

2022 COMMUNITY RESEARCH

BWXT Nuclear Energy Canada Inc.

FINAL REPORT

November 21, 2022

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Objectives

The objectives of this research are to gain a detailed understanding of local residents' awareness, attitudes, and opinions concerning BWXT operations in their local communities, specifically Peterborough and Toronto.

The research also seeks to compare and track the results of the 2022 data with the metrics provided in 2020 and 2018 to gauge how BWXT has performed over the last four years.

Specifically, the research investigates:

- Support for various types of energy production, including nuclear energy and stated knowledge of nuclear energy/technology;
- Awareness, knowledge and familiarity of BWXT operations in the local community;
- Impressions of BWXT as an organization, including attention to safety, community engagement, job creation, etc.; and,
- Recall and awareness of BWXT communications in the community.



Methodology

- A 10-minute online and telephone survey was conducted among residents of Toronto and Peterborough who live in proximity to the BWXT facilities.
- BWXT NEC mailed postcards with an invite to complete the survey online to households in targeted neighbourhoods (by postal walk) around the Toronto and Peterborough facilities. A draw for \$500 CAD Virtual Visa® Prepaid Card was included as incentive.
- The same survey was conducted via telephone interviews, with targeted dialing in neighbourhoods closest to the Toronto and Peterborough facilities (sample was sourced by postal walk).
- The surveys were conducted between October 15 and November 1, 2021. In total, n=247 surveys were completed – n=102 in Toronto (n=53 online, n=49 telephone) and n=145 in Peterborough (n=76 online, n=69 telephone).
- The overall margin of error for a sample of n=247 interviews is +/- 7.1%, 19 times out of 20.
- The response rate to the 2022 survey is lower than in previous years, some results should be treated with caution due to low base sizes.
- Statistically significant changes are noted with a ▲ or a ▼ arrow denoting a change up or down in the finding from 2020, within a 95% interval, 19 times out of 20. Any changes not noted with the arrows are not statistically significant and should be interpreted as no change in the measure.



EXECUTIVE SUMMARY

Executive Summary

Increased support for nuclear energy

Support for nuclear energy has seen directional increases among Peterborough residents (+14) and Toronto locals (+12) from 2020. However, support for hydroelectric, solar and wind power and natural gas is consistently higher among respondents from both regions.

Overall impressions of BWXT NEC have directionally increased

Overall impressions towards BWXT from both regions are nearly over half of what impressions were in 2018, indicating stronger affinity for the company. Both regions also saw increases in BWXT's attention to environmental concerns, safe operations and regular communications regarding community updates.

Demand for information on safety implementations and company products/activities

Peterborough and Toronto residents are most concerned about safety measures as well as company activities and would like to see more information from BWXT NEC in these two regards. The top two ways of receiving information BWXT NEC is through a newsletter/flyers (preferred among Torontonians) or the Internet (preferred among Peterborough residents).

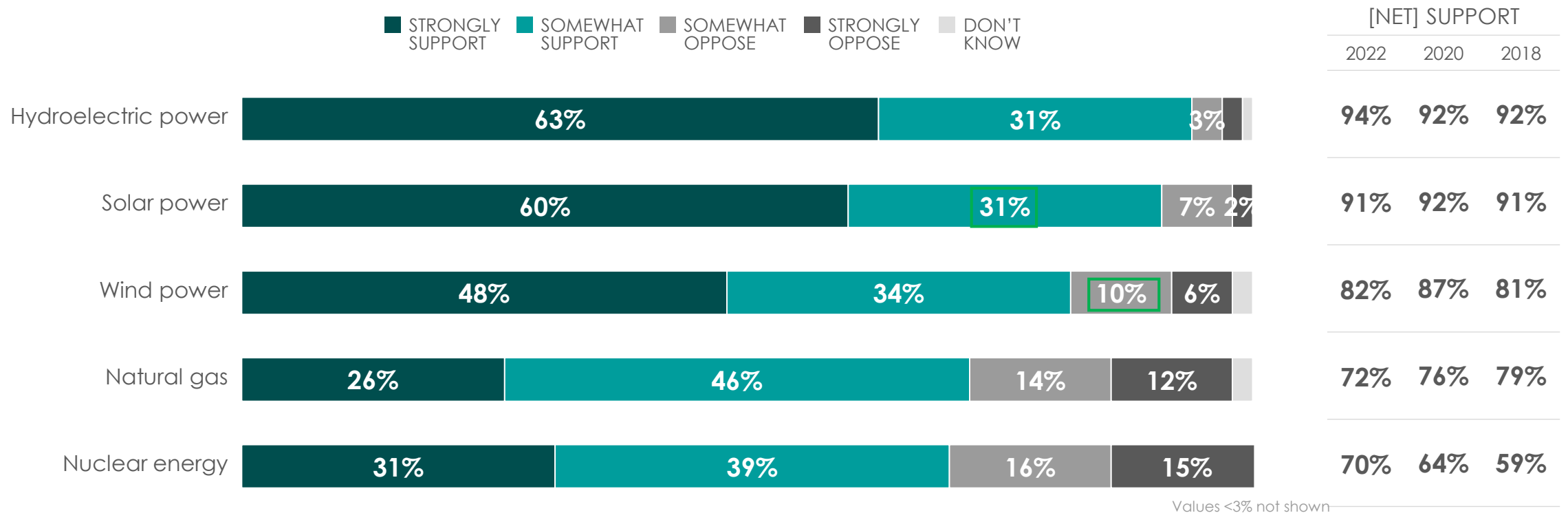
More knowledge of BWXT NEC facility in local community increases positive impressions, but regarding specific topics in different regions

Knowing more about the number of people BWXT NEC employs significantly increases overall impressions of the company for Peterborough residents. Conversely, knowing that natural uranium pellets fabricated at the BWXT NEC facility in Toronto go on to produce about 25% of Ontario's energy significantly increases impressions of the company.

Support for and Knowledge of Nuclear Energy

Support for Various Ways of Producing Electricity – Peterborough

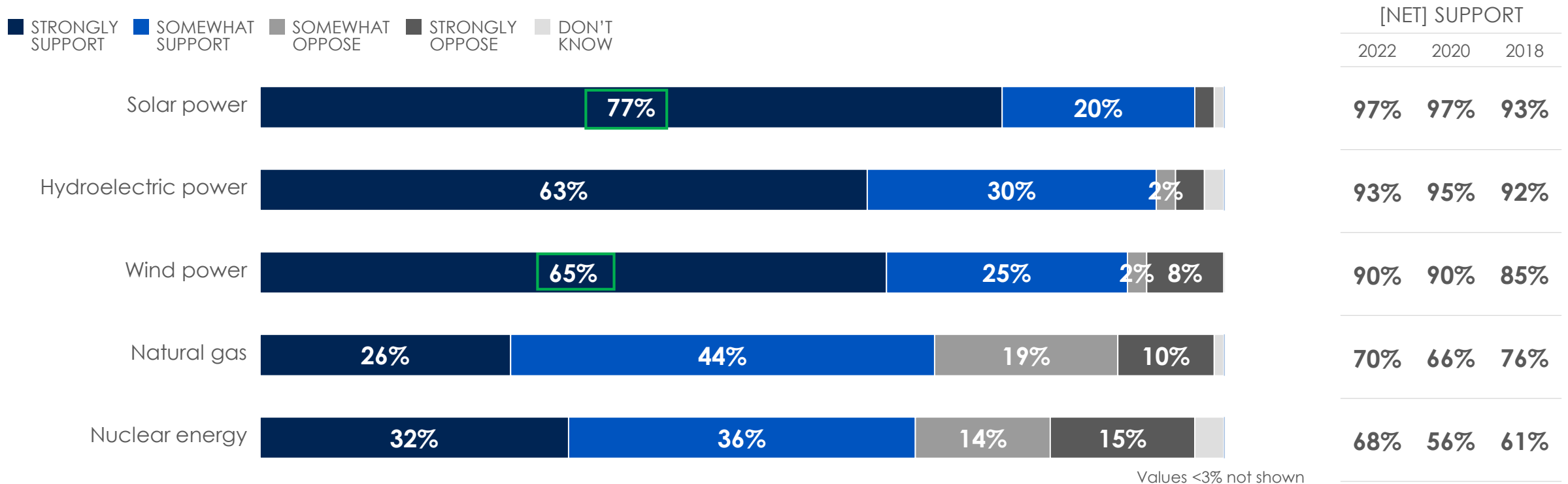
- Support for nuclear energy continues to increase marginally from 2018 and 2020 results, however it garners the lowest support among Peterborough residents as a way to produce electricity. Hydroelectricity (94%) and solar power (91%) continue to be the most supported, led by those who *strongly support* both elements, 63% and 60% respectively.



Q2. 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. How about ...?
 Base: All respondents – Peterborough 2022 (n=145); 2020 (n=200); 2018 (n=203)

Support for Various Ways of Producing Electricity – Toronto

- Support for nuclear energy among local Toronto residents saw directional growth from 2020 (+12). Similar to residents in Peterborough, however, Torontonians have the lowest support for this energy source (68%). Conversely, Toronto locals have the most support for solar power (97%).

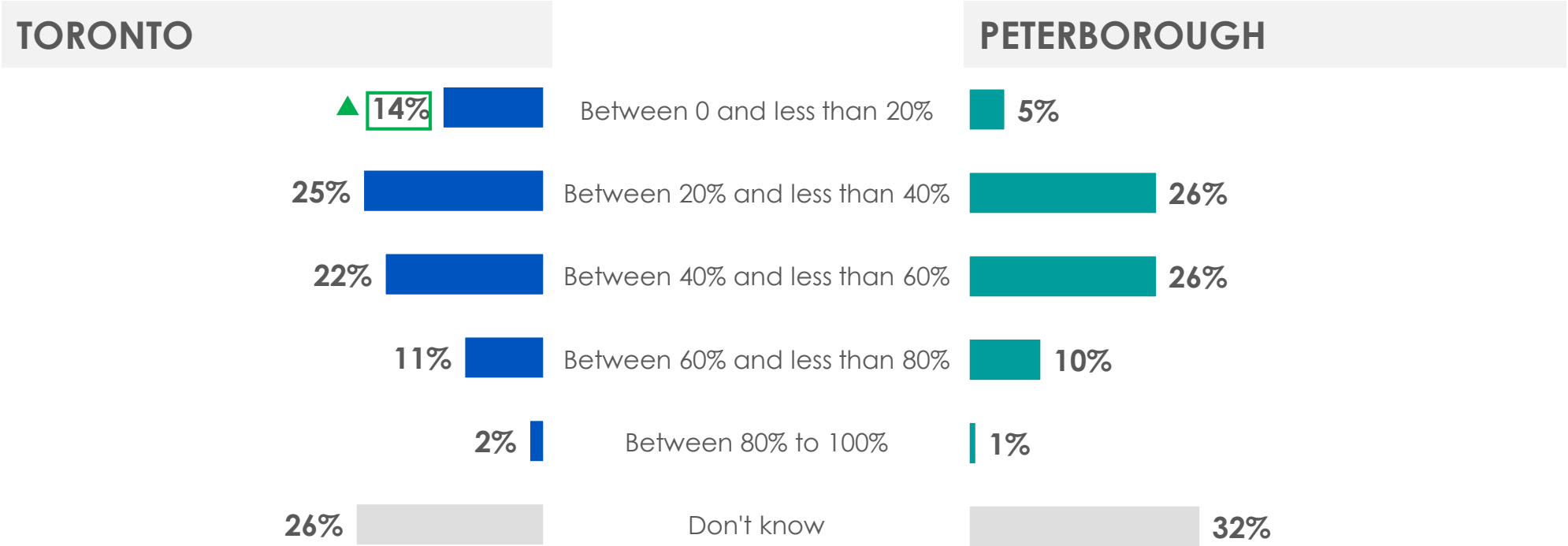


Q2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. How about ...?
 Base: All respondents – Toronto 2022 (n=102); 2020 (n=146); 2018 (n=149). Toronto results should be treated with caution due to low base size.

