



Attitudes to the nuclear industry November 2005

Presentation by

Robert Knight
Ipsos MORI

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Outline

- **Context - Issues of concern**
- **Attitudes to the nuclear energy industry**
- **Attitudes to replacement newbuild**
- **Summary of key findings and implications**

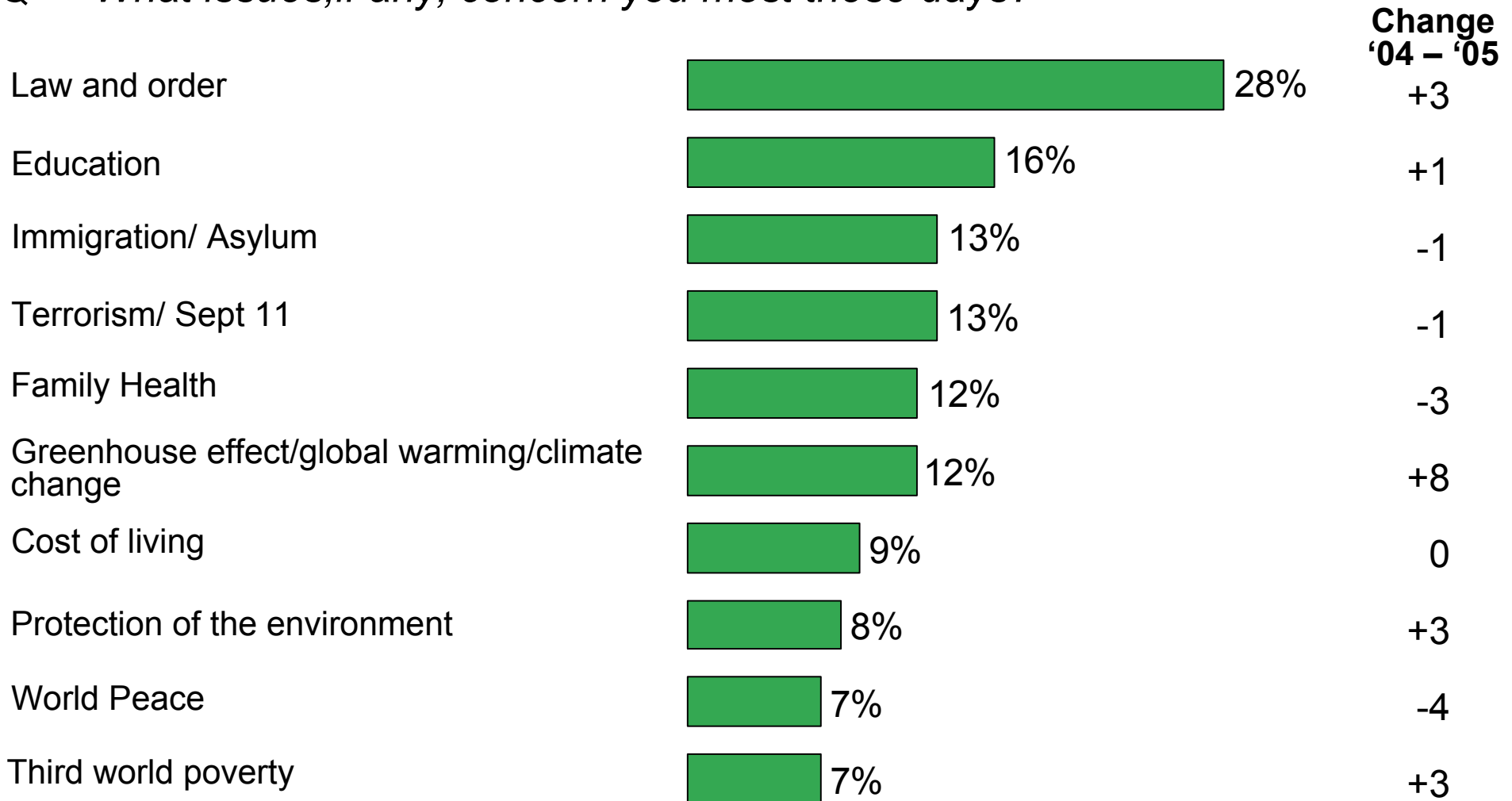
Methodology

- **Regular tracking of the public's attitudes toward the nuclear industry for BNFL/NIA. Occasional surveys for other clients eg EDF Energy**
