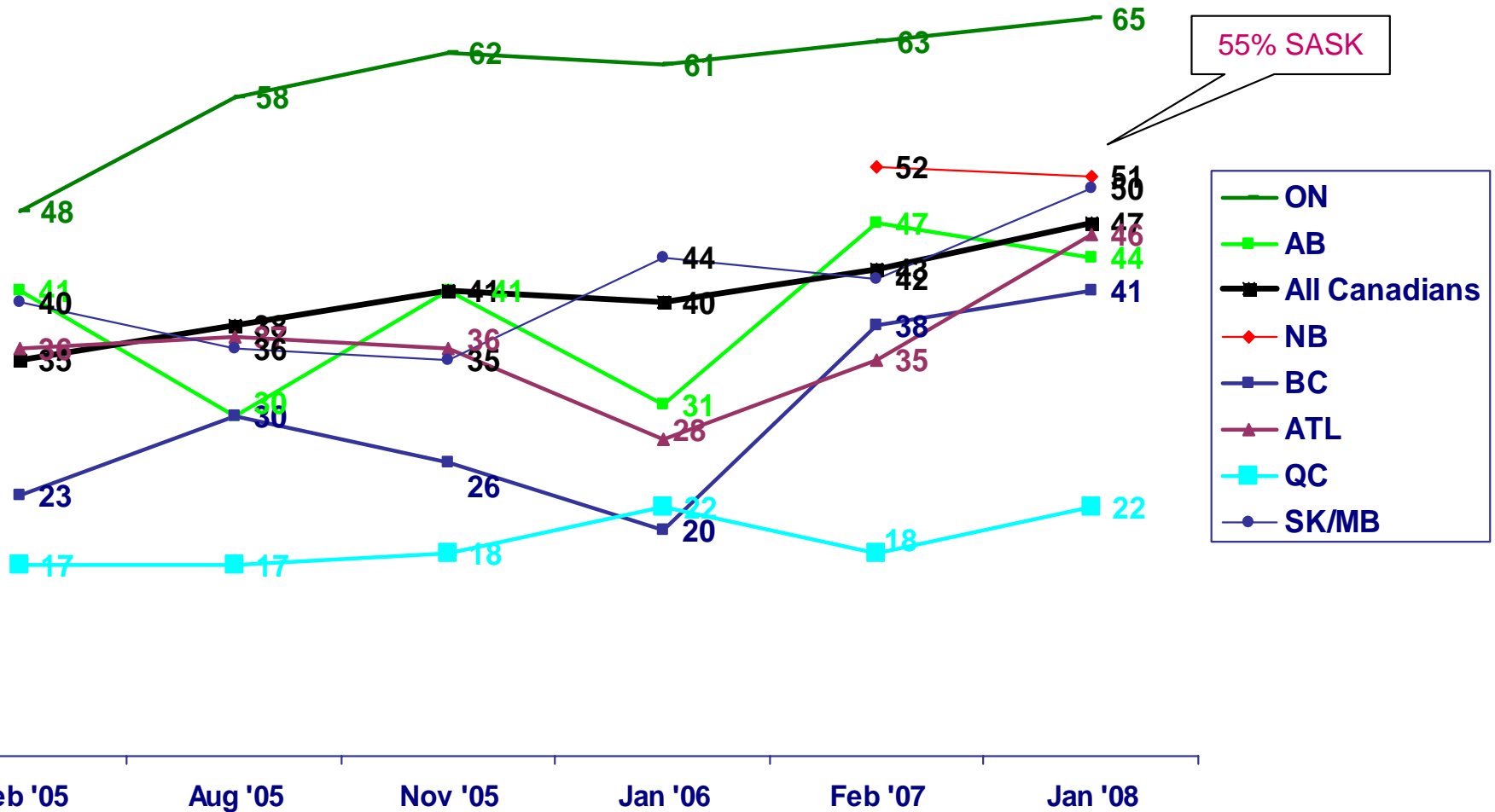


Regional Support for Nuclear: Most in Ontario (65%), Saskatchewan (55%), New Brunswick (51%)...Least in Quebec (22%)...



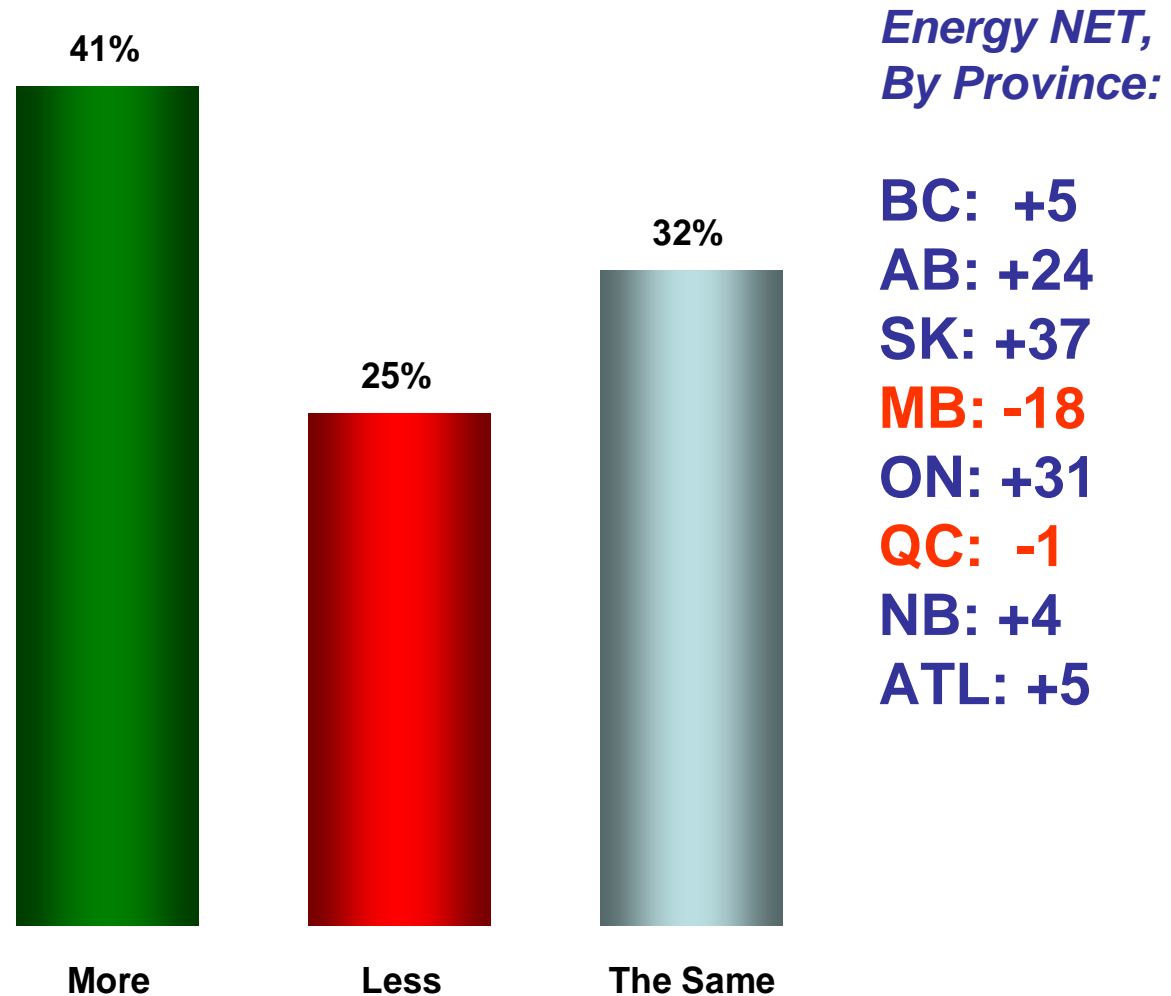


But Historical Tracking Shows Support For Nuclear Energy Continues To Increase In All Regions, With Exception Of Alberta (-2 Since '07)...





