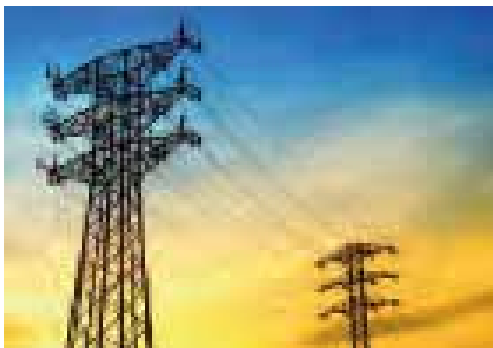




Perceptions of Nuclear Power

**John Wright, Senior Vice President,
Canadian Public Affairs Division
*Ipsos Reid Corporation***



**2:00 to 2:45 on Tuesday,
October 6th, 2009**

Nobody's Unpredictable



Presentation Outline...



Purpose and Methodology...

Energy as an Issue...

Awareness and Perception of Nuclear...

Nuclear Support Tracking...

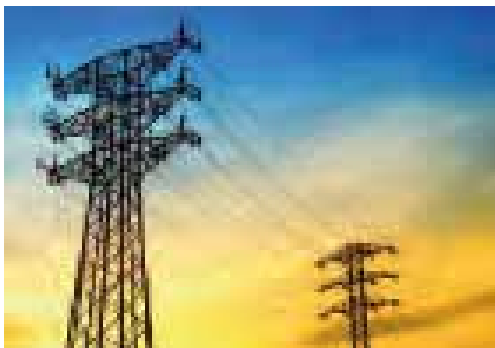
**Ontario & Saskatchewan
Provincial Issues...**

**Comparing Public Opinion On Nuclear Power in
Canada and the U.S. ...**

Closing Remarks...



Purpose & Methodology...



2:00 to 2:45 on Tuesday,
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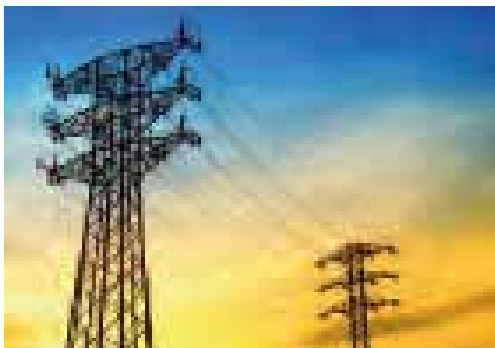
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- The research program tracks overall support for and attitudes toward nuclear energy in Canada since a February 2005 benchmark.
- The latest survey was conducted by telephone from August 18th to August 20th, 2009.
- The total sample is 1,156 resulting in a margin of error of +/-2.9%.
Oversampling was conducted in Saskatchewan and New Brunswick. The regional sub-samples and associated margins of error are:

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



Energy As An Issue...

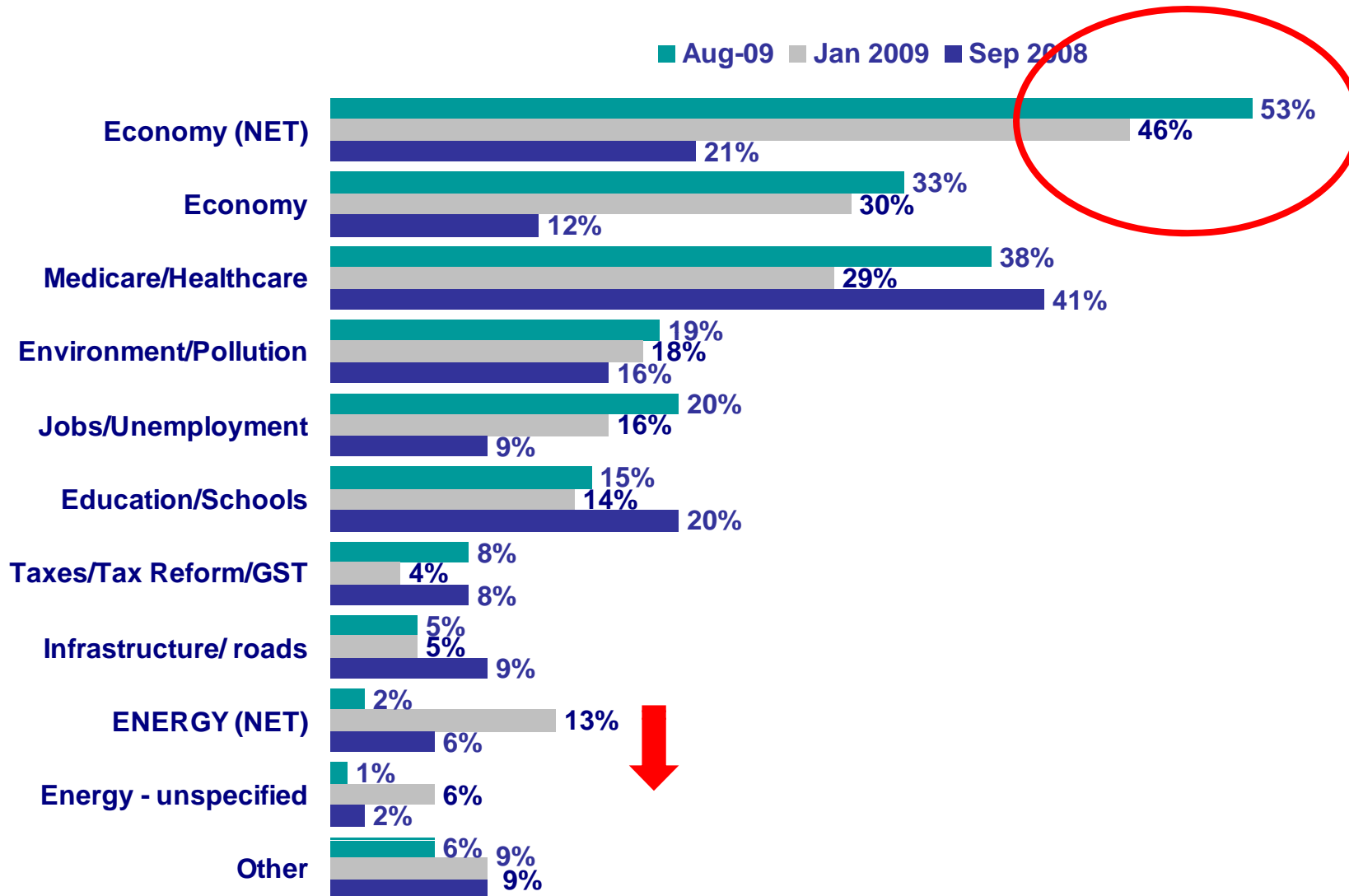


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Energy No Longer An Issue of Immediate Importance: Down 11 Points to Only 2% ...



Mentions less than 3% not shown (except energy)

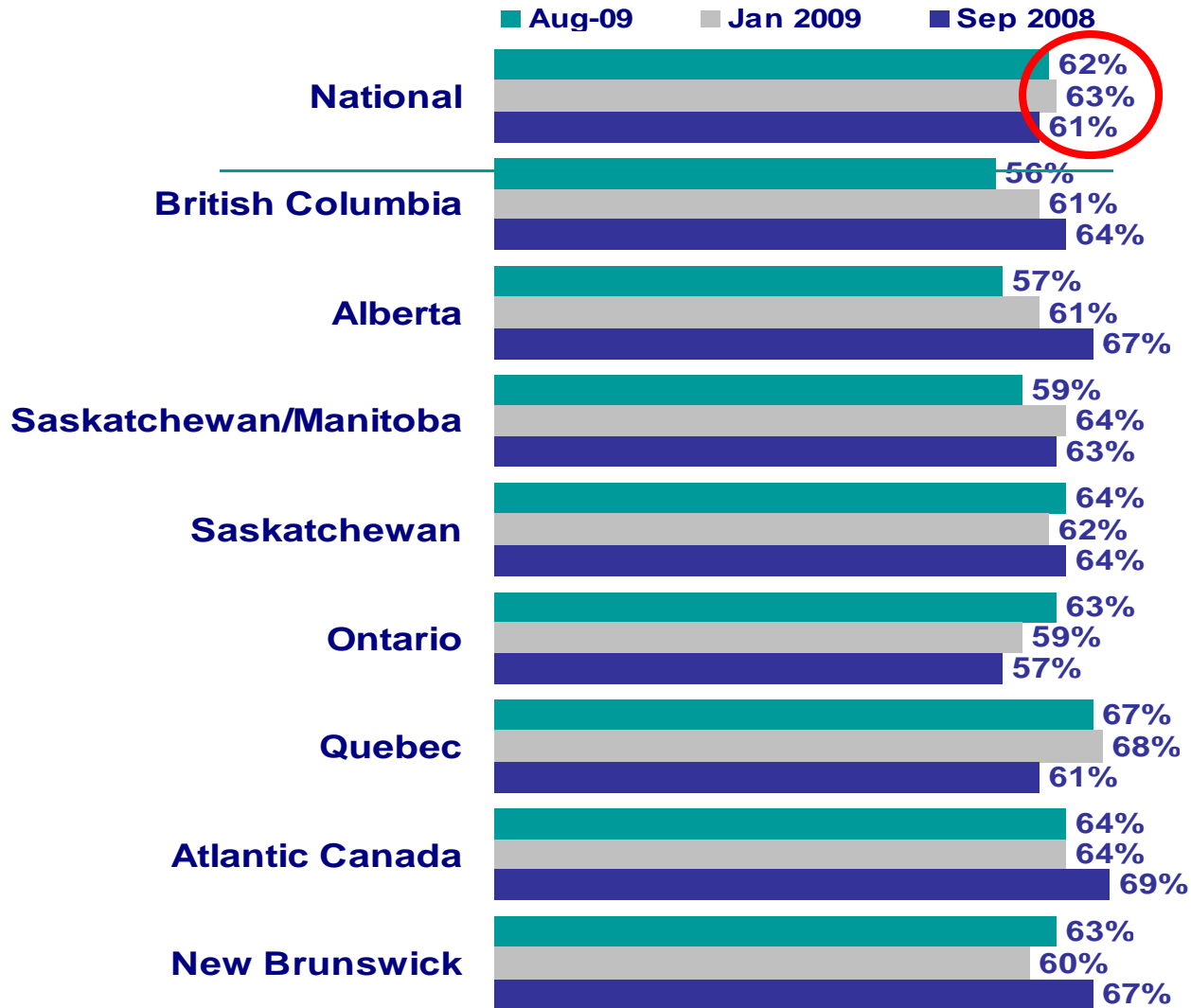
Now, thinking of the issues presently confronting the province of (PROVINCE) and people like yourself, which one do you feel should receive the greatest attention from the provincial government, that is the one thing they should give top priority to? Base: Aug 2009 n=1,156; Jan 2009 N=2200, Sep 2008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



2/3'rds of Canadians—a Majority in Every Province or Region—Don't Believe that Conservation Efforts by Consumers will Offset Electricity Demands...