- **Latest survey conducted via MORI Omnibus (face-to-face, in-home) among a representative sample of 2,035 adults across Great Britain. Split-sampling was used, so some questions are based on half the total sample**
- **Data weighted to reflect the population of Great Britain**
- **Fieldwork: 3-7 November 2005; EDF survey: 21-27 October 2005; UEA survey: 1 October – 6 November 2005**
- **Twice annual survey of MPs: approx 100 MPs interviewed 7 June – 1 August 2005**

Issues of concern

Overall pattern stable, but climate change increasing its profile rapidly

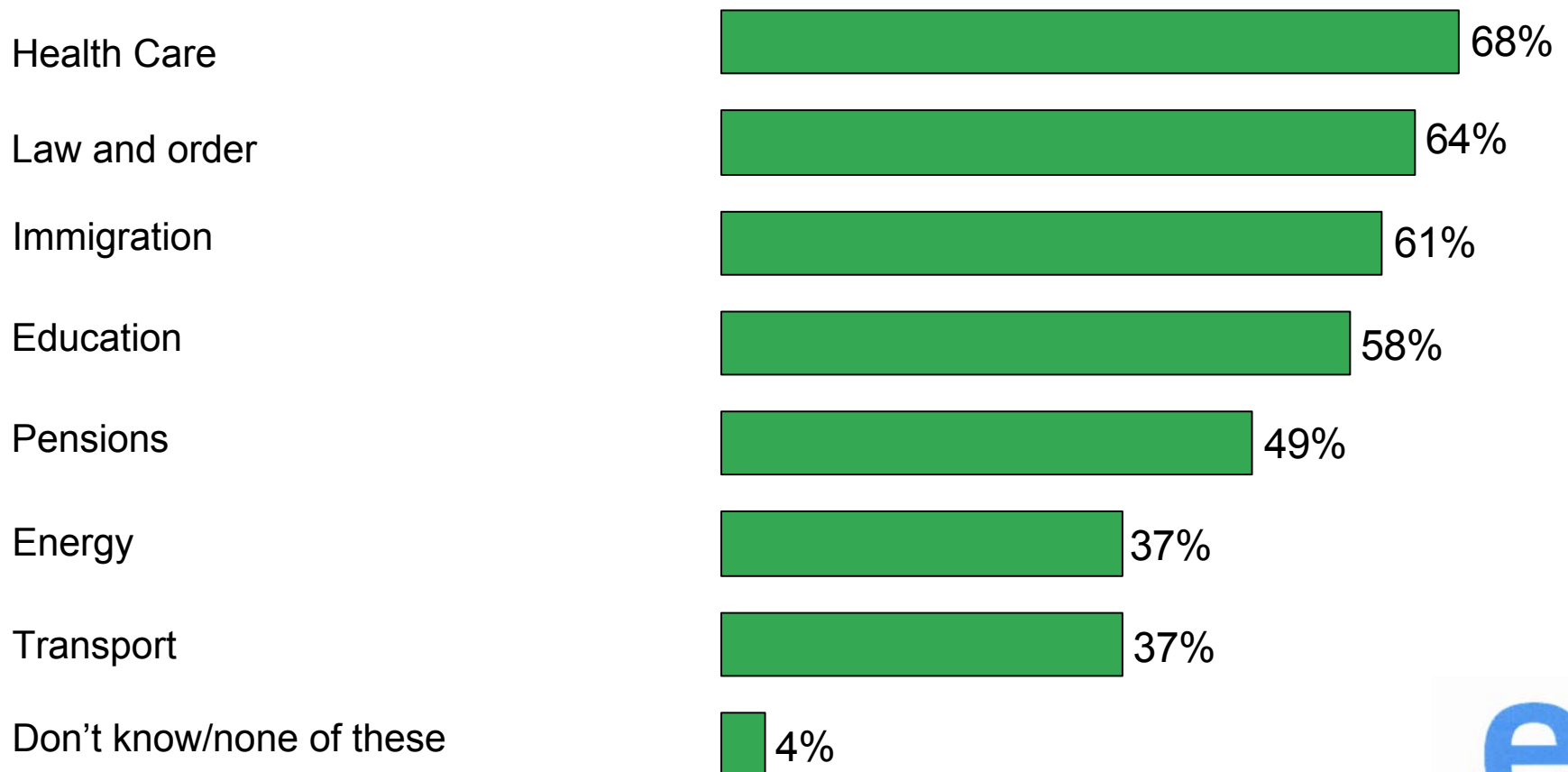
Q *What issues, if any, concern you most these days?*