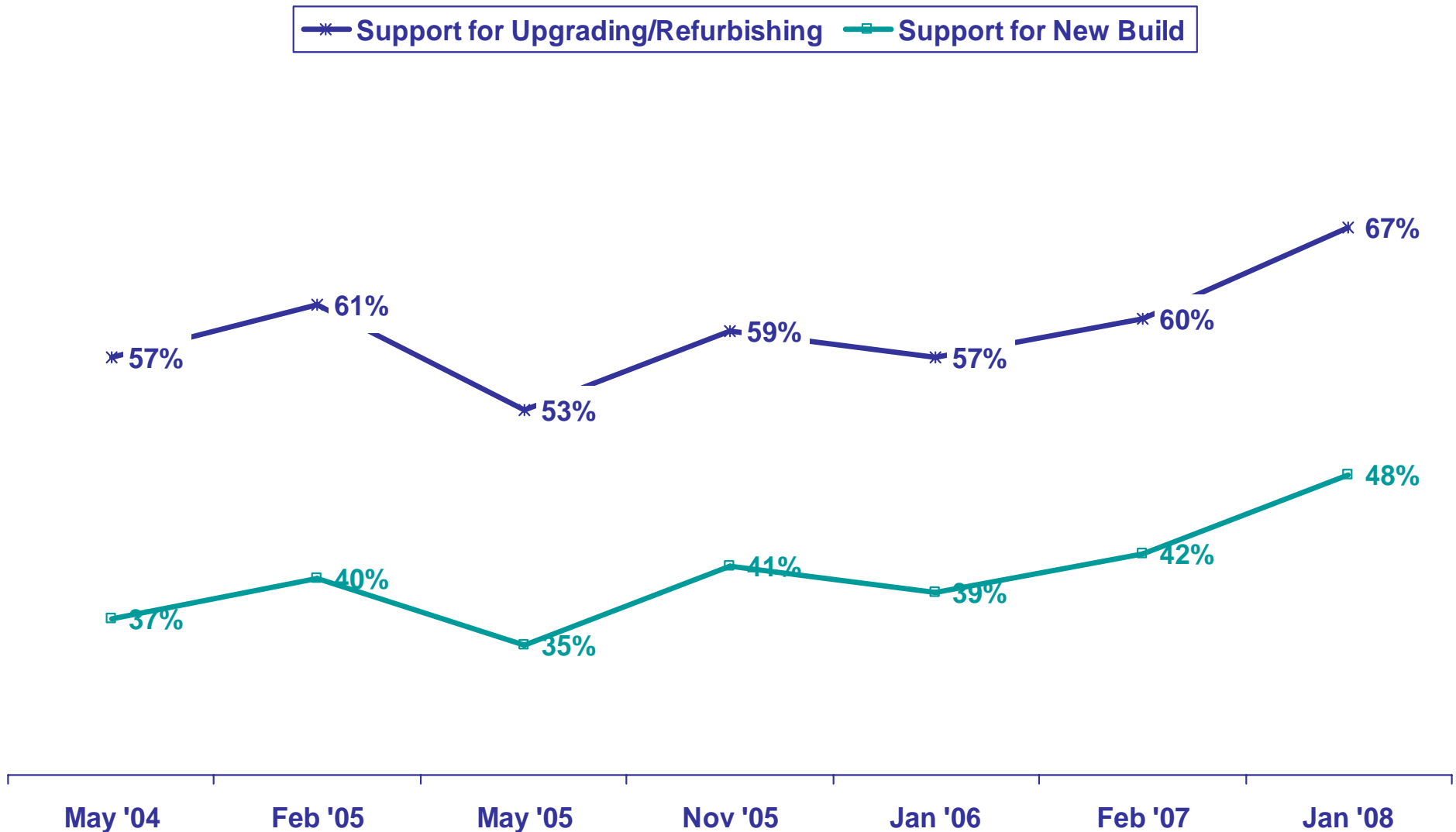
41% Of Canadians Feel Nuclear Power Should Play More Of A Role In Their Province Over Next Decades...Only 2 Provinces/Regions Net Less...





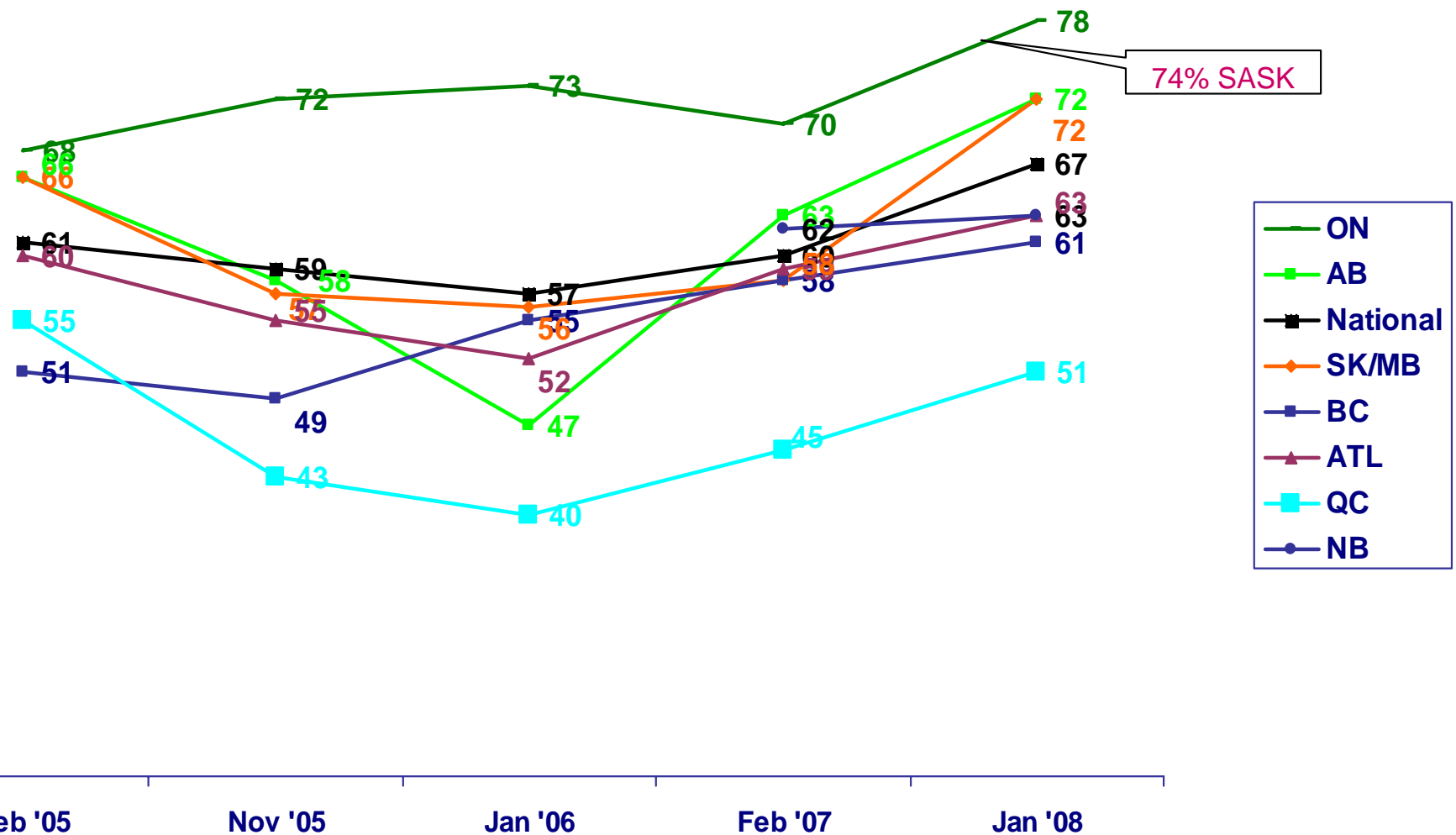
National Support for Refurbishing & New Build Reach Historic Levels: 67% For Refurbish, 48% For New...