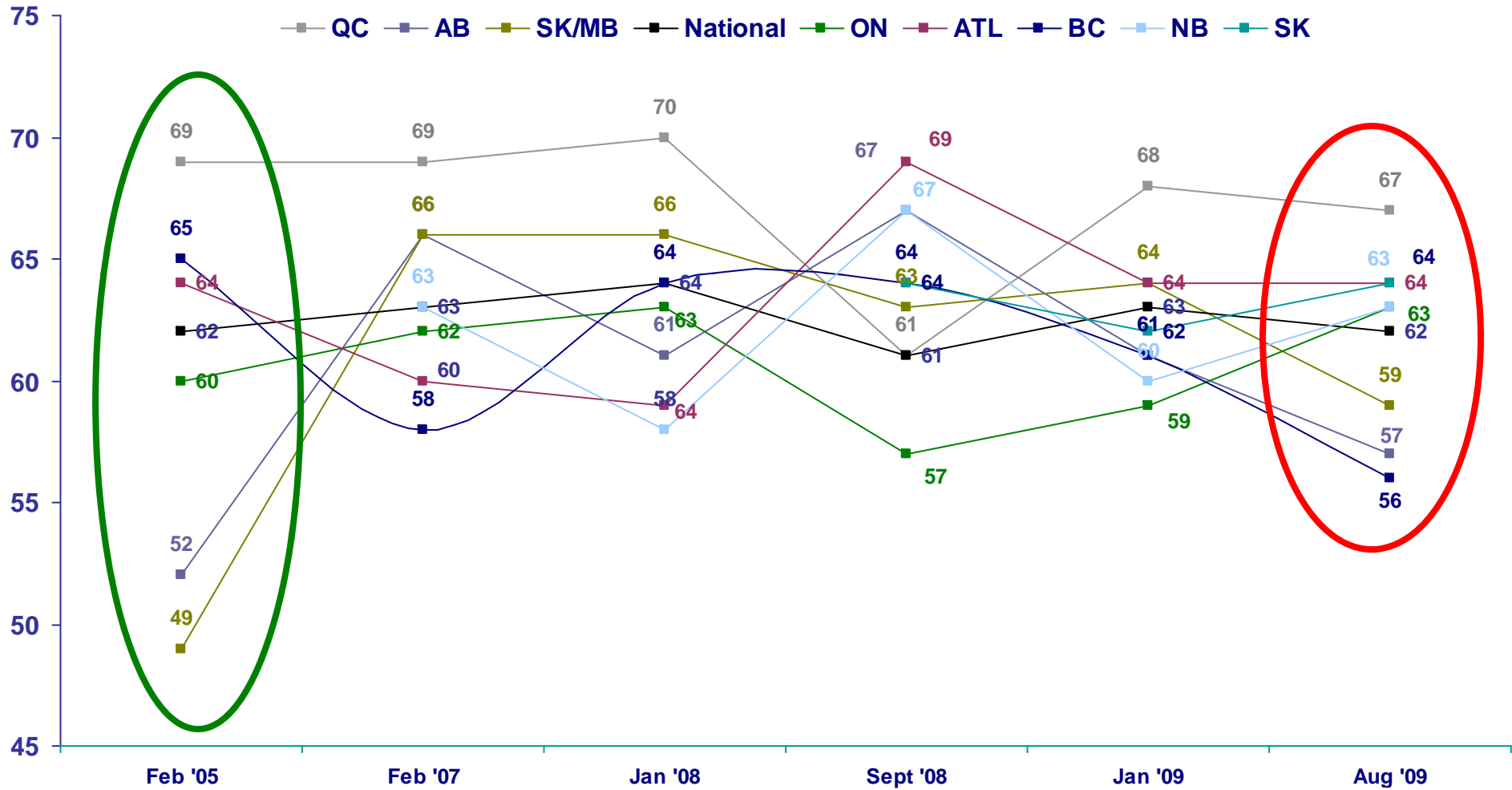


Conservation Efforts Won't Offset Demand

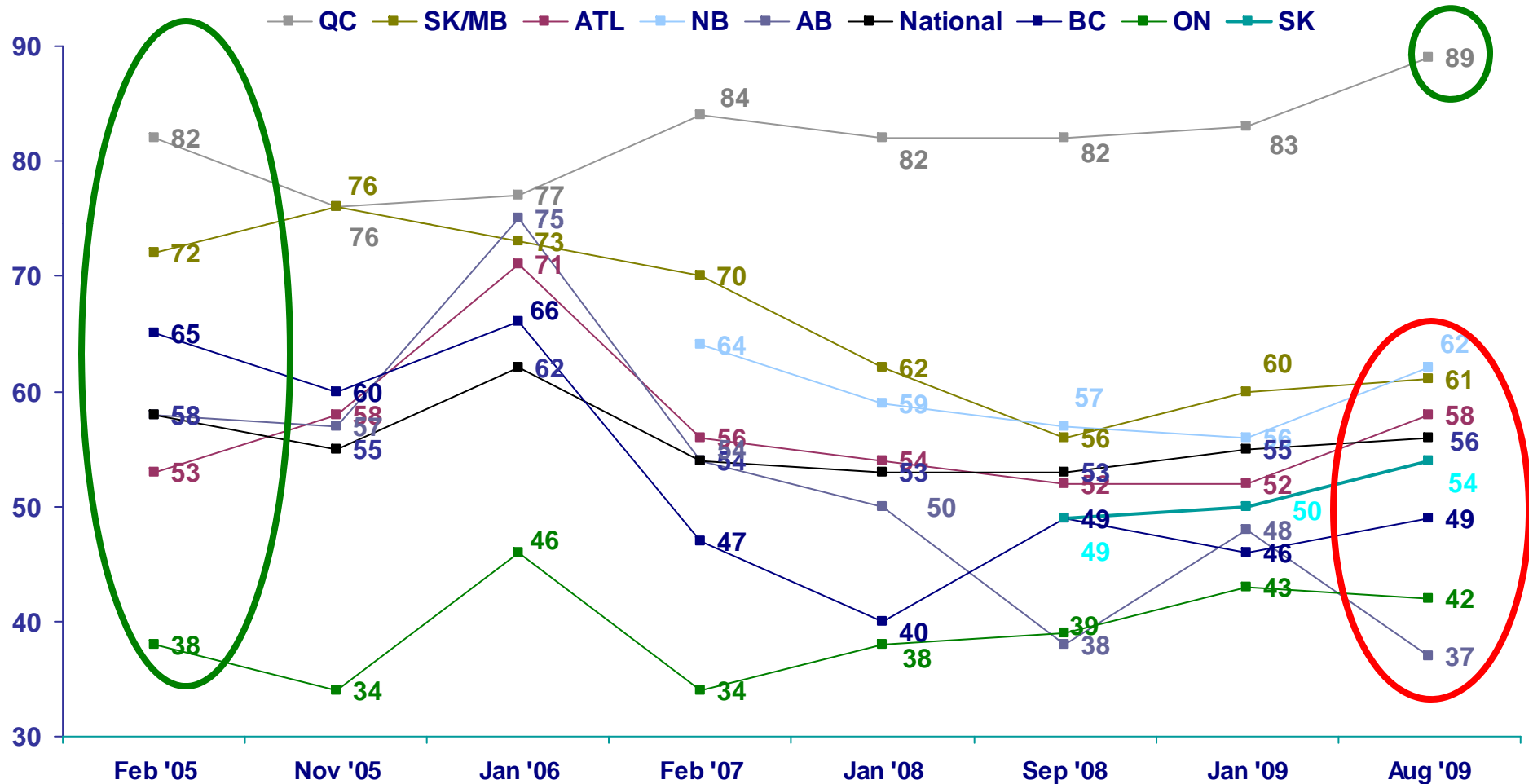


Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that: 1). We have enough electricity in my province to meet our future needs, 2) Conservation efforts by consumers will not offset the growing demand for energy? Base: Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Feb 05 N=1820

Conservation Won't Offset Demand



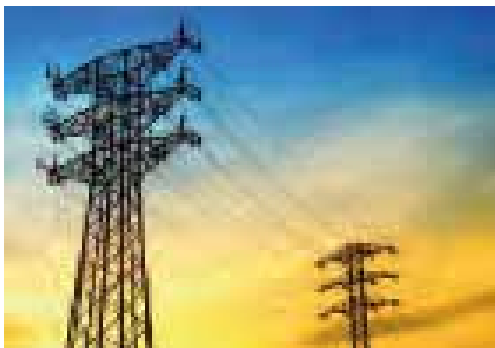
Have Enough Electricity In My Province



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 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



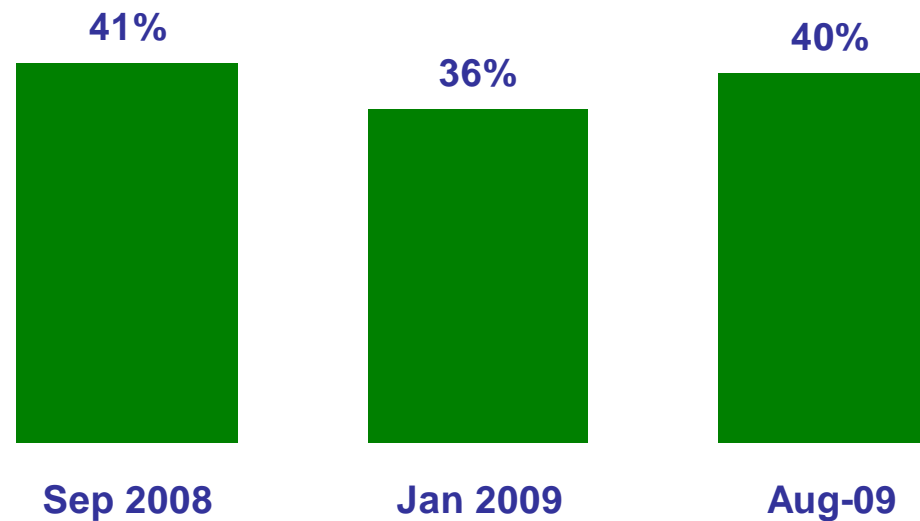
Awareness and Perception of Nuclear...



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Read, Seen or Heard Anything Recently About Nuclear Power

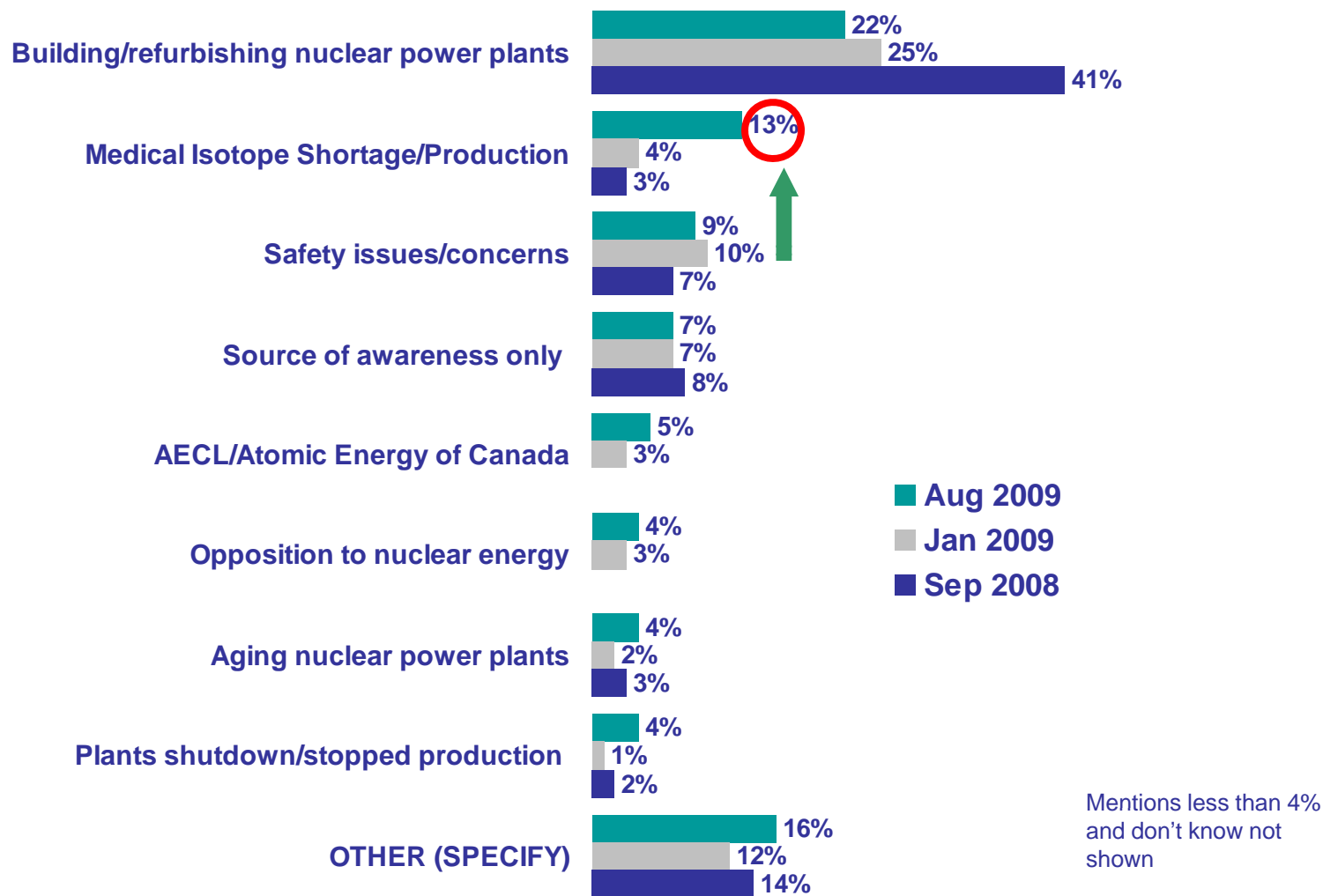




Only 13% Can Specifically Recall Something About Medical Isotopes, Up 9 Points Since January...

