

Bruce, Huron, & Grey Counties Public Opinion Research Tracking

WINTER 2018

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OBJECTIVES & METHODOLOGY

OBJECTIVES AND METHODOLOGY

OBJECTIVES

Bruce Power commissioned research in order to understand and track attitudes and opinions from Bruce, Grey, and Huron County residents towards a number of topics and issues, including:

- Energy/electricity issues in the community and support for nuclear energy and refurbishment of the Bruce facility
- Familiarity and impressions of Bruce Power
- Communications with residents

METHODOLOGY

Telephone interviews were conducted among a representative sample of n=850 local residents, including: n=365 interviews in Grey County, n=262 in Bruce County, and n=223 interviews in Huron County. N=430 interviews were conducted via landline telephone and n=420 were conducted via cell phone.

The data has been weighted by region, gender and age to ensure the final sample reflects the population of all three counties.



Method: = Telephone (CATI), Random Digit Dialing (RDD). Both landline and cell phone sample was utilized.



Fielding dates: January 31st to February 12th, 2018.



Margin of error: +/-3.4%, nineteen times out of twenty on overall sample.

KEY FINDINGS

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IMPRESSIONS OF BRUCE POWER

- Impressions of Bruce Power remain positive and relatively unchanged among residents of Bruce, Grey, and Huron counties, while familiarity with the organization continues to be high.
 - At nine in ten or more, the vast majority of residents are confident that the Bruce Nuclear Facility operates safely (93%), that Bruce Power is a good community citizen (90%), and see Bruce Power as being involved with the community in a positive way (89%).
 - Familiarity with Bruce Power remains strong with more than three quarters (78%) of residents mention being at least 'somewhat familiar' with the organization, unchanged since last year (76%).
 - Impressions of Bruce Power continue to be mostly positive as the vast majority (84%) of those who are familiar with the organization feel 'excellent', 'very good', or 'good' about the organization.
 - Over the course of the past 12 months impressions of Bruce Power have significantly improved among those familiar with the organization as one in ten (12%) residents mention having a more positive impression of the organization (+4 points since 2017). The vast majority (82%) of residents indicate that their impression of the organization has not changed over the past 12 months, while only five percent (5%) of residents mention that their impression has worsened.

KEY FINDINGS

MOST IMPORTANT ISSUE & SUPPORT FOR NUCLEAR POWER & REFURBISHMENT

- The most important issues mentioned by Bruce, Grey, and Huron county residents include healthcare and jobs (at 16% apiece), the importance of these two issues has not changed over the course of the past 12 months.
 - Other issues mentioned as important include infrastructure (14%; +4 points since 2017) and taxes (12%; +5).
- Overall, support for the refurbishment of the Bruce Nuclear Facility remains strong.
 - Well over eight in ten (84%) residents continue to support the refurbishment of the Bruce nuclear facility, consistent with 2017 (85%).
 - Residents are most likely to support refurbishment of the Bruce nuclear facility because it will create jobs (21%). Other common reasons include that it is good for the economy or that it is necessary (at 9% each).
- At seven in ten (69%), knowledge of nuclear energy remains unchanged since 2017. A majority of residents feel that they are 'somewhat knowledgeable' (56%), with thirteen percent (13%) claiming to be 'very knowledgeable' about the technology.

KEY FINDINGS

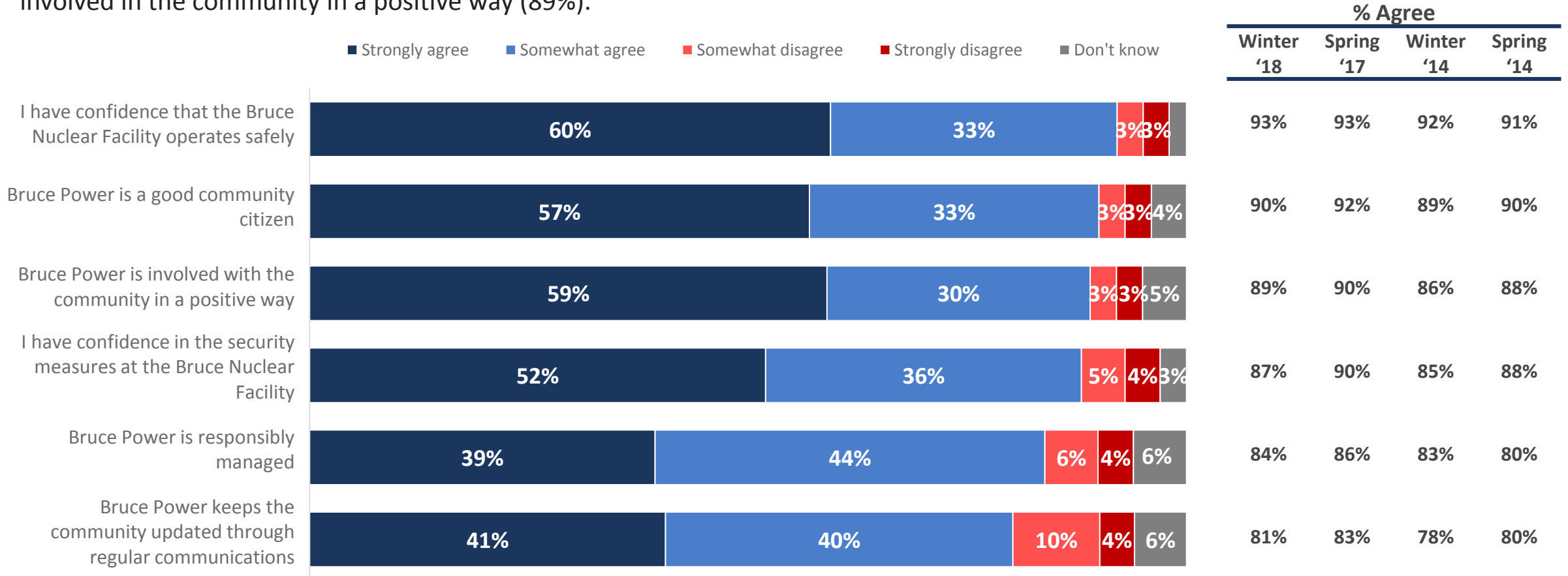
COMMUNICATIONS

- Most residents recall receiving communications from Bruce Power. The Internet increasingly highlighted as the preferred source for information about the organization and facility.
 - Six in ten (60%) residents have read, seen, or heard something about Bruce Power recently, statistically unchanged from 2017.
 - Residents are most likely to highlight the Internet as their preferred source for information about Bruce Power and are statistically more likely to cite this platform than in 2017 (22%; +5 points). Other preferred sources of information include newsletters or flyers (19%), newspapers (18%), or the radio (12%).
 - Two thirds (67%) of residents do not mention any area of concern that they have about Bruce Power's operations.
 - Among those residents who would like more information about the Bruce facility, the highest proportion cite disposal procedures (11%), safety measures (7%), storage concerns (6%), or needing more information in general (5%).

IMPRESSIONS OF BRUCE POWER

ATTITUDES TOWARDS BRUCE POWER

Across all metrics, the vast majority of residents hold positive attitudes towards Bruce Power. Residents are most inclined to feel confident that the Bruce Nuclear Facility operates safely (93%), that Bruce Power is a good community citizen (90%), and that the organization is involved in the community in a positive way (89%).