Base: All General Public (982), 2005

Awareness of major challenges

Q *In which of these areas are you aware of major challenges facing Britain and the British Government?*



Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

Interest in Energy Issues

Q *What would you say is your level of interest in each of the following issues that I am about to read out?*

Very/fairly interested

Global warming and climate change



Renewable energy (such as wind, solar or wave power)



Where Britain's energy will come from in future



Nuclear energy

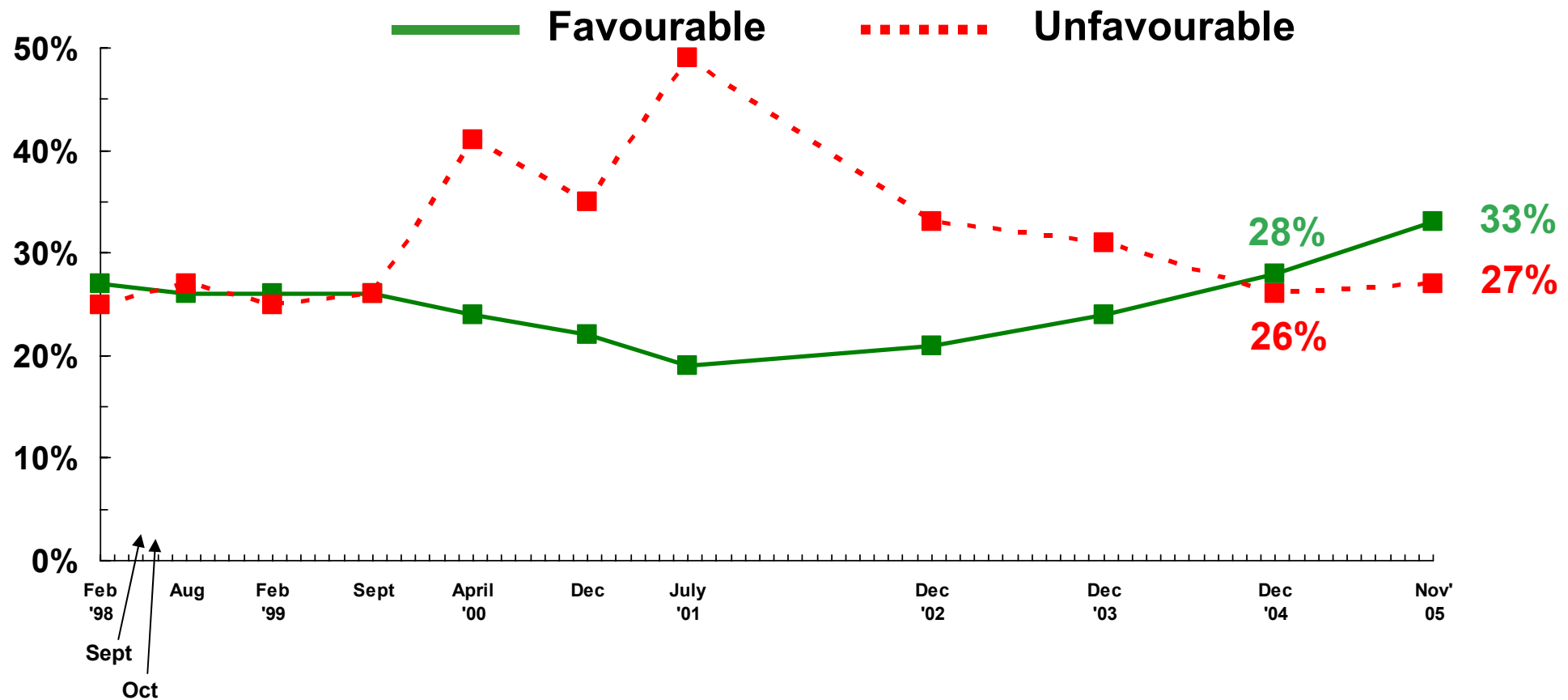


Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

Attitudes to the nuclear energy industry

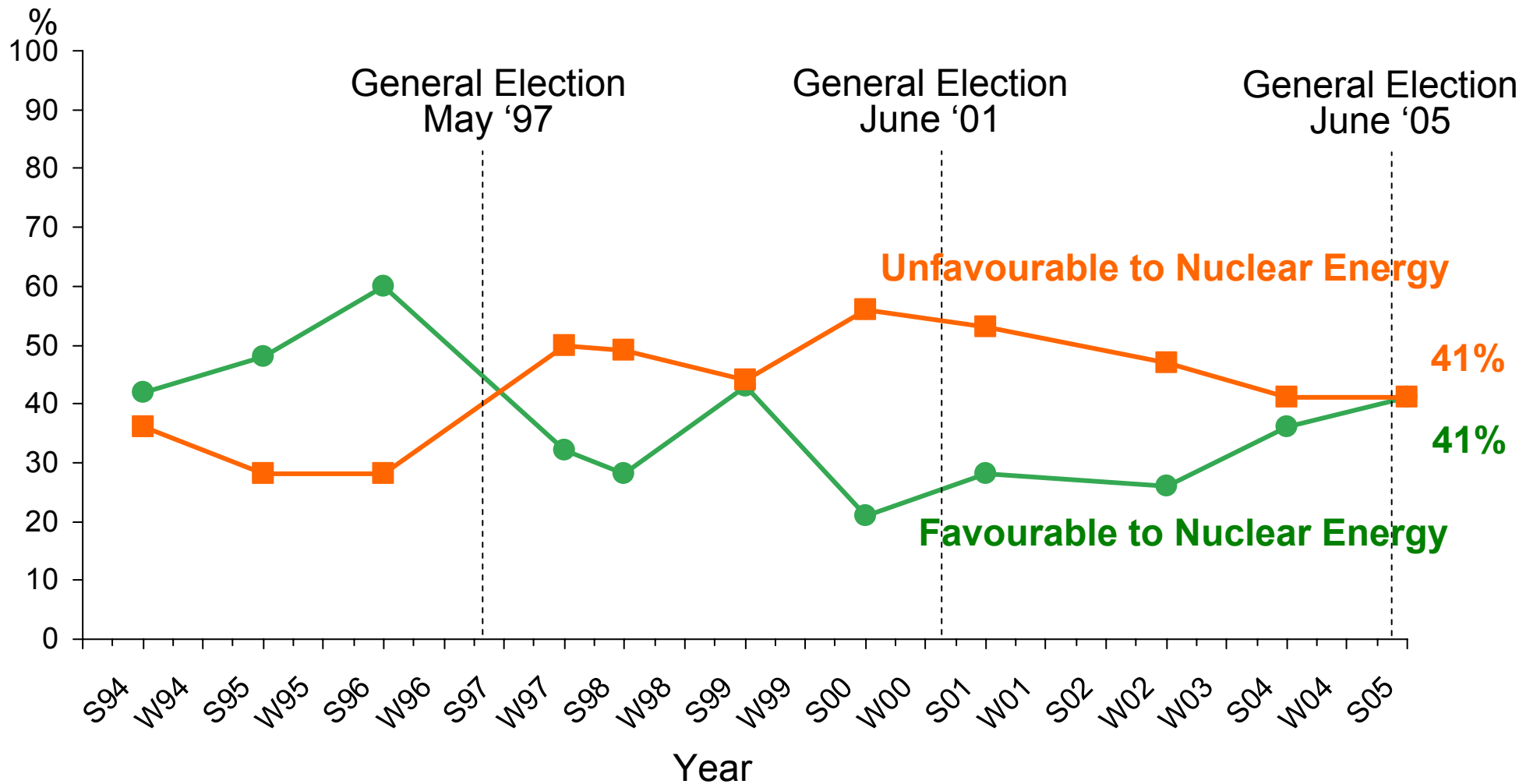
Public now more likely to be favourable than unfavourable to nuclear energy

