

**REPORT** 

December 2020



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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.

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

#### Specifically, the research investigated:

- 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 30, 2020. In total, n=346 surveys were completed n=146 in Toronto (n=73 online, n=73 telephone). and n=200 in Peterborough (n=89 online, n=111 telephone).
- The overall margin of error for a sample of n=346 interviews is +/- 6.0%, 19 times out of 20.
- Statistically significant changes are noted with a ▲ or a ▼arrow denoting a change up or down in the finding from 2018, 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**

#### Support for and Familiarity with Nuclear Technology

Support for nuclear energy production remains stable with 2018 levels. While more than half of respondents in both the Toronto (56%) and Peterborough (64%) regions are supportive of nuclear energy production, support for the technology continues to fall below other forms of electricity generation such as solar, hydroelectric, wind, and natural gas. Support for nuclear technology is significantly higher in Peterborough than it is in Toronto.

Although overall familiarity with nuclear technology has diminished in both Toronto (50%, -10 pts) and Peterborough (58%, -13 pts), familiarity with BWXT has increased for both regions with both Toronto (53%, +14 pts) and Peterborough (72%, +33 pts) showing statistically significant growth from the previous wave.

Furthermore, among those who are familiar with BWXT, positive impressions are on the rise: significantly more Toronto (54%, +15 pts) and Peterborough (49%, +18 pts) respondents indicate they feel excellent/very good towards BWXT.

Collectively this indicates that while 2020 and the COVID-19 pandemic may have shifted focus for many local Toronto and Peterborough residents away from nuclear energy (as evidenced by the falling familiarity levels), BWXT brand awareness has held strong and in fact has *increased*, especially in Peterborough where the largest Canadian BWXT facility is located.



## **Executive Summary**

#### Impressions of BWXT NEC

Beyond overall familiarity and high-level impressions of the company, the data show that specific attitudes towards BWXT nuclear technologies vary between the Toronto and Peterborough regions. While **both regions see a significant increase** (compared to 2018) **in the proportion who feel BWXT is keeping the community updated via regular communications** (65% Toronto +15 pts, 71% Peterborough +18 points) when provided a series of statements and asked to provide their agreement levels, the two markets showed disparate attitudes:

- Local Torontonians largely agree that BWXT **operates its facility safely** (72%) and that they can **easily access information about BWXT** (71%)
- Conversely, local Peterborough residents are more likely to agree that **BWXT contributes to the local economy** (84%) and keeps the community updated via regular communications (71%). The emphasis of Peterborough respondents on safety may be linked to the size of the nuclear facility being significantly larger than its Toronto counterpart.

#### **BWXT NEC Communications and Impressions**

The proportion of respondents who have seen/read/heard anything about BWXT in the past year has significantly increased in 2020 (47% Toronto, +30 pts; 76% Peterborough, +51pts) with most hearing about the company via a company newsletter or newspaper article.

Overall awareness of BWXT is reflected in the strong awareness of their website with more than six in ten in each region indicating familiarity with the site and just under half specifying that they have actively visited the website in the past 12 months. Among those who visited the BWXT website, a majority in each market agreed that the website was informative and had information dedicated to local residents. Few felt the website was difficult to understand.



## **Executive Summary**

#### **Event Attendance and Impressions**

Community event attendance remains low in both regions with Torontonians being more likely to attend a community barbeque or BWXT information night (15% vs. 7% Peterborough). While the effect of the COVID-19 pandemic is almost certain to impact this metric, it still provides an indication of a growth opportunity for BWXT.

Among both regions, overall event impressions remain positive and Torontonians appear particularly engaged with BWXT events:

Torontonians provide all event metrics a rating of 85% or higher with almost all agreeing that the event was informative (95%) and that the information they received was useful (90%). In comparison, Peterborough provides softer agreement scores: 80% feel the BWXT representative was able to answer their questions while 76% feel the event was informative. In sum, while both regions provided positive scores for BWXT events, Torontonians showed stronger agreement, while Peterborough showed softer feedback.

#### Impressions of BWXT NEC Community Initiatives

Knowledge of BWXT and how it shapes impressions of the company vary between the two markets polled.

Toronto respondents were significantly more likely than those in Peterborough to state that BWXT being a member of the Canadian Council for Aboriginal Business gives them a more positive impression of the company (68% Toronto vs. 53% Peterborough). Torontonians also highlighted BWXT's commitment to provide funding to local community groups and organizations as something that makes them feel more positively towards the company (65% positive). Contrastingly, local Peterborough residents highlight environmental monitoring activities (57% positive) and that the strict regulation of BWXT's activities (56% positive) as aspects that provide a positive impression of the company.

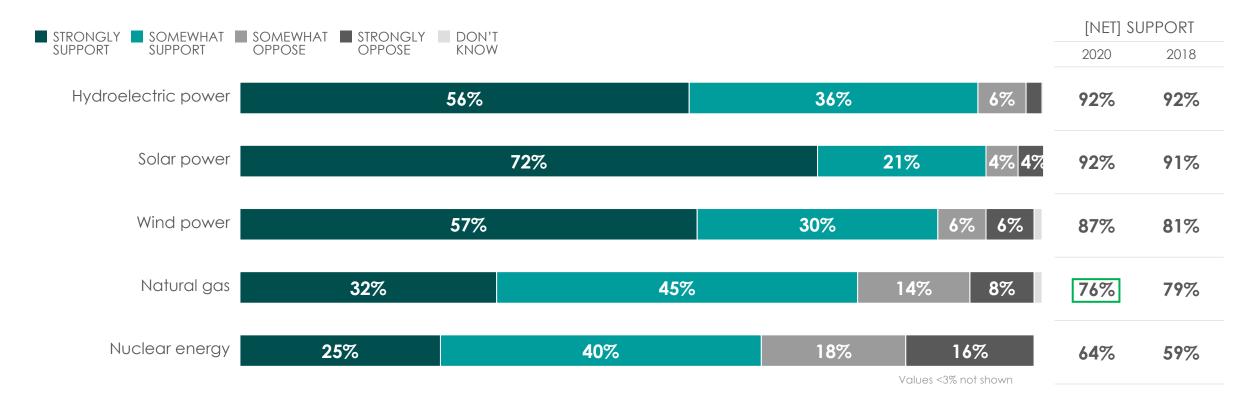


# Support for and Knowledge of Nuclear Energy



## Support for Various Ways of Producing Electricity - Peterborough

• While 64% of local Peterborough residents surveyed support nuclear energy (including quarter who strongly support it), it has the lowest support out of the various types of electricity generation, falling well below renewable sources such as water, solar, and wind.