Percentage of Ontario Electricity Generated from Nuclear Power

• Peterborough and Toronto residents tend to underestimate the proportion of electricity that is generated from nuclear power, while a significant proportion of residents say that they don't know. Among those residents who have an idea, most say that nuclear accounts for less than 60% of Ontario's generating capacity, the average being 30%.

60%
of Ontario's energy needs are met by nuclear*

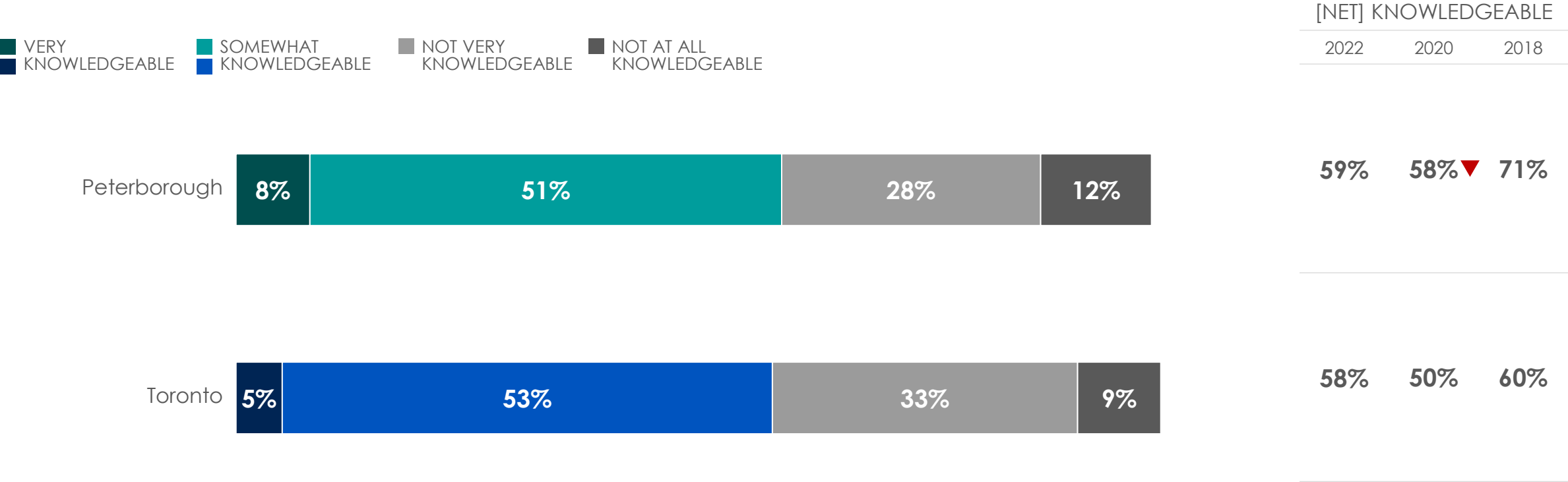


Q2a. Approximately what percentage of electricity in Ontario is generated from nuclear power? Your best estimate is fine. If you do not know, please say so.
 Base: All respondents – Toronto 2022 (n=102) / Peterborough 2022 (n=145); 2020 Toronto (n=146) / Peterborough (n=200) Toronto results should be treated with caution due to low base size.
 *Source: [Our generation > Nuclear power - OPG](#)



Knowledge About Nuclear Energy and Nuclear Technology

Nearly the same proportions of respondents say that they are knowledgeable about nuclear energy/technology for both Peterborough and Toronto residents, 59% and 58% respectively. While results for Peterborough remain unchanged, measures for Toronto saw an 8-point increase from 2020, shifting back towards 2018 proportions.

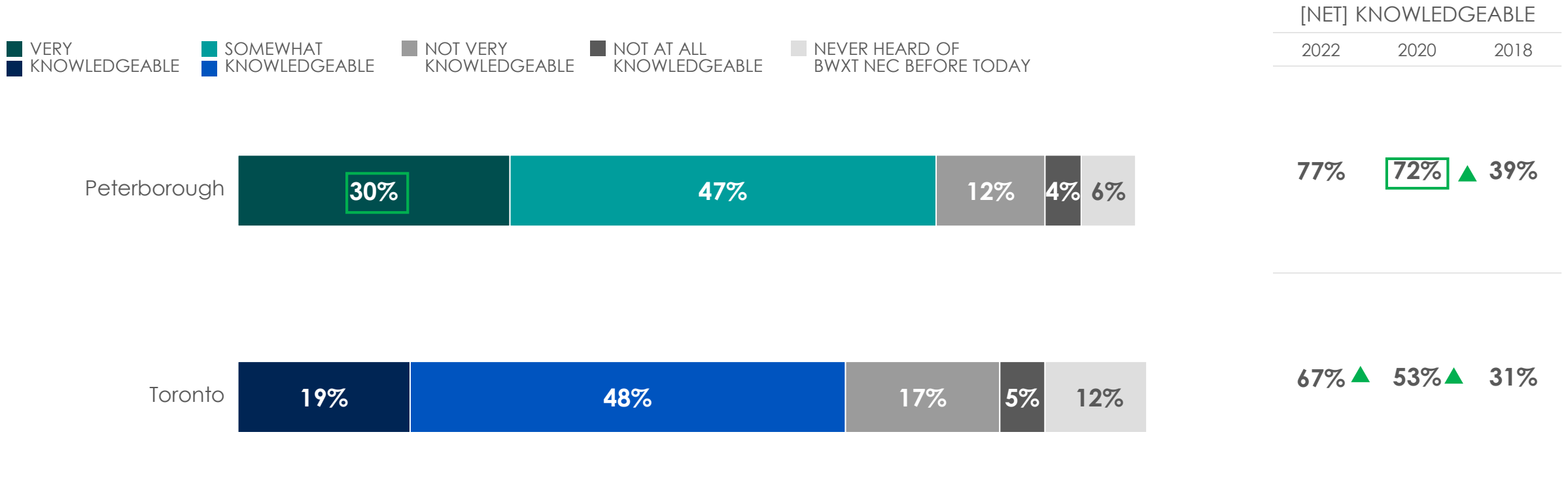


Q3. Overall, would you say you are very knowledgeable, somewhat knowledgeable, not very knowledgeable, or not at all knowledgeable about nuclear energy and nuclear technology?
 Base: All respondents – Toronto 2022 (n=102); 2020 (n=146); 2018 (n=149) / Peterborough 2022 (n=145); 2020 (n=200); 2018 (n=203) Toronto results should be treated with caution due to low base size.

Familiarity and Impressions of BWXT

Familiarity with BWXT Nuclear Energy Canada

- Levels of familiarity with BWXT remain high in 2022 among residents, with a significant increase of 14 points among local Toronto residents, resting at 67%.
- Peterborough residents are significantly more likely than Toronto locals to be *very knowledgeable* (+11).



Q4. How familiar would you say that you are with a company called BWXT Nuclear Energy Canada? [If Toronto sample read: BWXT Nuclear Energy Canada has a facility at 1025 Lansdowne Avenue in Toronto.] [If Peterborough sample read: BWXT Nuclear Energy Canada is located at 1160 Monaghan Road, near the intersection of Monaghan Road and Sherbrooke Street]. BWXT NEC has more than 60 years of extensive experience and innovation in the supply of nuclear fuel, using natural uranium, for the Canadian nuclear power industry. Are you ... ?

Base: All respondents – Toronto 2022 (n=102); 2020 (n=146); 2018 (n=149) / Peterborough 2022 (n=145); 2020 (n=200); 2018 (n=202) Toronto results should be treated with caution due to low base size.

Overall Impression of BWXT Nuclear Energy Canada

- Almost the same proportion of local residents in Peterborough and Toronto have a high overall impression of BWXT, both of which increased directionally since the previous wave, by 11 points and 8 points respectively. This positive sentiment towards BWXT is nearly more than half of what impressions were in 2018.
- Torontonians are significantly more likely to not know enough to have an opinion compared to Peterborough locals.

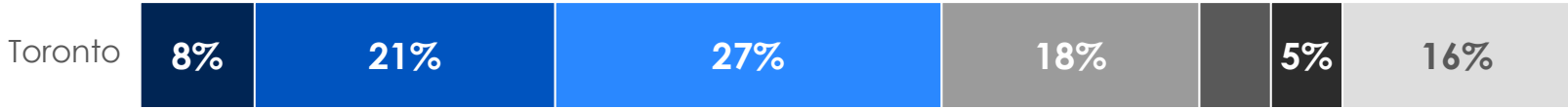
EXCELLENT
 VERY GOOD
 GOOD
 FAIR
 POOR
 VERY POOR
 DO NOT KNOW ENOUGH TO HAVE AN OPINION

[NET] GOOD+

2022	2020	2018
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65% 54%▲ 39%



57% 49%▲ 31%

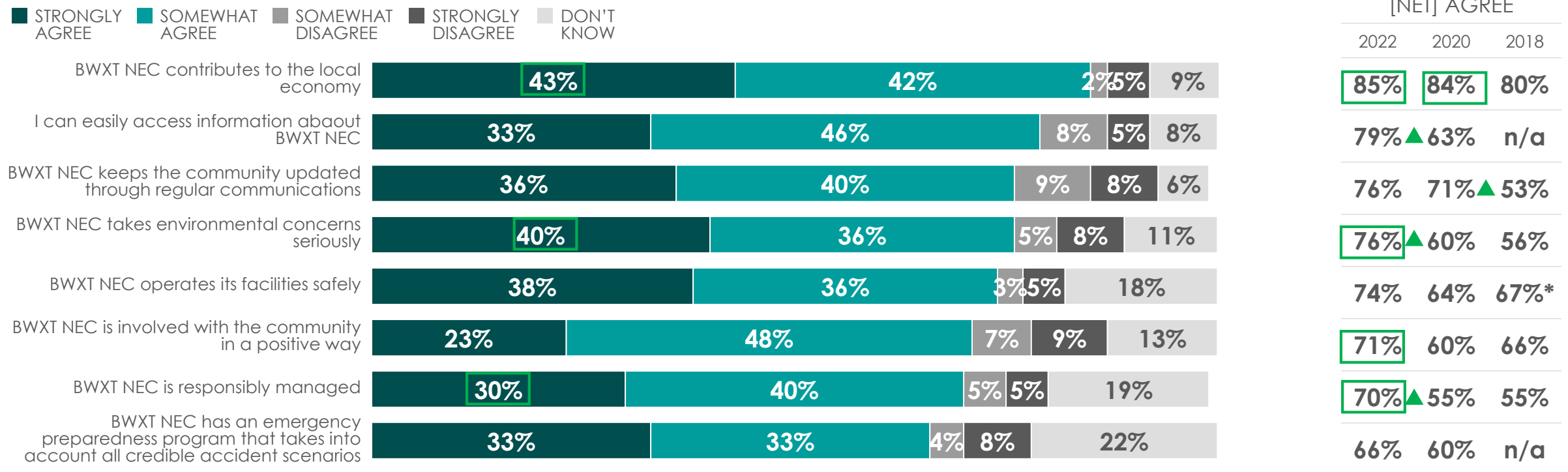
Q5. What is your overall impression of BWXT Nuclear Energy Canada? Would you say that your impression is ...?
 Base: Familiar with BWXT – Toronto 2022 (n=85); 2020 (n=103); 2018 (n=65) / Peterborough 2022 (n=129); 2020 (n=176); 2018 (n=101) Toronto results should be treated with caution due to low base size.



