

## **Staying Ahead of the Curve -What Canadians Think About Nuclear**

**John Wright, Senior Vice President, Ipsos Reid**

Good afternoon ladies and gentlemen. I have a few things to say before I get into my presentation. First of all I said to my wife earlier this morning, “Did you ever in your wildest dreams, believe that after working on this file for so long, that I would actually show up in Ottawa, in front of this audience without being directed, without being filtered, without in any way shape or form being told what to present to an audience by my client?” She said, “Honey... you’ve never been in my wildest dreams.” (Laughter)

The second thing is that I want to explain a little bit about us, and how we got into this position in working with the Nuclear Association. I have been with the company for twenty years; I have all of those other things on my resume just to keep my options open. But really, we haven’t done any political work for any political party in this country since about 1986. That was before I joined the firm in 1989.

A lot of people think of us as being a political policy shop in many ways because of the work we do as the agency of record for various newspapers and television outlets and this country of radio places. I am also in charge of the Associated Press relationship that we have in the United States. We have grown from a four million dollar company when I joined in 1989, to a quarter billion dollars of market research in North America every year. I am from a Public Affairs Unit, which in fact specializes in working with associations and with mainly corporate reputation groups in managing and dealing with their issues. We have been privileged enough to work with the Nuclear Association for the last numbers of years in not only tracking, but giving them some advise and counsel in terms of how they should position this as an issue. Our unit, of which I am simply one of many who work on this account, have had an opportunity to see it evolve over the last number of years.

What I really want to do today is to walk through a series of pieces here. One is that we have just finished doing a major piece on public opinion and as I said, this is not directed by my client. There are many things here to show you, but unfortunately I will not be able to show you everything because I haven’t got the time. (People know that I usually can’t say “hello” in less than half an hour!). We have a large presentation, but I have taken out some of the key pieces that I thought you’d be interested in.

Secondly, we’ll talk about the key theme that underlines the presentation. Energy is a provincial issue because this really is down at the ground level. We will talk about the levels of support for nuclear energy. I think there have been some mythologies about this that have perpetuated that in fact in the province of Ontario, some people will suggest that the province is being against nuclear energy and nuclear support. That is simply and utterly untrue when we look at opinion going back many, many, many years. I will show you where it sits today across the country and then I will focus in on Ontario and that is specifically because that is the area where there is the greatest amount of activity right now, but secondly it drives national opinion to the levels that it is and I want to show you what that looks like.

I want to talk a little about the Chalk River Controversy and levels of confidence because often times what you think about, is that it’s everybody’s issue in the Country because it’s your issue and that public affairs officers can take stacks and stacks and stacks of newspaper clippings and you can read all the things and you can think that the entire world is actually focused on your

issue when in fact hardly anybody is. So we are going to look at little bit at that - It's a case of assurance.

Lastly are just four very brief conclusions. This is a big file - There are many issues and as i've said, we've had the privilege to have been involved for many years on it, so I take today the questions in advance of;

"Are these the only questions you ask?" No.

"Are these the only conclusions you could come to?" No.

"Is there other advice you can give?" Yes.

"Would you like to do more polling?" Absolutely. (Laughter).

I was saying just before the beginning of this, it is completely by accident that I realize that a colleague of mine in our public affairs company in England, called MORI (which is equivalent to Ipsos Reid in North America), is actually in charge of the nuclear polling for the society in England and in Europe. We actually for the very first time, exchanged presentations this week and they are virtually identical - not in terms of the results but in terms of the questions. It is interesting to know that the methodology and approach is the same wherever you are.

Let me talk to you a little bit about some of the key findings here. The research program in terms of the methodology and how we have approached it this year is not different at all. We're doing a telephone interview and we're showing the results today from a poll that was undertaken between January 17th and the 23<sup>rd</sup>. The total sample was 2,187. That's a very significant size, mainly because those who aren't involved in public opinion want to be able to look down into the regions of this country. You can get a pretty good handle on the pulse of this nation by only doing a thousand interviews, but you want to go deeply down and see if you can get more information. Key parts of it we had actually over-sampled in Alberta, Saskatchewan, Ontario, Quebec and New Brunswick. As you can see here this is pretty well what we were dealing with in terms of the size of the sample frame, and there are margins of error that look daunting, there are some eight points here and there

You know what folks? We've been looking at this long enough to know that directionally, what you're going to see today is pretty much what it has been, and I can verify is the case out there when we weigh this to each of the provinces and regions.

The key theme is really that support for nuclear is growing and that's why I said at the beginning of this in jest to a degree, that I am being unfiltered by my client. I am simply going to state the truth. Some people would say "well, you'd expect a pollster who works for the Nuclear Association to stand up and say everything is going well". I would not have been able to say that three years ago, and you'll see why. I can say it today with all confidence that if someone else were to do this poll, they would find the same thing.