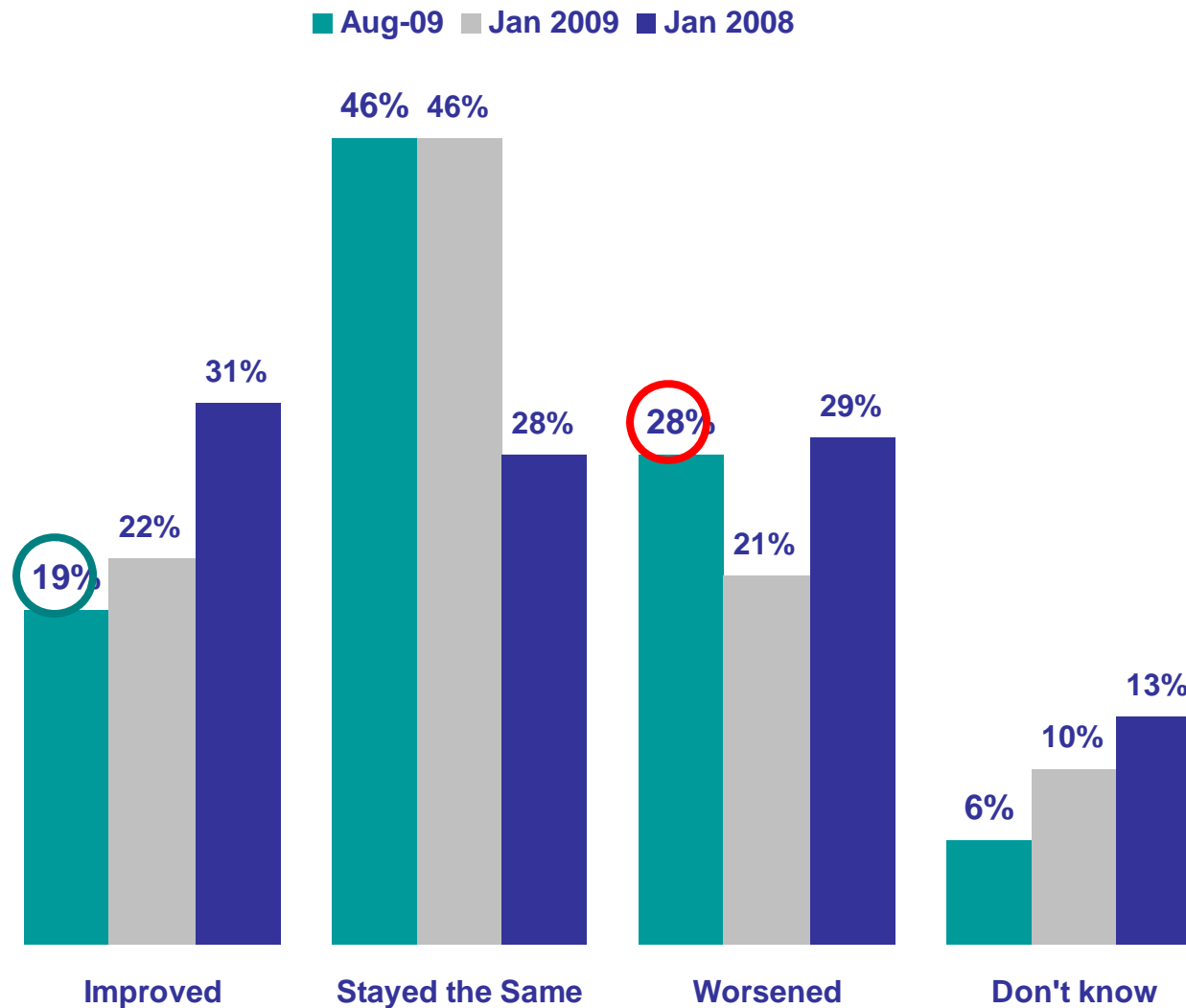


What Has Been Read, Seen or Heard Recently About Nuclear Power



Have you read, seen, or heard anything recently about nuclear power? Base: Aug 09 N=1,156; Jan 2009 N=2200, Sep 2008 N=1285, What have you read, seen or heard recently? Base: Aug 2009 N=529; Jan 2009 N=809, Sep 2008 N=522, Jan 2008 N=1008

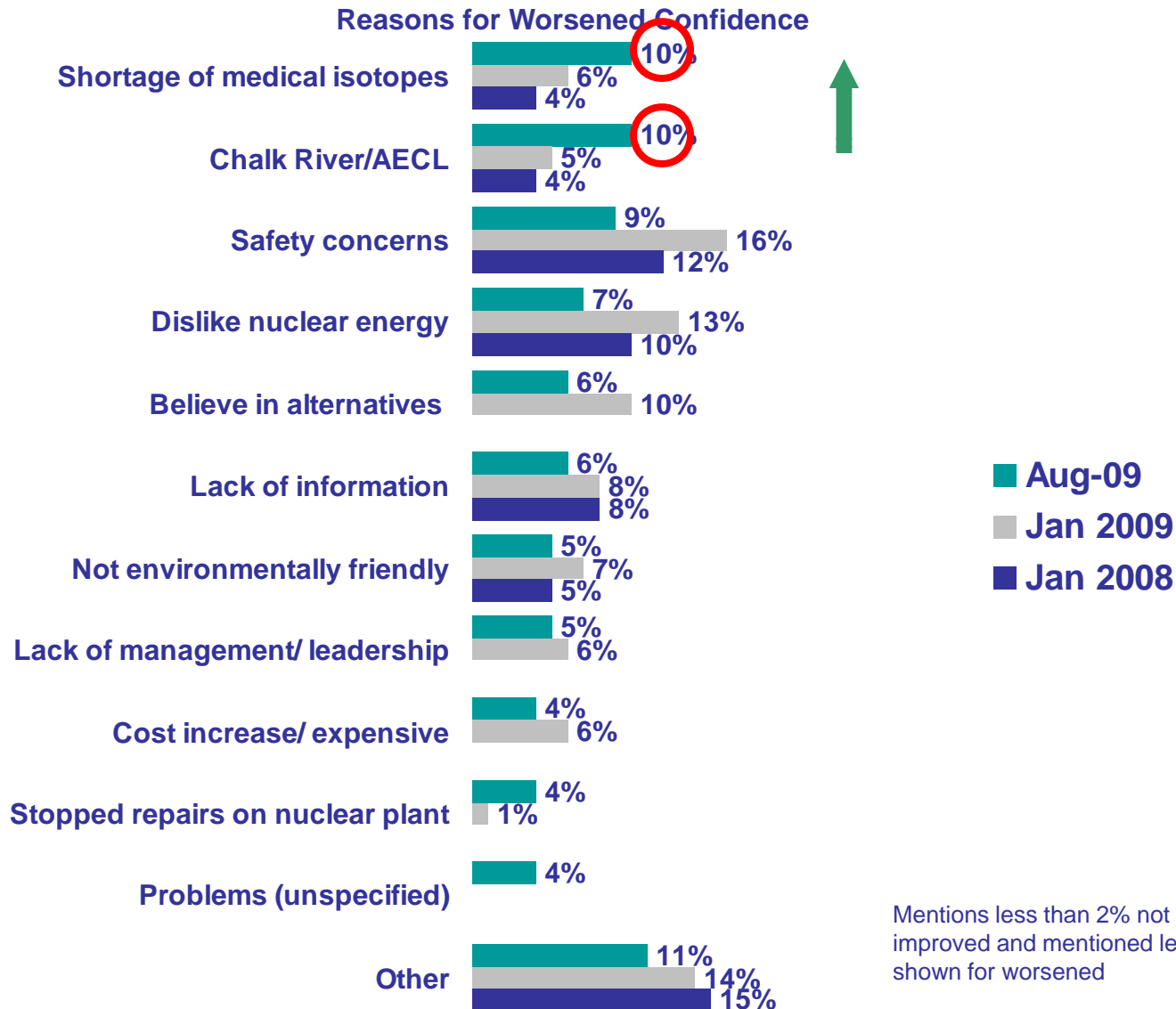
28% Say Their Impression of Nuclear has Worsened, 19% Improved (Gap -9)...



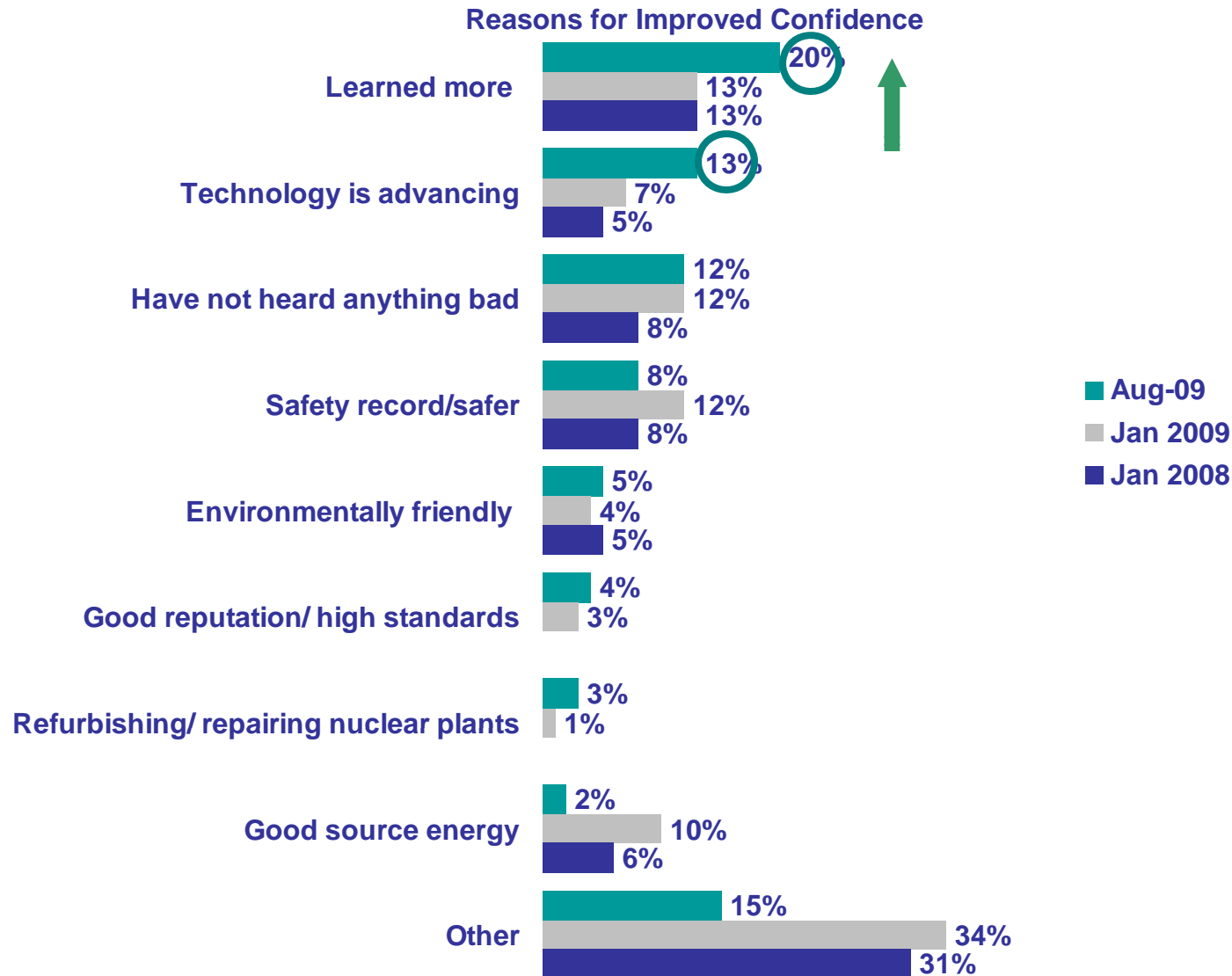
Would you say that your confidence in the Canadian nuclear industry has improved or worsened in the past 12 months? Base: Aug 09 N=1,156; Jan 2009 N=2200, Jan 2008 N=2187



For the 28% “Worse”, Shortage of Isotopes (+4) and Chalk River/AECL (+5)...**TOTAL: 3%**



For the 19% “Improved”, Learning More (+7), Technology Advancing(+6)...



Mentions less than 2% not shown



Nuclear Support Tracking...