Q15. I'm now going to read you a few statements about Bruce Power, please tell me to what extent you agree or disagree with each one? Is that strongly or somewhat?
 Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816); Spring 2017 (n=477); Winter 2014 (n=477); Spring 2014 (n=477)

<3% not labelled



ATTITUDES TOWARDS BRUCE POWER BY AGE AND GENDER

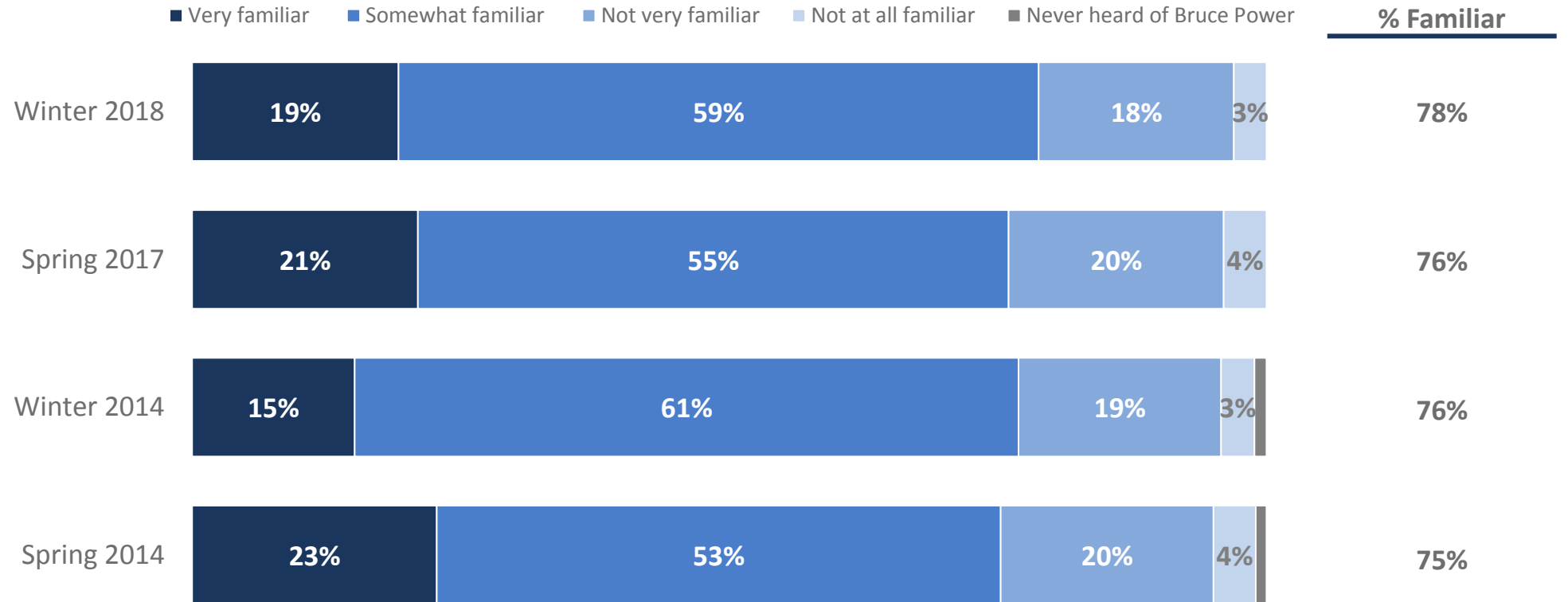
Middle aged adults (35-54) and Bruce County residents are more likely to think that Bruce County keeps the community updated through regular communications and that it's involvement in the community is positive. Middle aged adults (35-54) are also more likely to feel confident that the Bruce Nuclear Facility operates safely.

	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: Familiar with Bruce Power</i>	<i>(n=816)</i>	<i>(n=253)</i>	<i>(n=350)</i>	<i>(n=213)</i>	<i>(n=146)</i>	<i>(n=232)</i>	<i>(n=438)</i>	<i>(n=392)</i>	<i>(n=424)</i>
I have confidence that the Bruce Nuclear Facility operates safely	93%	93%	94%	91%	90%	96%	92%	92%	93%
Bruce Power is a good community citizen	90%	93%	89%	89%	88%	94%	90%	91%	90%
Bruce Power is involved with the community in a positive way	89%	95%	87%	85%	86%	94%	87%	90%	88%
I have confidence in the security measures at the Bruce Nuclear Facility	87%	89%	87%	86%	89%	91%	85%	88%	87%
Bruce Power is responsibly managed	84%	85%	84%	80%	81%	83%	85%	83%	84%
Bruce Power keeps the community updated through regular communications	81%	89%	80%	71%	73%	87%	80%	82%	79%

Q15. I'm now going to read you a few statements about Bruce Power, please tell me to what extent you agree or disagree with each one? Is that strongly or somewhat?
 Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816)

FAMILIARITY WITH BRUCE POWER

Almost eight in ten (78%) residents are familiar with Bruce Power, unchanged compared to previous waves of research. One in five (19%) residents are 'very familiar', while slightly more than half (59%) are 'somewhat familiar'.



Q12. How familiar would you say that you are with Bruce Power? Are you...
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

FAMILIARITY WITH BRUCE POWER BY DEMOGRAPHICS

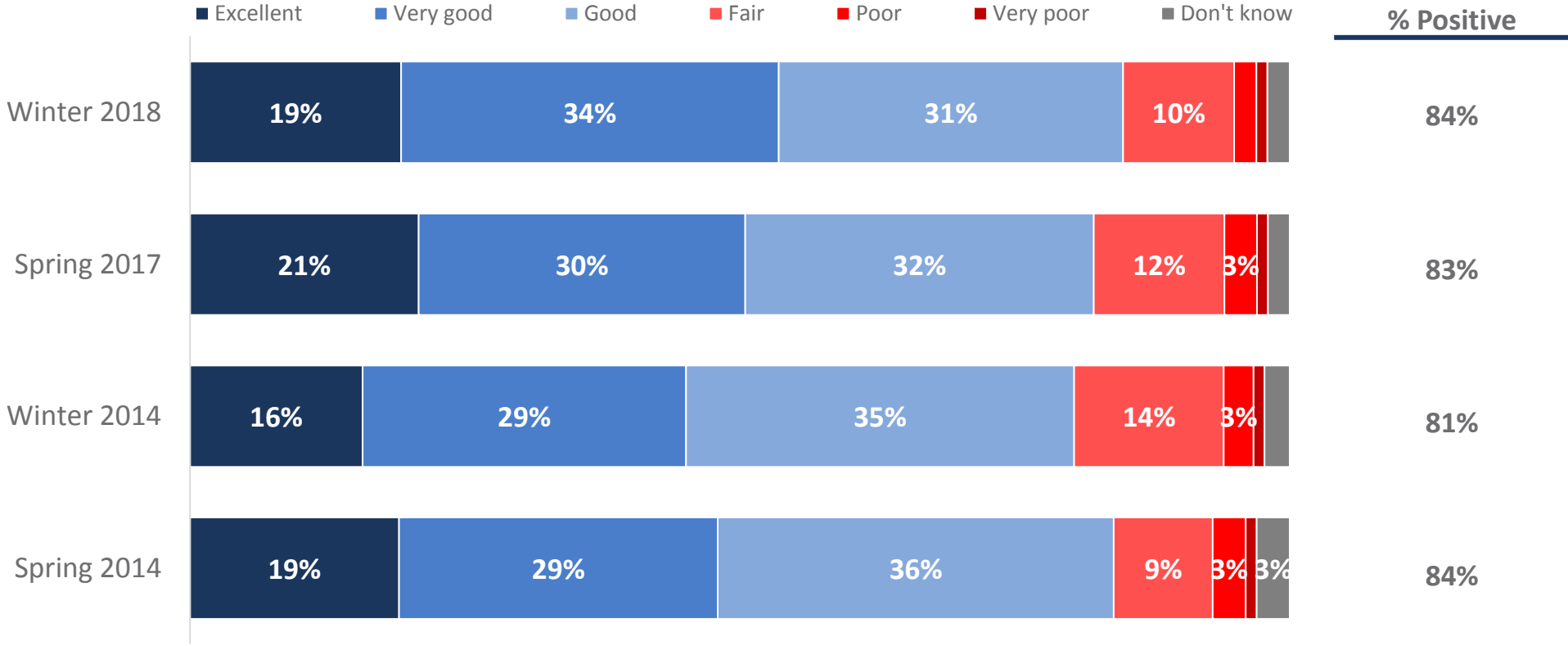
Bruce County residents and middle aged adults (35-54) are more likely to say that they are familiar with Bruce Power. Men are more likely to claim to be ‘very familiar’ with Bruce Power, compared to women (25%, compared to 13%).