Impressions with BWXT NEC (Among those Familiar)

– Peterborough

- Overall impressions of BWXT NEC saw significant improvements among Peterborough residents across several aspects, particularly regarding the company's serious consideration of environmental concerns (+16), ease of access to information about BWXT (+16) and responsible management (+25). Other aspects saw directional increases, including regular updates regarding the community (+5), safely operating the facility (+10), positive involvement with the community (+11) and emergency preparedness (+6).



Values <3% not shown

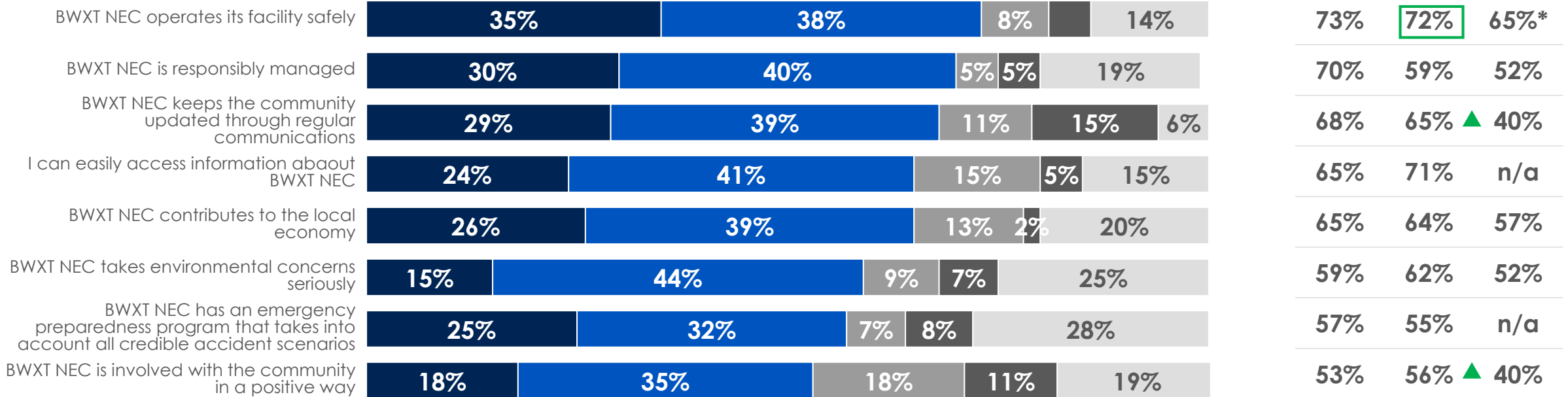
*Note: in 2018 this attribute was worded as follows: I have confidence that the BWXT NEC facility operates safely
 Q6. I'm now going to read you a few statements about BWXT Nuclear Energy Canada. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one ...
 Base: Familiar with BWXT – Peterborough 2022 (n=129); 2020 (n=176); 2018 (n=101)

Impressions with BWXT NEC (Among those Familiar)

– Toronto

- Most Toronto respondents agree that BWXT operates safely (73%, +1), is responsibly managed (70%, +11) and keeps the community updated through regular communications, 68%, (+3%). Over half (53%) say that BWXT NEC is involved with the community in a positive way.

■ STRONGLY AGREE
 ■ SOMEWHAT AGREE
 ■ SOMEWHAT DISAGREE
 ■ STRONGLY DISAGREE
 ■ DON'T KNOW



Values <3% not shown

*Note: in 2018 this attribute was worded as follows: I have confidence that the BWXT NEC facility operates safely

Q6. I'm now going to read you a few statements about BWXT Nuclear Energy Canada. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one ...

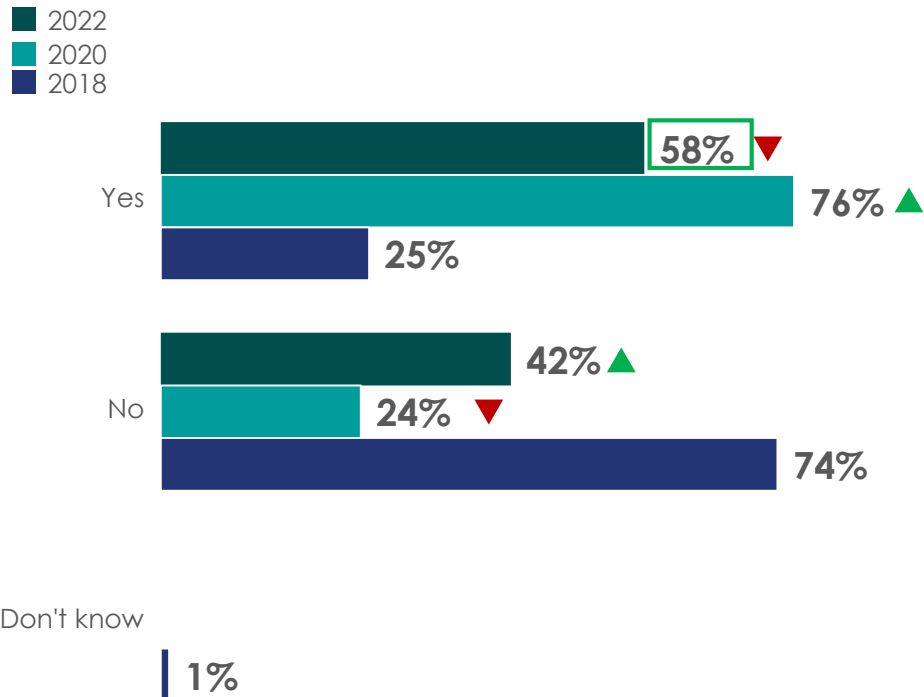
Base: Familiar with BWXT – Toronto 2022 (n=85); 2020 (n=103); 2018 (n=65) Toronto results should be treated with caution due to low base size. Toronto results should be treated with caution due to low base size.

Communications with Residents

Recently Read/Seen/Hear Anything Re: BWXT NEC – Peterborough

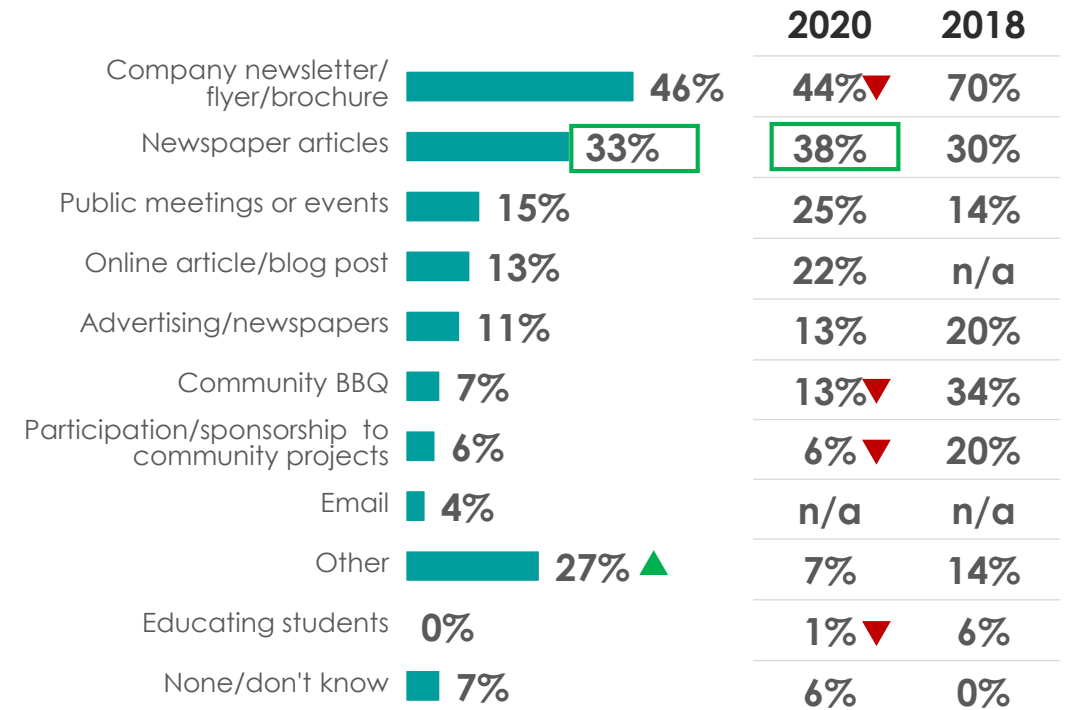
- Six in ten (58%) Peterborough respondents have read/seen/heard anything about BWXT NEC recently, a significant 18–point decrease from 2020. Roughly the same proportion recall BWXT advertising from a newsletter compared to the last wave.
- Peterborough residents are significantly more likely to recall advertising from newspaper articles than Torontonians (33% vs. 7%).
- Peterborough residents are also significantly more likely to recall BWXT advertising from another source than they were in 2020 (+20).