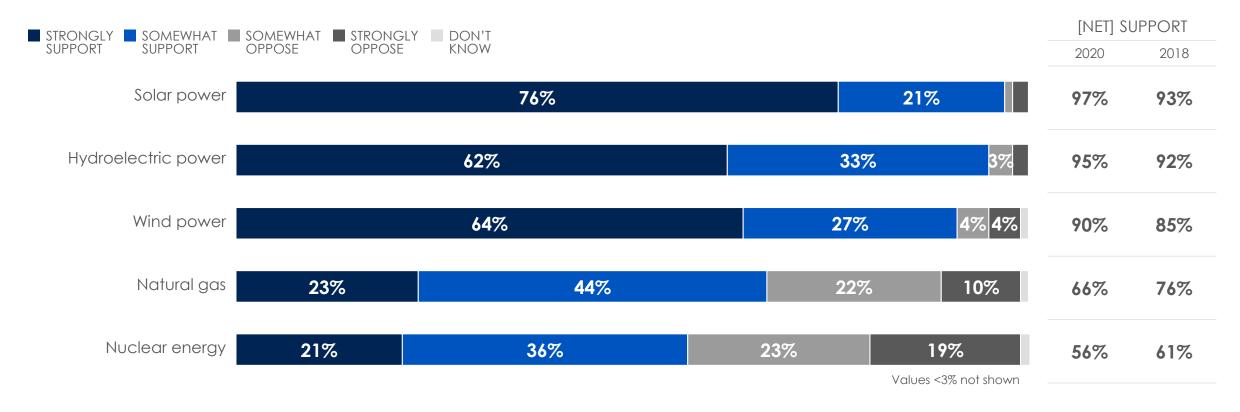
Q2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. How about ...? Base: All respondents – Peterborough 2020 (n=200); 2018 (n=203)





## Support for Various Ways of Producing Electricity – Toronto

• Local Toronto residents surveyed have a similar view of nuclear energy, with 56% saying they support this type of energy production.



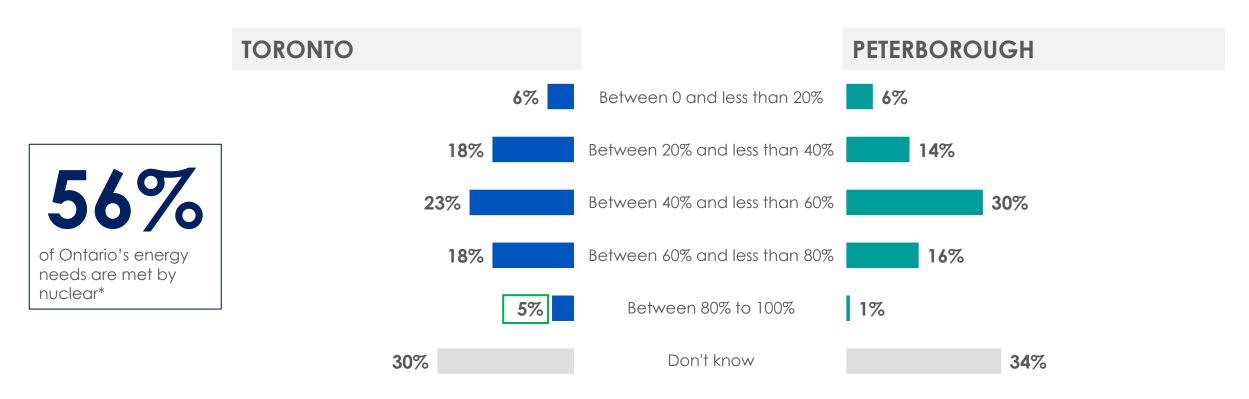
Q2. I am going to read you a list of several ways to produce electricity. Please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. How about ...?

Base: All respondents – Toronto 2020 (n=146); 2018 (n=149)



## Percentage of Ontario Electricity Generated from Nuclear Power

• The Toronto and Peterborough regions see similar fallout in their responses on how much of Ontario's electricity is generated from nuclear with a quarter to three in ten estimating that between 40-60% of Ontario's energy is nuclear powered. That the curve of awareness peaks around 60% demonstrates that local Toronto and local Peterborough respondents have a good sense of how nuclear energy support's Ontario's electricity needs.



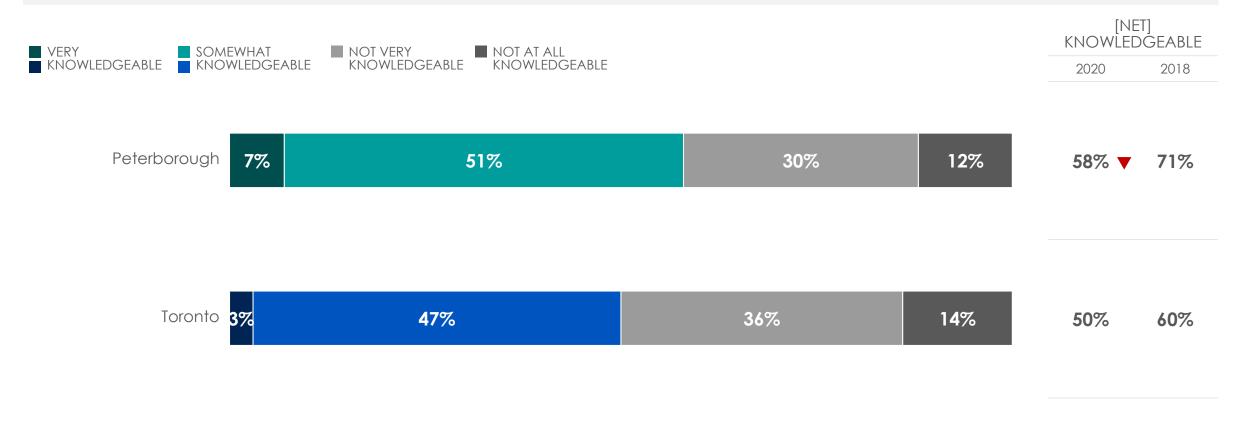
Q2a. Approximately what percentage of electricity in Ontario is generated from nuclear power? Your best estimate is fine. If you do not know, please say so. Base: All respondents – Toronto (n=146) / Peterborough (n=200)



<sup>\*</sup>Source: https://www.cer-rec.gc.ca/en/data-analysis/energy-markets/market-snapshots/2017/market-snapshot-canadas-nuclear-energy-output-ranked-6th-in-world.html

## Knowledge About Nuclear Energy and Nuclear Technology

• Six in ten Peterborough respondents say they are knowledgeable about nuclear energy/technology, a significant decline from 2018. However, Peterborough respondents continue to demonstrate a stronger knowledge base than Torontonians- 50% of local Toronto residents are knowledgeable about nuclear.



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 2020 (n=146); 2018 (n=149) / Peterborough 2020 (n=200); 2018 (n=203)

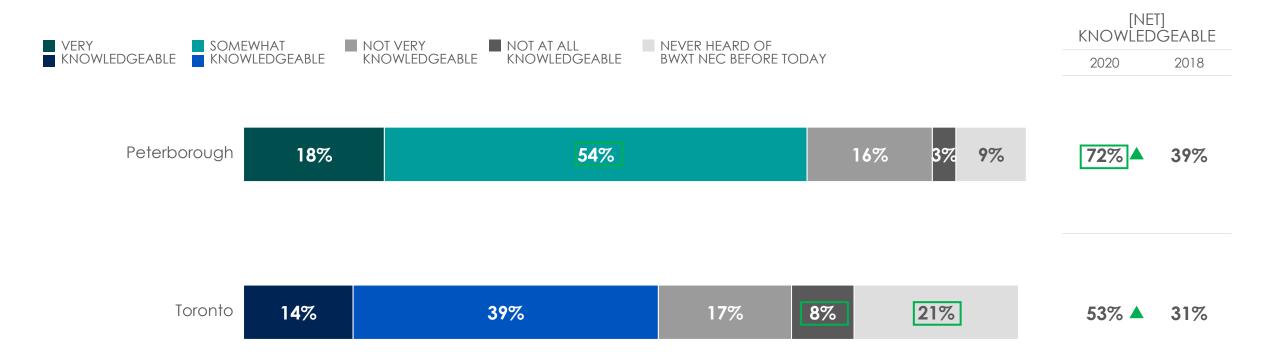


# Familiarity and Impressions of BWXT



## Familiarity with Company BWXT Nuclear Energy Canada

• Respondents in both communities are significantly more familiar with BWXT in 2020 than they were in 2018. Soaring 33 points since the last wave- 72% of Peterborough respondents are familiar with BWXT. More than half of Torontonians indicate they are familiar with BWXT, a 22-point jump from 2018.