Confidence levels in provincial electricity supply continue to drop for most. We're at historical lows across the country in terms of people believing that we have enough energy to meet our demand. Quebec is apparently immune to a lot of this and that really is a case of their hydro electricity that is generated there, and believing that they really don't have a problem with that kind of energy being supplied to them. What you will find however is that there is considerable support for nuclear in spite or despite that.

Support for nuclear power in fact is up. It's up seven points in the last two years and it's up twelve points since February of 2005. 2005 in February is a key point for the industry because it was the time in which there was a public information campaign that was launched to try and bring support back to previous levels.

Tracking Shows Support for Nuclear Energy – This continues to increase in all regions with the exception of Alberta, which is down negligibly since last year. 41% of all Canadians feel that nuclear power should play more of a role in their province over the next decades. What was a really important thing for the nuclear industry to realize was that it wasn't an "either/or" proposition of nuclear vs. solar vs. wind vs. other circumstances. Canadians want to see solutions, but they want to see it as a mix of solutions brought together by the key players in this country.

National support for refurbishing and new build are actually at historic levels. From all of our trackings, we have 67% of Canadians who would support refurbishing and 48% for new build. This takes us back to where we pretty well were many years ago, and that is that the country is split in terms of how it views nuclear and its support. It is very much driven by regions of the country as you'll see.

Support for refurbishing continues to rise in all provinces. Over last year you'll see it's up eight points in Ontario, four points in Alberta, the prairies are up fourteen points; lead by Saskatchewan, and even in Quebec where I said support is lowest, a half of those people now support refurbishing. So there is a renaissance and you can use that word in terms of public opinion across this country.

On the chalk river issue as you'll see, totally unprompted, only 7% of the entire population of Canada understood what was going on. Another 17% were prompted meaning that we actually then informed the rest of the group outside of that 7% what was going on and asked if they heard, read, or seen anything about it and we did some fancy calculations which you'll see. It ended up with only a quarter of Canadians having heard anything substantive about the issue. When we then followed up with a series of questions on confidence in the industry, it had a slight negative effect on people's opinion of the industry, but it was negligible. As you will see, it was primarily flat.

"Energy is a Provincial Issue". If you ask what the most important issue is across the provincial governments in this country, you will find obviously that there are differences. However, you will find that health care and Medicare, as well as education and schools rank at the top with the environment and pollution. As most Canadians will know, healthcare and education are organic. It's always a key concern and has been since 1995. It's the other issues that you watch that move around through the cycle and depending upon the focus of, you'll find that the environment can either be number one or two in any transitory way.

Just a matter on the environment - It was the first issue that I dealt with when I came to the company in 1989. You'll remember those days back when people were driving their BMW's to Earth Day and we were all involved in that before the recession hit. It was around the time of the Exxon Valdez, the Montreal accord on the ozone. It was a time when we were dealing with aerosol cans and we were dealing with clam shells.

It's interesting that today we have a level of concern about the environment which is very similar to where we were then, but there are a couple of ingredients that people fail to recognize. Number one, despite the fact that we've had intergenerational education, that we've had all of this go on over the last period of time, in 1990, 21% of people across this country would have been considered to be about the greenest that you could get. They occupied a demographic that was female between the ages of 30-35 with children, who've fundamentally believed that unless they did something specifically, the country and perhaps the world was going to go into the dustbin of history. It really took a lot of focus on the environment.

If you replicate that study today despite everything that has taken place, you'll actually find that that group of people at 21% is reduced to 18%. It's inconsistent with what you would think, and that is that you would have though intergenerationally we would have moved through it, had more people thinking in that direction. The answer is no, and one of the fundamental reasons is because hope has gone out of this issue.

As one of the issues that I say to any group that is involved whether it be nuclear, or energy, or environmental, or recycling - unless people actually believe and see the product of their purpose and how they are dealing with this issue, unless it's reflected back to them that they're making a difference, then they have no hope. That is the key thing whether you're in recycling and you take out all of those bins every Thursday night or so. Actually the people who are most against this and feel that they are hopeless are people who are about the age of fifty, male, who are in urban centers. I think it is actually the people who put out the stuff on that night. They actually don't feel that they've made a big impact. The lesson for the Nuclear Association is to show that there is demonstrable benefit from doing these things, and that people are actually engaged in the right decisions around the issues like the environment.

Nuclear and the Environment is an interesting issue because if you look at this, you will find that 69% say that nuclear industry is concerned about the environment. If you look at all of the other groupings, (what I'm going to direct you to is not the far right hand side of the screen, but I'm going to direct you to the "Intensity", which is the dark green.) You will actually see that 25% of the country believes that the nuclear industry is focused on the environment to a very significant degree, which parallels a number of others, including natural gas and the oil and petroleum industry. That represents a core of people who believe that this is where these industries are making the best approach to it, but where you go to the next level is a group of people who somewhat believe that to be the case. You say "well, have we made any progress?", and the answer is yes.