Support Up Over 2007: Upgrade/Refurbish +7, New Build +6...



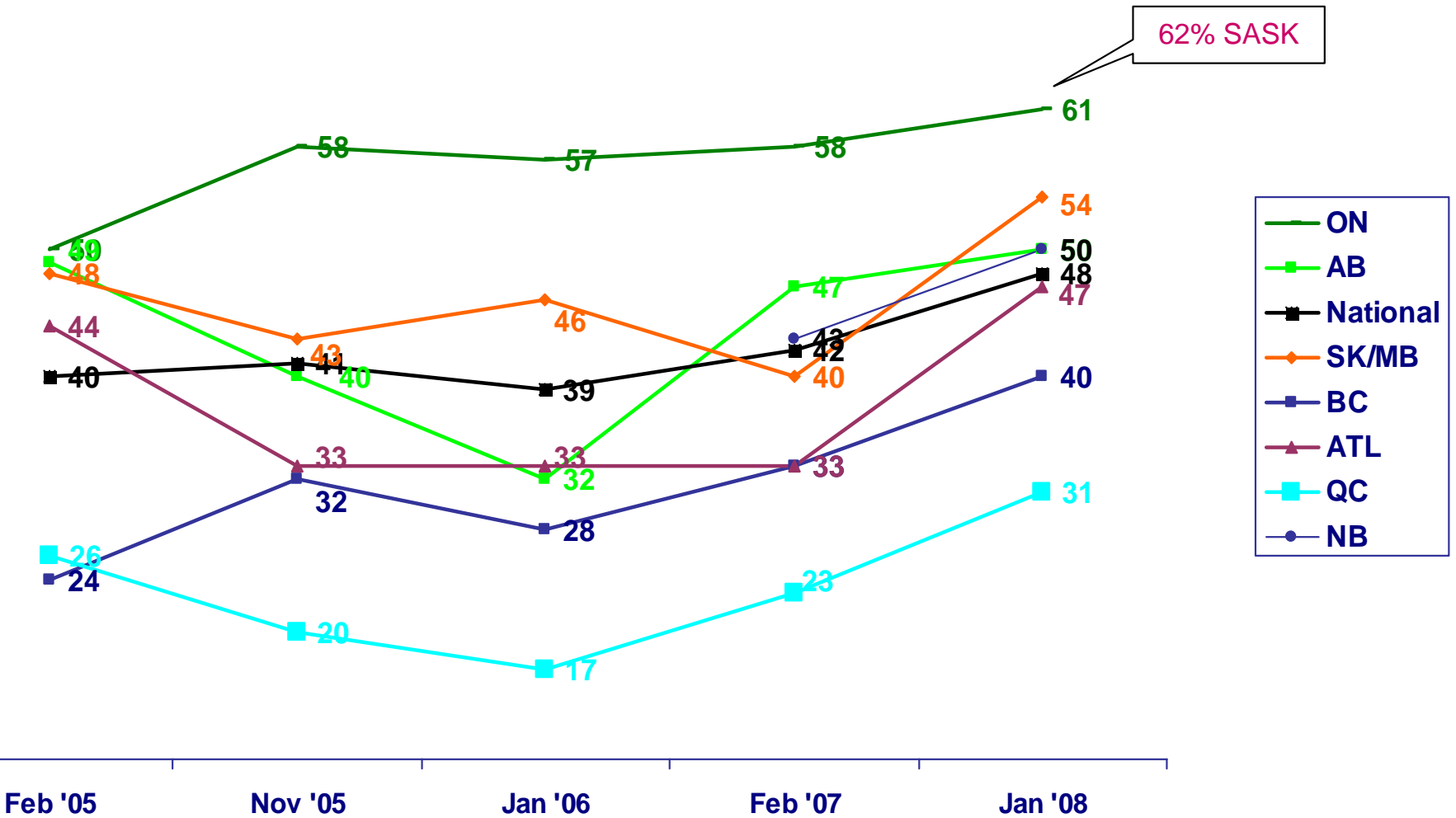


Support For Refurbishing Continues To Rise In All Provinces, Particularly Ontario (+8), Alberta (+4) And Prairies (+14) (Led By Saskatchewan). Even In Quebec, Where Support For Nuclear Lowest, Half (51%) Now Support Refurbishing...