READ/SEEN/HEARD ANYTHING



Q7. Have you recently read, seen, or heard anything about BWXT Nuclear Energy Canada?
Base: All respondents – Peterborough 2022 (n=145); 2020 (n=200); 2018 (n=203)

RECALL SPECIFICS



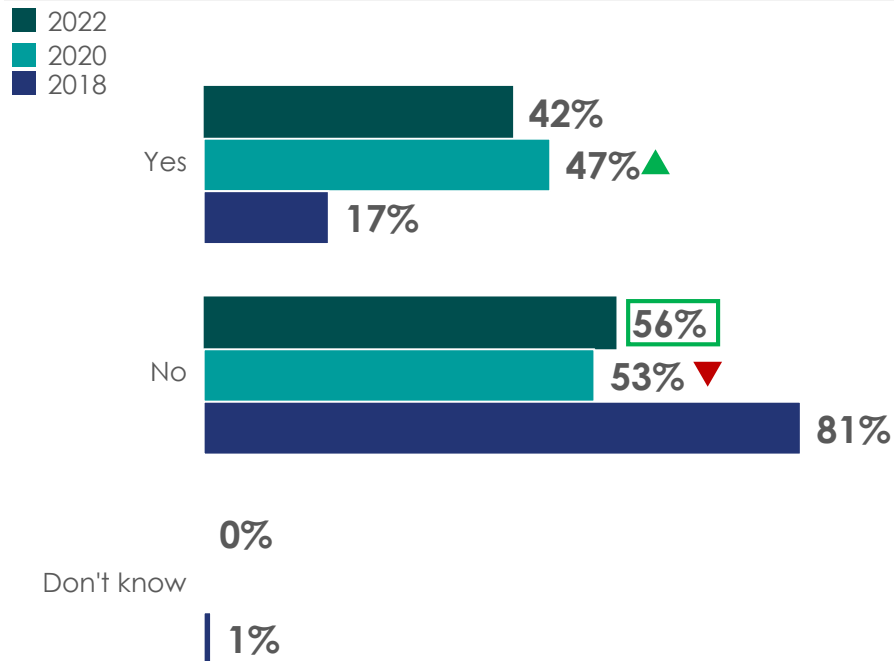
Q8. What do you recall?
Base: Heard about BWXT – Peterborough 2022 (n=84); 2020 (n=151); 2018 (n=50)

Attributes <3% not shown

Recently Read/Seen/Heard Anything Re: BWXT NEC – Toronto

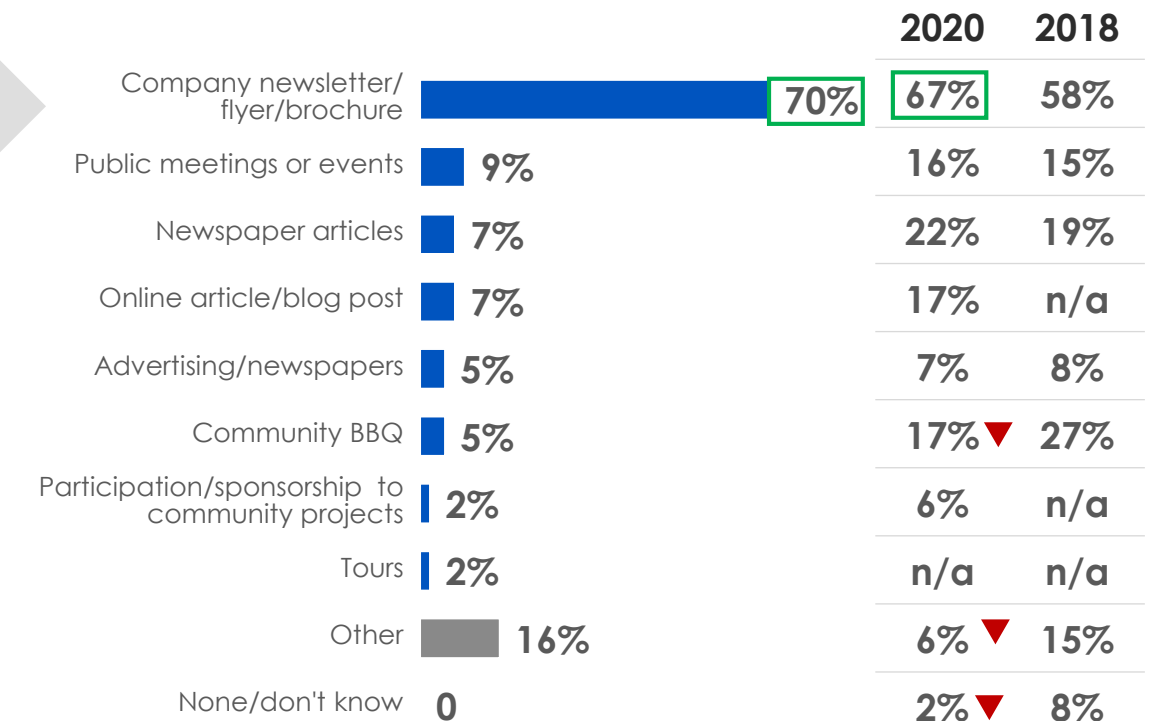
- The proportion of Torontonians who have read/seen/heard anything about BWXT NEC recently saw a marginal decrease (-5) compared to 2020.
- Toronto residents are significantly more likely to recall anything from BWXT NEC through a company newsletter/flyer/brochure than those residing in Peterborough (70% vs. 46%).

READ/SEEN/HEARD ANYTHING



Q7. Have you recently read, seen, or heard anything about BWXT Nuclear Energy Canada?
Base: All respondents – Toronto 2022 (n=102); 2020 (n=146); 2018 (n=149) Toronto results should be treated with caution due to low base size.

RECALL SPECIFICS



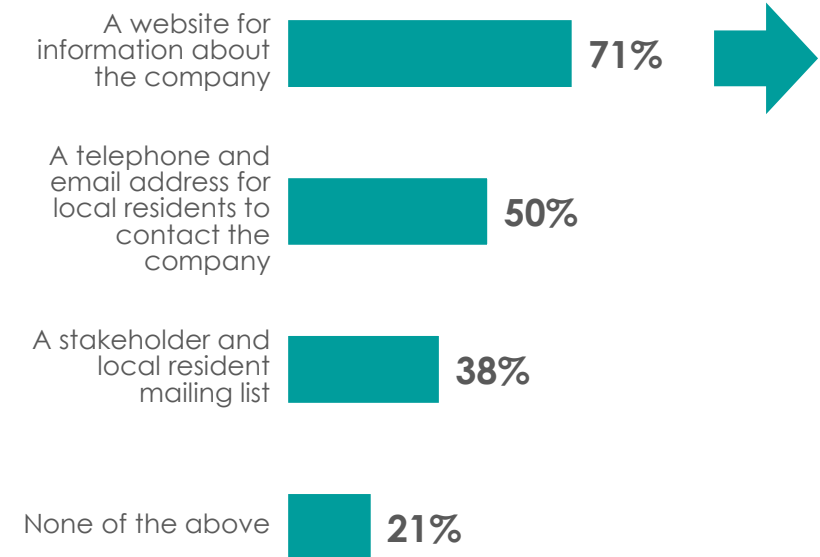
Q8. What do you recall?
Base: Heard about BWXT – Toronto 2022 (n=43); 2020 (n=69); 2018 (n=26)

Attributes <3% not shown

Website Awareness, Usage and Overall Impression – Peterborough & Toronto

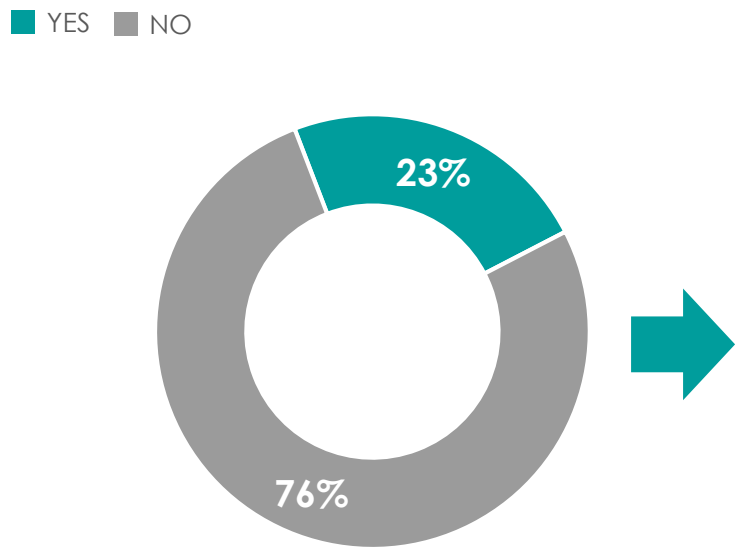
- Seven in ten (71%) of Peterborough and Toronto residents are aware that BWXT has a website with information about the company, with 23% saying they did visit the site in the past year. Among those who visited, over half (54%) had a positive impression of the website.

AWARENESS



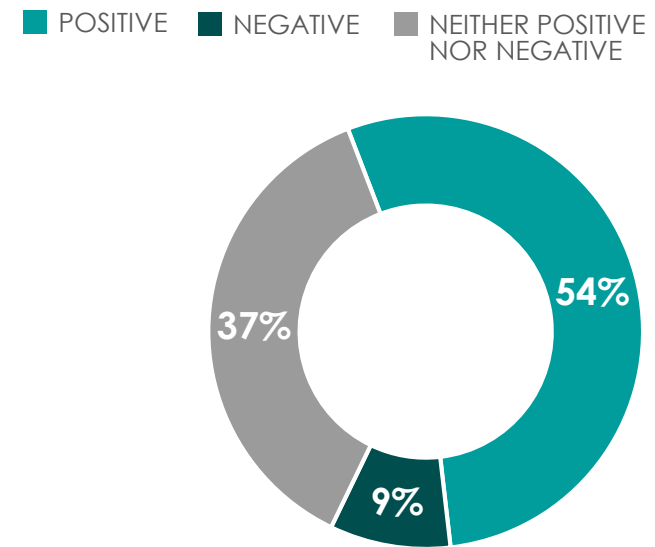
Q8a. Are you aware that BWXT NEC has any of the following? Please select all that apply. How about ...?
Base: Those who answered Very/somewhat/Not very familiar with BWXT NEC – n = 214

VISITED WEBSITE IN P12M



Q8b. Have you visited BWXT NEC's website in the past 12 months?
Base: Aware of website – n = 152

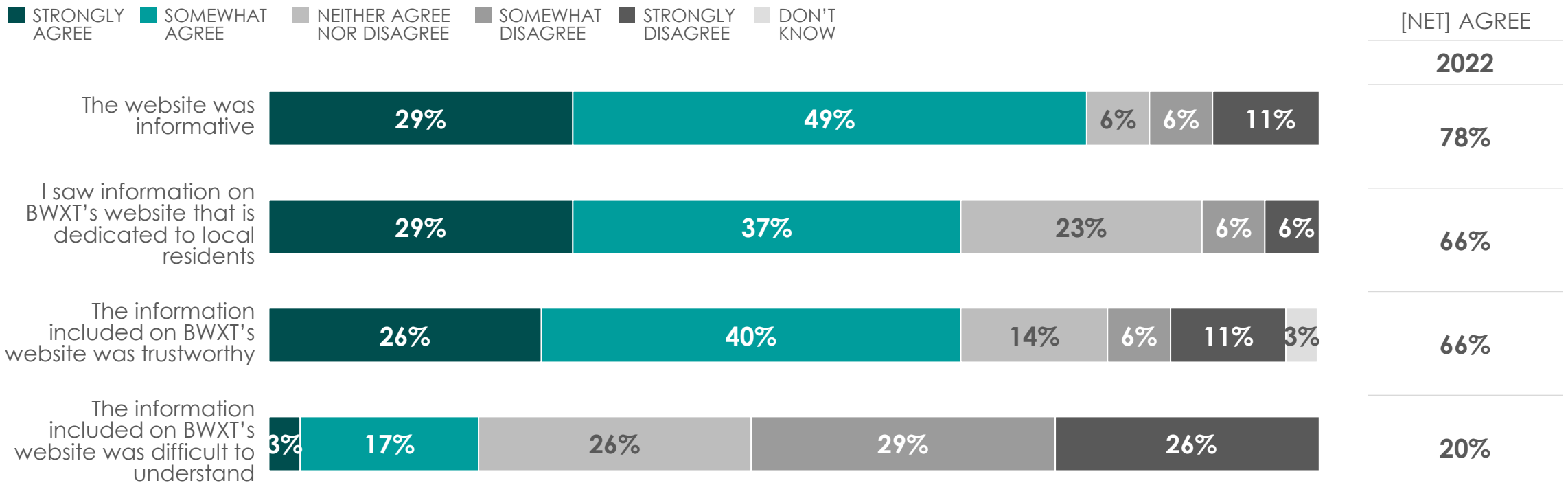
WEBSITE OVERALL IMPRESSION



Q8c. What was your overall impression of BWXT NEC's website? Would you say it was ...?
Base: Visited website in Past 12 Months – n = 35