Over the last number of years we have actually seen it up in all of the areas except down the bottom with coal. You can see it having dropped in public confidence but you can take a look at the green which is the nuclear line in the middle, and you can see that relative to others it's one of the very few areas which have gone up. So whether a combination of the communications efforts or in fact the belief that nuclear is a solution to some of the green house gas issues and global warming, there is a view amongst Canadians that this is an industry that is contributing to benefit us, as opposed to taking away from it.

There's a fundamental question in this that drives almost everything else. If I look at economic confidence, and we hear a lot in the media in the last number of months about, "Well, Canadians are really concerned about the economy"..... well I can tell you they're not. "They are really concerned about the slowdown"..... no they aren't.

We have over the last month or so, shown publicly that 85% of people in this country believe that the economy is doing very well. If you ask people how many people in this country believe that we are going to go into a recession, it's only 17%. There's one fundamental condition that drives people's views on the economy (only one) and there are a number of factors surrounding it. It is about their own job anxiety.

If you go back to the recession in 1992 and 1993, we were tracking 36% of people thought they'd lose their jobs. Today 17% believe that they are going to lose their jobs and that coincides with the 17% who believe that we're headed into a recession. So you watch that level and when it gets to a certain point, then you see people starting to pull in their horns and stop spending money and acting in a recessionary- proofing way.

So the question is, “What’s your underlying trigger?” The underlying trigger is this: “Do we have confidence in the electrical supply for our future needs, yes or no?” That is the fundamental issue that in fact drives this and you will see from these two here, that on the left hand side of the screen is the basic question, “Do we have enough electricity in our province?”, and on the right hand side, “Do we think that conserving and taking the efforts to conserve will or will not offset that demand?”. What you could see here is in the dark blue, is where we are this year compared to the light blue last year. You can see on the confidence side, Ontario smack in the middle. On the left hand side where its way down in terms of confidence, only about one third believe that we have enough electricity for our future needs in that province. You can see changes in British Columbia where it’s dropped down from 47% to 40%. You can see in almost every other jurisdiction except in Quebec and some of the Maritimes where in fact, there hasn’t been any movement. This is the fundamental question that underlies this issue because if you look at the other side, conservation efforts won’t offset demands; you have majorities in virtually every place saying that even if we were to conserve and do all of those things we wouldn’t be able to offset the demands.

When you look across here, there are certain provinces at the top who you can see - Quebec, in the light blue; saying that they have enough electricity but all the other ones are down near the bottom and outside of Alberta, which has gone up a little bit, everybody else is headed down in a particular decline. What you’re finding across the country and in many jurisdictions is a decline in the view that electricity is there for when we need it. We asked a question like, “Do you think that the government needs to do more now to ensure the adequate supply?” the answer was yes, strongly agree, seven in ten and this is across the country.

Then we asked people (and i’ll show you the Ontario version in a minute), 36% of people said that people and businesses in their community will face an electrical shortage in the near future and then when you do the math on this what you actually find is that about only 15% believe that within the next five years, were going to have some real problems in our communities actually turning on the lights and doing things. There is a notion amongst one third of the people that we will have some problems, but that’s a national perspective and i’ll show you what it means in Ontario in just a few minutes.

The Effect of Rising Energy Costs on Electricity - Everybody believes that this is going to go up of course, but actually most believe that natural gas and hydro electric power will be affected the most. So again there’s this sense of we’re running out of capacity, we don’t have the reliance that we should have on this and the cost is going escalate.

Now we look at The Support for Nuclear Energy - We’ve tracked this now for many, many years. Questions remain virtually the same. If you look at nuclear energy here, which was taken only a couple of weeks ago, you’ll find that 47% of the Canadian public supports nuclear energy and 51% is against it. You can see the variations there - about 16 % are totally on side with nuclear energy but another 31% - somewhat, and then you get into the offside group.

There was a piece of research that we’ve done in the last number of years and we repeat it as part of this on communications because the key question will be, “How many people in this country are absolutely and fundamentally against nuclear power?”. The answer is approximately 15%. So when the voice is the loudest, it is usually being enunciated by that group and then there’s another group beyond that of maybe 20% who in fact are somewhat against it, depending upon the circumstance. That is usually determined by one of two things; you may be against it because of waste issues, you many be against it because of safety issues, and you may be against

it because of other things. It's a qualified opposition whereas the 15% or so are in fact unqualified.

You look at where nuclear ranks, then what you look at is the trend line, the National Trend Line for Nuclear Power - If you go all the way back to October 1987 with the tracking of this you'll see that a significant change took place between May of 2004, and February of 2005. This is not The Blackout - that actually happened the year previously, so you say how could we get to that stage? I'll show you in a minute; it is primarily driven out of the province of Ontario. Everybody else remained relatively static but in Ontario it changed significantly.