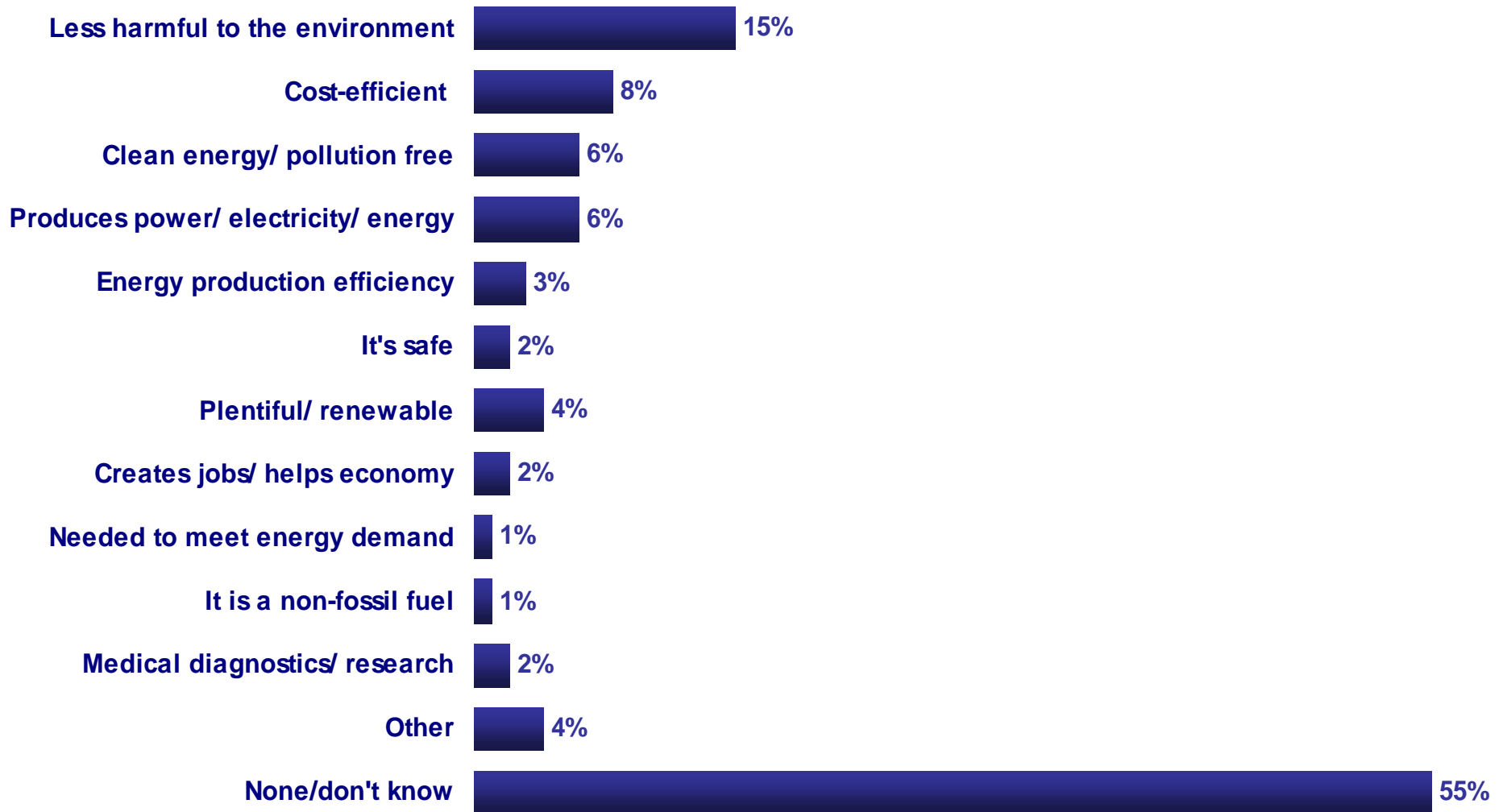


Similarly, Support For New Build Up Over 2007 Across The Country: Momentum Led By Prairie Provinces (+14), Atlantic Canada (+14), British Columbia (+7), And Quebec (+8)...





Despite All the Good News Potential Blind Spot: More Than Half (55%) Of Canadians Can't Mention Any Top Of Mind Benefits Of Nuclear Power...





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Focus on Ontario...



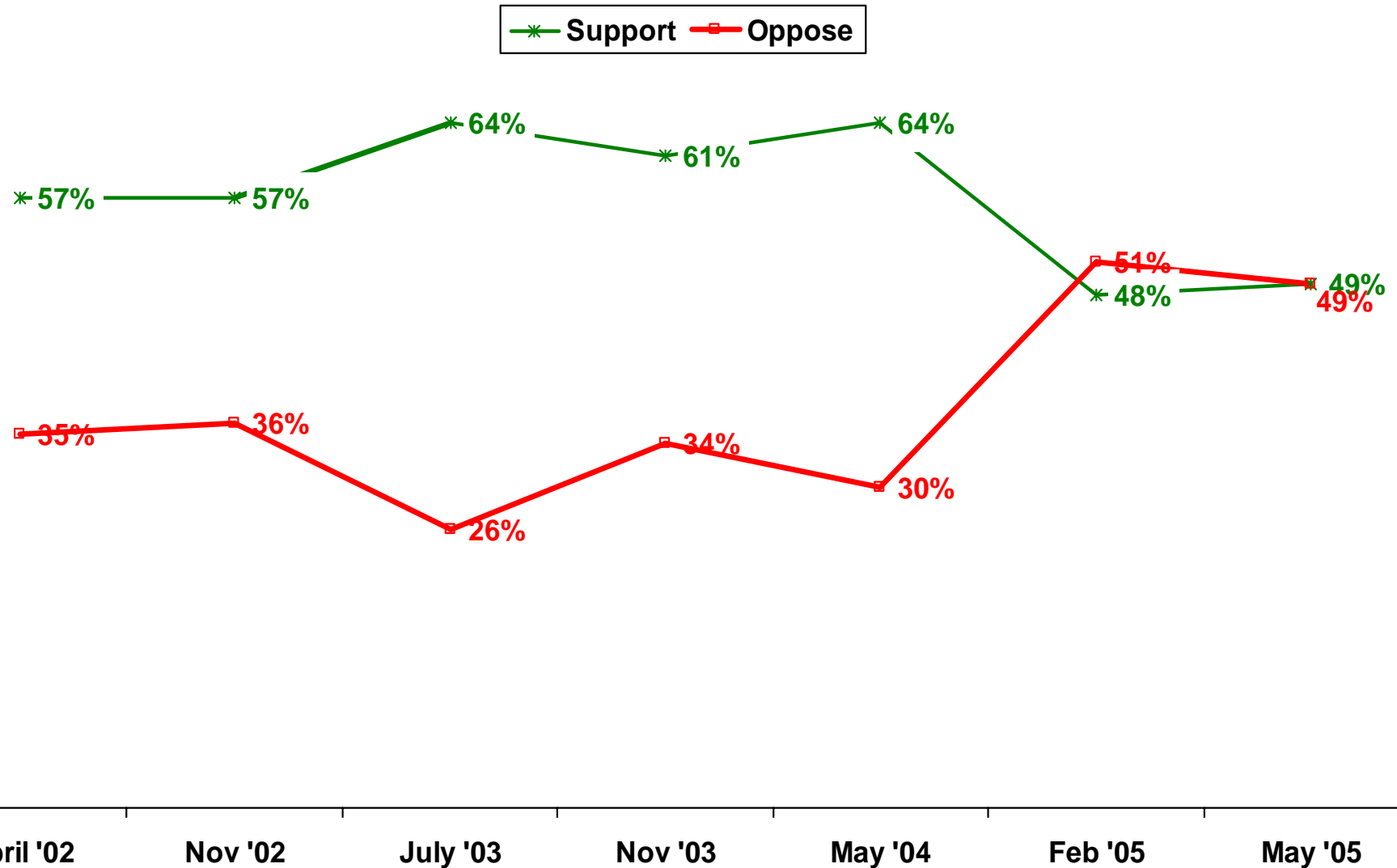
Some Key Factors That Framed Nuclear Over From May 2004 to February 2005...

- **Blackout, firings, Manley report...happened previously...**
- **Hydro rates going up: Bad news for industries**
- **Make or break year for nuclear power: \$1 billion riding on the revival of Unit One reactor Pickering**
- **Security lax for nuclear materials**
- **Pickering upgrade as much as \$100 million over budget**
- **A year after blackout, power use is up: Ontario's energy gluttony persists**
- **Nuclear waste storage: how much for how long?**
- **Salaries of Hydro execs have spiraled into the millions since 1999**





FOCUS ON ONTARIO: Support For Nuclear Energy Tracking...