Opinions with BWXT NEC's Website – Peterborough & Toronto

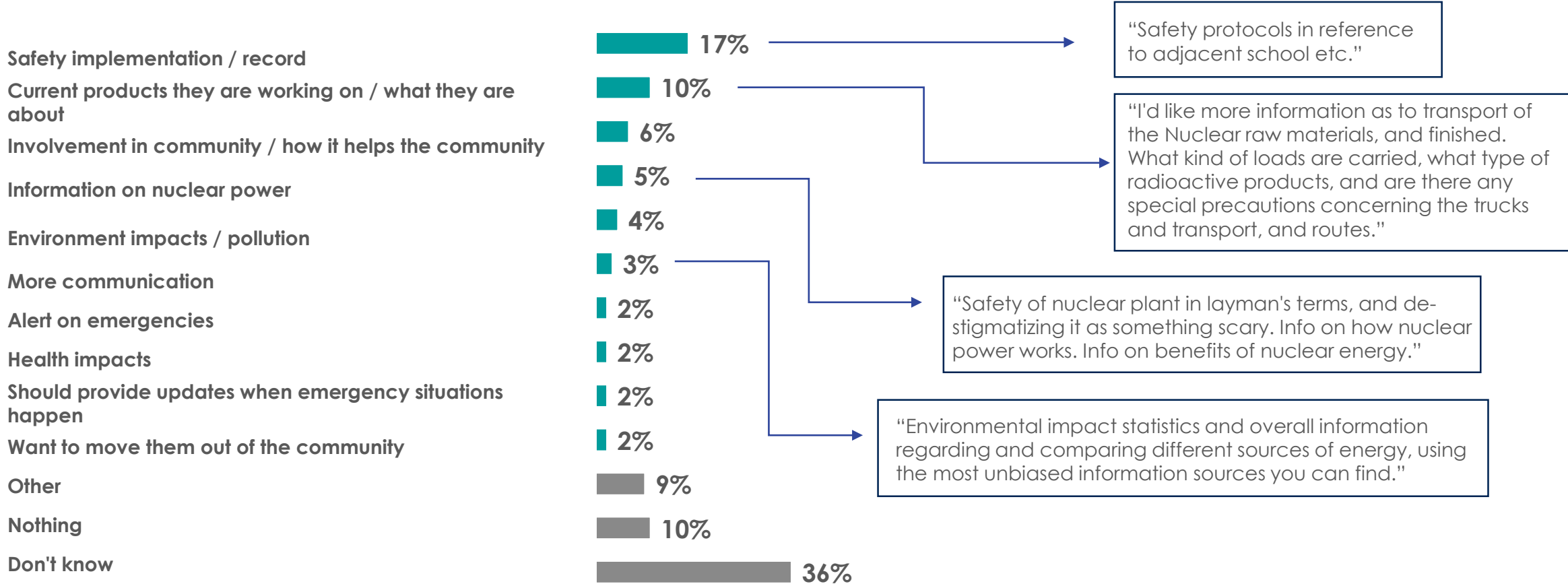
- Eight in ten (78%) of Peterborough and Toronto residents say the website is informative. The same proportion say the information they saw is dedicated to local residents and is equally trustworthy at 66% each. To a lesser extent, 20% say the information was difficult to understand.



Q8d. To what extent would you agree or disagree with the following about BWXT NEC's website? How about ...?
Base: Visited website in Past 12 Months – n = 35

Additional Information Would Like to See on Website

• Similar to 2020 results, both local residents of Toronto and Peterborough would like to see more information on the website pertaining to safety implementation as well as current products they are working on.

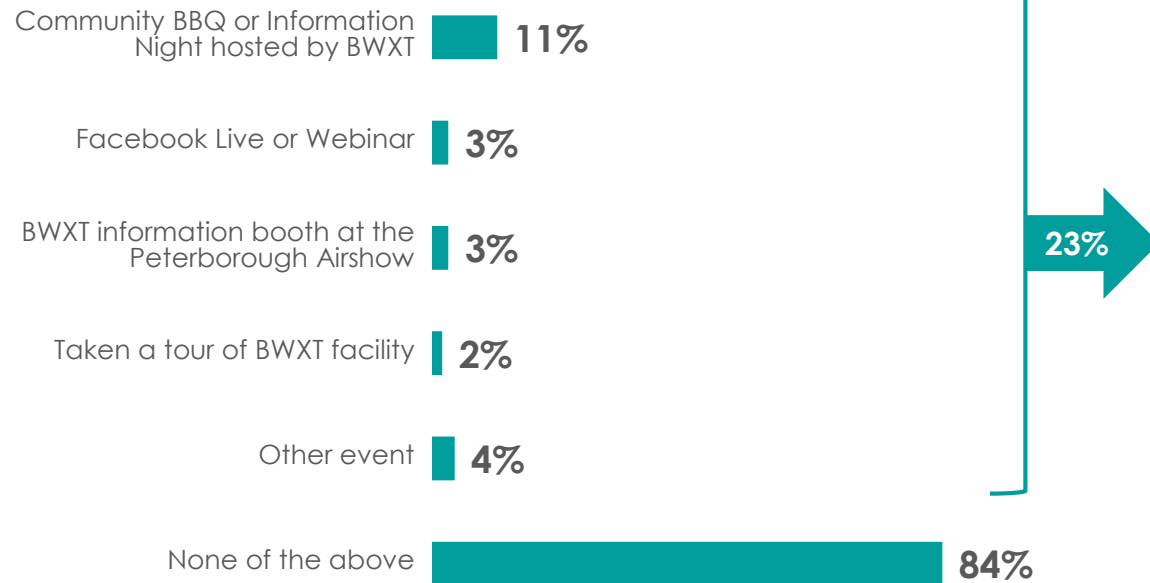


Community Engagement

BWXT NEC's Community Events – Peterborough

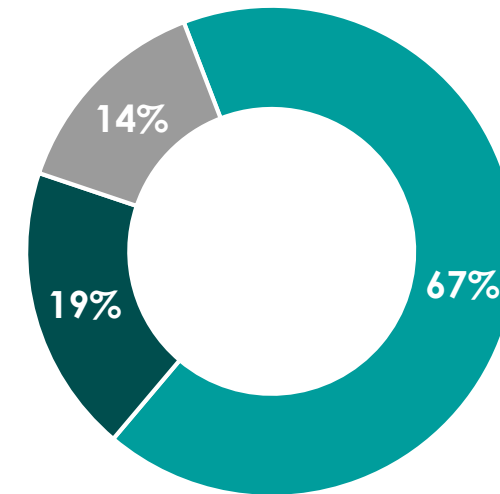
- One in ten (11%) locals in Peterborough have attended a community BBQ or information night hosted by BWXT, a slight increase from 2020 results (+6), suggesting that residents might be more comfortable attending public social events despite COVID-19. Most Peterborough residents have a positive impression of BWXT NEC's community events.

ATTENDANCE



EVENT OVERALL IMPRESSION

■ POSITIVE ■ NEGATIVE ■ NEITHER POSITIVE NOR NEGATIVE



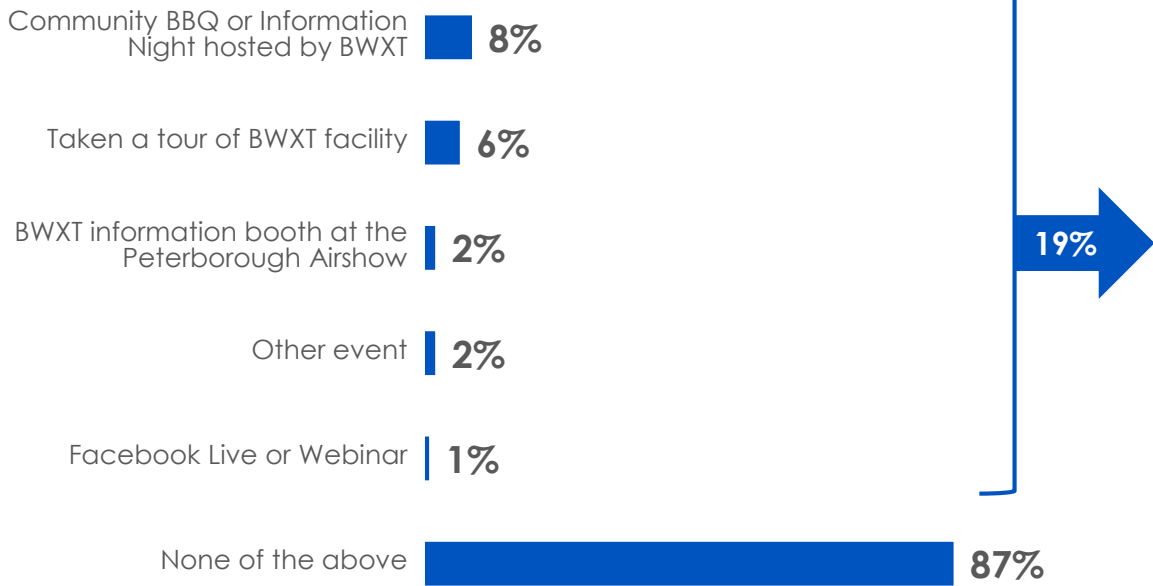
Q9a. Have you attended any of the following BWXT NEC's community events or an event where BWXT was present? Select all that apply, how about ...?
Base: All respondents – Peterborough (n=129)

Q9b. What was your overall impression of the BWXT event? Would you say it was ...?
Base: Attended at least one event – Peterborough (n=21)

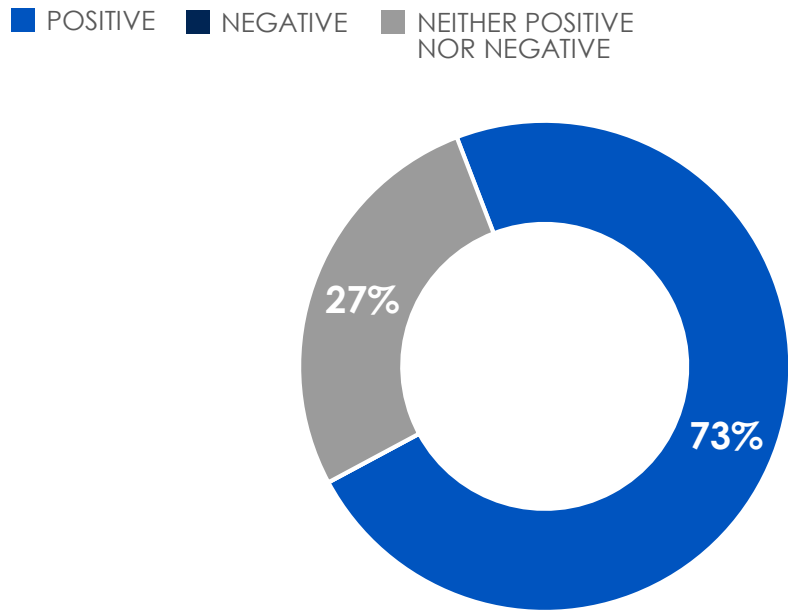
BWXT NEC's Community Events – Toronto

• One fifth (19%) of Toronto residents have attended a community event hosted by BWXT. Nearly three quarters (73%) have a positive impressions of the events, relatively stable from the previous wave.