Since 2005, we've basically come back to where the industry was before that separation. It goes back to the point that since 1987, there have been some highs and lows in the industry. We're not looking at a situation where the vast majority or, even the majority on a consistent basis of Canadians prior to 2005, was fundamentally opposed. There are junctures to it and we can see back in February of 1994, (I think it was), we've got Chernobyl and a series of other things which occurred where people had a point of view then, but it changes. I would argue at the moment that in Canada, it's come back to where it normally is if you go back to 1987. You can see the tracking of this over time and the reason we do this is because we like to look at the intensity of the support.

The Support Levels of Province by Province - You can see in British Columbia it's 41% support, 44% support in Alberta, and Saskatchewan it's 55% support. Manitoba and Saskatchewan evens out at 50%, 65% in Ontario and it continues down to the Maritimes. New Brunswick is at 51%, so the numbers are not that far apart in terms of overall support. You can see here, Historical Tracking shows the support for nuclear energy continues to increase in all the regions so if you draw that line, it's been on a constant upswing.

41% of Canadians feel that nuclear power should play more of a role in their province over the next decade. What is important, is to see where you take the people who are saying, "More likely to play a role", vs. "less likely", and you do the subtraction to find the net scores. You'll find that there are certain parts of the country that are more likely to give support to nuclear playing more of a role. British Columbia - it's not all that much, but you get into Alberta ...a twenty four point difference, Saskatchewan...a thirty-seven point difference, Ontario... thirty-one. These are the provinces that believe that nuclear should be playing more of a role in their province in their future.

In terms of National Support for Refurbishing and New Build - you can see where we are since May of 2004. We have gone in one level, from 57% to 67% support and in the other level, we are now up to almost half of the population for new build. We can see that support for refurbishing continues to rise in all provinces, particularly Ontario, which is up eight points, Alberta is up four, the Prairies are up fourteen, led by Saskatchewan and even in Quebec where I indicated support for nuclear is the lowest ...**half** now support refurbishing.

Similarly, support for new build is up right across the board. The momentum is lead by the Prairie provinces...+14, Atlantic Canada... +14, British Columbia...+7, and Quebec...+8, so we're seeing a renaissance, but mainly pushed by that underlying issue of capacity and belief in future capacity throughout the other provinces.

Now, what do people actually believe are the benefits of nuclear power? This is one of the key things that we are going to have to address in the coming years through communications continued, because what you're looking at here is in terms of a top \_\_\_\_\_ notion. More than half of Canadians can't mention any benefit of nuclear power. That is a really significant thing because while they may know that we need some more, and while they are finding out that it

plays a better role in their life, there's still over half the public who doesn't say that it supplies electricity on a continuing basis so we can have confidence moving forward.

I want to go to the focus in Ontario. There were a number of factors that contributed to significant decline in support. If you look over the 448 headlines which occurred in the newspaper (because I did), during that period of time from May until February 2005, you'll find that there were a series of areas that were reminiscences about The Blackout, there were firings, and there was the Manly report.

There were things that had happened previous to that time frame that were reflected upon but we were talking about hydro rates going up, that it being bad news for industries. It was a make or break year for nuclear power, there was one billion dollar riding on the revival of Unit 1 reactor in Pickering. There were questions about the security of nuclear materials, the Pickering upgrade; there was great controversy over the costs and over the budget. It was a year after The Blackout and some of the headlines were talking about, "Ontario's Energy Gluttony Persists." And "Nuclear waste storage – how much, for how long?" There was a concentration on salaries of Hydro executives that many believed had spiraled into the millions since 1999.

There were a whole series of factors that were not necessarily related to nuclear power per se, but the conditions around nuclear power and where we have found ourselves is pretty well here. You can see where the change happened in Ontario in May to February - that is that very significant jump, so we went from a province which was to the majority supporting nuclear power, to a group of folks who were disagreeing more than they had before. This pushed national support way down.

How this was responded to by the industry, was to come forward with a communications campaign to try and re-educate or try and educate people. I am sure there are many of you who saw the advertising campaign that was put forward on this and it was run at a pretty heavy weight in Ontario. It was a communications campaign and some pretty significant polling that went along with it to try and track on the messaging on this and to make sure that it was communicating in the right way. This is what happened; you can see that within months of the campaign hitting and also within months of the issue having been discussed and moving on in a political sense the support and the province returned to just recently, where we were probably back in 2002.

That is the major reason why support in the country went down. It was addressed over that period of time with a major campaign and we now have it at almost historic highs. It's 65% compared to 64% previously of support for nuclear in the province of Ontario. It traded the condition for the government to be able to make the right decisions as far as the industry was concerned. When you look at the tracking of intensity, look to the left hand side of the screen. That is absolutely imperative where you see them moving from 19% intensity of support in April of 2002, then get up to about 27% in January of this year, so there is a very strong commitment in nuclear in the province of Ontario. And as I said, if you look to the far right of your screen, what is the lucky number? 15% voice against. That is the traditional 15% who have been against nuclear no matter how you try and explain it, communicate it, or otherwise, that is the group.