April '02

Nov '02

July '03

Nov '03

May '04

Feb '05

May '05

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=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

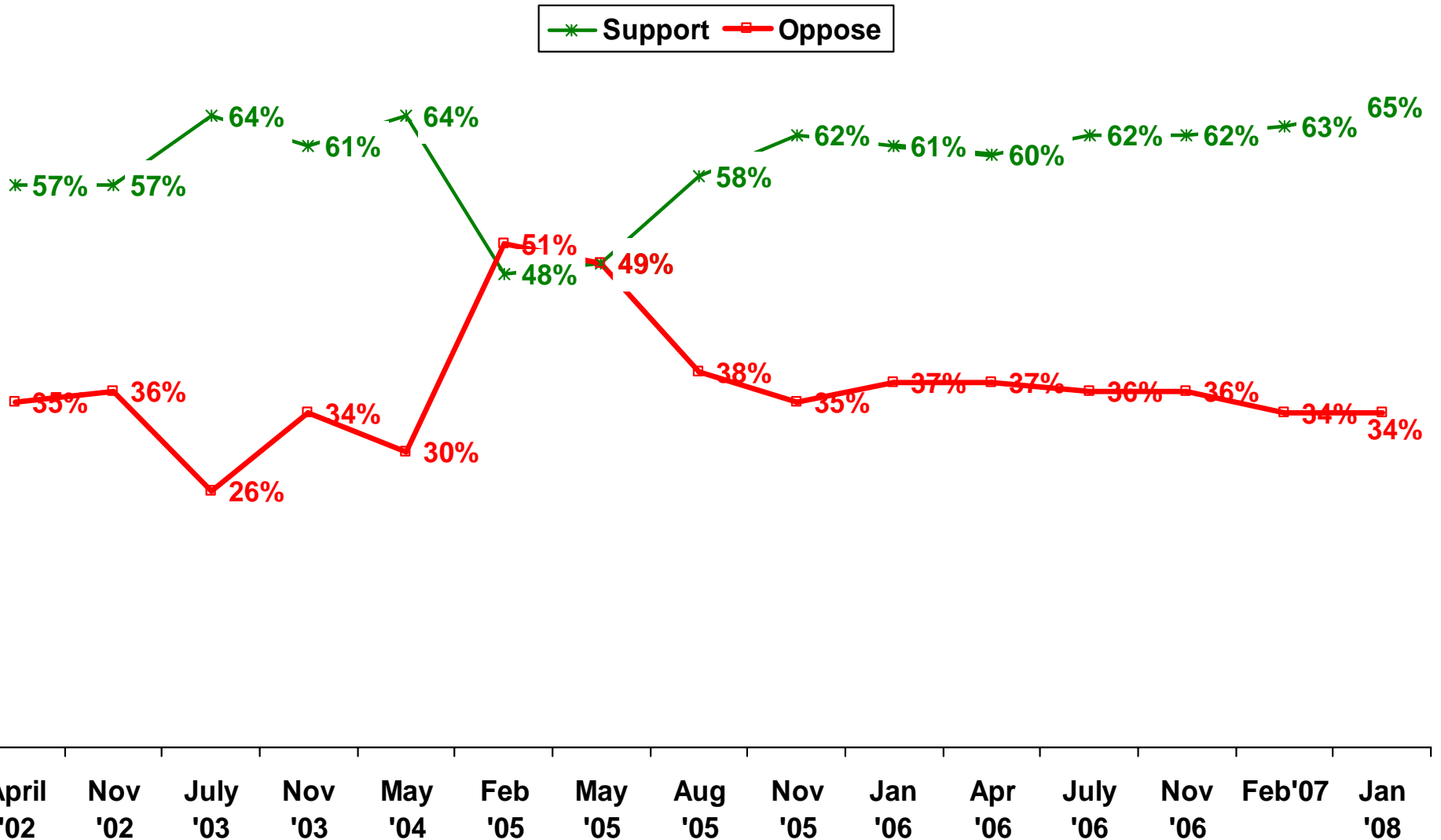


FOCUS ON ONTARIO: Communicating, Educating...





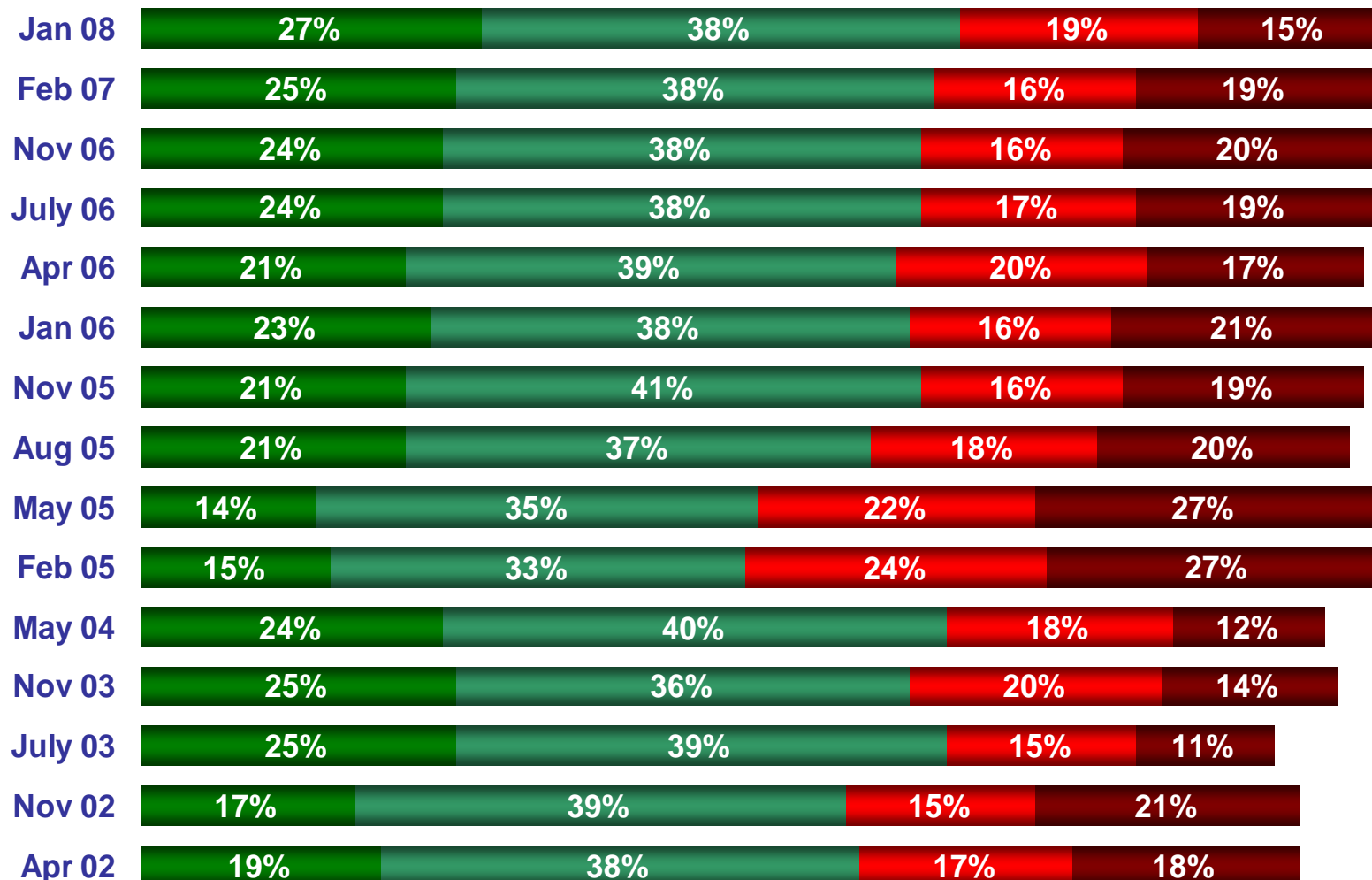
FOCUS ON ONTARIO: Support For Nuclear Energy Tracking...