ATTENDANCE



EVENT OVERALL IMPRESSION



Q9a. Have you attended any of the following BWXT NEC's community events or an event where BWXT was present? Select all that apply, how about ...?
Base: All respondents – Toronto (n=85)

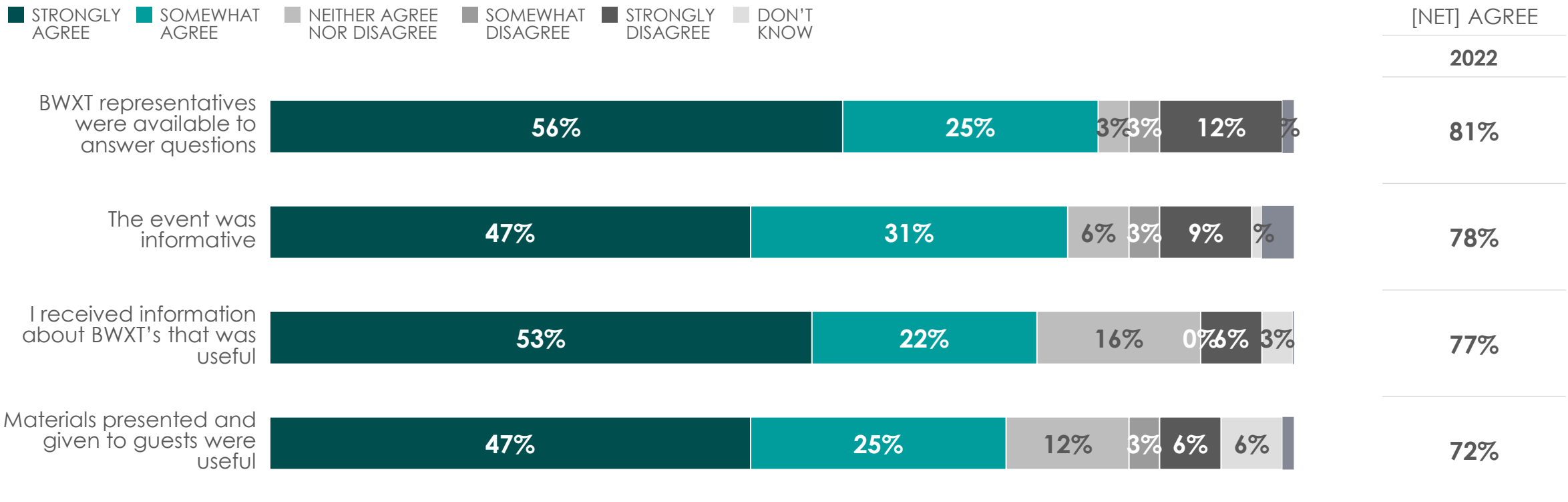
Q9b. What was your overall impression of the BWXT event? Would you say it was ...?
Base: Attended at least one event – Toronto (n=11) Toronto results should be treated with caution due to low base size.

A green box indicates a significantly higher difference than the other community.



Opinions About BWXT's Event Attended – Peterborough & Toronto

- Among Peterborough and Toronto residents who have attended an event, 81% agree that the BWXT representatives were available to answer questions, and nearly the same proportion say the event was informative (78%) and that information they received about BWXT was useful (77%). Seven in ten (72%) agreed that the materials presented and given to the guests were useful.

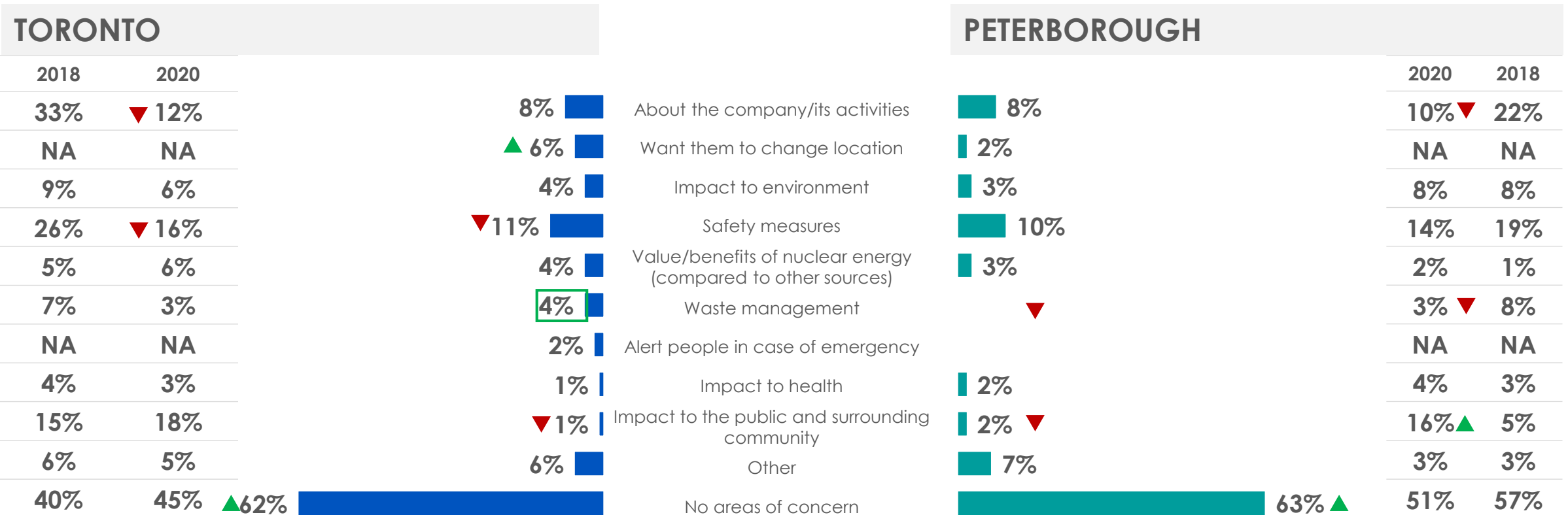


Q9c. To what extent would you agree or disagree with the following about the BWXT event? How about ...?
Base: Attended at least one event – n = 32

Information Sharing

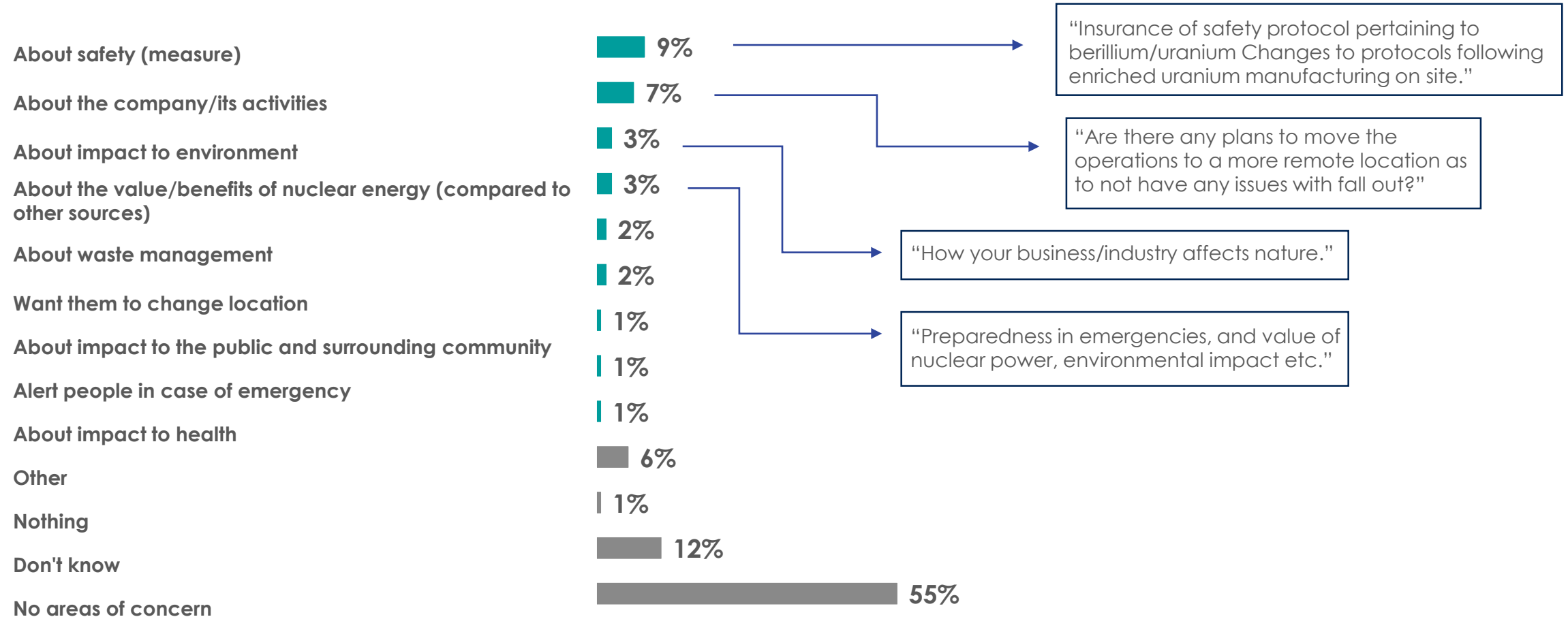
Areas of Concern/More Information About BWXT NEC

- Local Toronto respondents are significantly more likely than Peterborough residents to want BWXT to address topics surrounding waste management. Toronto residents also saw significant increases from the previous wave regarding changing BWXT's location as well as emergency contact measures. Directionally, Peterborough locals want to see more safety measure discussions than Torontonians. Both regions are significantly more likely to say there are no areas of concern than in 2020.