In Ontario a majority feel the government is moving either too slowly, or somewhat slowly. There's a sense that now the decision has been made it's time to move ahead. In fact when you take a look at this, 52% of Ontario's believe that the government should get on with or start the process of moving forward on nuclear power. There's a sense that there's a bit of urgency here based on need.

And as I said previously about the thought that there is going to be a problem when it comes to energy, this is a critical slide again because it goes to the element of confidence. Nationally, we're looking at only 32% or so who believe that we could have a problem in this country and then have the effect of that visited upon our communities.

Look at this... in the province of Ontario... 52%. Half of the public believes that we will have a shortage in the near future, and when you do the math on that, 30% believe that it is going to be within the next five years. As I said, there's a fundamental concern that is growing in the province about capacity and reliability.

Chalk River and the Controversy: If you have read, seen, or heard anything recently about nuclear power, just as wide as that was, this was done within a matter of only a couple of weeks I think of the actual controversy. Only 40% across this country had actually seen, read or heard anything that they could recall and we asked them in an open-ended way, "what was it" and you can see the long, long, long, list of stuff here when you take all of the answers that had been given and this is out of their mouth. We don't read them the amount, what you end up with, is 40% of the 40%. So at the end of the day, only 16% of Canadians recalled anything top-of-mind of the actual controversy.

When you say, "Well, only three in ten feel that their confidence in nuclear power has worsened", you can see that on the right hand side as a result of this at 29%. We actually find that 31% felt that it had improved, so it's basically a wash. As a result, even here, Chalk River likely played a small role in terms of why there is worse in confidence, there's no single issue here that sticks out as having driven why their drop in confidence has taken place. At the end of the day you can fundamentally say that when you look at the same with renewed confidence, there's not much here. There is virtually no role that Chalk River has played in the issue dealing with the industry that allowed people to lower their confidence levels.

I'm just going to leave you with four very brief conclusions we could do lots more of this, and it is fun, but certainly I want to leave you with a few parting thoughts.

The first is, as I said; confidence in future energy supply is to nuclear, as is job anxiety to economic confidence – it is the key driver. When we look at a communications perspective and messaging for this industry, it is complicated. There are many things that we have to look into so it's not simply about the environment, or sustainability, or global warming, or safety and materials. It's not simply about those things, it really is about the future energy supply and the confidence that people have that their province is going to be able to produce it in the next period of time.

The next thing is that Canadians want a mix of solutions. They don't want an "either/or" proposition, they want desperate parts of the energy industry sector working together. You can find in almost every other issue that I deal with and a very similar one would be waste, the garbage and waste and recycling industry, is that if you indicate you're taking a waste site and using energy related technology so that the off-shoot of that is energy. A waste to energy facility, your support for that vs. incineration goes up eighteen points. What that again means is that the whole underpinning of this is the concern about energy, mixed with green clean environmental issues but it's not the one that drives the most concern. You've got to keep that very, very clear.

Last, there is a growing sense of need and urgency in the province of Ontario. We got past creating the circumstance where the industry has gotten past in making sure that government understands that there is a capacity issue, the public has already bought into that. They have for some time. The issue now is that the public wants to get going and to move ahead.

That pretty much concludes the latest round of polling that we have here in Canada and hopefully has explained a little bit about what public opinion is about in this country.

## **QUESTIONS AND ANSWERS**

**Guest:** “How do you address the idea that your polling data is somewhat limited because of the high percentage of people under 30 , who don’t have traditional land based phone lines and therefore aren’t included in your data.”

**John Wright:** “Actually, the number of people who don’t have LAN based phone lines are about 6% of the population at the moment. That would be that mainly in the teenage and younger years of the second thing is we have to weight the data to in fact - I can answer it in a couple of ways:

If you weigh the data to reflect the population, the first thing is that you can deal with that 6% quite easily. Secondly, there are a number of studies that have been done by the industry (We’re not just dealing with polling data, we’re dealing with market research) the concerns that you’ve raised are the very ones that Proctor and Gamble and Wal-Mart and everybody else would raise too, is that in fact response rates themselves, do not necessarily have an impact on the outcome of these issues. If you even take a look at the internet response rates while you would say that they have maybe exclusionary to different parts of the population, in fact the differences are such that it leads you to the same business conclusion. In other words we’re looking at internet response rates that only give you results that are maybe one or two point’s difference than the telephone polling data at the moment. So, it’s a good question, but we haven’t reached the stage where so many people are using cell phones as their contact that it’s affecting our research and secondly, basically I only need 500 people a night over four nights to answer the phone in order to weight the population to make it look exactly like the population in the country. That is three or four ways of answering that question.

We’re still confident in the data. If I wasn’t we’d be using another way of getting at people.”

**Guest:** “I would just like to know, when the government is setting policy and trying to get an indication of public opinion, do they look to your numbers, or are they conducting independent polling to get this information?”