	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: All Respondents</i>	<i>(n=850)</i>	<i>(n=262)</i>	<i>(n=365)</i>	<i>(n=223)</i>	<i>(n=151)</i>	<i>(n=239)</i>	<i>(n=460)</i>	<i>(n=403)</i>	<i>(n=447)</i>
Very familiar	19%	30%	15%	12%	13%	24%	18%	25%	13%
Somewhat familiar	59%	58%	58%	61%	59%	60%	58%	55%	63%
Not very familiar	18%	8%	23%	22%	25%	13%	19%	17%	19%
Not at all familiar	3%	3%	4%	4%	3%	3%	4%	2%	4%
Never heard of Bruce Power	0%	0%	0%	-	-	-	0%	-	0%
Don't Know	0%	0%	0%	0%	-	-	1%	1%	0%
Very/somewhat familiar	78%	88%	73%	74%	72%	84%	77%	80%	76%

Q12. How familiar would you say that you are with Bruce Power? Are you...
Base: All Respondents Winter 2018 (n=850)

IMPRESSION OF BRUCE POWER

Of those that are familiar with Bruce Power, impressions remain positive compared to last year as the vast majority (84%) continue to hold positive views of the organization.



Q13. And, what is your overall impression of Bruce Power?

Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816); Spring 2017 (n=477); Winter 2014 (n=476); Spring 2014 (n=477)

<3% not labelled

IMPRESSION OF BRUCE POWER BY DEMOGRAPHICS

Residents of Bruce County, men, and adults over 35 are the most likely to indicate that they have an 'excellent' impression of Bruce Power.

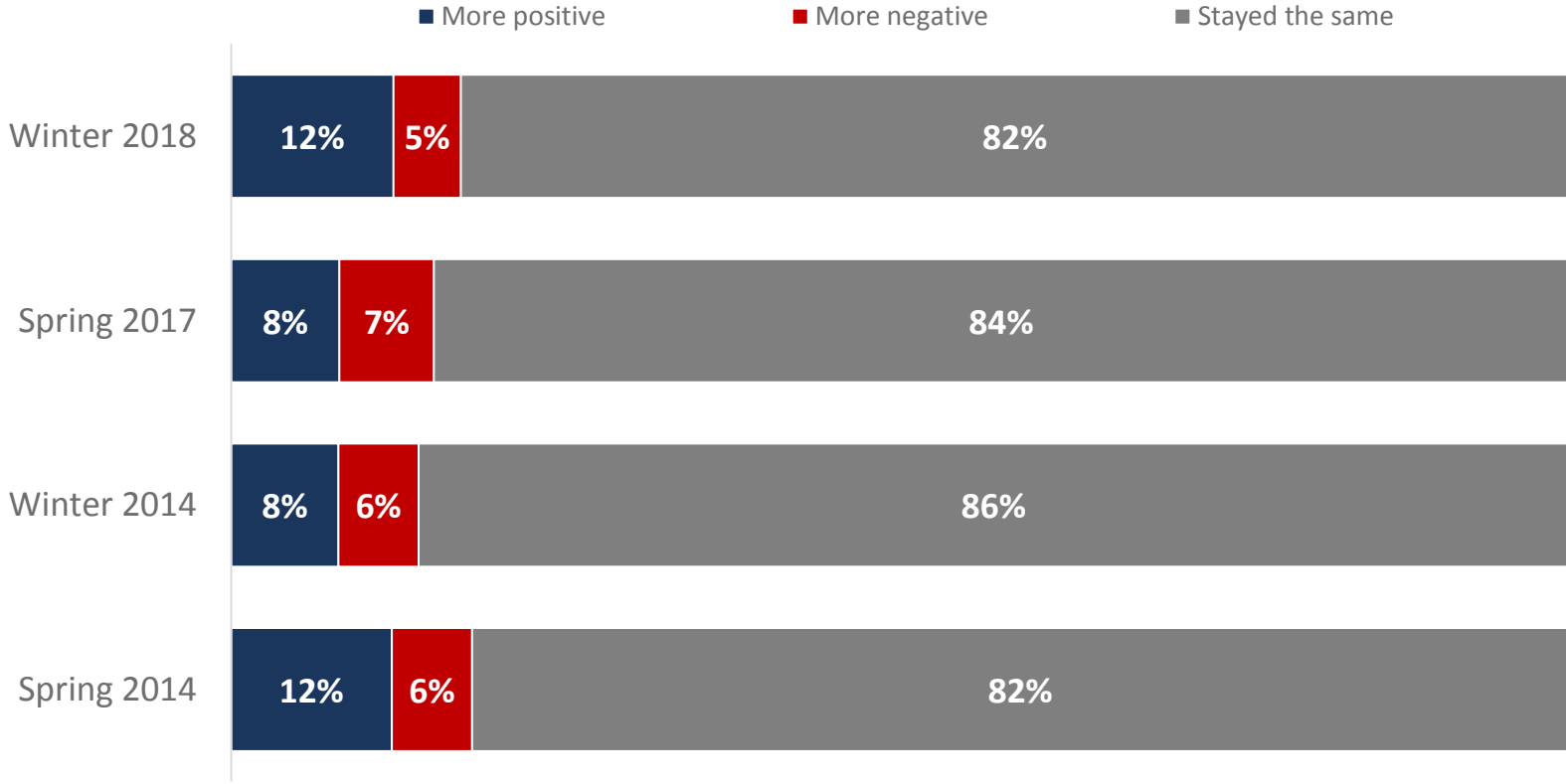
	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: Familiar with Bruce Power</i>	<i>(n=816)</i>	<i>(n=253)</i>	<i>(n=350)</i>	<i>(n=213)</i>	<i>(n=146)</i>	<i>(n=232)</i>	<i>(n=438)</i>	<i>(n=392)</i>	<i>(n=424)</i>
Excellent	19%	26%	18%	13%	10%	23%	21%	23%	16%
Very good	34%	31%	35%	35%	29%	37%	34%	34%	33%
Good	31%	29%	30%	35%	44%	23%	30%	29%	33%
Fair	10%	8%	11%	12%	8%	13%	10%	9%	12%
Poor	2%	4%	1%	3%	4%	2%	2%	3%	2%
Very poor	1%	2%	1%	1%	1%	1%	1%	1%	1%
Don't Know	2%	0%	4%	1%	4%	1%	2%	1%	3%
Excellent/very good/good	84%	86%	83%	83%	84%	82%	85%	86%	82%

Q13. And, what is your overall impression of Bruce Power?

Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816)

CHANGES IN IMPRESSIONS OVER THE PAST 12 MONTHS

Significantly more residents who are familiar with Bruce Power mention having a positive impression of the organization over the course of the past 12 months (12%, +4 points). The vast majority (82%) of residents indicate that their impression of the organization has not changed, while 5% of residents have a more negative impression.