Q9. Are there any topics of concern or any topics that you would like more information about regarding BWXT Nuclear Energy Canada's operations or activities?
 Base: All respondents – Toronto 2022 (n=89); 2020 (n=146); 2018 (n=136) / Peterborough 2022 (n=129); 2020 (n=200); 2018 (n=194) – excludes don't know

Areas of Concern/More Information About BWXT NEC - Verbatims

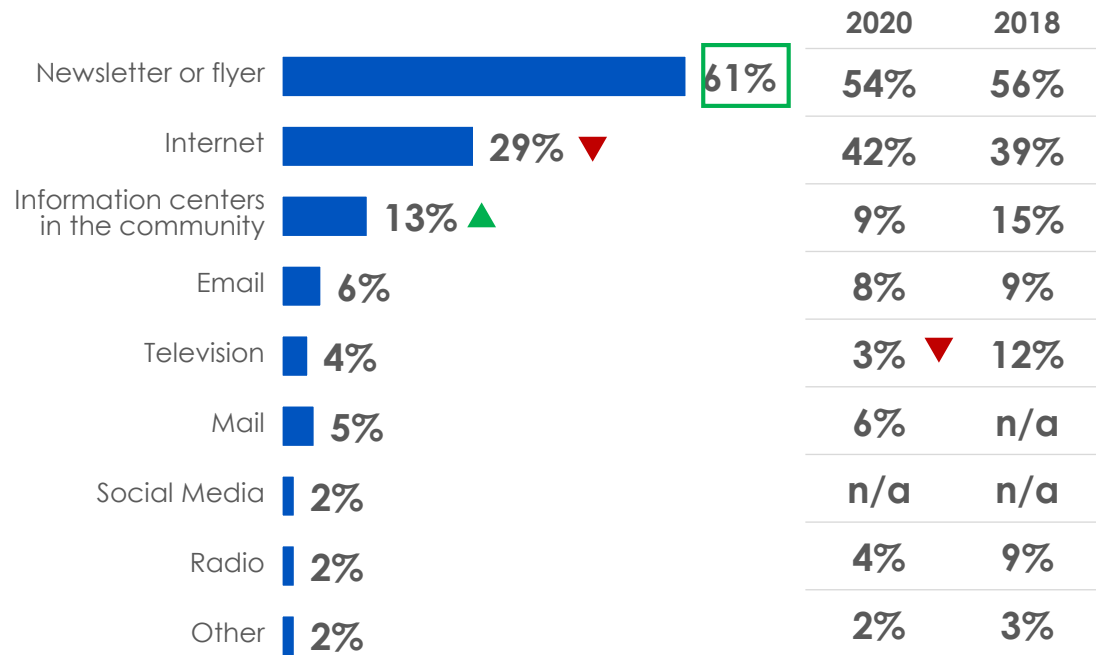


Q9. Are there any topics of concern or any topics that you would like more information about regarding BWXT Nuclear Energy Canada's operations or activities?
 Base: All respondents – n = 203 – excludes don't know (Toronto and Peterborough residents combined)

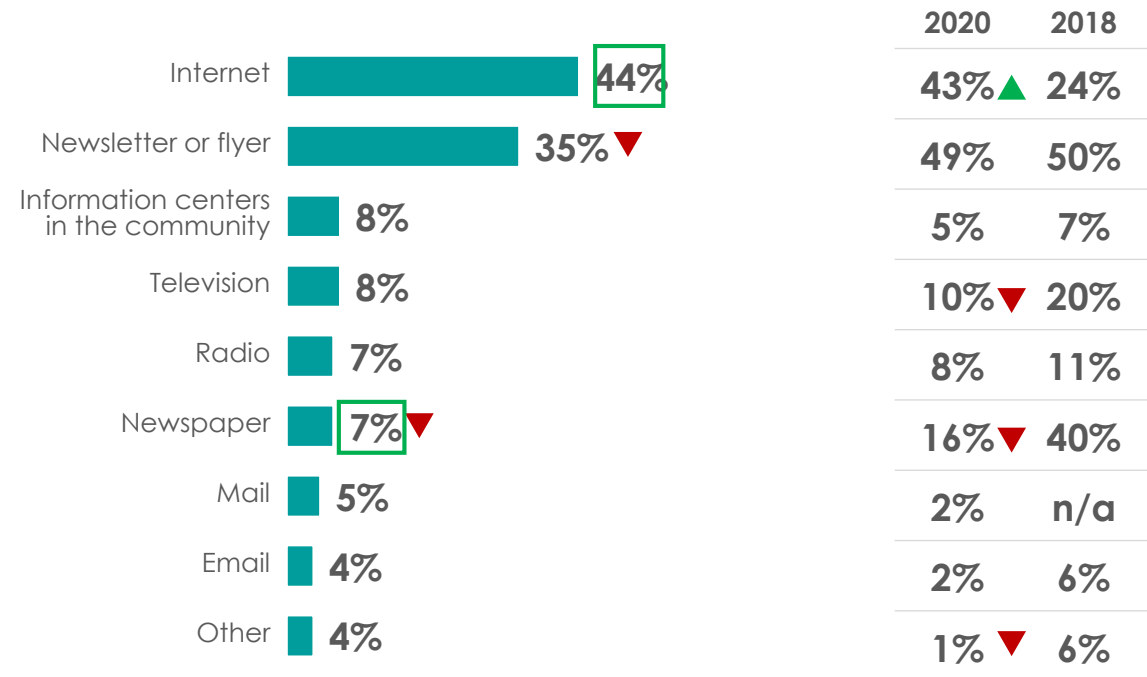
Preferred Method of Receiving Information from BWXT NEC

- Torontonians are significantly more likely than Peterborough residents to prefer to receive information about BWXT through newsletters or flyers, and significantly higher proportion from 2020 regarding information centres (+4). Local Peterborough residents are more likely to prefer receiving information via the Internet (unchanged from 2020) and newspaper – although this medium saw a significant decrease (-9).

TORONTO



PETERBOROUGH



Q10. What is the best way for BWXT Nuclear Energy Canada to provide you with information about the nuclear fuel facility and other topics such as BWXT NEC's safety information and involvement in the community?

Base: All respondents – Toronto 2022 (n=95); 2020 (n=133); 2018 (n=140) – excludes none and don't know

Q10. What is the best way for BWXT Nuclear Energy Canada to provide you with information about the nuclear fuel facility and other topics such as BWXT NEC's safety information and involvement in the community?

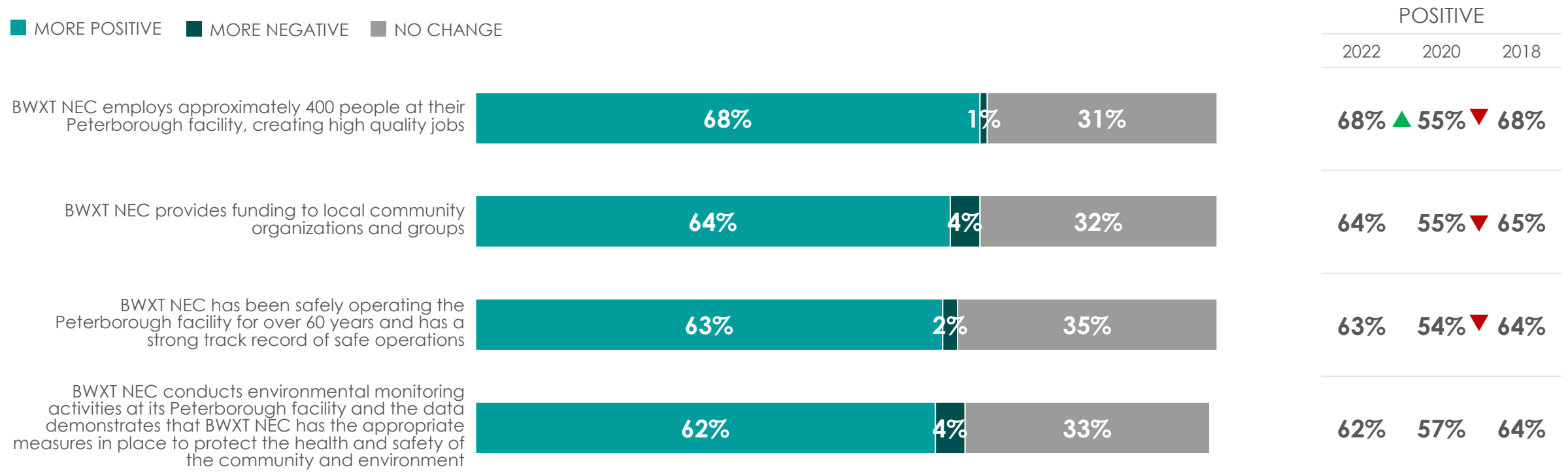
Base: All respondents – Peterborough 2022 (n=134); 2020 (n=181); 2018 (n=189) – excludes none and don't know

Impressions of BWXT Initiatives

Knowledge Affecting Impression of Organization – Peterborough

- Nearly seven in ten Peterborough respondents say knowing BWXT employs roughly 400 employees at their facility that creates high quality jobs garners more positive sentiment towards the company, a significant 13-point increase from 2020. Providing funding to local community organizations (+9), safe operations and a strong track record (+9) and environmental monitoring activities and operates under a strictly regulated environment (+7) all saw increases in positive impressions of the company.

■ MORE POSITIVE ■ MORE NEGATIVE ■ NO CHANGE



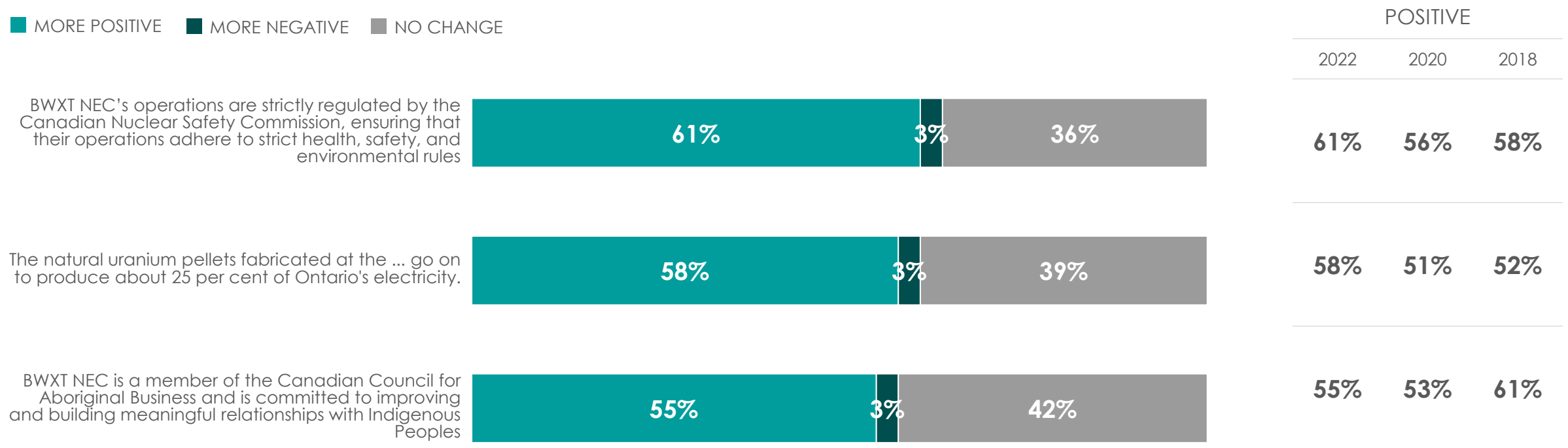
Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization, or would not change your impression of the organization? How about ...?