Q *How favourable or unfavourable are your overall opinions or impressions of the nuclear industry/ nuclear energy?*



Base: All General Public c2,000

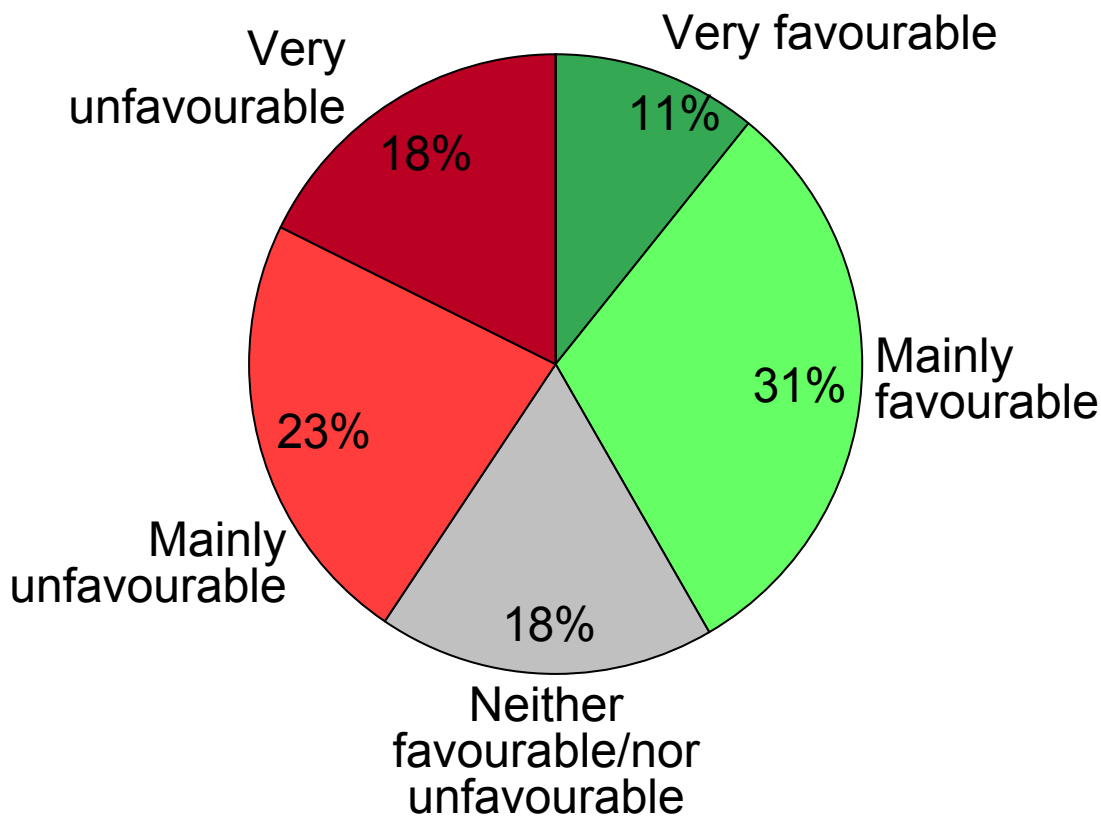
Favourability to Nuclear Energy – MPs



Base: All MPs asked (approx 100 each survey)

Favourability towards Nuclear Energy Industry by party

Q *How favourable or unfavourable do you feel toward the Nuclear Energy Industry?*