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 ...?

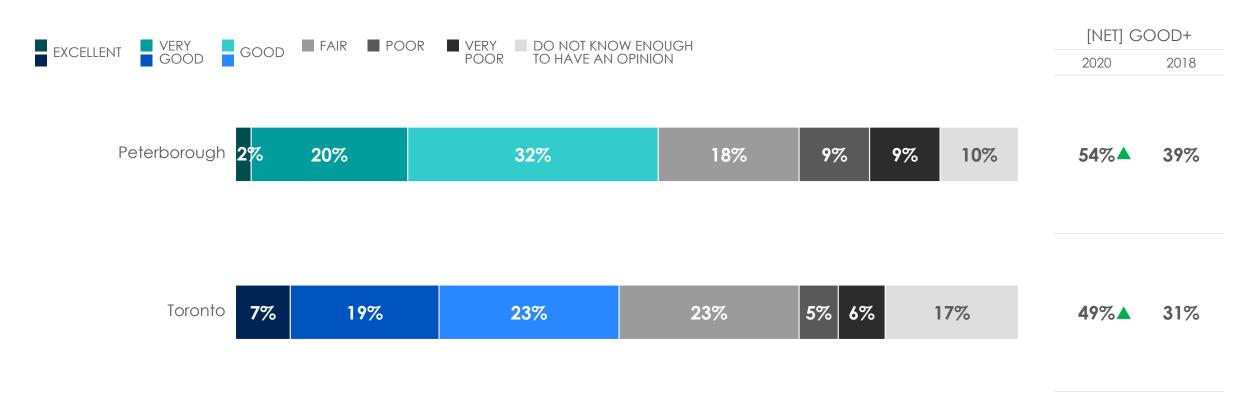
Base: All respondents – Toronto 2020 (n=146); 2018 (n=149) / Peterborough 2020 (n=200); 2018 (n=202)





## Overall Impression of BWXT Nuclear Energy Canada

• Among those with some familiarity with BWXT, half of Peterborough and Toronto respondents have at least a good impression of BWXT NEC, showing significant improvement from 2018 in both markets.



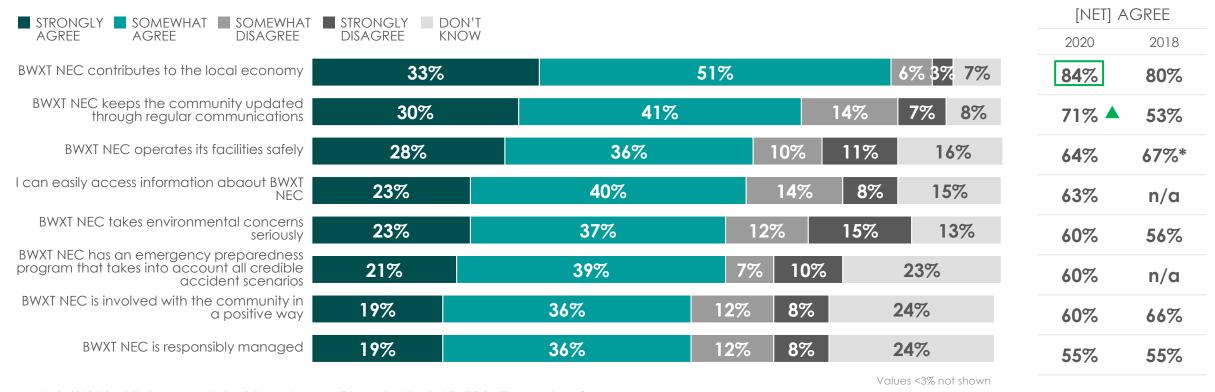
Q5. What is your overall impression of BWXT Nuclear Energy Canada? Would you say that your impression is ...? Base: Familiar with BWXT – Toronto 2020 (n=103); 2018 (n=65) / Peterborough 2020 (n=176); 2018 (n=101)





## Impressions with BWXT NEC (Among those Familiar) – Peterborough

• Eight in 10 Peterborough respondents familiar with BWXT NEC feel the company contributes to the local economy, which is significantly higher than Toronto respondents. Seven in ten agree that the company keeps the community updated with regular communications, a significant increase from 2018, while two-thirds are confident the company operates safely and agree they can easily access information about BWXT.

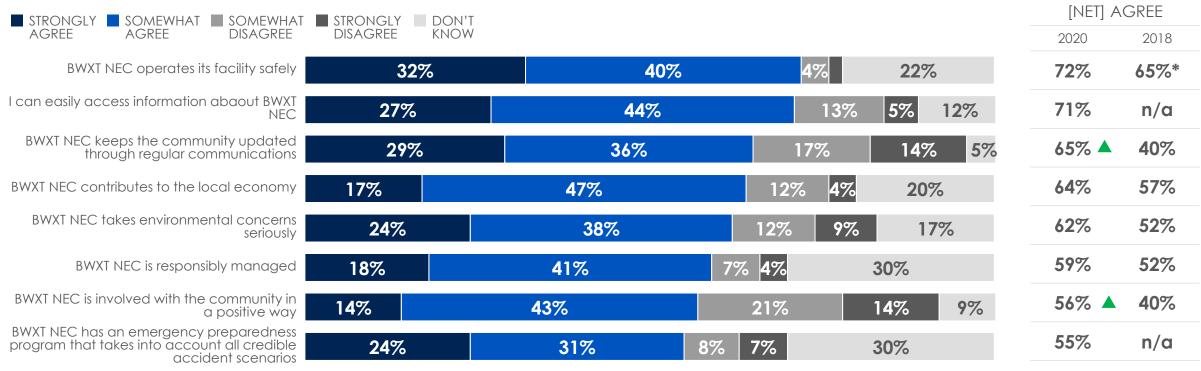






## Impressions with BWXT NEC (Among those Familiar) – Toronto

• Seven in ten Toronto respondents agree the company operates safely, and that they can access information about BWXT easily. Respondents are significantly more likely this year to agree that BWXT keeps the community updated through regular communications and that the company is involved in the community in a positive way.