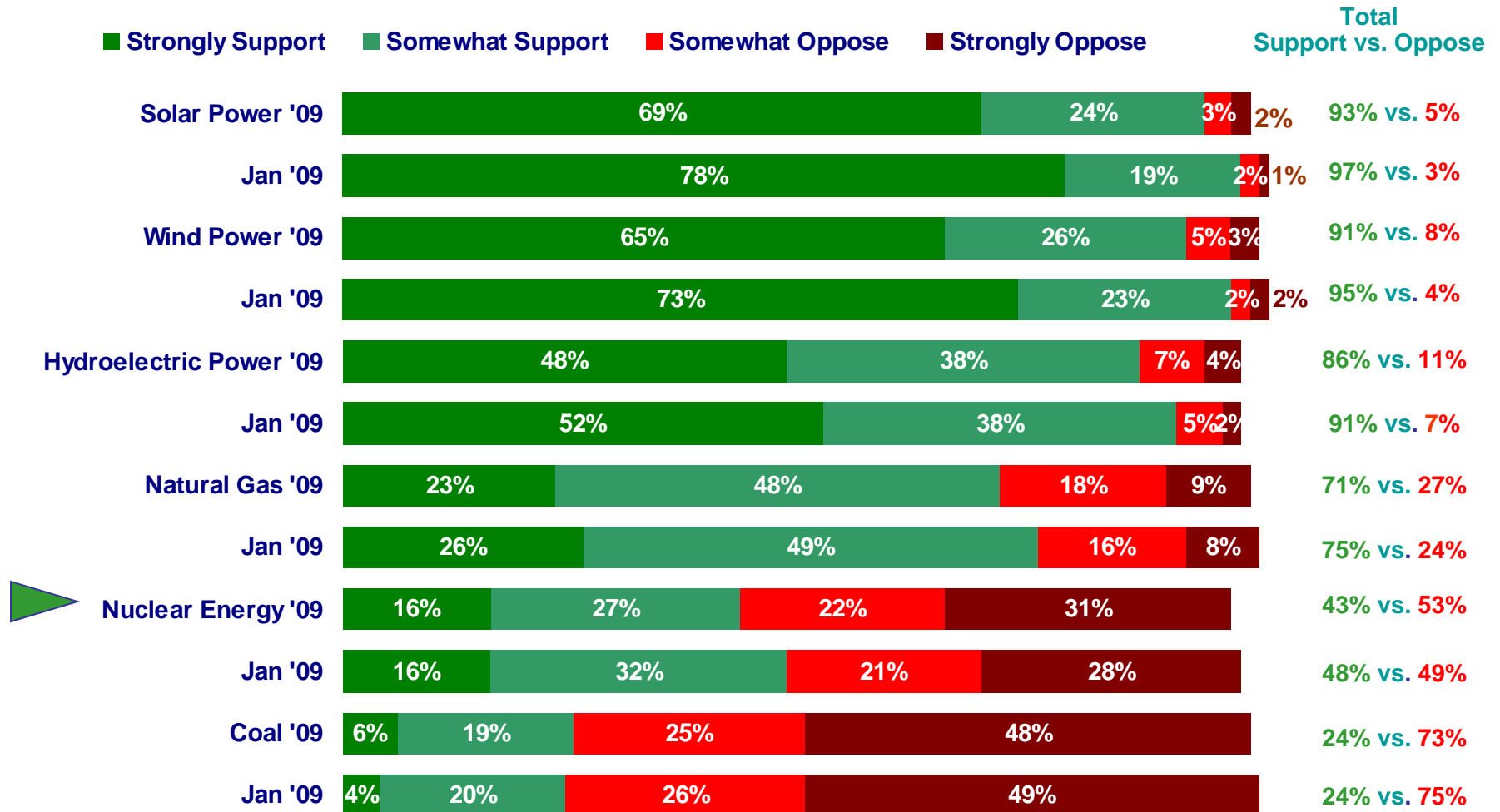


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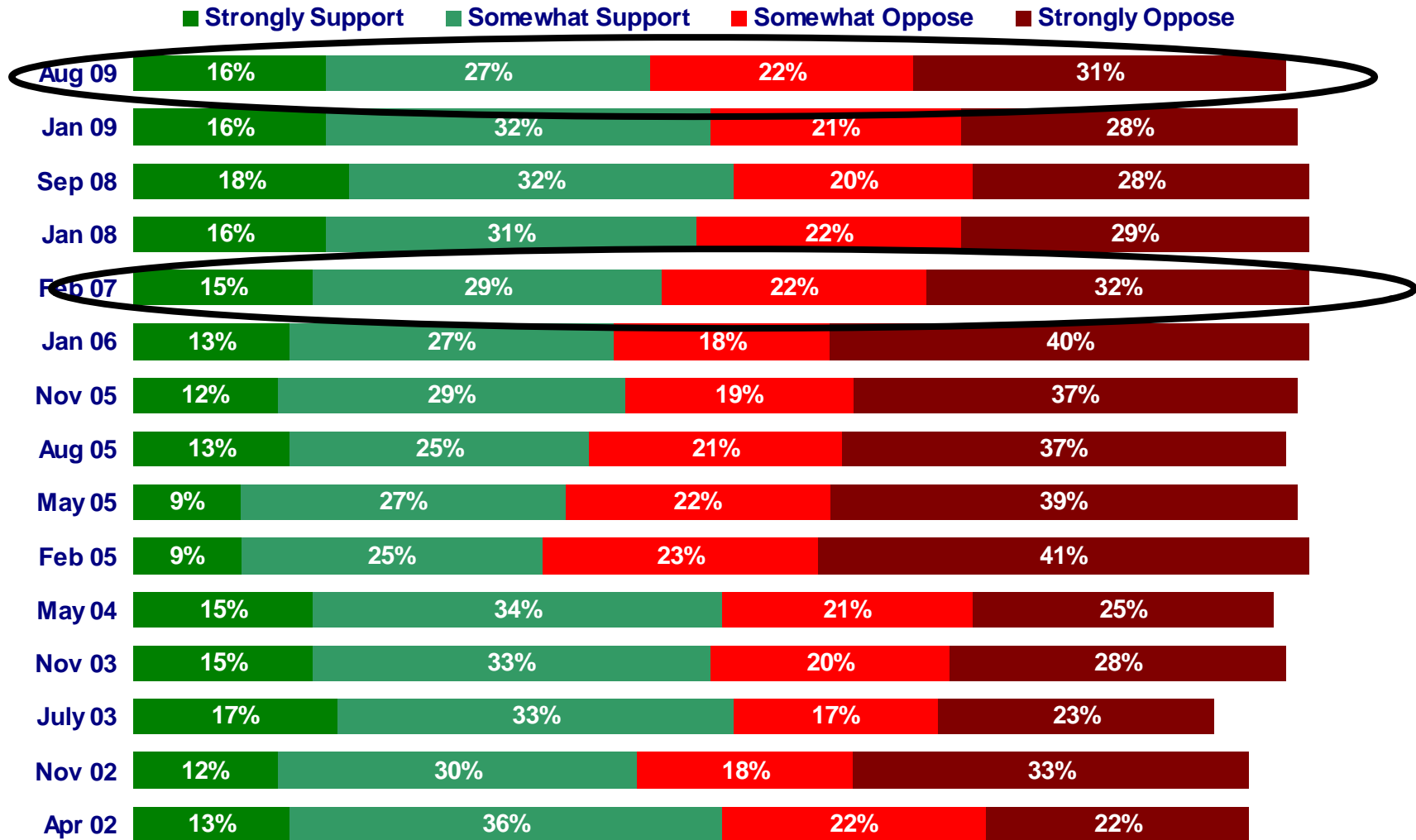


National Support for Nuclear Energy Down 5 Points Since Jan '09--Other Energy Sources Too...

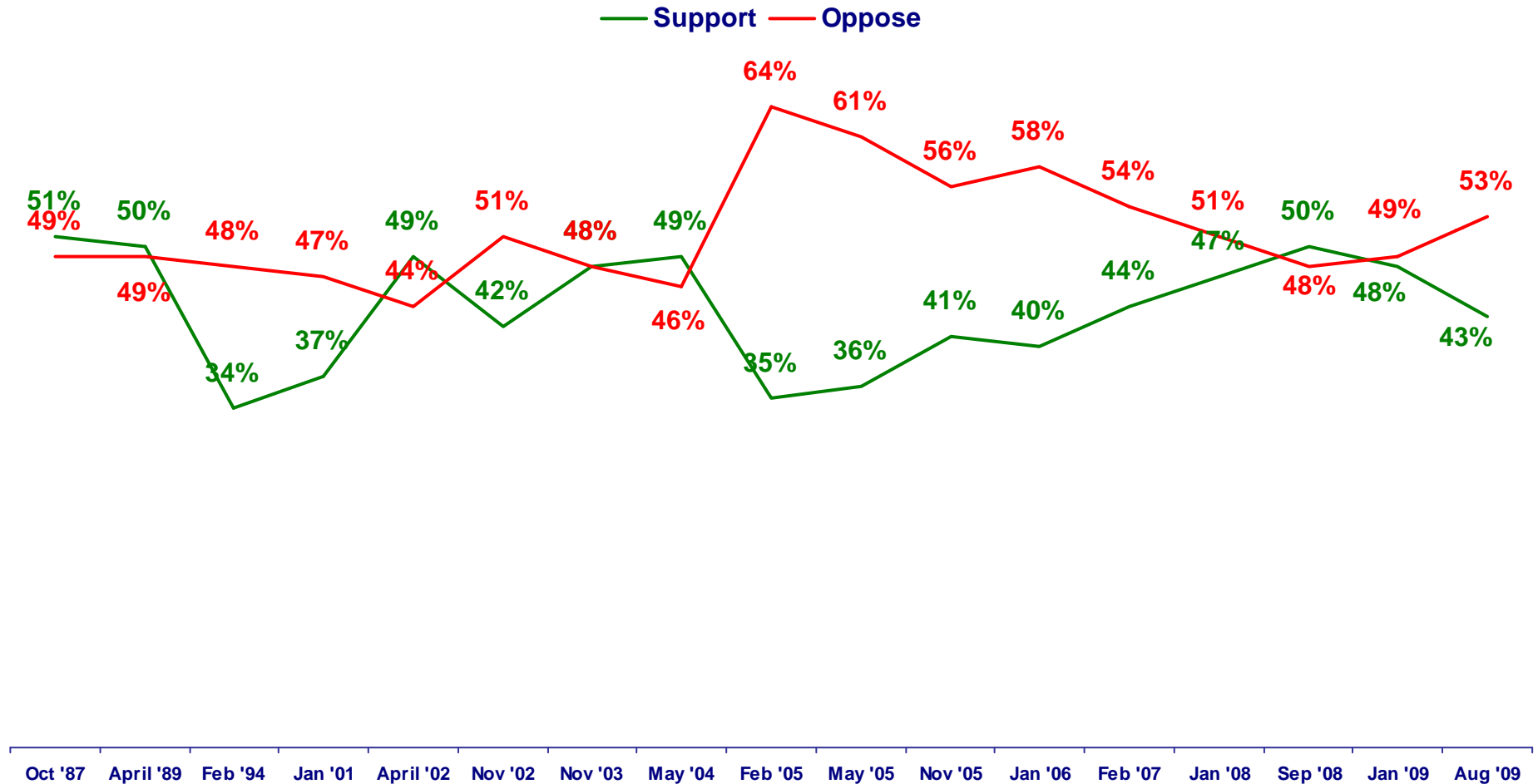


I am now going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. How about . . . Base: Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123

Nuclear Support Over Time: Back to 2007... With the Worst of 2005 Well Behind...