**John Wright:** “I don’t do polling for the government on this issue. I wouldn’t because of how we are structured with his association, but I would suspect that they would be following their own tracking with their own polling projects. The other thing is that this is one piece which is entered unfiltered into the public domain as being posted on the website previously, which is a transparent of showing of the numbers which is an anomaly, you don’t normally find this and we don’t change them or anything. They have access to this information plus anything else that is released publicly. I suspect their doing their own polling plus they’re taking this into consideration.”

**Guest:** “My first question really is to Murray rather than to you. Your final conclusion was that the people of Ontario want the government to get on with things. Is that being passed on to the government of Ontario?”

**Murray Elston:** “I think we have left the message that the industry is prepared to move. We obviously know that there is a process that they’ve got in play. For instance last week in Toronto, I delivered a speech to the Ontario Energy Network and my indication was that while we have challenges like human resource management, an acquisition of material has been pretty much like you’d heard earlier. Laura actually gave a presentation pretty much the same point. We were in a position to start tackling those and we have taken steps on the human resource side, but that we were ready and committed to assisting the government to deal with what we have described as a “gap” in the electricity supply which is looming. Both directly and indirectly the message is there and I think it has been heard.”

**Guest:** “That sounds very technical – what is being said is that the people want it and we know that politicians poll the people, so they don’t need the technical argument.”

**Murray Elston:** “These materials are pretty new; you’re seeing it fresh off the presses so to speak.”

**Guest:** “But the specific question is can you explain why you said that only 40% of the people (your respondents) knew something about the NRU event. It’s been in the front page, it’s been actually on television, which I thought everybody watched. Can you explain why only 40% of people would even be aware of that? To me it’s unbelievable almost.”

**Murray Elston:** “Again there are two ways to answer that one. If we think about the issue and how it went nationwide a lot of it was about medical isotopes. Some of it talked about nuclear, some of it talked about safety, some of it talked about the regulator...there were a whole series of things in which people talked about it, and 40% of people heard something, but they didn’t hear enough to get a grasp of the specific issue. We asked them on an open-ended basis, then we actually told them what the issue was, and we found that only 40% of the 40% actually heard something specific about that. It was a very interesting case a few years ago, where I used (as an example) in presenting this for the first time, where we did some work on a very serious situation in a health care institution. There had been a television camera in place by a family in a room where there were some elderly people. It caught on film of someone doing something to the elderly person – shaking them, that was then released in a W5 report if I recall correctly. It achieved very, very significant awareness levels across Ontario. We were asked to do some polling to look at the awareness level. The awareness level was at about 80%. Then we asked the primary question, “What was the nursing home chain that actually had this happen?”, and less than 1% could name it. It really was a case of almost like a hit and run and nobody got the license plate. You have a situation here which is very similar where there is a coughing of sound. People saw stuff, but they didn’t grasp the “kernel” of it. Secondly, even though we read about it in the newspapers, lets just remember that CTV only has about eight hundred thousand on a Friday night watching the CTV National News which is considered to be the #1 leading

newscast and we've got 21.5 million adults in this country or 23 and a half million. Not everybody is watching the news, not everybody is grasping it, and they are more concentrated on other things."

**Guest:** "Good afternoon. Perhaps both of you could make a once sentence comment on this...now that our numbers seem to be at a good level. When do we change the advertising campaign the CNA has done over the past couple of years has been very effective, but in my opinion, a soft approach. At what point do we change that soft approach to more of a hard approach to get the inertia moving forward faster?"

**Murray Elston:** "That becomes the tactics that we have to discuss inside so it basically is going to be triggered through our discussions at our Communications Department. The one thing that John often reminds us of is the fact that if we had a valid question when we had an election, the numbers that we need to be very solidly a majority territory are 45 to 48%. So when we sit at 65% in Ontario, the strength of that number is very, very strong and probably gives us a lot of cushion. It also tells us that it's probably going to take an expenditure of a lot of resources to move it a lot higher and for the purpose of which, it might be more difficult to measure. We're happy with providing people with messages that are supportive of understanding that we're a good performing industry. That we are ready to take on a problem that exists and that is the potential gap in energy supply, but we are as most of you working in this industry relatively frugally focused on expenditures until we know that there is going to be real prospective gains. It is not something that we're at right at the moment, it will though, as we move forward, be driven by some event that might have softened or what we would say probably would lead to the softening of the support and then we'd probably become more engaged. Not right now, because our numbers are very strong. In fact the last time John and I talked, he said that he couldn't believe that they are actually at this level. He didn't say they are at such a high level, I don't recommend polling again, (laughter) but he did say this is a pretty good situation for us to be in. This is all about monitoring, it's all about understanding what events are occurring. It's one reason we wanted to sample where a particular event may have taken us. We will look at potential trigger events, to see whether or not we need to get more specific and then we'll consult with our executive and board to see whether or not we can have contributions from our members to go into such a campaign."