Q14a. In the past 12 months, has your overall impression of Bruce Power’s Nuclear Generation station changed? Would you say your impression has become more positive, more negative or has stayed the same? Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816); Spring 2017 (n=477); Winter 2014 (n=476); Spring 2014 (n=477)

CHANGES IN IMPRESSIONS OVER THE PAST 12 MONTHS BY DEMOGRAPHICS

Among those familiar with Bruce Power, men are more likely to say that their impression has improved whereas Grey County residents are less likely to mention that their impression has worsened.

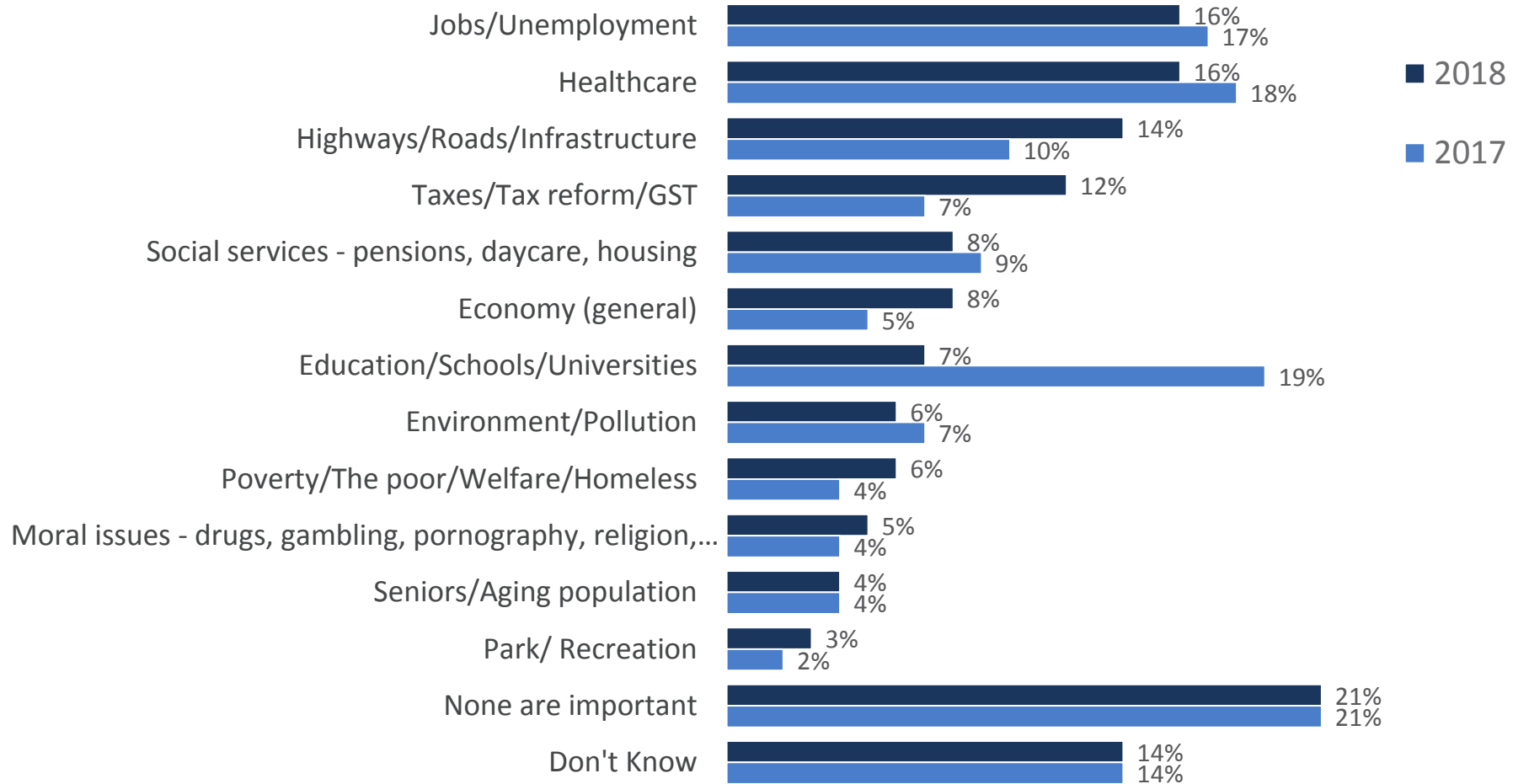
	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: Familiar with Bruce Power</i>	<i>(n=816)</i>	<i>(n=253)</i>	<i>(n=350)</i>	<i>(n=213)</i>	<i>(n=146)</i>	<i>(n=232)</i>	<i>(n=438)</i>	<i>(n=392)</i>	<i>(n=424)</i>
More Positive	12%	15%	11%	10%	8%	11%	14%	16%	8%
More Negative	5%	7%	2%	7%	6%	4%	6%	4%	6%
About the Same	82%	78%	86%	82%	86%	86%	79%	80%	85%

Q14a. In the past 12 months, has your overall impression of Bruce Power’s Nuclear Generation station changed? Would you say your impression has become more positive, more negative or has stayed the same? Base: Respondents who indicated they are at least familiar with Bruce Power Winter 2018 (n=816); Spring 2017 (n=477); Winter 2014 (n=476); Spring 2014 (n=477)

SUPPORT FOR REFURBISHMENT

TOP OF MIND ISSUES IN THE LOCAL COMMUNITY

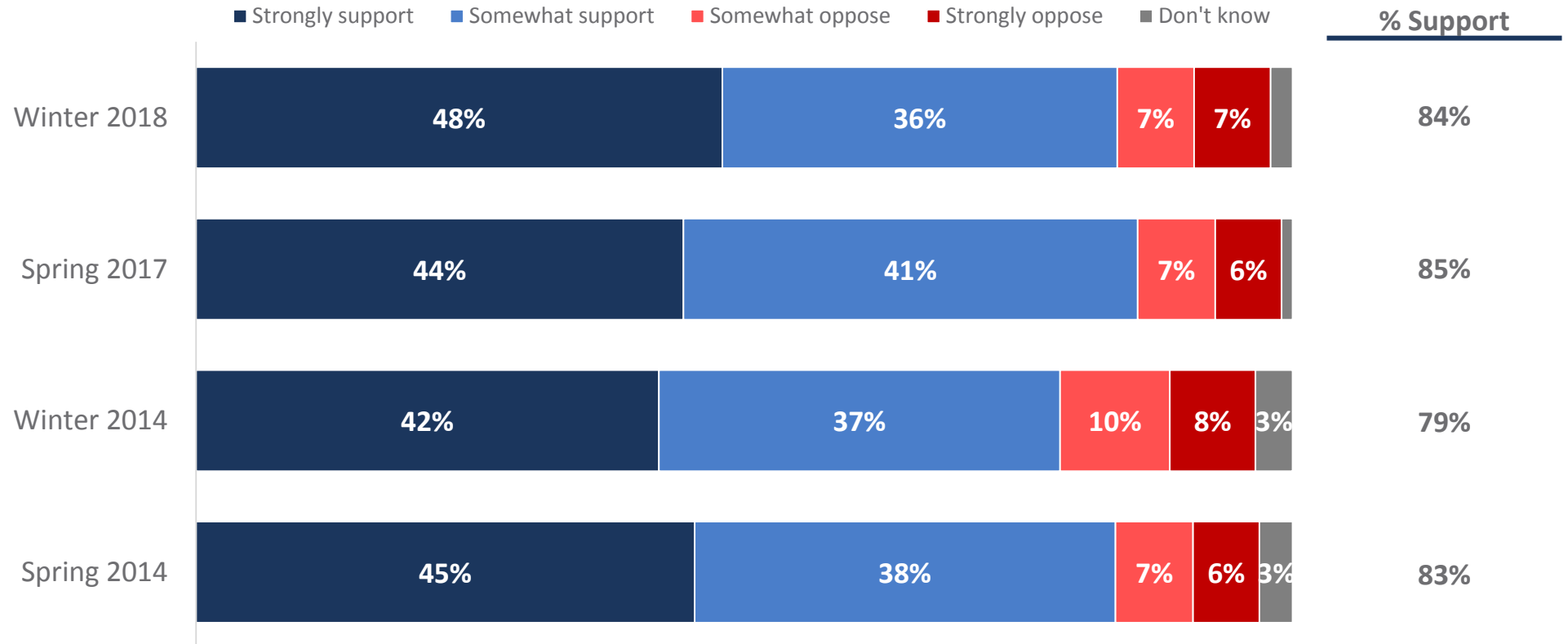
Among a wide range of issues that residents feel should receive the greatest attention from community leaders, healthcare and jobs (at 16% apiece) top the list, followed closely by infrastructure (14%). Compared to 2017, residents are more likely to mention infrastructure (+4 points), taxes (12%; +5), and the economy (8%; +3), but residents are less likely to mention education (7%; -12).