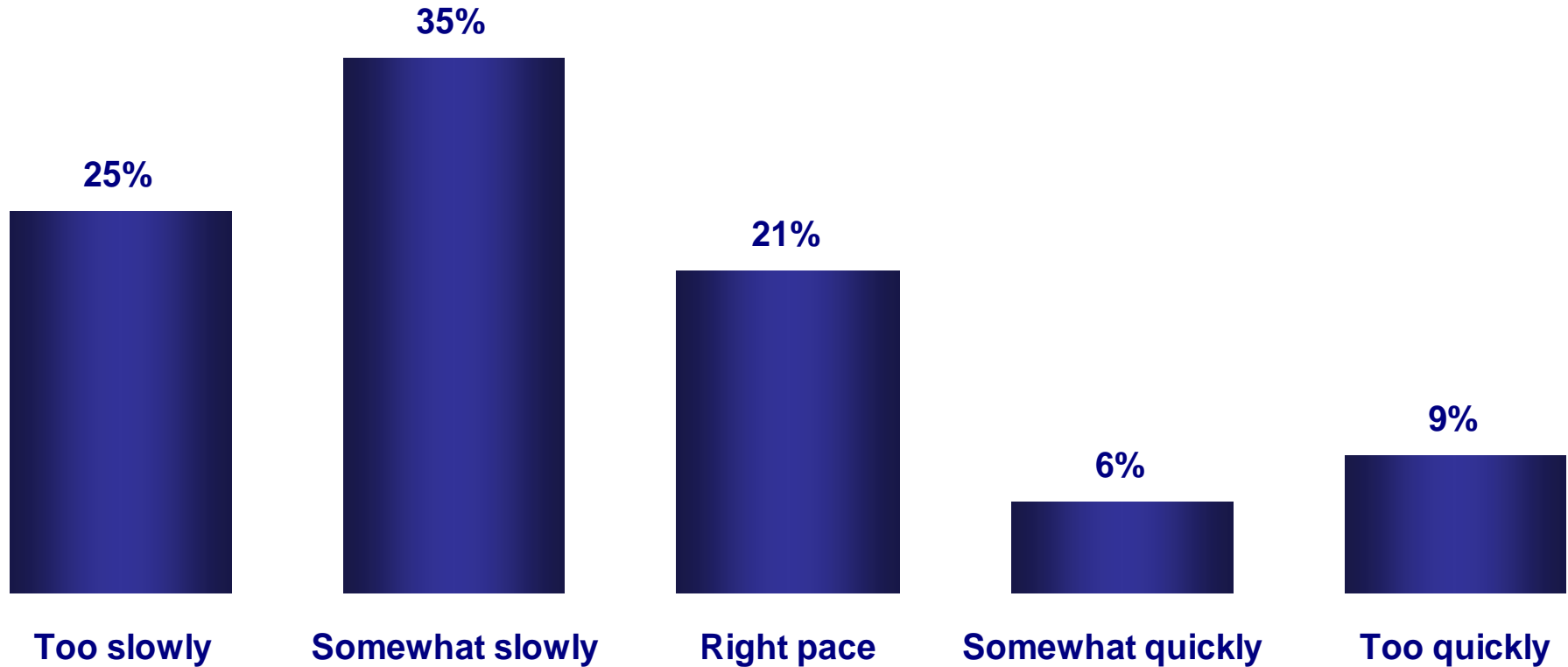
FOCUS ON ONTARIO: Intensity Of Support For Nuclear Energy Tracking...

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





In Ontario, A Majority (60%) Feel The Government Is Moving Either Too (25%) Or Somewhat (35%) Slowly In Building New Nuclear Power Facilities...



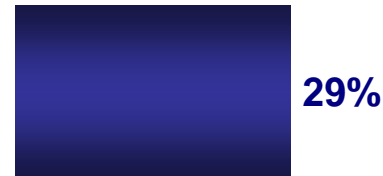


A Majority (52%) Of Ontarians Believe The Government Should Get On With (23%) Or Start The Process (29%) And Build New Nuclear Power Plants Now... Only One-in-ten (12%) Say No To Building Now...

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



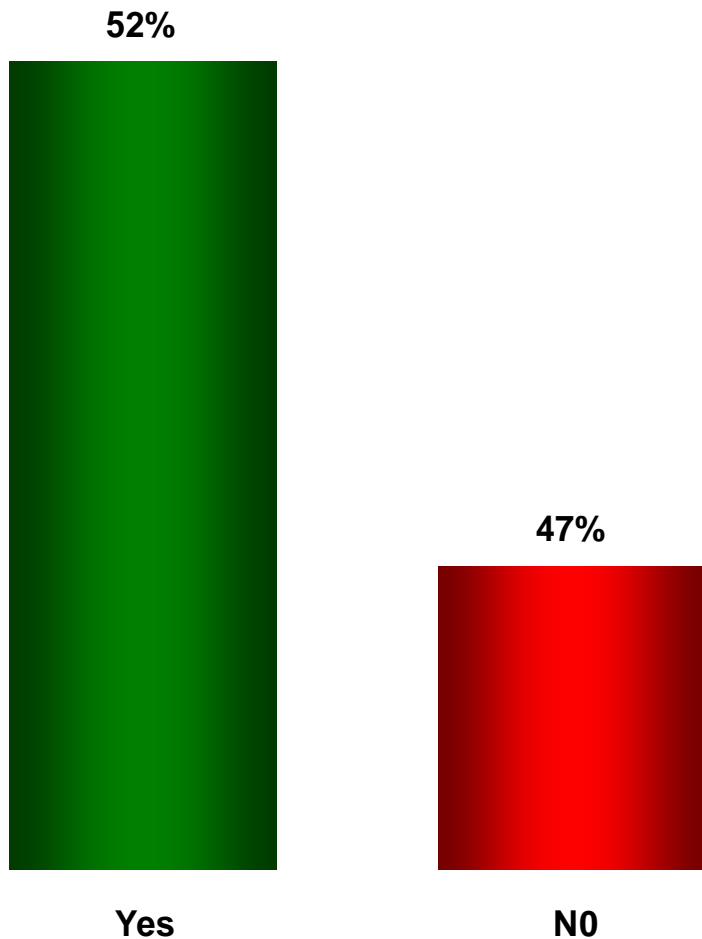
I feel we should not build new nuclear power plants now