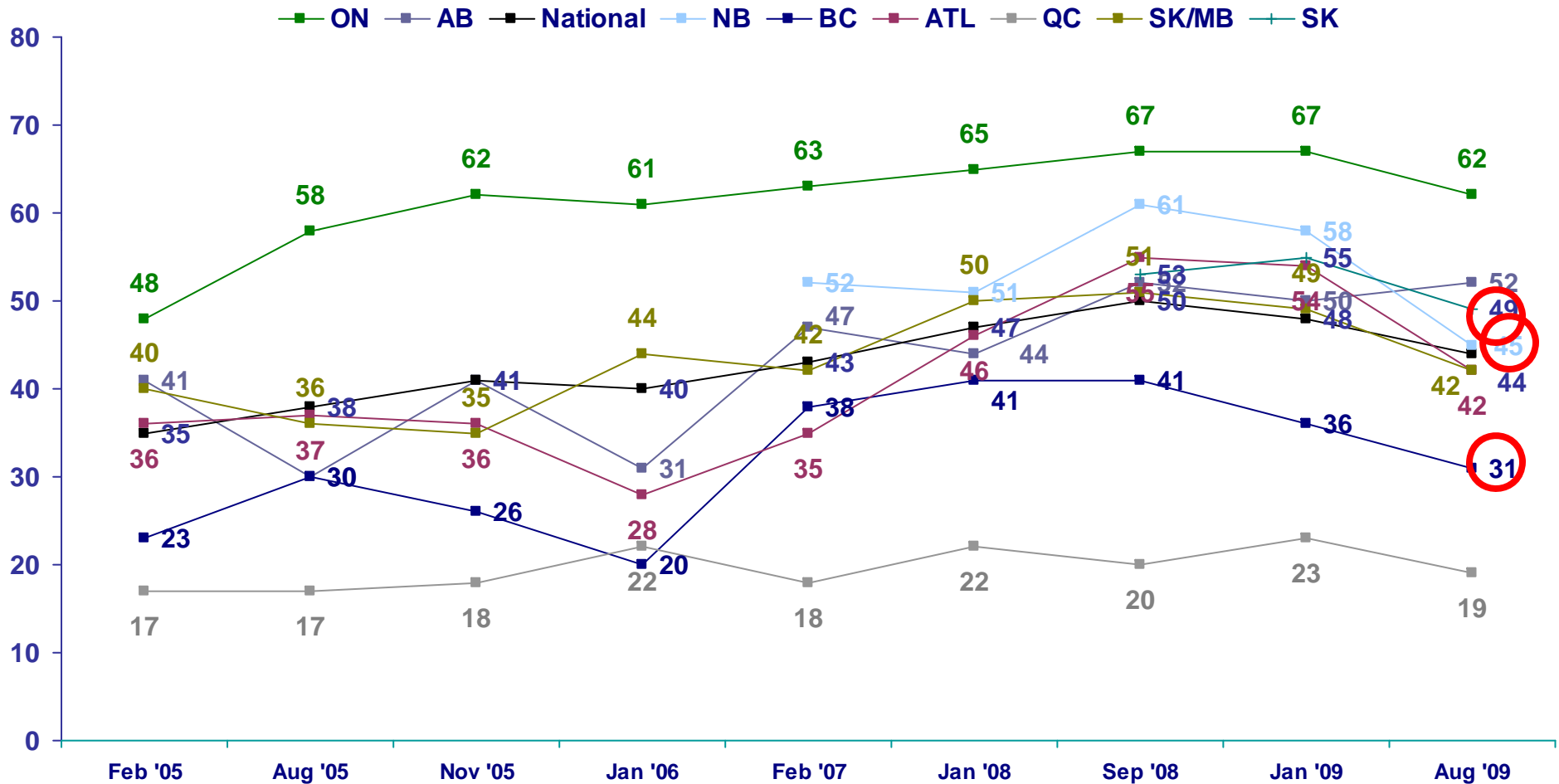
I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: Aug 09 N=1,156; Jan 09 N=2200, Sep 08 N=1285, Jan 08 N=2187, Feb 07 N=2123, Jan 06 N=1000,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



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=2,200, Sep 08 N=1,285, Jan 08 N=2,187, Feb 07 N=2,123, Jan 06 N=1,000, Nov 05 N=1,000



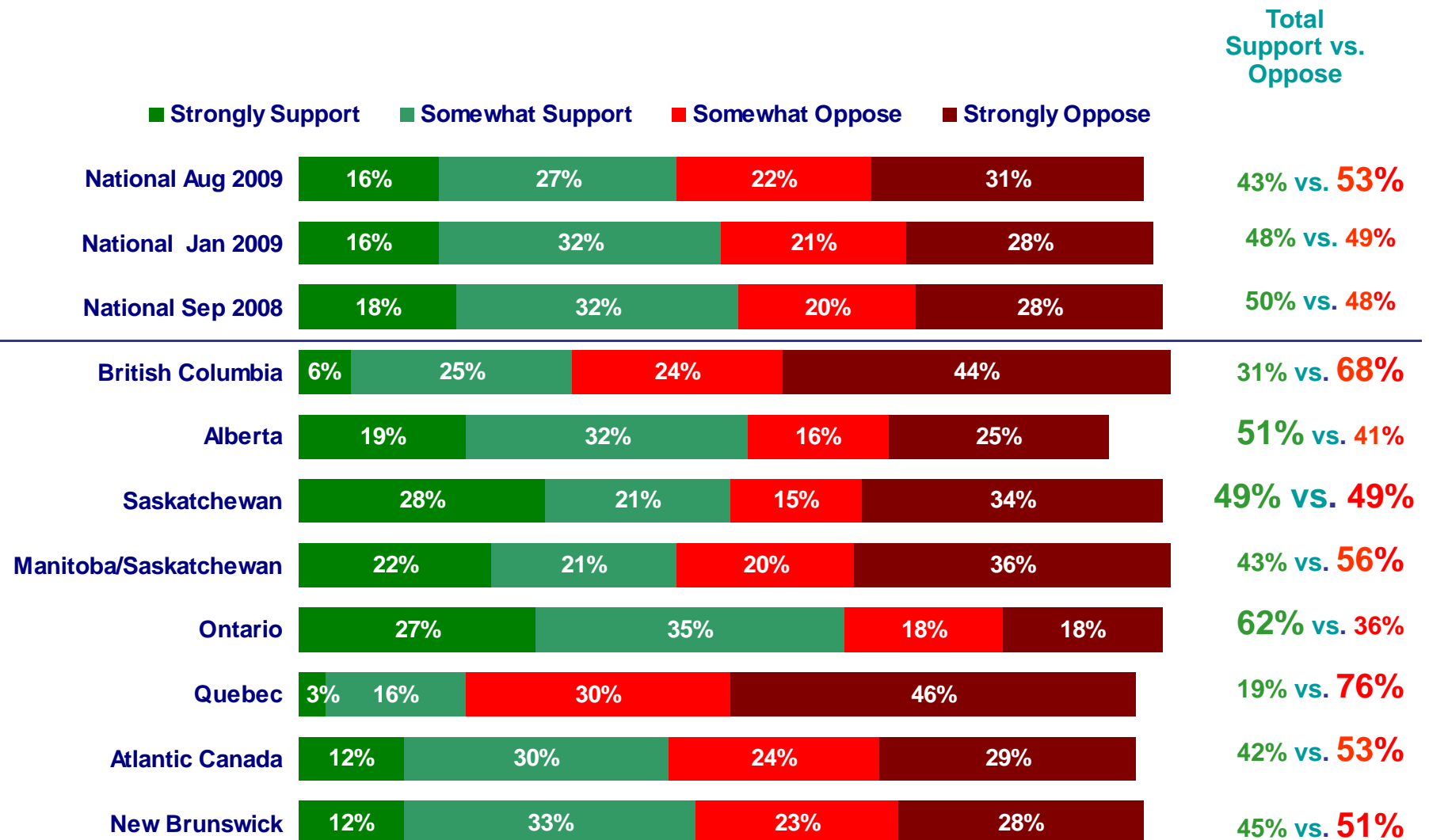
Attributable to New Brunswick (-13), BC (-5) and Saskatchewan (-6)...



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



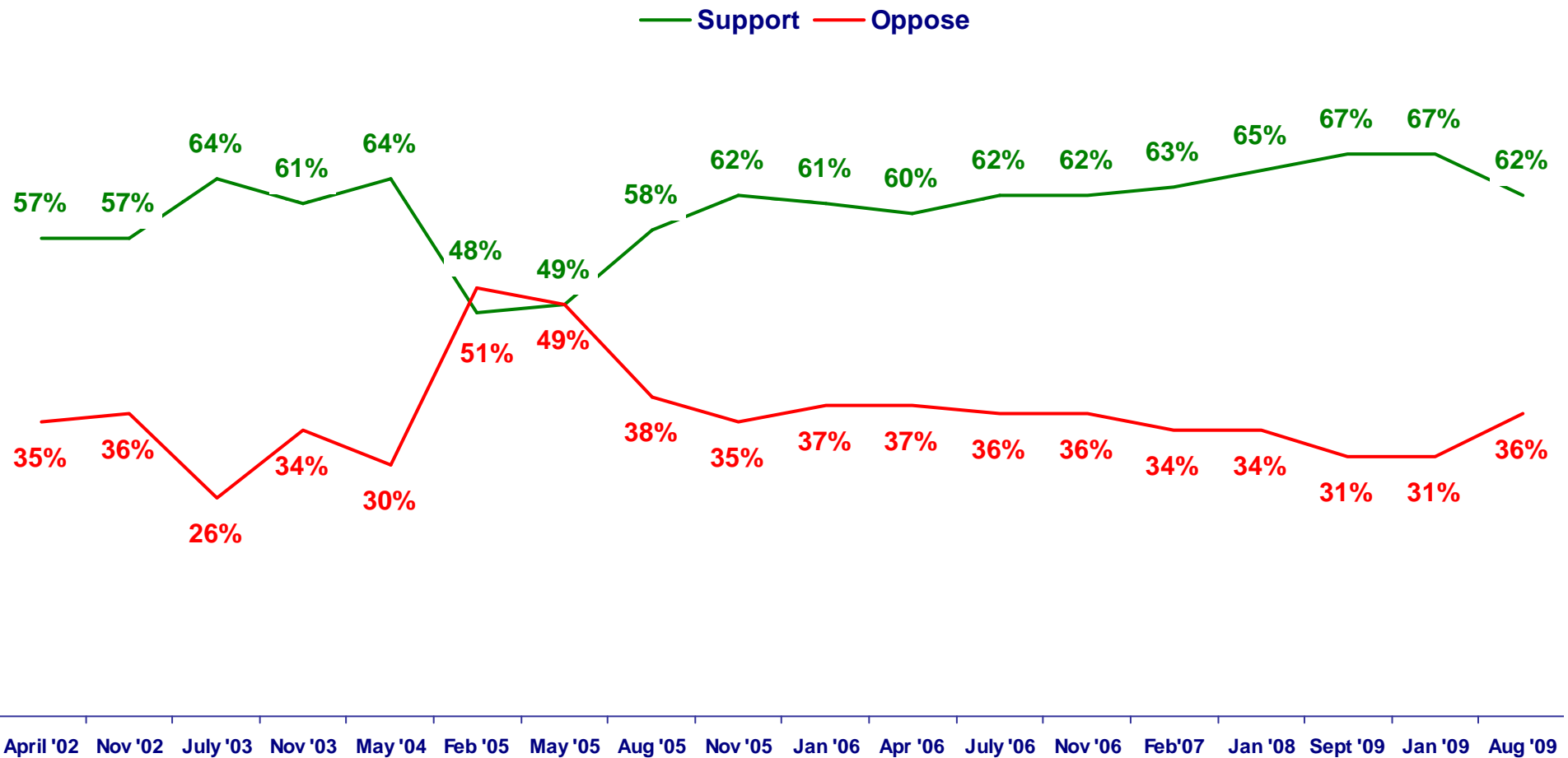
Provincial/Regional Levels of Nuclear Support & Opposition:



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



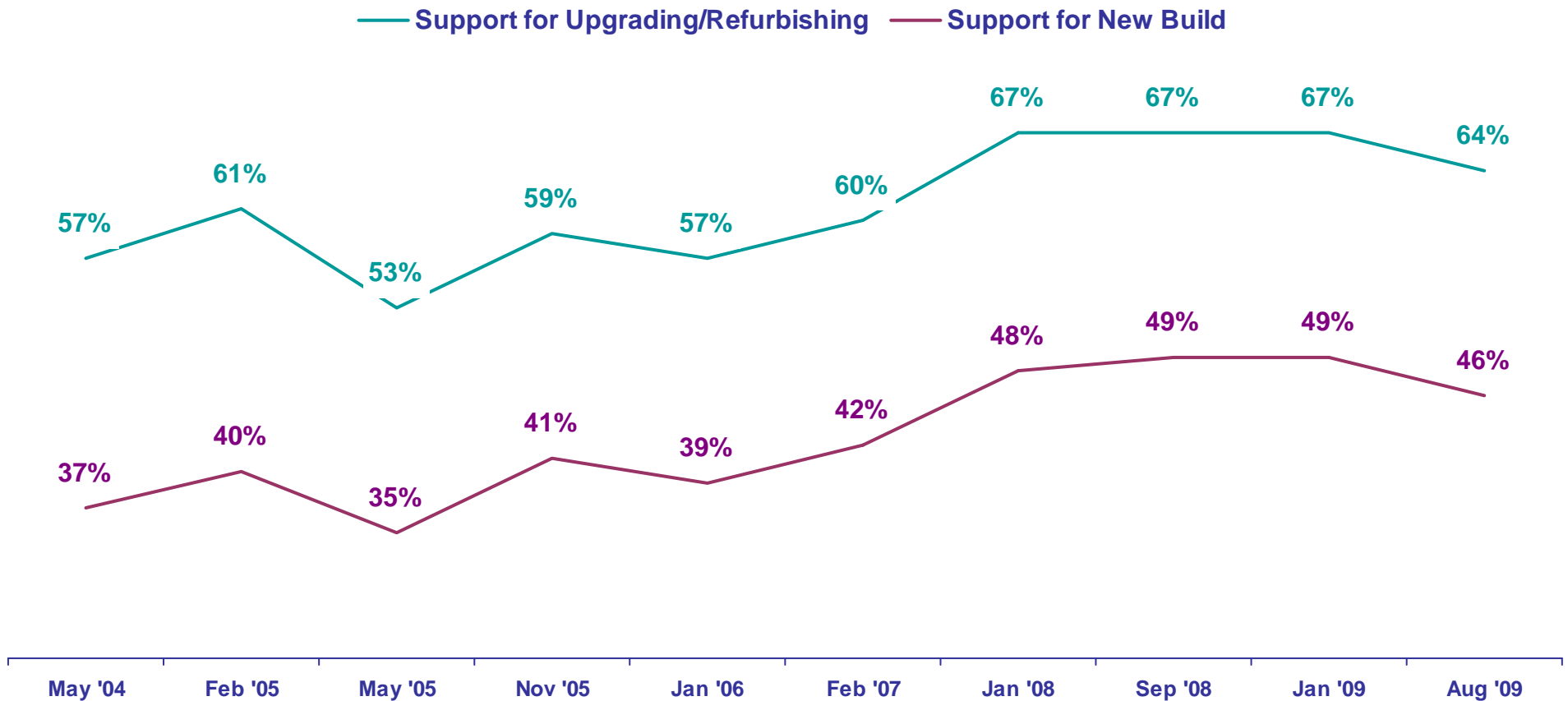
In Ontario, Support For Nuclear Energy is 62%, Down to Fall of 2005 Levels...



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: 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



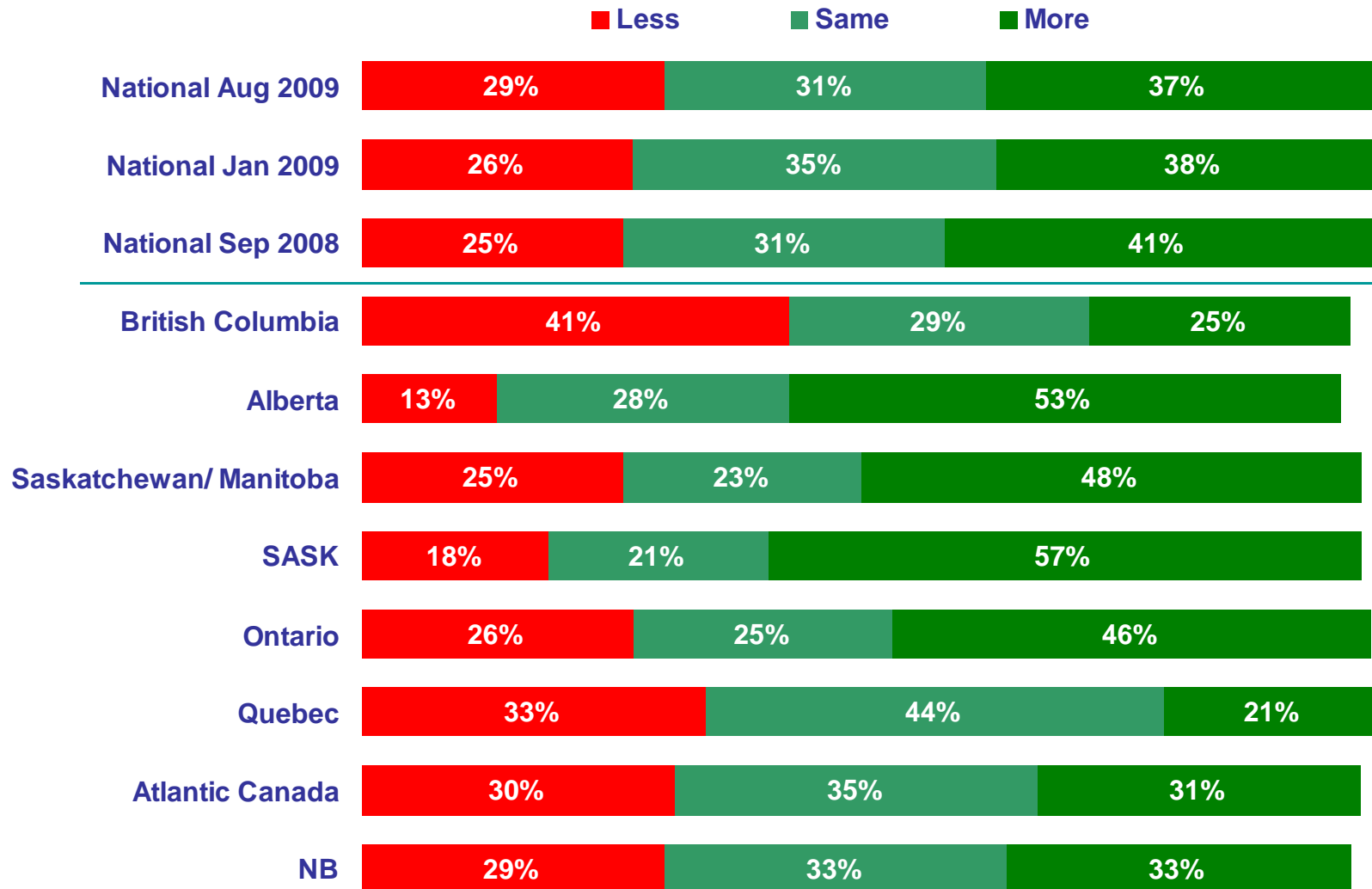
Nationally, Support for Refurbishing & New Build is Down Slightly...



Many large power-generating plants in Canada with various fuel sources will have to be replaced over the next 10 to 15 years because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Canada's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...Base: Aug '04 N=1,156; Jan '09 N=2200, Sep '08 N=1285, Jan '08 N=2187, Feb '07 N=2123, Jan '05 N=1000, Nov '05 N=1000



7 in 10 (68%) Nationally (Majorities Everywhere) Want More Nuclear in Future Energy Mix...



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: Aug 09 N=1,156; Jan 2009 N=2200, Sep 2008 N=1285, Jan 2008 N=2123



Ontario & Saskatchewan...

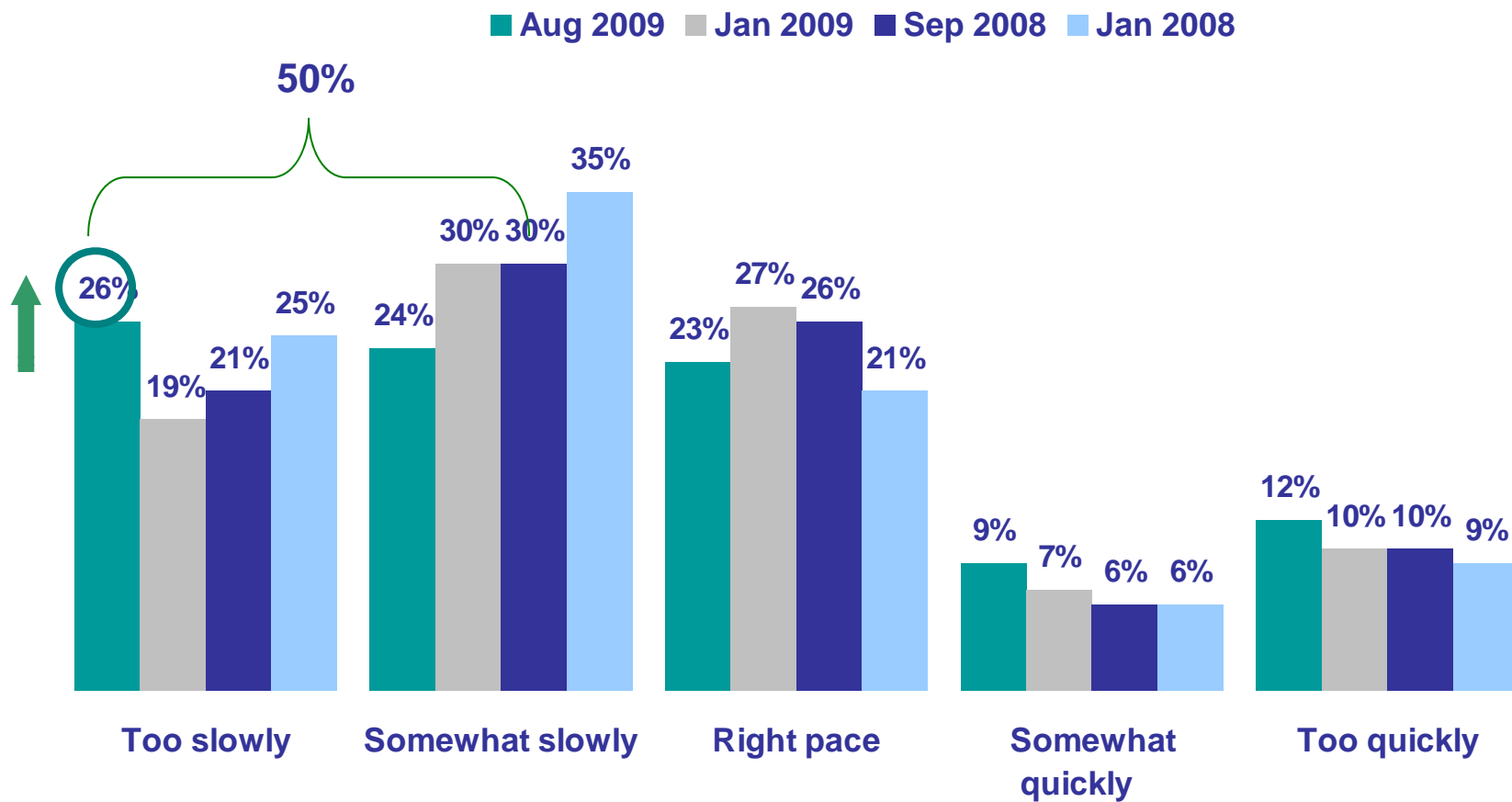


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In Ontario, More Say Government Moving Too Slowly Building New Nuclear Power (+7)...



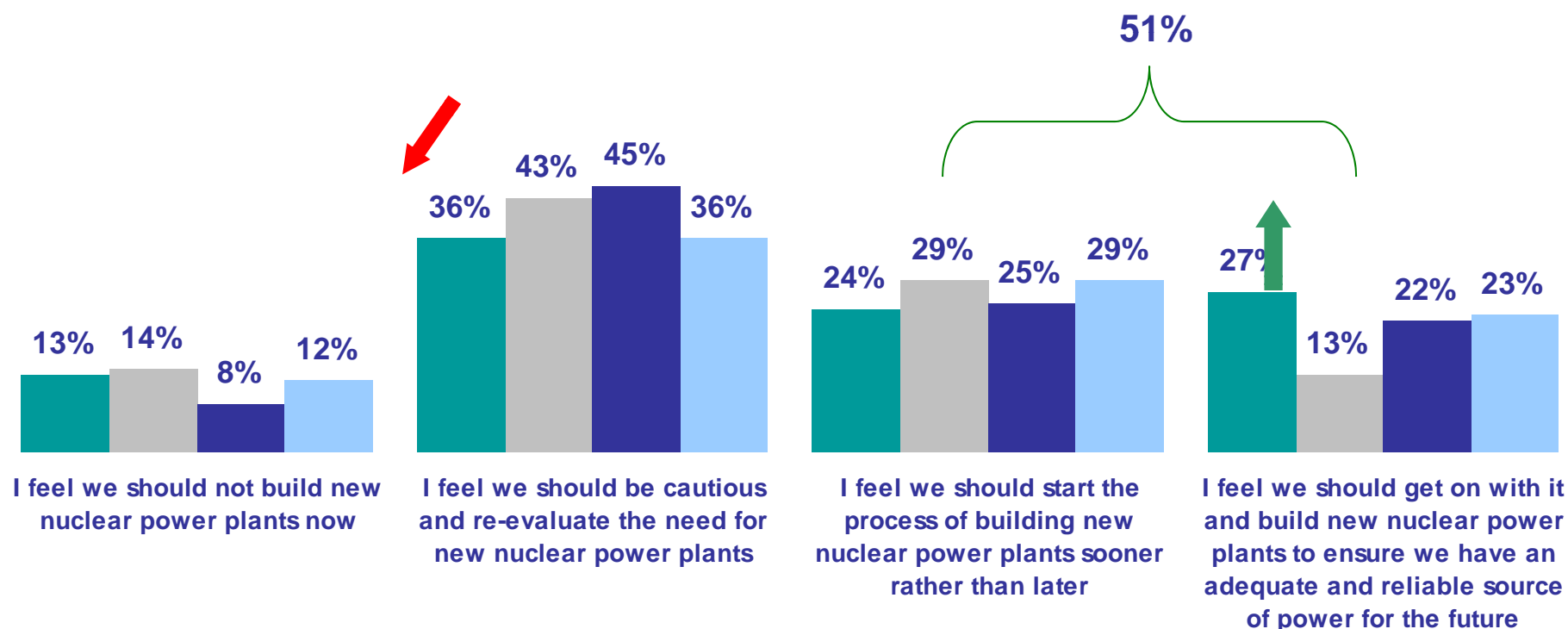
As you may know, the government of Ontario has approved the replacement and refurbishment of existing nuclear power plants. Based on what you have read, seen, or heard do you feel the government is moving too slowly, somewhat slowly, at the right pace, somewhat quickly, or too quickly in building new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



Half (51%) Say Ontario Should “Get On With It” (27%), Build “Sooner Rather than Later” (24%)... (27%), Build “Sooner Rather than Later” (24%)...