Q1. Thinking of the issues presently facing your community, which one do you feel should receive the greatest attention from community leaders?
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

SUPPORT TO REFURBISH NUCLEAR REACTORS IN BRUCE COUNTY

Support for the refurbishment remain strong as the vast majority of residents (84%) continue to support the refurbishment of the Bruce Power nuclear facility. Half of residents (48%) indicate that they ‘strongly support’ refurbishment, while one third (36%) ‘somewhat support’ refurbishment. 14% of residents oppose refurbishment. 14% of residents oppose refurbishment.



Q6A. Many large power-generating plants in Ontario will have to be replaced over the next 10 to 15 years because they are aging. In order to help meet future electricity demand, to what extent would you support or oppose Bruce Power’s plans to refurbish nuclear reactors in Bruce? Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

<3% not labelled

SUPPORT TO REFURBISH NUCLEAR REACTORS BY DEMOGRAPHICS

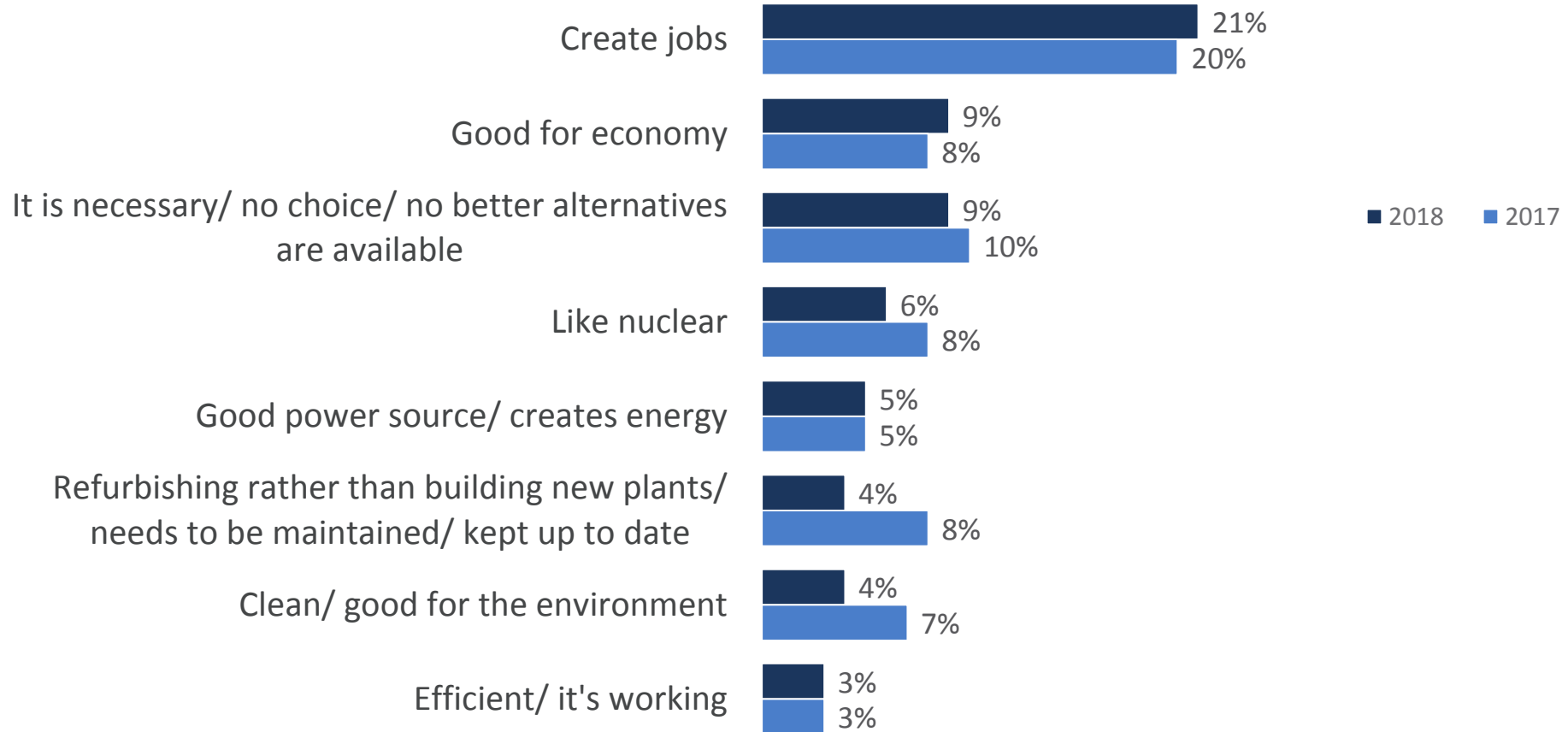
Men are more likely than women to support refurbishment (88%, compared to 80% respectively). Bruce County residents and those over the age of 35 are more likely to 'strongly support' refurbishment.

	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: All Respondents</i>	<i>(n=850)</i>	<i>(n=262)</i>	<i>(n=365)</i>	<i>(n=223)</i>	<i>(n=151)</i>	<i>(n=239)</i>	<i>(n=460)</i>	<i>(n=403)</i>	<i>(n=447)</i>
Strongly support	48%	57%	46%	42%	37%	54%	50%	55%	42%
Somewhat support	36%	28%	39%	41%	45%	33%	34%	34%	38%
Somewhat oppose	7%	7%	7%	7%	8%	8%	7%	4%	10%
Strongly oppose	7%	7%	6%	7%	8%	5%	7%	5%	8%
Don't Know	2%	1%	2%	2%	2%	1%	2%	2%	2%
Total support	84%	85%	85%	83%	82%	86%	84%	88%	80%

Q6A. Many large power-generating plants in Ontario will have to be replaced over the next 10 to 15 years because they are aging. In order to help meet future electricity demand, to what extent would you support or oppose Bruce Power's plans to refurbish nuclear reactors in Bruce? Base: All Respondents Winter 2018 (n=850)

REASONS FOR SUPPORTING REFURBISHMENT

Residents continue to be most likely to support refurbishment because of job creation (21%). Other common reasons for supporting refurbishment are because it is good for the economy (9% each) or because refurbishment is necessary (9%). Compared to 2017, residents are less likely to indicate support for refurbishment because it's better than building new plants (4%; -3 points) or because it's good for the environment (4%; -3 points).