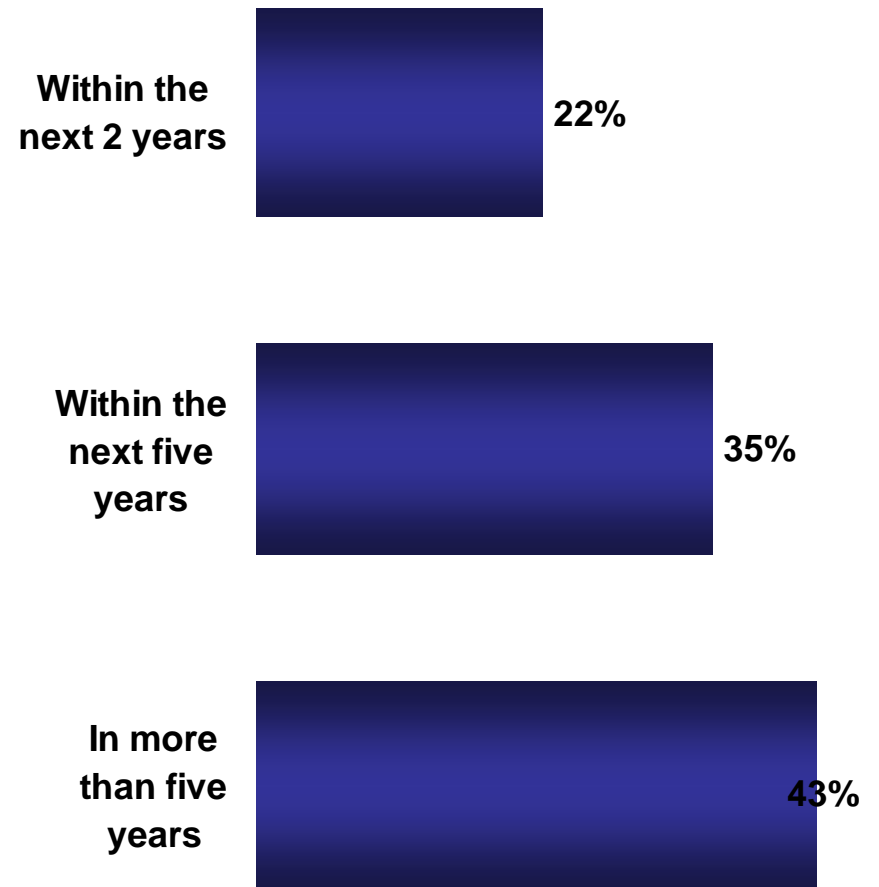


FOCUS ON ONTARIO: Effectively Double National Level: 52% Believe They'll Face A Community Electricity Shortage In Near Future... 30% Within The Next Five Years...

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



When Will Shortage of Electricity Occur Net of 15% Within 5 years= 52 x .57





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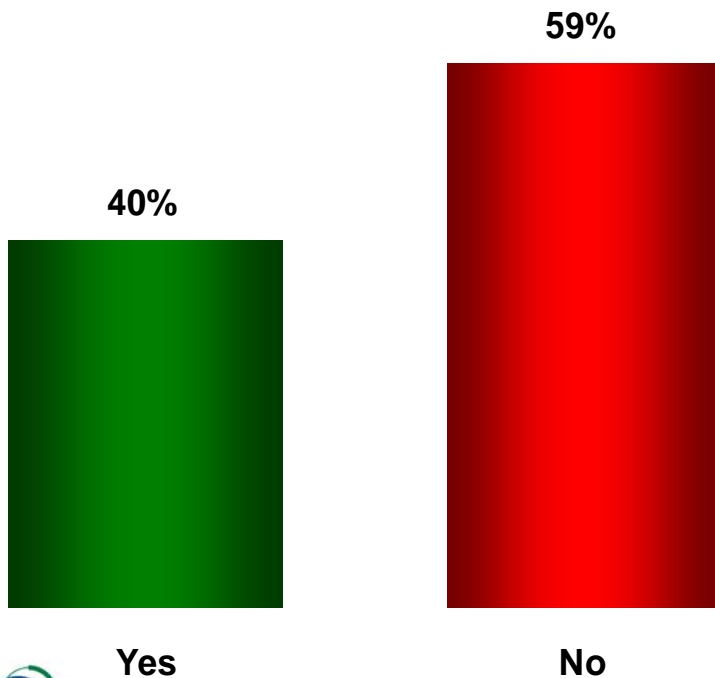


Chalk River Controversy & Confidence...

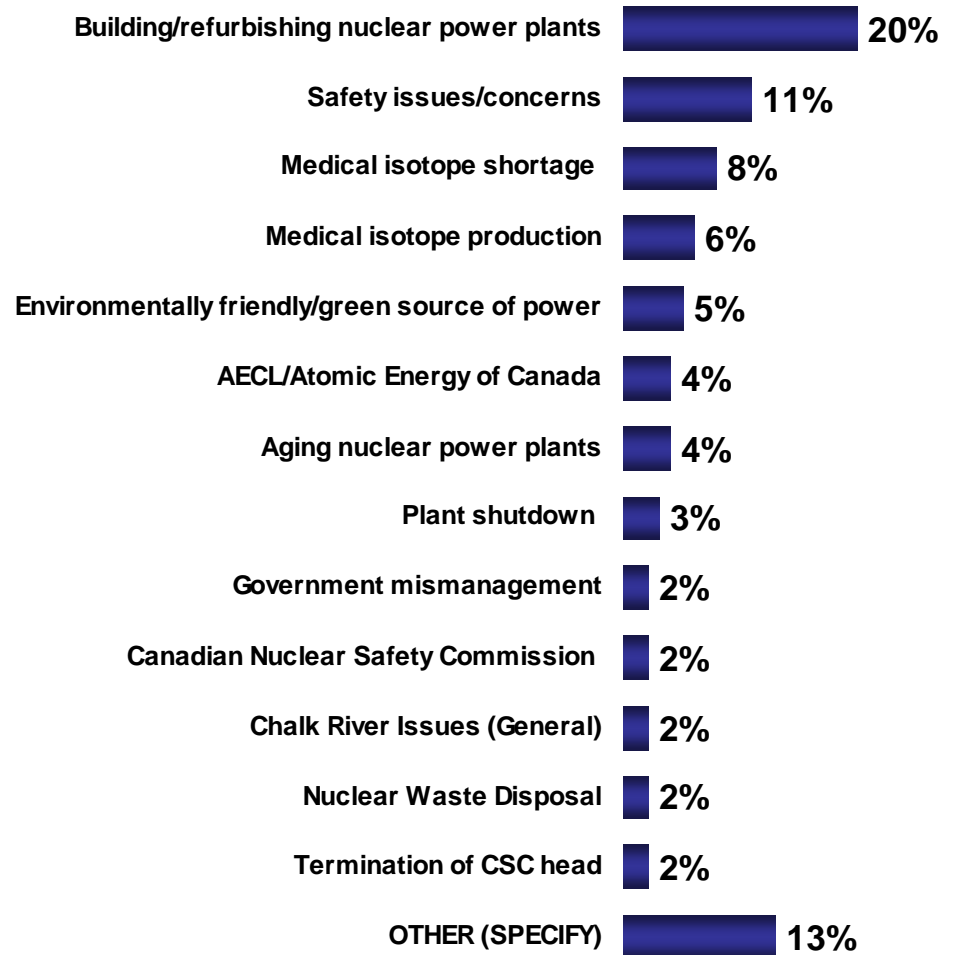


Only 16% of Canadians Recall Anything Top of Mind Potentially Connected To the Chalk River Controversy...