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

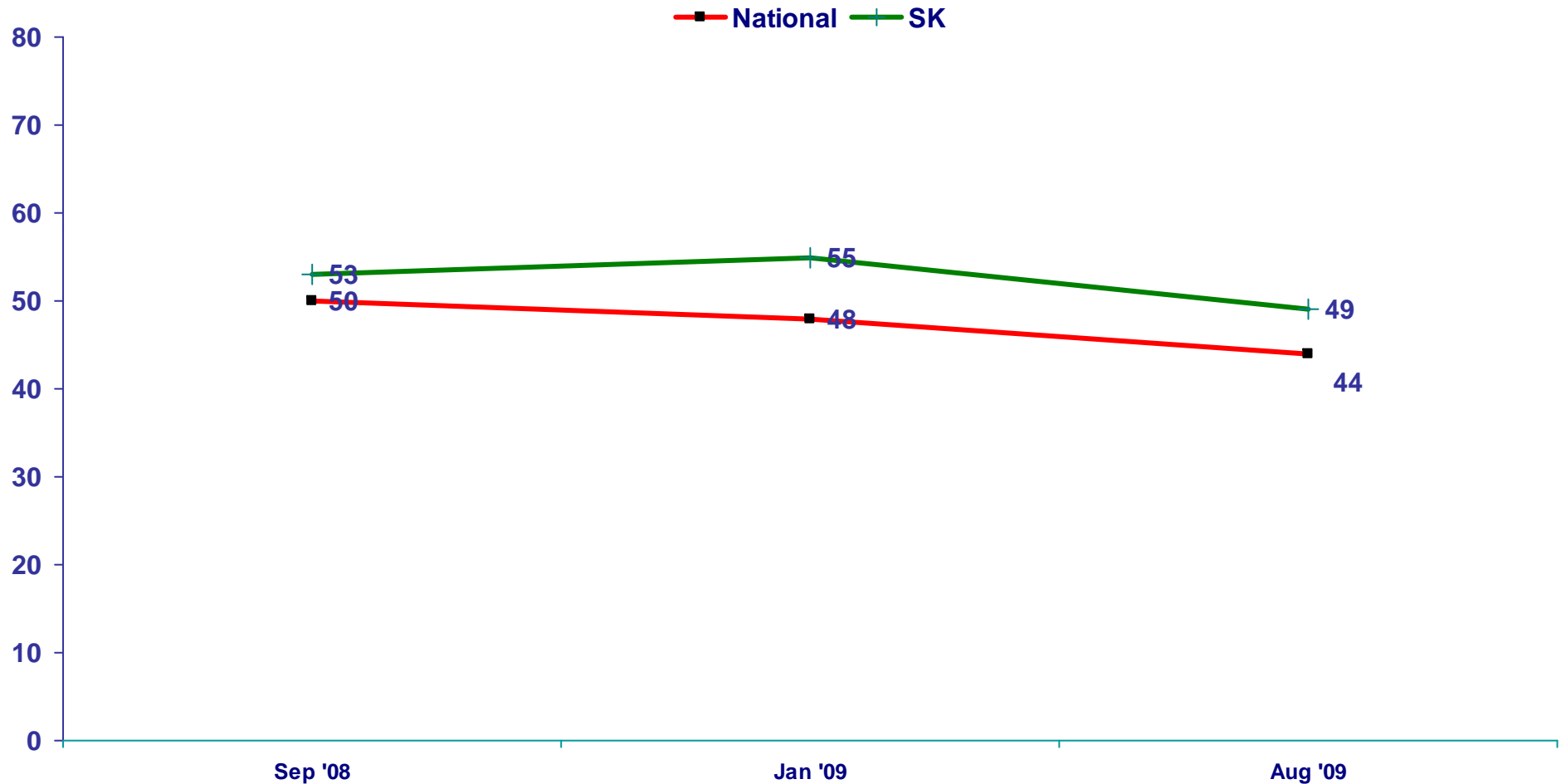


Please tell me which of the following statements are closer to your view. Please select only one. Base: Jan 2009 N=760, Sep 2008 N=492, Jan 2008 N=752
 Why would you say we should be cautious and re-evaluate the need for new nuclear power plants? Base: All who feel we should be cautious and re-evaluate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



Support in Saskatchewan for Nuclear Power

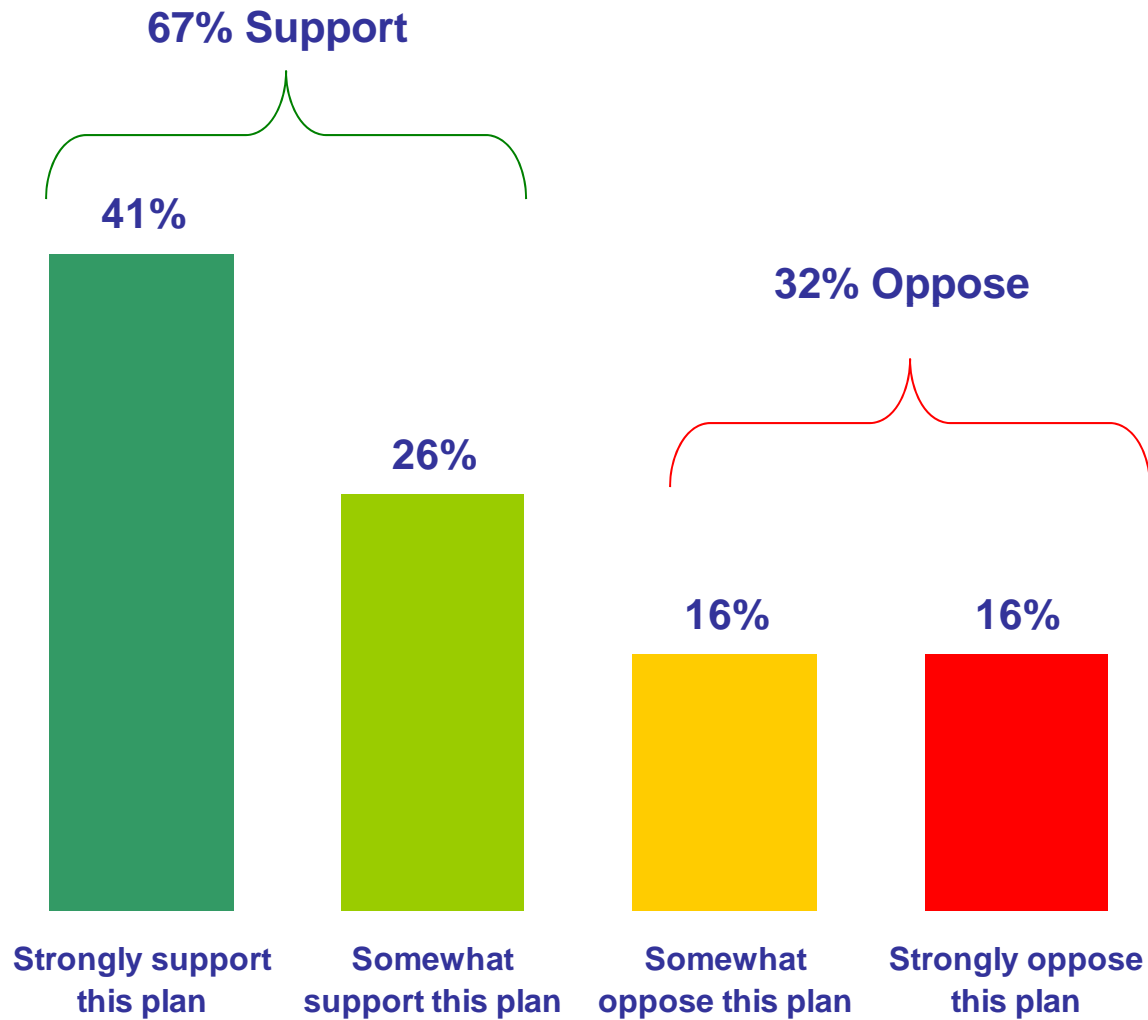
Relatively Stable: Sept.'08, Jan.'09, Aug.'09...



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



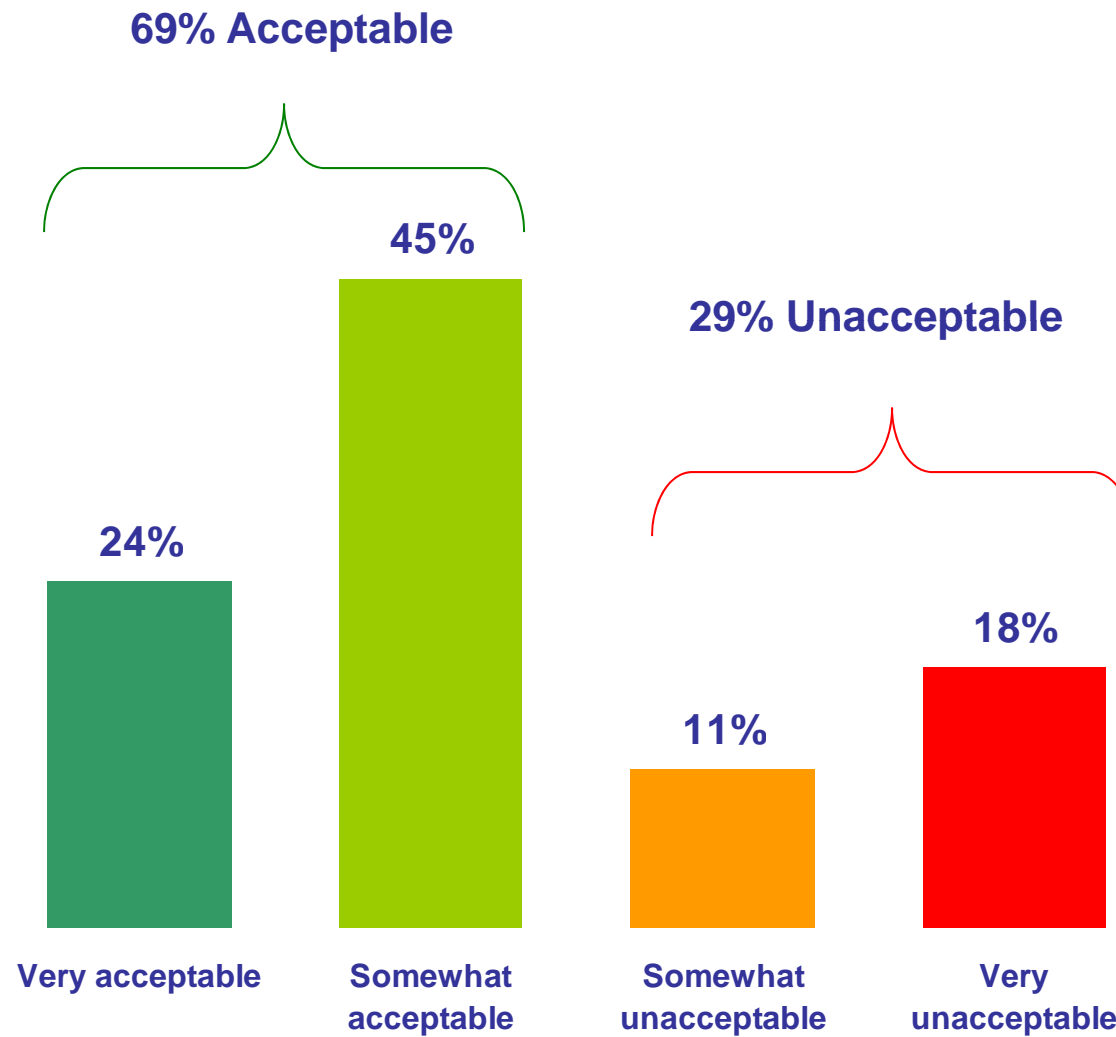
In Saskatchewan, Support for Building Isotope Facility is Very Strong...