**John Wright:** "My client said it best; I really don't have anything to add." (Laughter).

**Guest:** "I noticed that the province of Ontario is building many windmills. My question is, is the public support for windmill strong? How strong? Who is driving this? Is it the government, or is there a big public support for windmills?"

**John Wright:** "I think I hear in your question a series of questions, but I'll just answer the one. I think what the public has said through what you've seen today is that there is a concern about the reliability and capacity of electricity in their province. As a result, they'll take it from anywhere they can get it. I think that there is a political imperative that the government in Ontario, which is secure now for another four years until it's next election. In the year prior to the election last time, and the year following their announcement on nuclear in June, tacked about as far left as they could get on the environment portfolio for political reasons, to kept he

NDP at bay. I think from their overall prospective, much like you've seen that one grid, where it had, "Where do you want to get the solutions from?"...its' all of the above. Where's the lions share of expenditure going to be? It's going to be probably be in nuclear as opposed to the other places, but what people want to see is a government and an industry and a group of just \_\_\_\_\_players actually pooling all of their resources to get us to a sense of reliability."

**Murray Elston:** "I think it is also an indication, actually almost all of our speakers have sort of dealt with the same issue in their remarks identifying that it is a diversity of mixed supplies. There is an impression that (you saw the numbers) emissions for things like solar and wind, when people are focusing on a debate on carbon emissions, they come out very strongly on that. I think people are looking at those as valuable contributions on another level but when it comes down to electricity supply, they are not prepared to give up anything, but where they really are was also identified looking at strong base load provision."

**John Wright:** "The research that we have done for the association over the past number of years has been very iterative. On top of that, I have done work for the Ontario Power Generators Association of a whole series of other clients and this for over a decade. On top of that, we've done work in the qualitative area. There is a notion that windmills (if you had enough of them, and I stress that), could produce clean energy and power...lots of things. The engineering argument, the economic argument really doesn't enter it into it. What you do have through all of that is a sense of exactly as Murray said; people want to make sure that every option is being tried. You asked the question, "who is driving it?" I don't know except that there are groups within the population that I just say within the opinion polling, there are groups within the population who believe that windmills are far better than other things that are there. As a result, it is going to be pushed along by between 15% and 25% of the population. That doesn't represent the majority of opinion because the majority at this stage, (over two thirds) want to see nuclear play a role in the overall energy mix."

**Guest:** "Did you do any polling about the technology for new build reactors, that is who is support CANDU or foreign technologies?"

**John Wright:** "No...no sir."

**Guest:** "Thank you very much, that's very interesting results you get in the polling. I am puzzled as the last guest was here, by that issue of the Chalk River. I am from the Radiation Safety Institute. We get a lot of questions from people about this and we don't do polling, so it's antidotal. The question was not in the way people put it to us. It wasn't Chalk River; very few people know anything about Chalk River. What it was, was the firing of the independent regulator and that's what bothered people, that's the issue, that's the ONLY issue the way they've framed it. Those questions developed in February after your polling, and I'm just wondering if perhaps it's the timing that the issue is still there but not reflective to the January poll you did?"

**John Wright:** "A couple of things we didn't ask about Chalk River, that's my phraseology to you, so I could have picked anything and just put it there. We were right in the midst of it, in the midst of it there were questions about the firing, there were the hearings that came afterwards."

Secondly, we left it pretty open-ended for people to comment on this, and so I could take you back through it and I know that it's going to be made available. There are sections where the medical isotope issue is there and there's a series of other things. I don't dispute the fact that 40% of the public, who have heard about something to do with "something" out there, is not a small number. Even if 10% of the adult public decided to give you an email or call you...you're dealing with 2.5 million people who phone you. You're dealing with large numbers who are aware of it. The question is what was the central point to what they heard? The research is showing that unless you prompt them into a particular direction (and even after prompting them in a particular direction) you don't get anything incredibly conclusive. If we'd said, "What's Al Gore's message, about given all of the stuff, we'd probably get one line that would be out over everything else. What this shows is that six in ten didn't hear anything about it that they recall. Four in ten did, and of that, only four in ten can name anything. When you do the math on that, it's 16% actually got the message, which means that it's probably close to three and a half million people heard it in this country and understand it, so many of them may have called you (or some of them). I'm just doing the quick math on this in my head, but I'm just saying that there's lots of stuff that goes on that people really don't hear that much about."

**Guest:** "Thank you very much for your presentation. I am curious about the relationship between the support for nuclear power and the support for an on-going stable, reliable supply of electricity into the future. Can you distinguish Ontarians views from that perspective? Are they really interested in more nuclear power, or are they really interested in a secure, stable supply going forward?"