Read, Seen or Heard Anything Recently About Nuclear Power

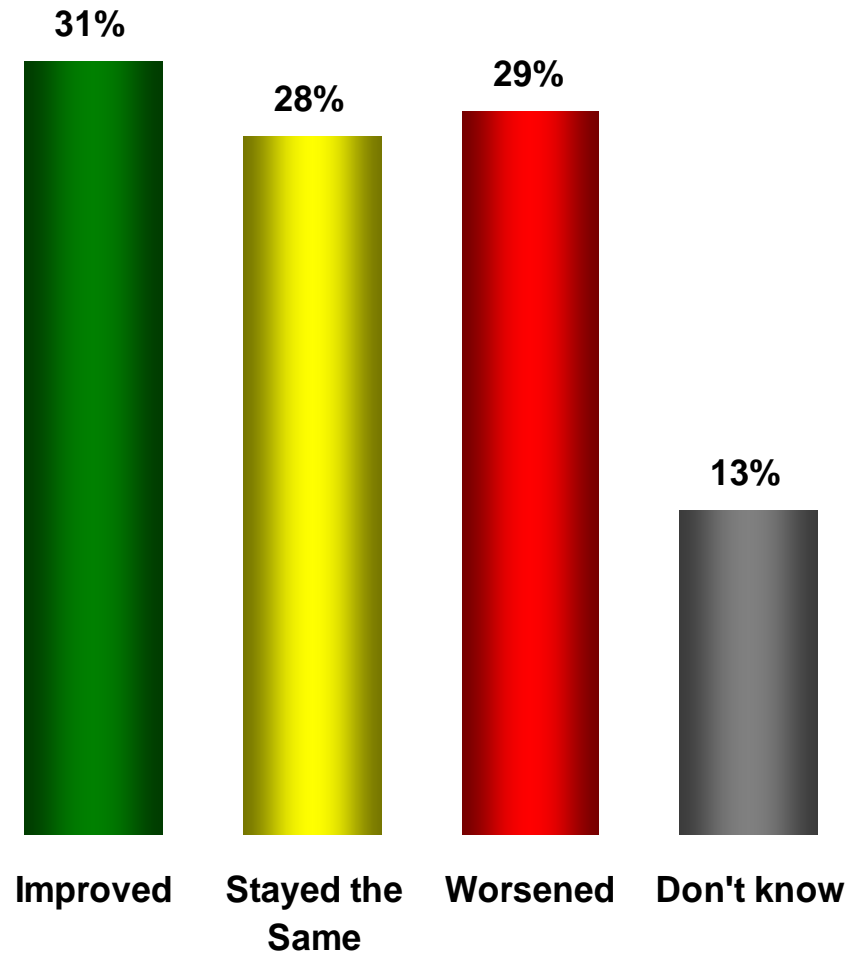


What : Net 40% on Issues Dealt With In Chalk River Controversy...Net=40 x .40





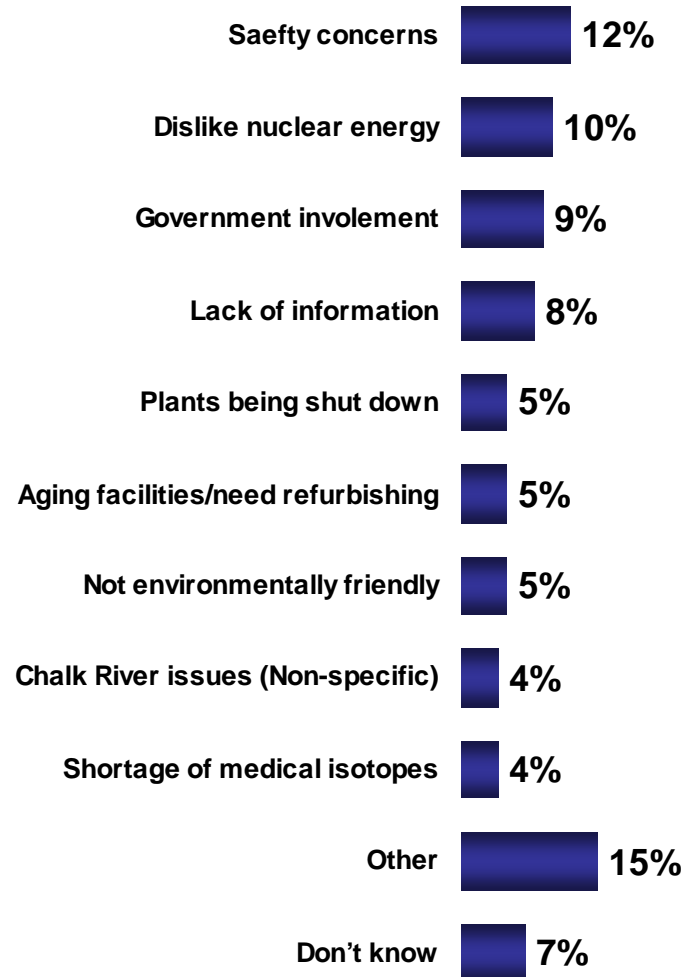
Only Three-in-ten (29%) Feel Their Confidence In Nuclear Industry Has Worsened In Past 12 Months...Net +2...





But Even Here, Chalk River Likely Played A Very Small Role: Only 25% Of This Group Name Issues Potentially Touching On The Controversy...The Result: Total Net Negative Reputation Fallout Is Likely 7%...

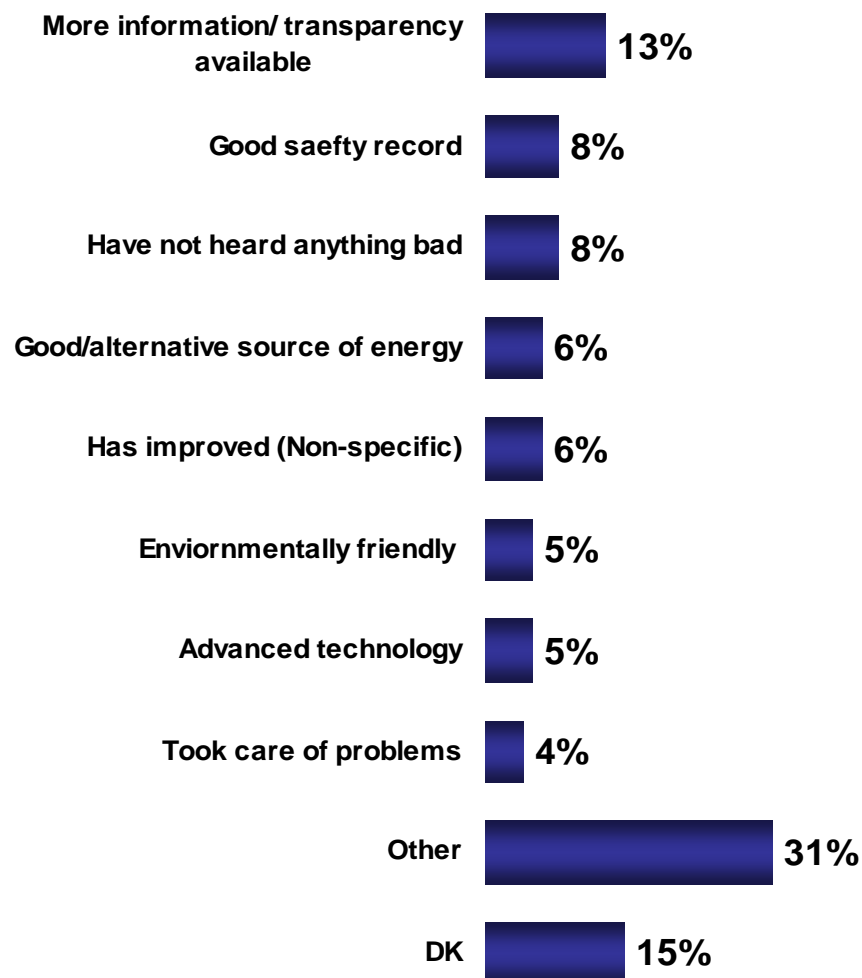
Reasons for Worsened Confidence





Of The 31% Claiming *More Confidence*, They Cite More Information And Transparency, Good Safety Record, And No Bad News For Their Increased Confidence...

Reasons for Improved Confidence





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Conclusions...

- **Confidence in Future Energy Supply is to Nuclear as is Job Anxiety To Economic Confidence: the Key Driver...**
- **Canadians Want A Mix of Solutions, and Want Disparate Parts of the Energy Industry/Sector Working Together...**
- **Green/Clean Energy to Combat Greenhouse Gases is Viewed as a Positive...Waste and Safety Issues Viewed as Manageable...**
- **There is a Growing Sense of Need/Urgency in Ontario...**



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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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