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 2020 (n=103); 2018 (n=65)

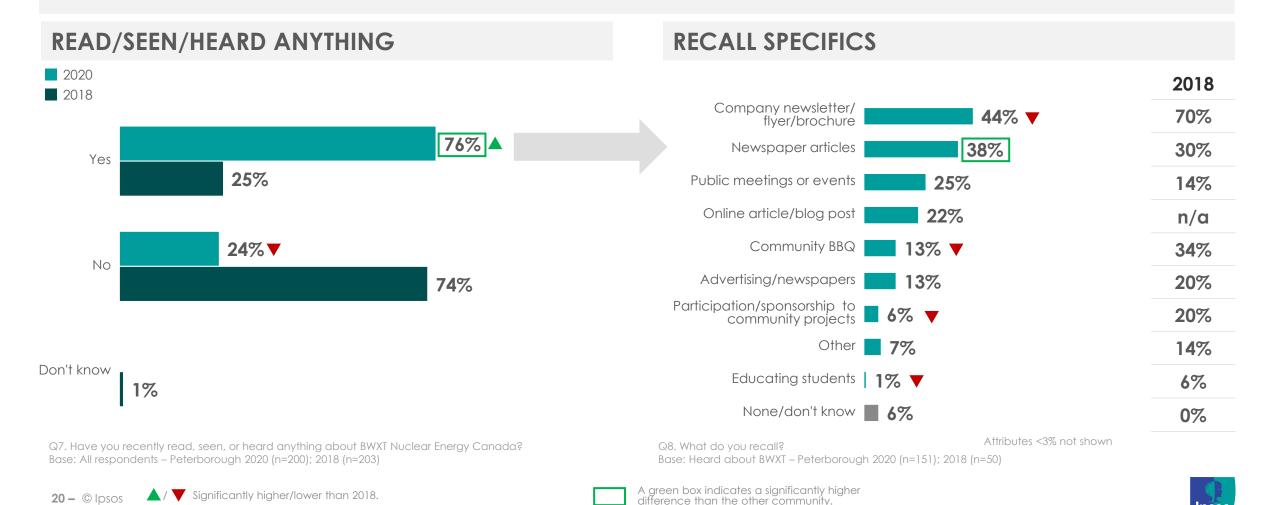


## Communications with Residents



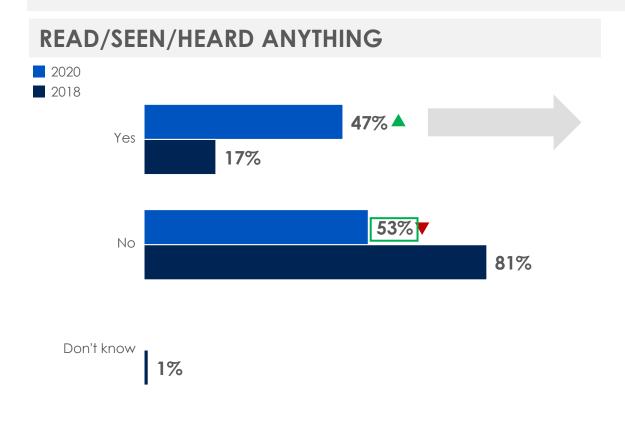
## Recently Read/Seen/Heard Anything Re: BWXT NEC – Peterborough

• Three quarters of Peterborough respondents have read/seen/heard anything about BWXT NEC recently, a significant increase from 2018. While fewer local Peterborough residents learn about BWXT via a newsletter compared with last wave, more than three in ten continue to hear about the company via newspaper articles.



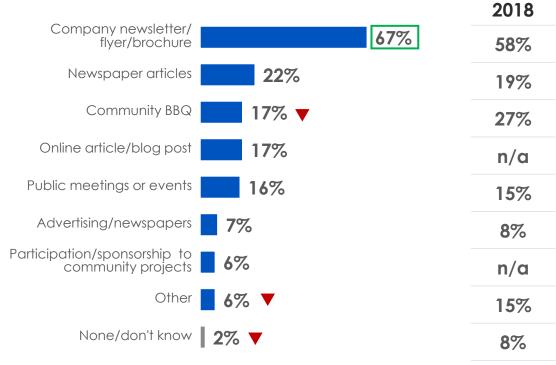
### Recently Read/Seen/Heard Anything Re: BWXT NEC Toronto

 Nearly half of Toronto respondents have read/seen/heard anything about BWXT NEC recently, a 30-point jump from 2018. Torontonians continue to most commonly learn about BWXT via a company newsletter/flyer/brochure, with a further two in ten reading newspaper articles about the company.



Q7. Have you recently read, seen, or heard anything about BWXT Nuclear Energy Canada? Base: All respondents – Toronto 2020 (n=146): 2018 (n=149)

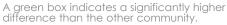




Q8. What do you recall? Base: Heard about BWXT - Toronto 2020 (n=69): 2018 (n=26) Attributes <3% not shown



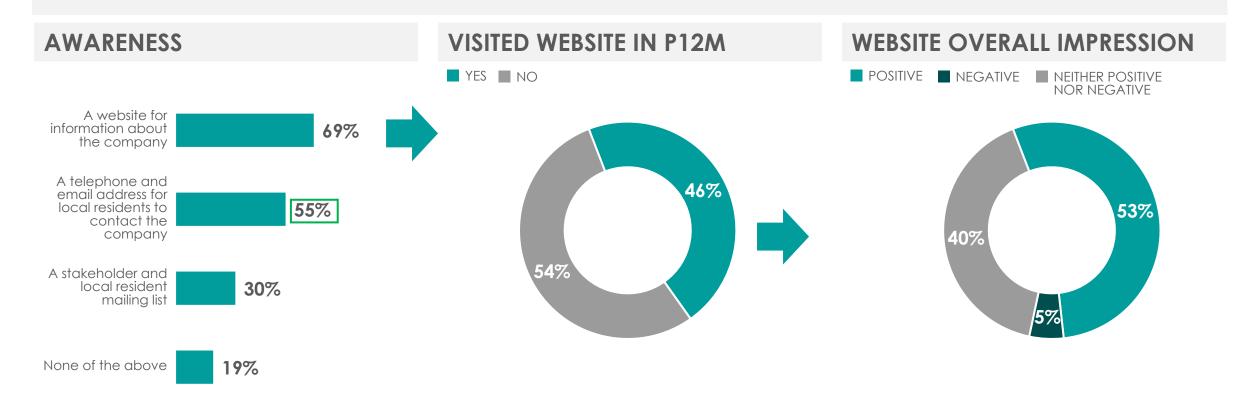






## Website Awareness, Usage and Overall Impression - Peterborough

• Seven in ten local Peterborough residents are aware that BWXT has a website with information about the company, with half of these respondents saying they have visited the site in the past year. Among those who visited, half said the website gave a positive impression.



Q8a. Are you aware that BWXT NEC has any of the following? Please select all that apply. How about ...? Base: All respondents – Peterborough (n=175)

Q8b. Have you visited BWXT NEC's website in the past 12 months? Base: Aware of website – Peterborough (n=120)

Q8c. What was your overall impression of BWXT NEC's website? Would you say it was ...?

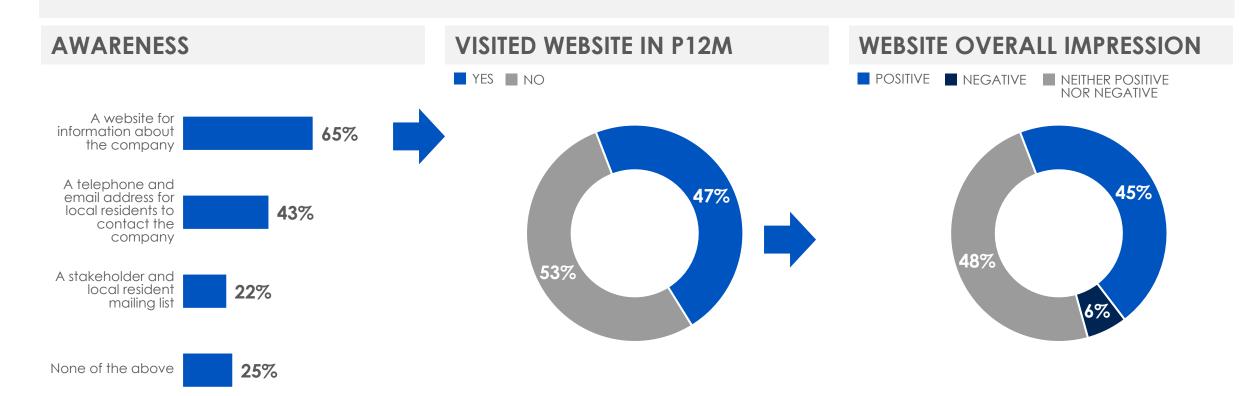
Base: Visited website in Past 12 Months – Peterborough (n=55)





## Website Awareness, Usage and Overall Impression – Toronto

• Two thirds of Toronto respondents are aware that BWXT has a website, with half of those aware having visited the site in the past year. In line with the response shown in Peterborough, nearly half of those who visited the site felt it was a positive experience.