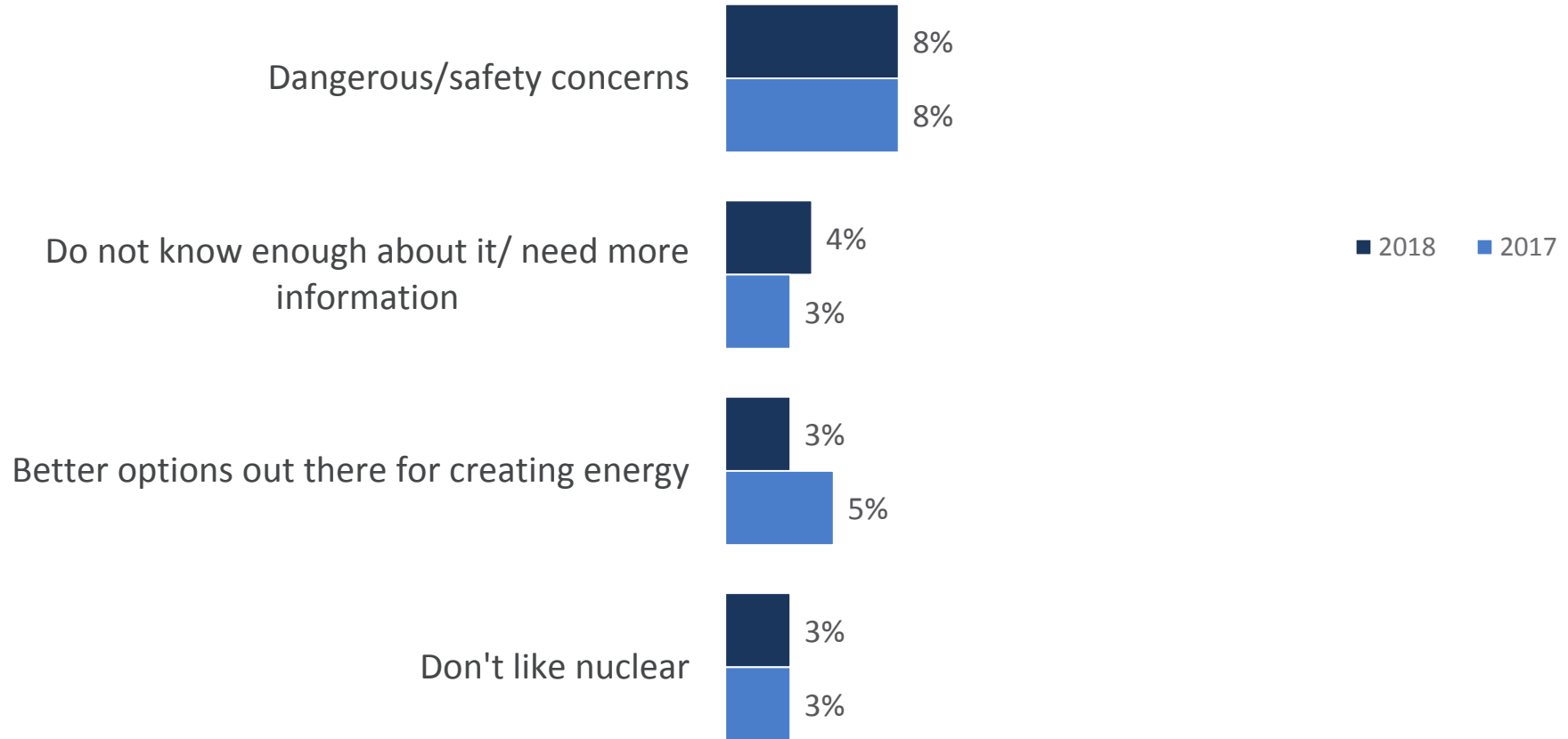
Q6B. Why do you say that?

Base: Support/oppose plans to refurbish nuclear reactors in Bruce Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=485)

Mentions <3% not labelled

REASONS FOR OPPOSING REFURBISHMENT

Similar to last year, danger and safety concerns is the most commonly cited reason for opposing refurbishment (8%). Compared to last year, residents are less likely to mention that they oppose refurbishment because there are better energy alternatives available (3%; -2 points).



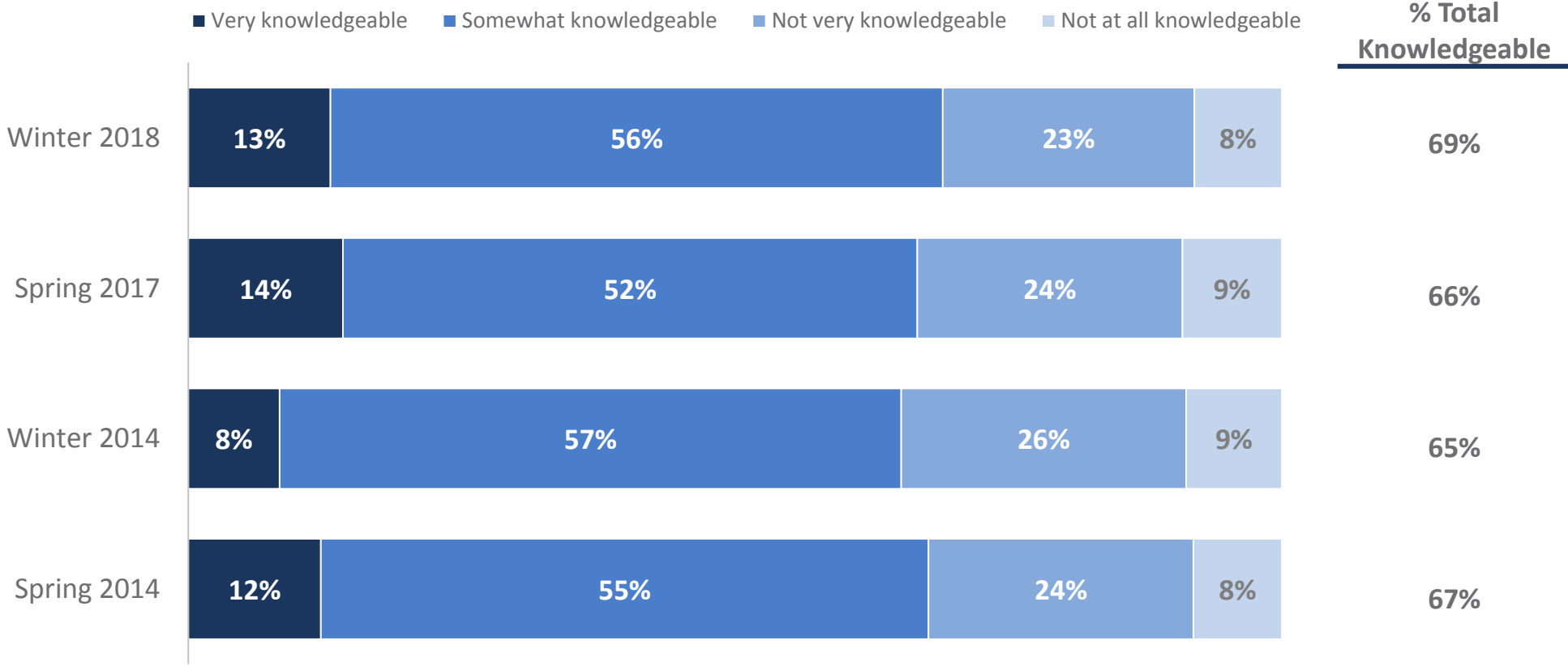
Q6B. Why do you say that?