As you may know, the government of Saskatchewan has proposed to build a new nuclear facility in the province that would produce both medical isotopes and also conduct nuclear research. Do you...Base: All Saskatchewan Respondents n=105



69% in Saskatchewan Accepting to Become Leader in Storage & Disposal of Nuclear Waste...



Some people say that if Saskatchewan invests more in nuclear technology such as isotope production and uranium production, the province should also become a leader in the disposal and storage of nuclear waste. Do you believe this is...Base: All Saskatchewan Respondents n=105



Comparing Public Opinion On Nuclear Power in Canada and the U.S. ...

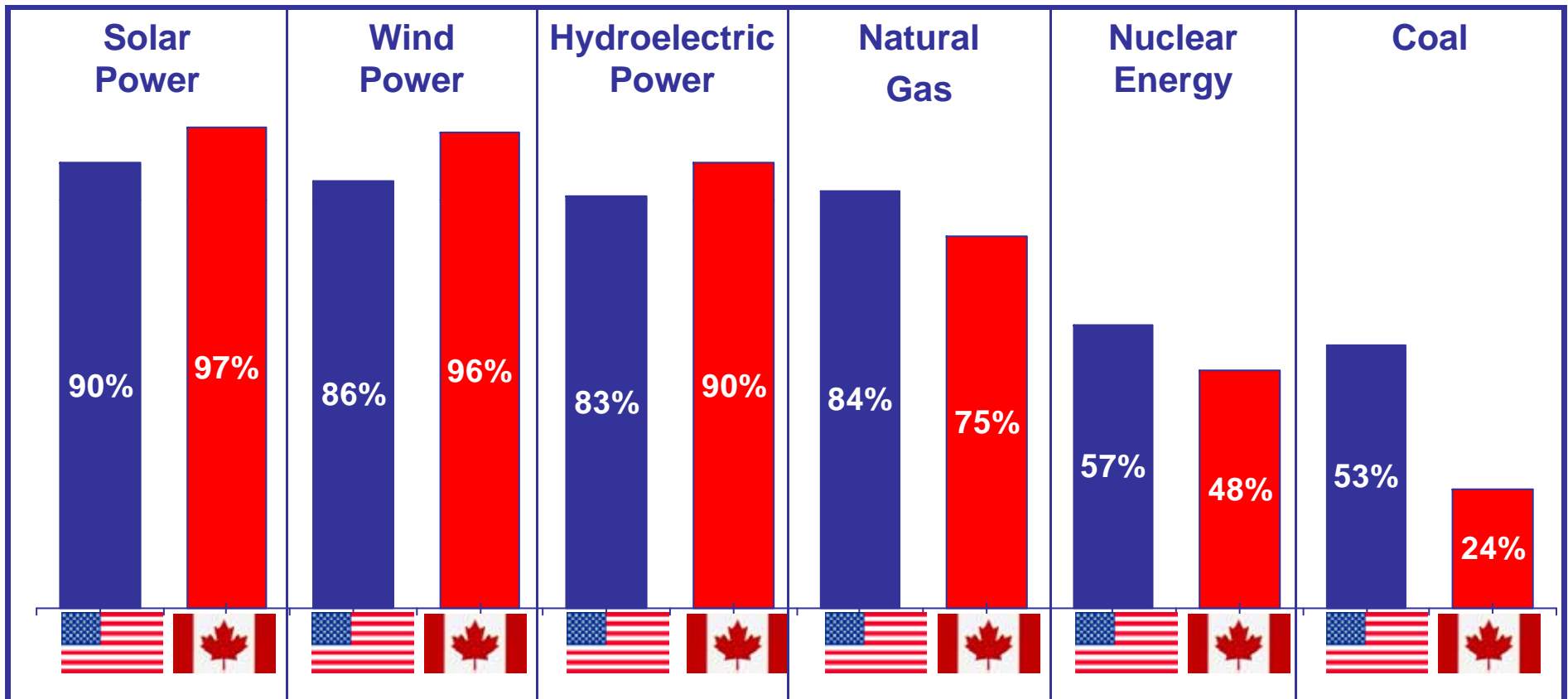


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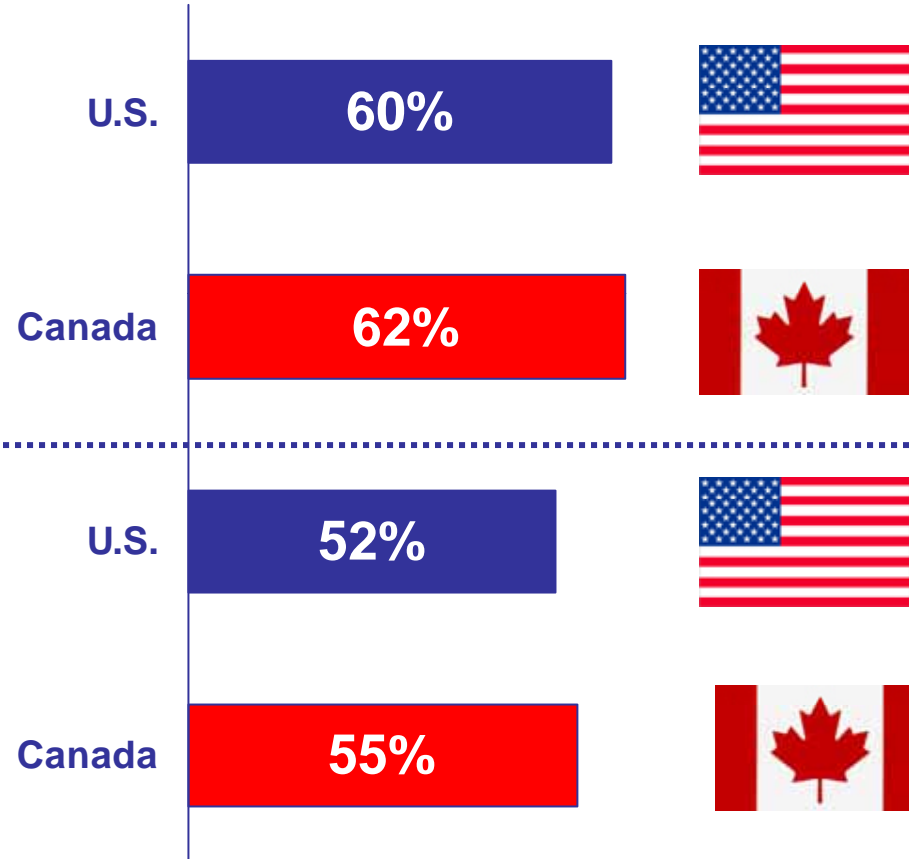


Energy Sources: Similar Levels of Support Except Where Coal is Concerned...



1. 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... [RANDOMIZE] [INSERT ITEM] [IF NECESSARY: Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose this way of producing electricity.]

Conservation efforts by consumers will not offset the growing demand for energy



We have enough electricity in my province/state to meet our future needs

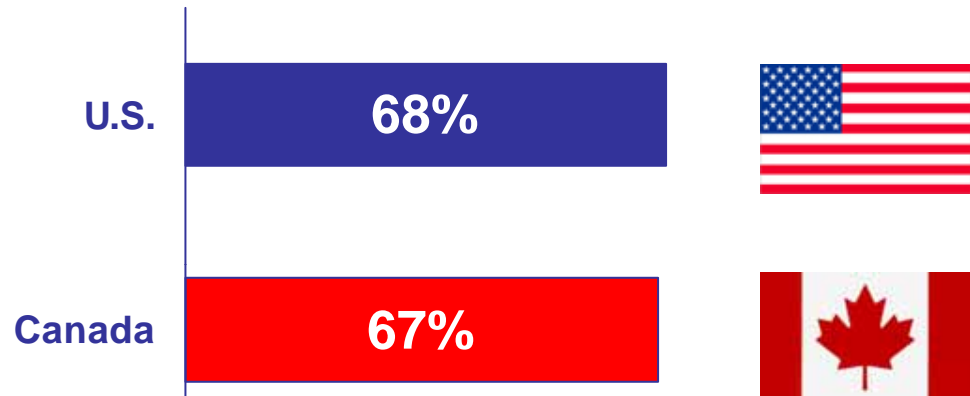
2. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that...? [RANDOMIZE]
- We have enough electricity in my state to meet our future needs
 - Conservation efforts by consumers will not offset the growing demand for energy



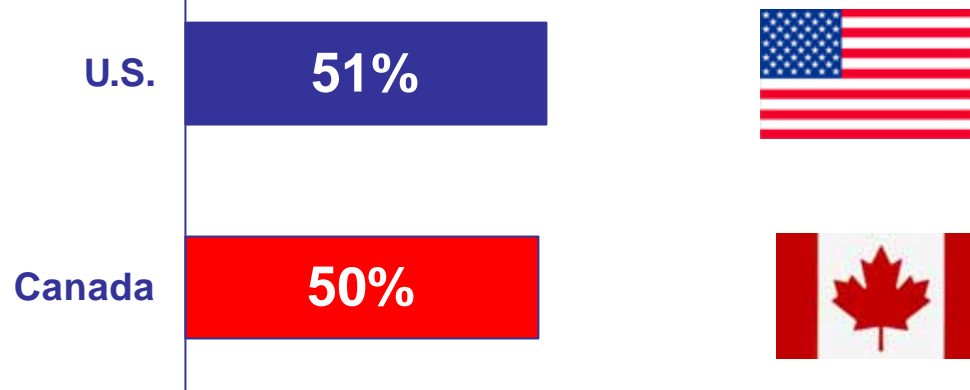
Support for Either Refurbishing or New Build in Both Countries is Virtually Identical...



Upgrading and refurbishing existing nuclear power plants



Building new nuclear power plants



4. In order to help meet America's future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose [ROTATE OPTIONS] And how about...
- Upgrading and refurbishing existing nuclear power plants
 - Building new nuclear power plants



United States



Canada



5. I am now going to read you a number of statements about nuclear energy and I'd like you to tell me whether or not you agree with each. Would you say that you strongly agree, somewhat agree, somewhat disagree, or strongly disagree? [RANDOMIZE] And what about...



United States



57%



57%



52%



48%

More nuclear energy can result in lower energy prices for consumers

Renewable sources of energy: hydroelectric, wind and solar sources of energy, cannot on their own meet the rising demand for energy

Nuclear energy is environmentally clean

I am confident that although there is currently no long-term disposal method for nuclear waste, the industry is appropriately managing and containing it



Canada



51%



49%



48%



52%

5. I am now going to read you a number of statements about nuclear energy and I'd like you to tell me whether or not you agree with each. Would you say that you strongly agree, somewhat agree, somewhat disagree, or strongly disagree? [RANDOMIZE] And what about...



Closing Remarks...



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- Energy as a provincial issue of importance has **fallen off the radar** for most as the economy has taken precedence...
- Support for nuclear energy has **weakened** somewhat across the country since January 2009 and is now **back to levels seen in 2007...**
- Support in Ontario and Saskatchewan still strong...
- **Scant** absorption of Isotope fallout...

- Most **don't believe conservation will offset demand**, or that province/region will have enough electricity...and that Nuclear is an important component to the **future energy mix...**
- Cost related issues **dampen support...**availability/reliability, environment and safety **increase support...**
- **Remarkable similarity** between Canada and US (& UK)...
- **Women have leverage...*Everywhere...***



For more information about the study,
please contact one of our project team members:

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martin.hrobsky@ipsos-reid.com



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