Q8a. Are you aware that BWXT NEC has any of the following? Please select all that apply. How about ...?
Base: All respondents – Toronto (n=101)

Q8b. Have you visited BWXT NEC's website in the past 12 months? Base: Aware of website – Toronto (n=66)

Q8c. What was your overall impression of BWXT NEC's website? Would you say it was  $\ldots$ ?

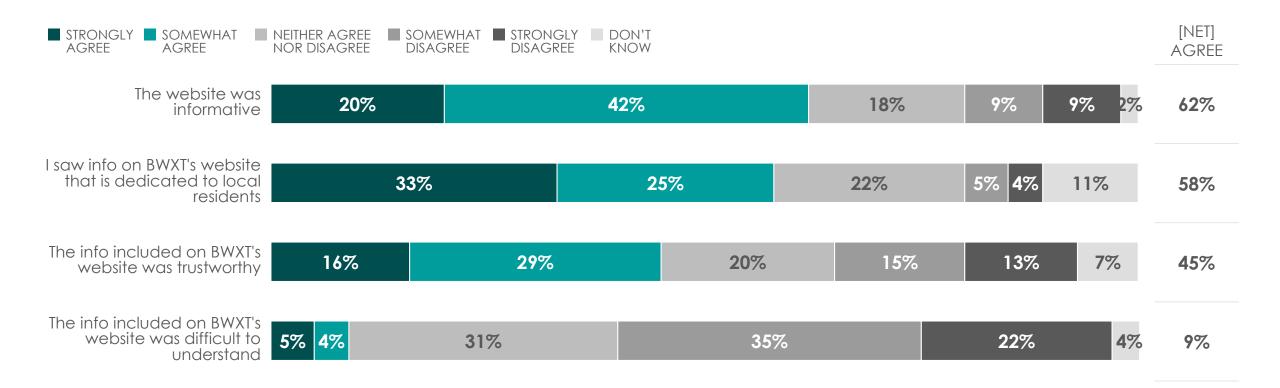
Base: Visited website in Past 12 Months – Toronto (n=31)





## Opinions with BWXT NEC's Website – Peterborough

• Among those who visited the BWXT website in the past year, two thirds of agree that the website was informative, while 58% agree that there was information dedicated to local residents. Respondents are divided however on whether the information was trustworthy.

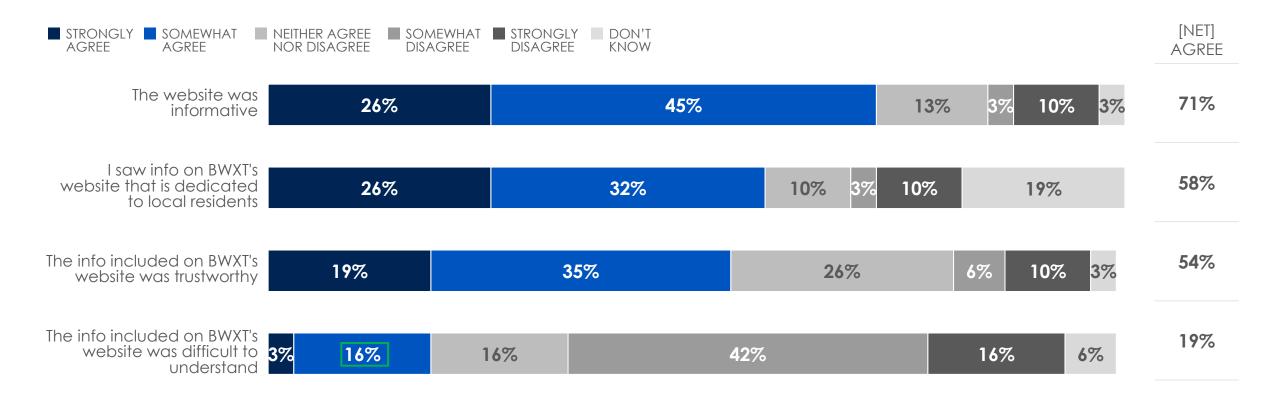


Q8d. To what extent would you agree or disagree with the following about BWXT NEC's website? How about ...? Base: Visited website in Past 12 Months – Peterborough (n=55)



## Opinions about BWXT NEC's Website – Toronto

• Among Toronto respondents who visited the BWXT website in the past 12 months, seven in ten agree the website is informative, while more than half agree that they saw information dedicated to local residents. Directionally more Toronto respondents agree that the website had trustworthy information, however, more also agree that the website had information that was difficult to understand.

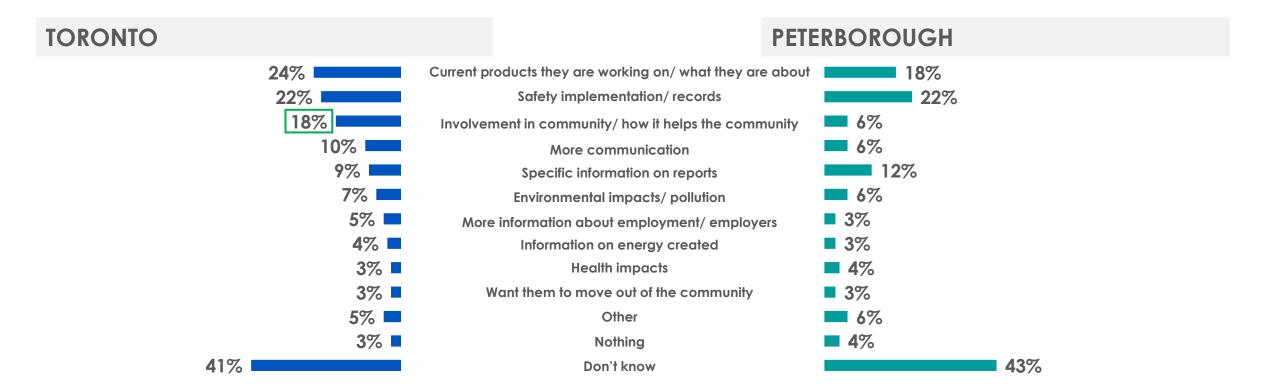






#### Additional Information Would Like to See on Website

 Both communities agree that they would like to see more information on the website pertaining to current products BWXT is working on, and safety implementation. Beyond those top two issues, Toronto respondents would be more interested in seeing how BWXT is involved in the community, while 12% of local Peterborough residents would like to see specific information on reports.