Base: Support/oppose plans to refurbish nuclear reactors in Bruce Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=485)

Mentions <3% not labelled

KNOWLEDGE ABOUT NUCLEAR ENERGY AND TECHNOLOGY

At seven in ten (69%), knowledge of nuclear energy remains unchanged compared to 2017. Of those that are 'knowledgeable', most (56%) feel that they are 'somewhat knowledgeable' while about one in ten (13%) claim to be 'very knowledgeable'.



Q3. Overall, would you say you are very knowledgeable, somewhat knowledgeable, not very knowledgeable, or not at all knowledgeable about nuclear energy and nuclear technology issues?
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

KNOWLEDGE ABOUT NUCLEAR ENERGY AND TECHNOLOGY BY DEMOGRAPHICS

Men, middle aged adults (35-54), and residents of Bruce County are more likely to feel knowledgeable (very/ somewhat knowledgeable) about nuclear energy and technology compared to other demographic groups.

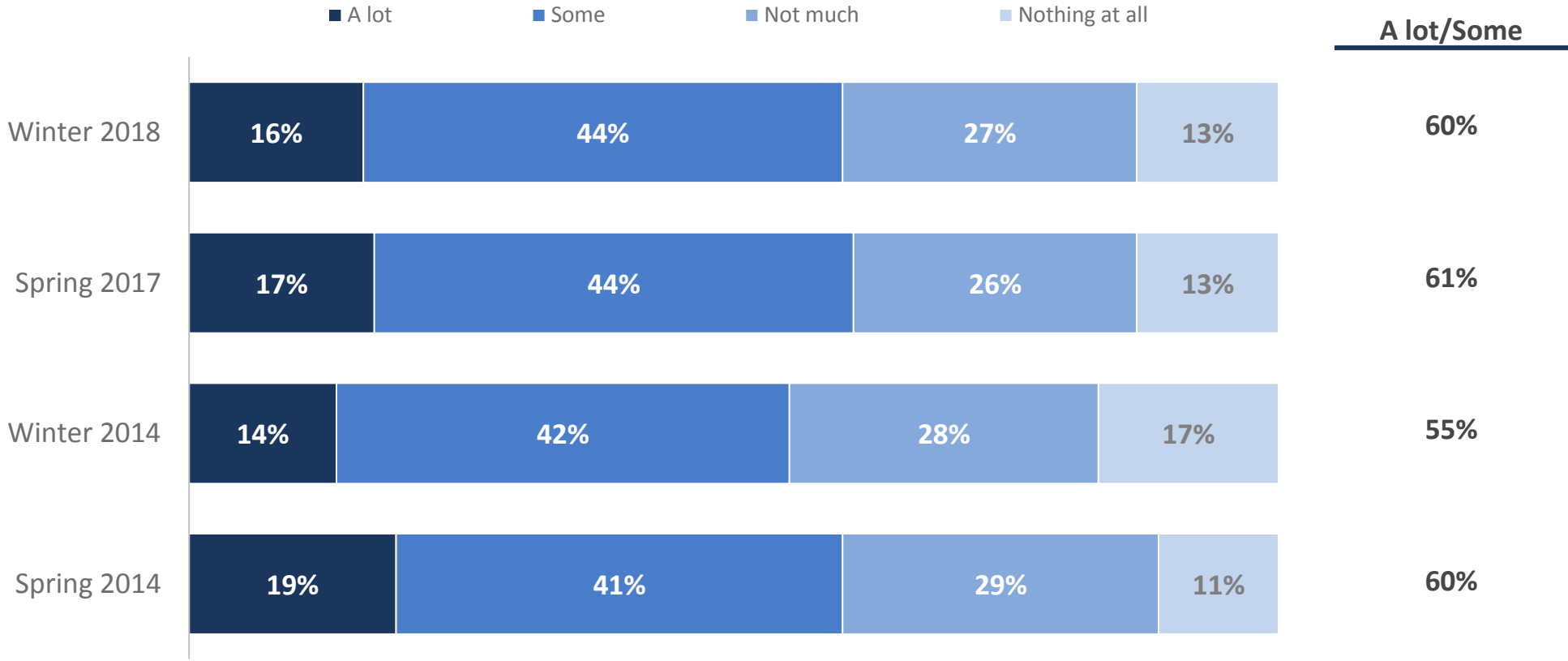
	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: All Respondents</i>	(n=850)	(n=262)	(n=365)	(n=223)	(n=151)	(n=239)	(n=460)	(n=403)	(n=447)
Very Knowledgeable	13%	18%	12%	10%	6%	14%	16%	20%	7%
Somewhat Knowledgeable	56%	58%	55%	55%	60%	62%	51%	58%	54%
Not very knowledgeable	23%	16%	25%	28%	23%	18%	26%	18%	27%
Not at all knowledgeable	8%	9%	8%	7%	11%	6%	8%	4%	12%
Total Knowledgeable	69%	76%	67%	65%	66%	76%	67%	78%	61%

Q3. Overall, would you say you are very knowledgeable, somewhat knowledgeable, not very knowledgeable, or not at all knowledgeable about nuclear energy and nuclear technology issues?
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

COMMUNICATIONS

RECALL OF BRUCE POWER

Six in ten (60%) residents have read, seen, or heard at least something about Bruce Power recently, consistent with what was observed last year.



Q14. How much have you read, seen, or heard about Bruce Power recently?
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500); Winter 2014 (n=500); Spring 2014 (n=500)

RECALL OF BRUCE POWER BY DEMOGRAPHICS

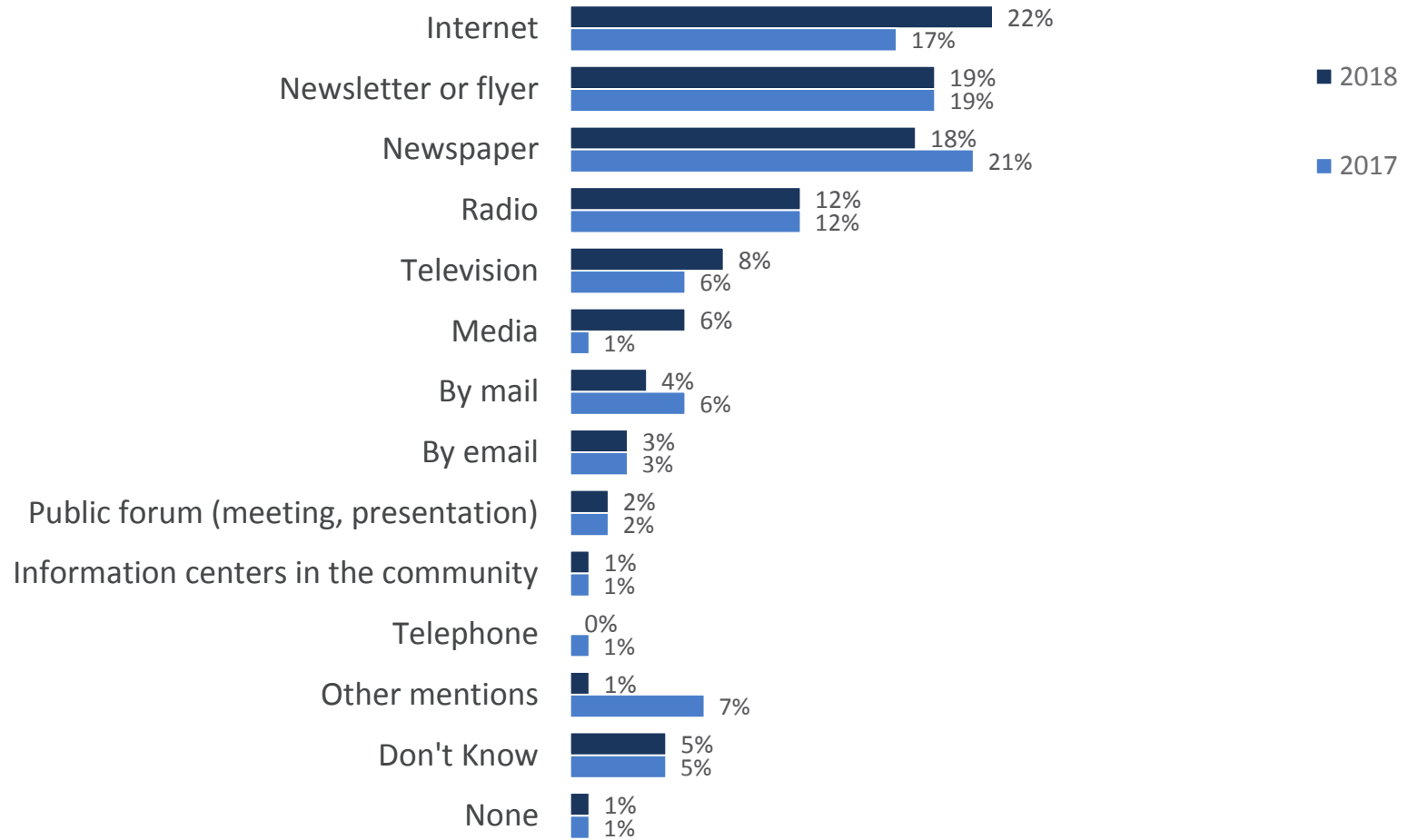
Men and residents of Bruce County are more likely to have read, seen, or heard at least something about Bruce Power whereas young adults (18-34) are the most likely to have heard ‘nothing at all’ about the company.