Base: All respondents – Peterborough 2022 (n=varies); 2020 (n=varies); 2018 (n=varies) – excludes don't know

Knowledge Affecting Impression of Organization – Peterborough (cont.)

- Directionally, slightly more Peterborough residents feel positive about BWXT NEC's strictly regulated operations by the CNSC compared to 2020 (+5) as well as the natural uranium pellets that are fabricated at the Peterborough facility to produce 25% of Ontario's electricity (+7). Remaining unchanged from the previous wave, 55% (+2) say they feel more positive knowing BWXT NEC is a member of the Canadian Council for Aboriginal Business.

■ MORE POSITIVE ■ MORE NEGATIVE ■ NO CHANGE



Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization, or would not change your impression of the organization? How about ...?

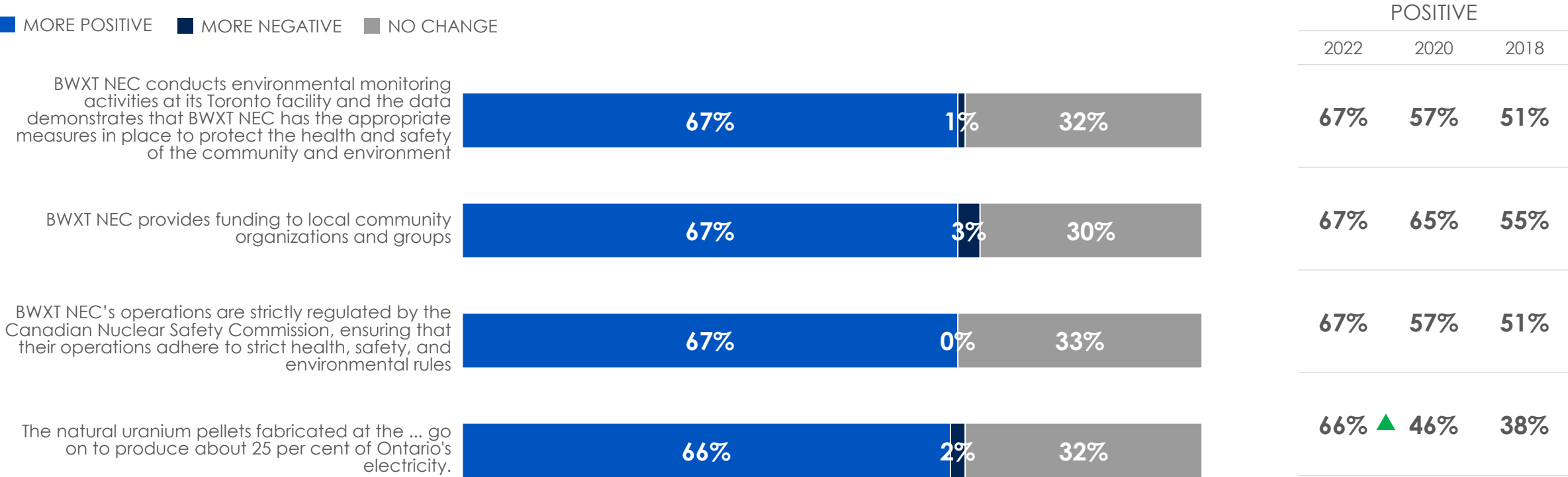
Base: All respondents – Peterborough 2022 (n=varies); 2020 (n=varies); 2018 (n=varies) – excludes don't know

Knowledge Affecting Impression of Organization

– Toronto (cont.)

• Knowledge of the natural uranium pellets that help produce 25% of Ontario's electricity significantly increased positive sentiment this year by a staggering 20 points. Directional increases of affinity towards BWXT were observed among Toronto residents regarding the organization's environmental monitoring activities to ensure appropriate measures are in place to protect the health and safety of the community (+10), and the knowledge that BWXT's operation are regulated by the CNSC (+10).

■ MORE POSITIVE ■ MORE NEGATIVE ■ NO CHANGE



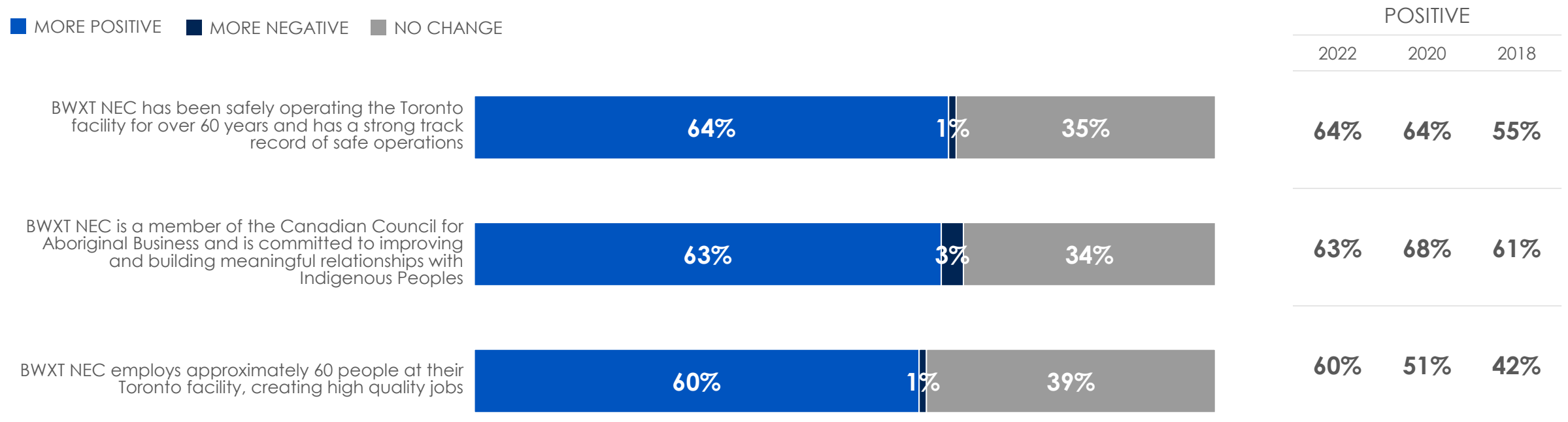
Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization, or would not change your impression of the organization? How about ...?
 Base: All respondents – Toronto 2022 (n=varies); 2020 (n=146); 2018 (n=varies) – excludes don't know Toronto results should be treated with caution due to low base size.



Knowledge Affecting Impression of Organization – Toronto

- Knowing that the employment of roughly 60 in their Toronto facility increases positive sentiment towards BWXT, a directional increase from 2020 (+9). Awareness of BWXT NEC's strong track record had no impact on impressions from the previous year, while directional downward shifts occurred regarding knowledge of the CCAB membership (-5).

■ MORE POSITIVE ■ MORE NEGATIVE ■ NO CHANGE



Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization, or would not change your impression of the organization? How about ...?

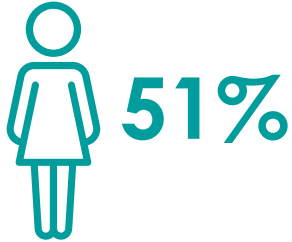
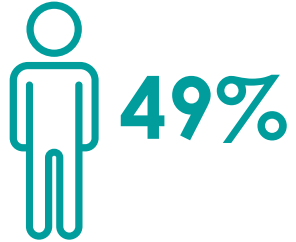
Base: All respondents – Toronto 2022 (n=varies); 2020 (n=146); 2018 (n=varies) – excludes don't know Toronto results should be treated with caution due to low base size.

APPENDIX

Respondent Profile – Peterborough



GENDER



AGE

18-34 years 18%

35-54 years 23%

55+ years 59%



EDUCATION

HS or less 17%

Post-sec/
college/trade 51%

University 32%



HOUSEHOLD SIZE

1 person 26%

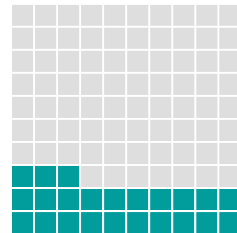
2 people 32%

3 people 23%

4+ people 18%



CHILDREN <18 YEARS IN HH



23%

Have children in HH

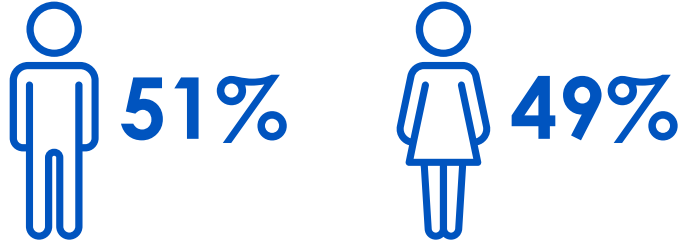
Base: All respondents – Peterborough (n=136)



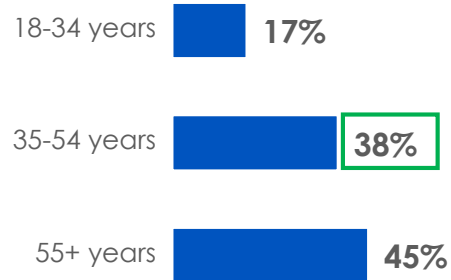
Respondent Profile – Toronto



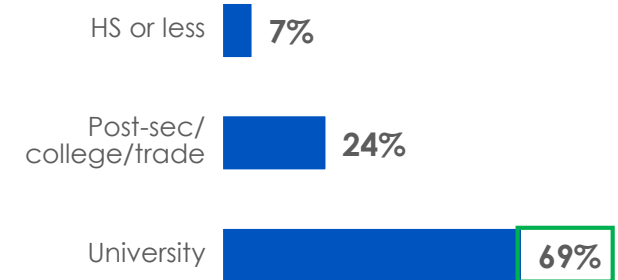
GENDER



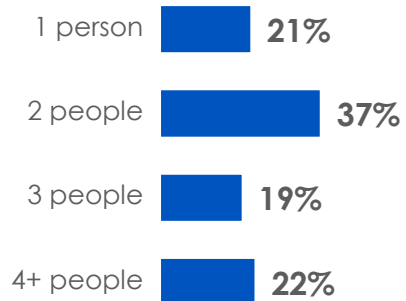
AGE



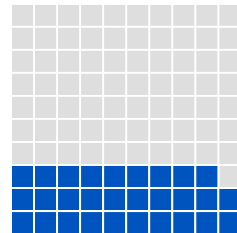
EDUCATION



HOUSEHOLD SIZE



CHILDREN <18 YEARS IN HH



Base: All respondents – Toronto (n=67)



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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

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You act better when you are sure.