Q8e. What, if any, kind of information would you like to see on BWXT NEC's website? Base: Visited website in Past 12 Months – Toronto (n=146) / Peterborough (n=200)

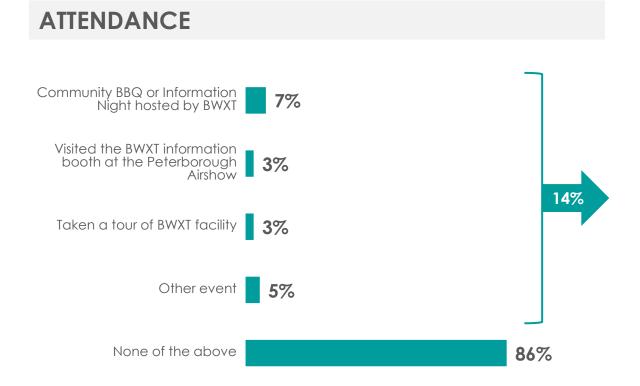


## **Community Engagement**

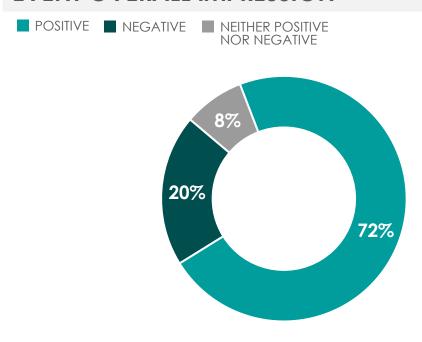


## BWXT NEC's Community Events - Peterborough

• Less than a fifth of polled Peterborough residents have attended a BWXT event, although this number could be expected to be higher if not for the COVID-19 pandemic which has effectively halted all potential in person gatherings. Among those who have attended an event, three quarters said the event made a positive impression on them.



#### **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 – Peterborough (n=182)

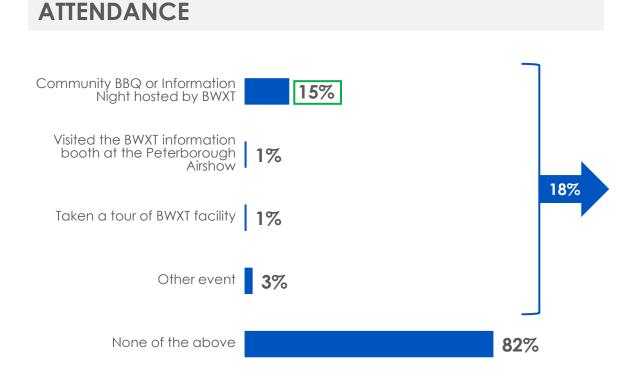
Q9b. What was your overall impression of the BWXT event? Would you say it was ...? Base: Attended at least one event – Toronto (n=25)



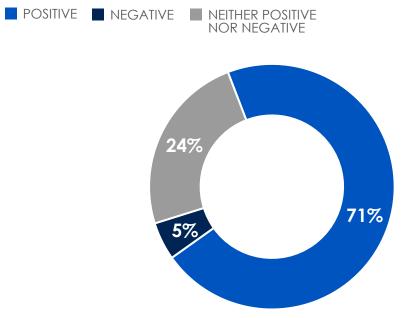
## **BWXT NEC's Community Events**

#### - Toronto

• A fifth of Toronto respondents have attended a BWXT event. Nearly three quarters of those who previously attended an event provided a positive rating.







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 ...?

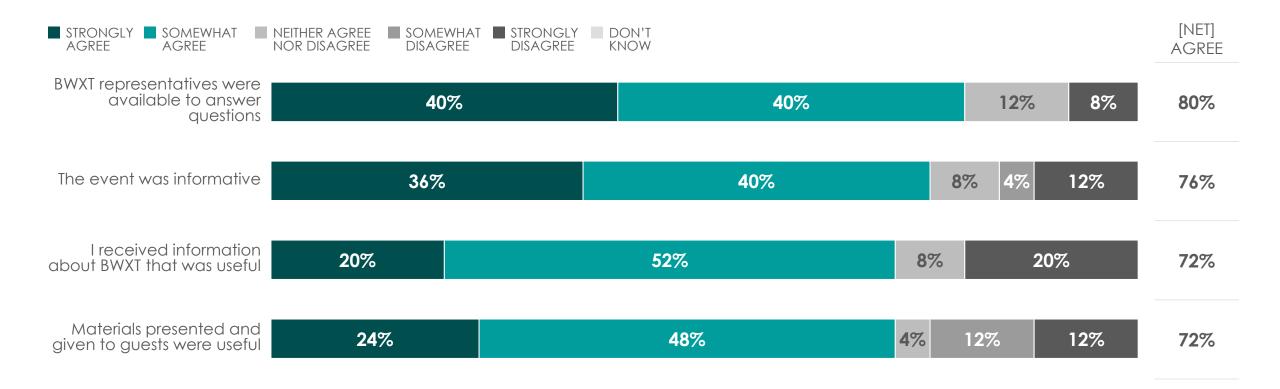
Base: All respondents – Toronto (n=119)

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



## Opinions About BWXT's Event Attended – Peterborough

• Among the 25 local Peterborough residents who have attended an event, 80% agree that BWXT representatives were available to answer questions, while three quarters agree that the event was informative. Seven in ten agreed that the information they received about BWXT and the material presented were useful.

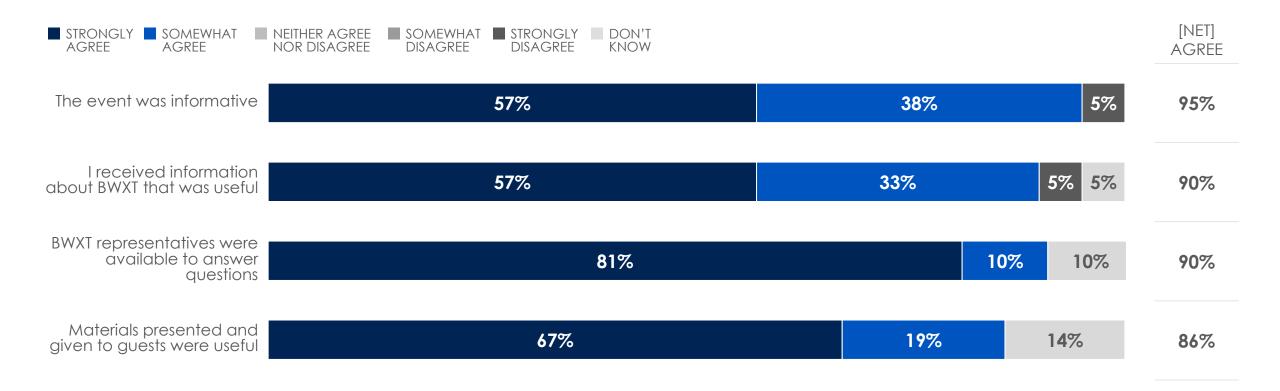


Q9c. To what extent would you agree or disagree with the following about the BWXT event? How about ...? Base: Attended at least one event – Peterborough (n=25)



## Opinions About BWXT's Event Attended – Toronto

• Among the 21 local Toronto residents who have attended an event, nearly all of them (95%) agree that the event was informative and that they received useful information about BWXT. More than eight in ten also agree that BWXT representatives were available to answer questions, and that the materials presented 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 – Toronto (n=21)