	TOTAL	COUNTY			AGE			GENDER	
		Bruce	Grey	Huron	18-34	35-54	55+	Male	Female
<i>Base: All Respondents</i>	<i>(n=850)</i>	<i>(n=262)</i>	<i>(n=365)</i>	<i>(n=223)</i>	<i>(n=151)</i>	<i>(n=239)</i>	<i>(n=460)</i>	<i>(n=303)</i>	<i>(n=447)</i>
A lot	16%	26%	13%	11%	14%	15%	18%	22%	11%
Some	44%	42%	44%	46%	40%	49%	42%	43%	45%
Not much	27%	26%	27%	28%	25%	26%	29%	24%	30%
Nothing at all	13%	5%	17%	16%	22%	10%	11%	11%	14%
Don't know	0%	1%	-	0%	-	1%	0%	0%	0%
A lot/some	60%	68%	56%	56%	54%	63%	60%	64%	56%

Q14. How much have you read, seen, or heard about Bruce Power recently?
Base: All Respondents Winter 2018 (n=850)

COMMUNICATING WITH RESIDENTS

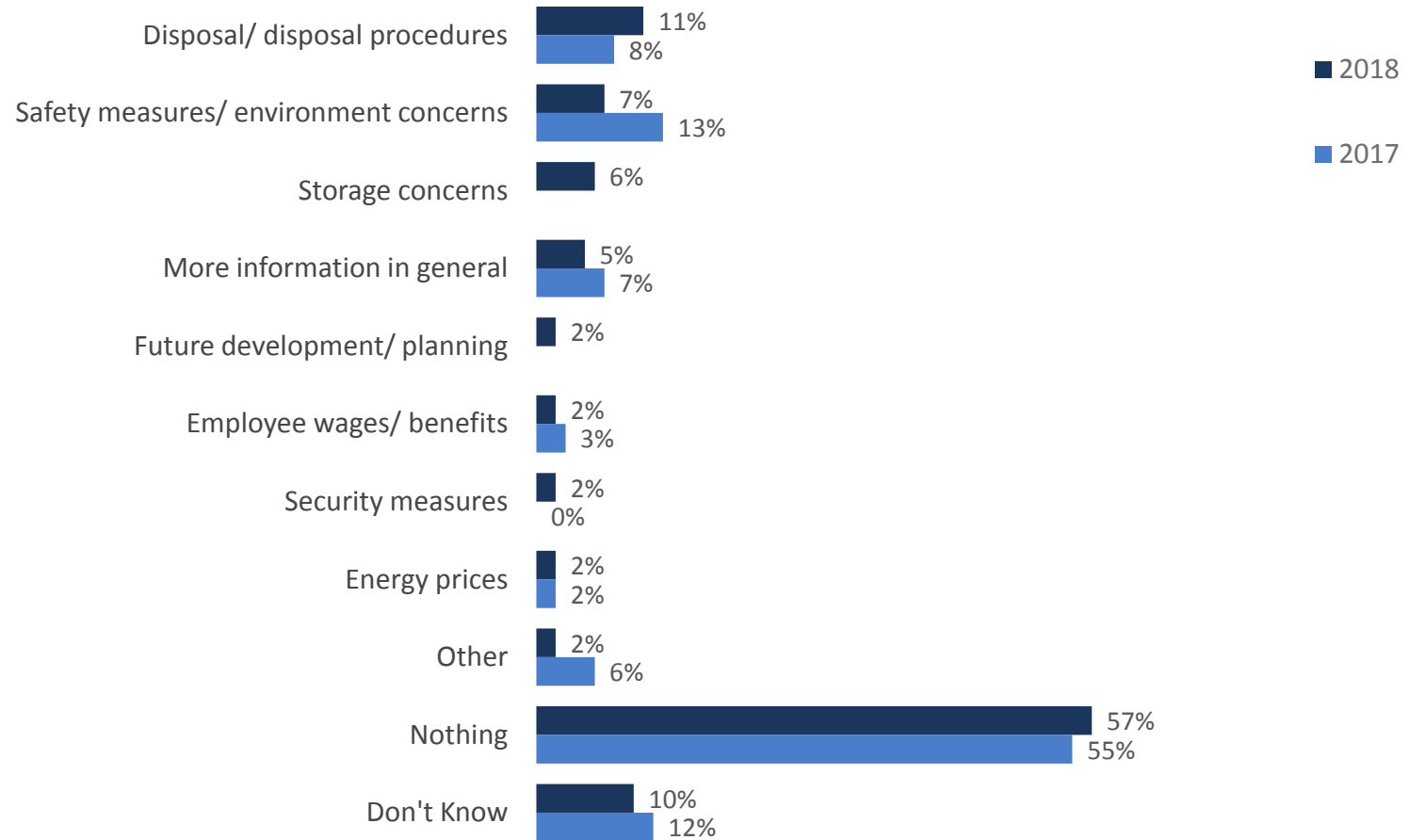
Residents increasingly mention the Internet (22%) as their preferred source for communications about Bruce Power (an increase of 5 points since 2017). Other preferred sources of information include newsletters or flyers (19%), newspapers (18%), or the radio (12%).



Q17. What is the best way for Bruce Power to provide you with information about the nuclear facility and other topics such as Bruce Power’s involvement in the community and other activities?
 Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500)

COMMUNICATING ABOUT BRUCE POWER'S OPERATIONS

Two thirds (67%) of residents do not mention any concerns that they have regarding Bruce Power's operations that they want more information about. Among those residents that do, the highest proportion (11%) cite disposal procedures, followed by safety measures (7%), storage concerns (6%), or needing more information in general (5%). More residents mention storage concerns (+6 points), future development (2%; +2), and security measures (2%; +2), while fewer residents mention safety measures (7%; -6) or some other concern (2%; -4) compared to 2017.



Q16. Are there any areas of concern you would like more information on regarding Bruce Power's operations or activities on the site? If so what topics? Base: All Respondents Winter 2018 (n=850); Spring 2017 (n=500)

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