**John Wright:** "That is a really good question. There's two ways you could look at it. Historically would have been the support for nuclear power, which in fact has remained up until 2004, stable. Then it dropped down then came back up again. The first thing, is that based on the historical perspective, if we had been going just from 2004, to the current day, I wouldn't be able to give you that perspective. I'd say historically given that line, except for that anomaly in the middle, it has been to support nuclear power. Secondly though when you ask people now what the largest contributor of electricity to the province, we do know that 51% or so, you're going to get people banking on that side of it, and therefore underlies the reliability aspect of it. If I were to ask tomorrow what are the best ways of dealing with this, nuclear power when presented as a choice between those options is the number one, but they want the energy mix. It has been a consistent support all along and right now they are tying the support level of nuclear, to the confidence and the reliability for the future."

**Guest:** "I think you might have answered my question because I had wondered in the context to the fundamental question if nuclear was really the lesser of three evils given what it was. I do have another question. Support for nuclear is up, so I need you to help square with me, when consumers are asked to identify the benefits as to why you like to support it, they couldn't pinpoint that so, it doesn't quite square with me."

**John Wright:** "We have a lot of education to do. One of it may be that it produces more electricity but even as the industry \_\_\_\_\_ that in the last couple of years, telling people that the province was achieving 51% of its electricity already from nuclear power, it was something that wasn't known by significant groups of people within the province. Secondly, there are groups

within the population who need to be educated or brought up to speed more than others. The most knowledgeable people on this issue tend to be males, tend to be urban and tend to be over the age of fifty and well educated. The people who tend to not know a lot about this, tend to be female in lower economic, lower age groups, and often in rural or outside of urban areas. I think what you have to do, is you have to educate people about this. The more education that can get out there about the benefits of nuclear, the more you're going to get that number reduced. Right now on an open-ended basis, it's something which comes in fits and starts. We had a campaign which did what it had to do, which was restore confidence and help people understand it more, but it's not been a relentless thing. We don't have one overarching piece and maybe that is something that the communications has to do in the future by simply focusing on one thing, but right now it's not out there. It's seen as something that's going to help with our electricity but, beyond that, there is no other benefit. Maybe that should be the only benefit, but it's not even there yet. I guess it goes back to this question, are they tying it together? Notionally, yes. Practically? Not yet. It is just more and more work that has to be done in educating the public."

**Guest:** "Thank you very much for your presentations, I am not sure if I am asking a question or making a comment. You know that public opinion (as you find through polling and marketing research), certainly has been shaken by many factors. One of those factors is what leaders of the community project to the public and the government leaders in provincial or federal as well as city counselors. Just an example this week the City of Ottawa passed resolution opposing the mine exploration that was going on nearby. Their whole reason was that there will be spill-over into the water supply to the city of Ottawa. CNA has a lot of responsibility not only to talk to the public at large, and also concentrate focus on government level at Provincial and federal, but also with greater responsibility, talk to the communities. We do have among ourselves Kincardine Mayor, who supported it but there are a lot of other mayors and counselors who need a lot of education as well as assistance in learning what this is all about. That was the comment, but the question is, how do the leaders when they project certain messages that count to the public, effect acceptance of nuclear and also, how would they then therefore make decisions going forward for this industrial?"

**John Wright:** "I will answer that very succinctly. The first thing is that you have as Murray said; you have to figure out what a win is. A win is not 100%, nor is it 80% and in some cases in different provinces, it might be only 40%. If you look at what a win is, it's what it takes to get elected, because the governments are the people that make the decisions that allow this process to take place. Even federally, it is now looking more like its 40% to get an elected government. I think that you have to look and see how many people in the country and in particular areas agree with your point of view. Right now, you'll have individual counselors and you'll have leaders in this community that can speak from the talking points of what the Nuclear Association has been talking about in its own pieces and in fact they'll be with a majority of people. Not only to get elected, but in fact far more. The reality is that beyond what you're seeing today, there is a lot of talking points that have been put together based on the iterative of knowledge that has been gathered by the communications people and they can supply to their materials, things that have been tested. They're not just made-up; they're tested and made sure that they work. The second part really goes to this entire presentation. Public opinion doesn't make decisions on people's behalf. It's a little bit like my favorite movie, *The Bishop's Wife*, with David Niven and Cary Grant. Because at the end of it, David Niven turns to Cary Grant and

says, “You didn’t make the decision for me, that’s not what I asked for.” And Cary Grant says, “You didn’t ask for the decision, you asked for guidance”. I think at the end of the day while we can have public opinion that asks all kinds of questions, we have to stand back for a minute and take our guidance. The guidance says right now we are in a lot better position today than we were three years ago. We have a set of cohesive issues: environment, energy and concern about the future that are driving this issue. We have a few provinces in the country where people are very concerned that unless something is done for government to ensure their capacity over the next number of years, then they’re going to be in trouble in their communities and in their businesses. If those things don’t resonate with local counselors they probably won’t get elected. Those are the things that people are now saying. It’s giving guidance to them and it’s something which they have to be acutely aware of, that people are concerned that this issue is now going to affect them personally and the businesses in their community.”