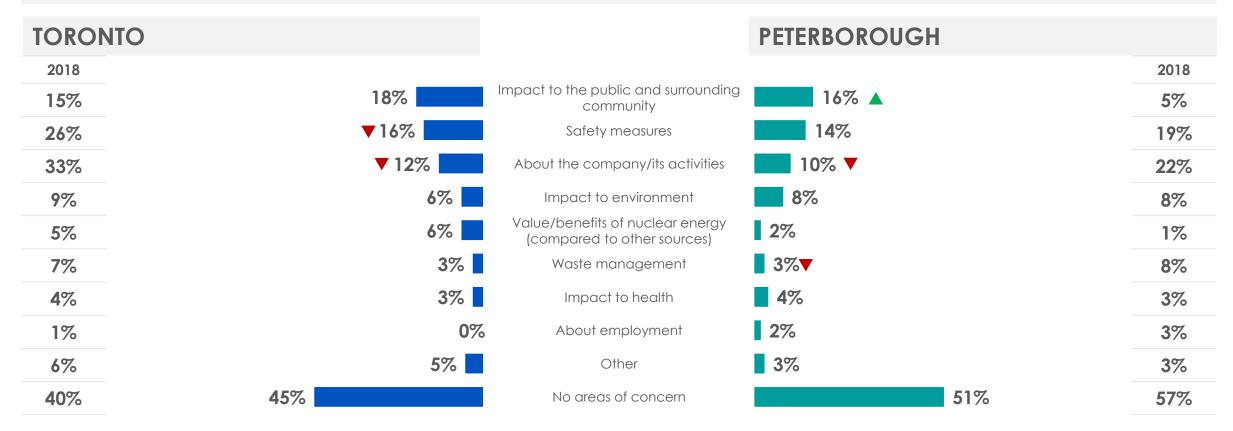


## Information Sharing



### Areas of Concern/More Information About BWXT NEC

 Respondents in both communities agree that they want more information about the impact of nuclear on the public and surrounding community, safety measures, and more information about the company/its activities. Respondents in Peterborough especially highlight the issue of community impact in 2020.



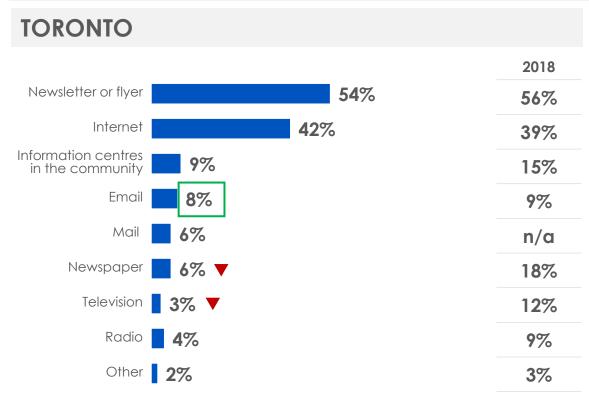
Q9. Are there any topics of concern or any topics that you would like more information about regarding BWXT Nuclear Energy Canada's operations or activities? Base: All respondents - Toronto 2020 (n=146): 2018 (n=136) / Peterborough 2020 (n=200): 2018 (n=194) - excludes don't know

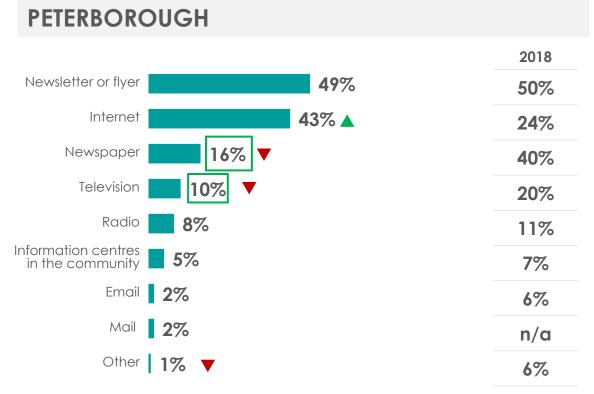




### Preferred Method of Receiving Information from BWXT NEC Toronto

• When asked how they would prefer to receive information about BWXT, Toronto and Peterborough respondents are agreed in their preference for a newsletter or flyer and online communications. Local Peterborough residents thereafter prefer newspaper or television communications in higher proportion, while Torontonians prefer to be emailed.





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 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 2020 (n=181); 2018 (n=189) – excludes none and don't know







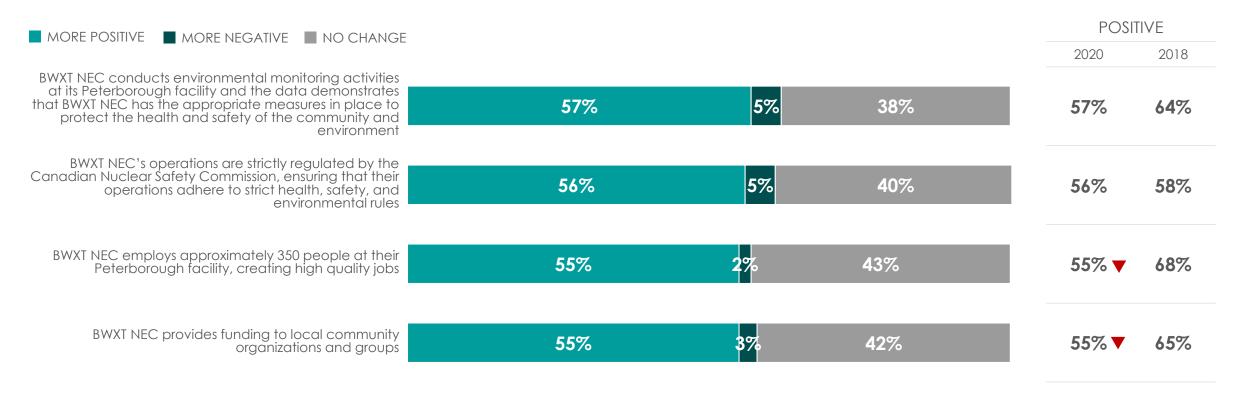


## Impressions of BWXT Initiatives



## **Knowledge Affecting Impression of Organization** - Peterborough

• Nearly six in ten Peterborough respondents say knowing BWXT conducts environmental monitoring activities and operates under a strictly regulated environment gives them a more positive impression of the company. Just over half say that knowing BWXT employs 350 people in the Peterborough facility and that the company funds local community organizations, leads them to feel positively towards the company, significantly down from last wave.



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 2020 (n=varies): 2018 (n=varies) - excludes don't know

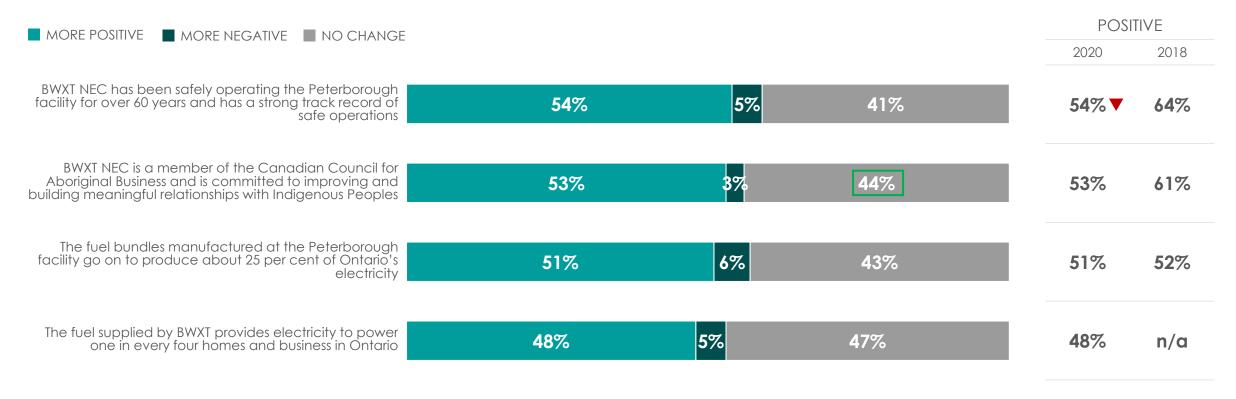






## Knowledge Affecting Impression of OrganizationPeterborough (cont.)

• Significantly fewer local Peterborough residents are influenced to feel positively by the information that BWXT has been operating safely for over 60 years in the area. Half continue to state that they feel more positive towards BWXT knowing that they are a member of the Canadian Council for Aboriginal Business, that the fuel bundles manufactured at the Peterborough plant produce 25% of Ontario's electricity, and that the fuel from the plant will power one in every four Ontario homes.



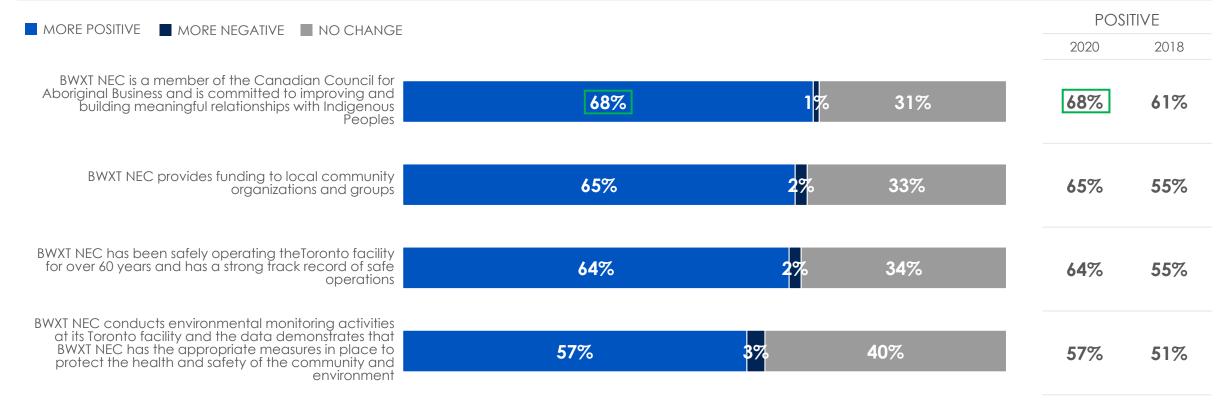
Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization? How about ...?

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



#### **Knowledge Affecting Impression of Organization** - Toronto

• Knowing BWXT is a member of the Canadian Council for Aboriginal Business not only leads Torontonian's to feel more positively towards BWXT, but it functions as a stronger driver of positivity than it did just two years ago. Furthermore, that the company provides funding for local community groups, and that it has been safely operating in Toronto for 60 years are likely to influence more positive impressions of BWXT among Toronto respondents, on trend with the attributes that drove positivity in 2018.



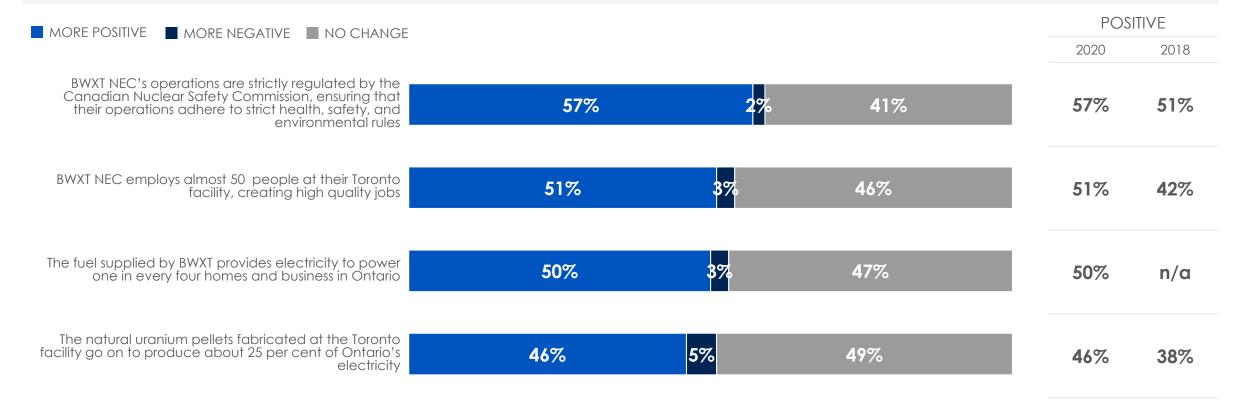
Q11. Would knowing the following about BWXT NEC's facility in your local community mean that you would have a more positive impression of the organization, a more negative impression of the organization, or would not change your impression of the organization? How about ...?

Base: All respondents – Toronto 2020 (n=146): 2018 (n=varies) – excludes don't know



### **Knowledge Affecting Impression of Organization** - Toronto (cont.)

• Torontonians are as likely as they were in 2018 to feel positively swayed by the knowledge that BWXT's operation are regulated by the CNSC, that they employ nearly 50 people in Toronto, that the fuel supplied by BWXT electrifies one in four homes in Ontario, or that the pellets fabricated at the Toronto facility produce 25% of Ontario's electricity.



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 2020 (n=146): 2018 (n=varies) – excludes don't know

A green box indicates a significantly higher

difference than the other community.







## APPENDIX



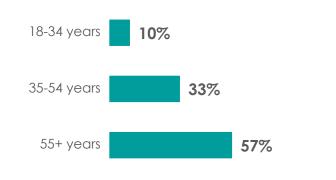
## Respondent Profile – Peterborough



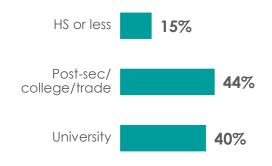




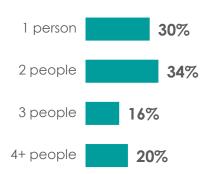




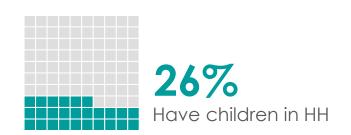




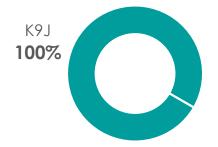
## HOUSEHOLD SIZE





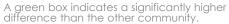






Base: All respondents – Toronto (n=200)







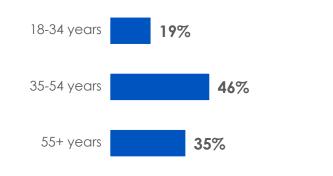
## Respondent Profile – Toronto



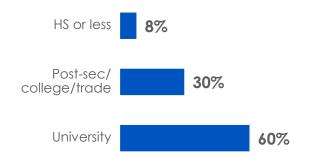




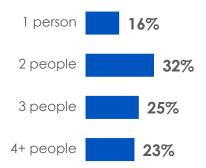




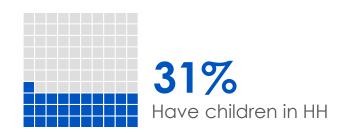




## HOUSEHOLD SIZE











Base: All respondents – Toronto (n=146)



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



## About Ipsos

lpsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: **You act better when you are sure.** 