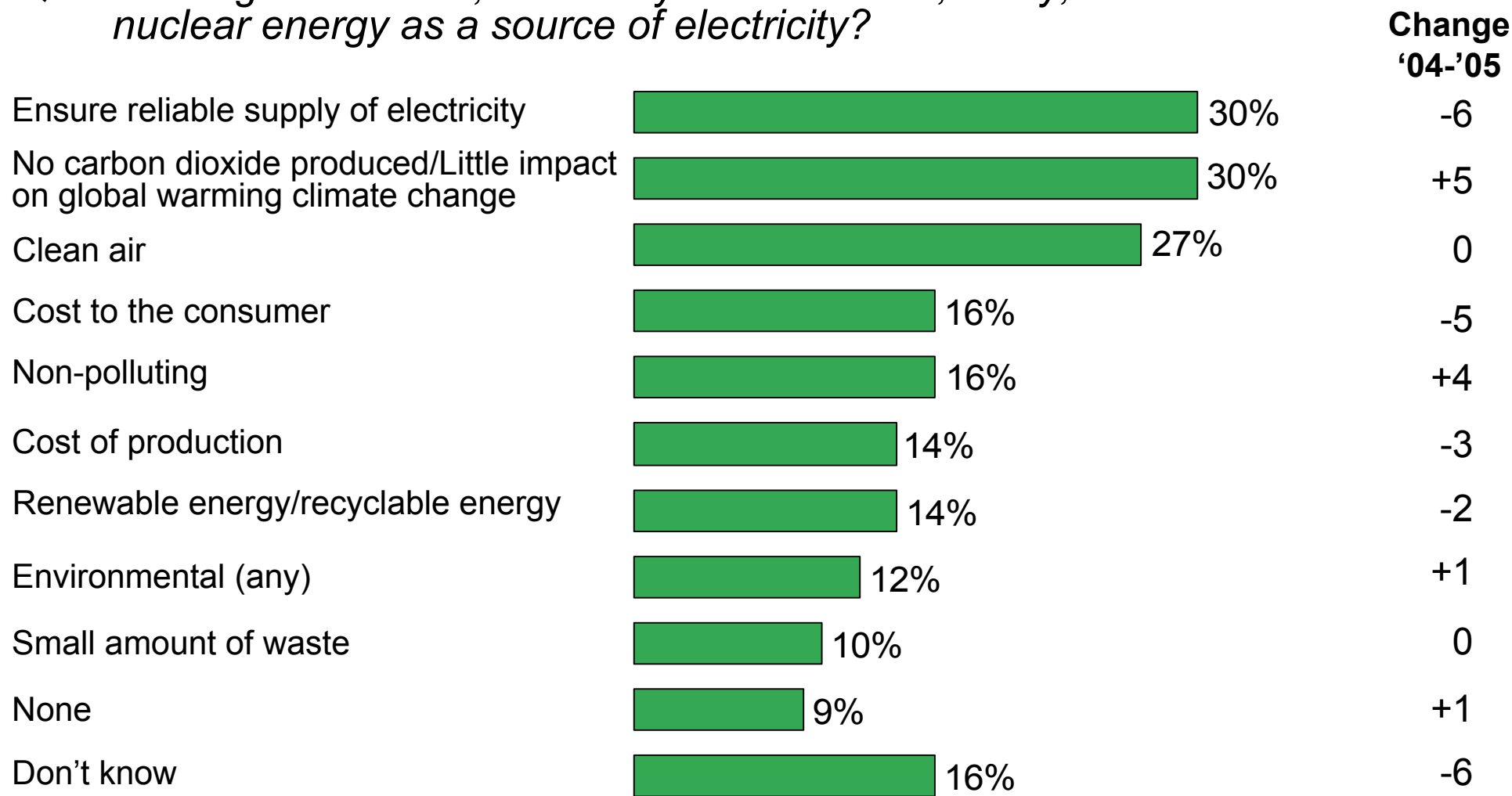
	Favourable		
	S'04	S'05	Change
	%	%	S'04-S'05
			±
All	36	41	+5
Labour	26	33	+7
Conservative	74	79	+5

	Unfavourable		
	S'04	S'05	Change
	%	%	S'04-S'05
			±
All	41	41	0
Labour	48	44	-4
Conservative	6	6	0

Base: All MPs (98), Labour MPs (53), Conservative MPs (29) asked, Summer 2005

Benefits: CO₂ message has achieved parity with reliability

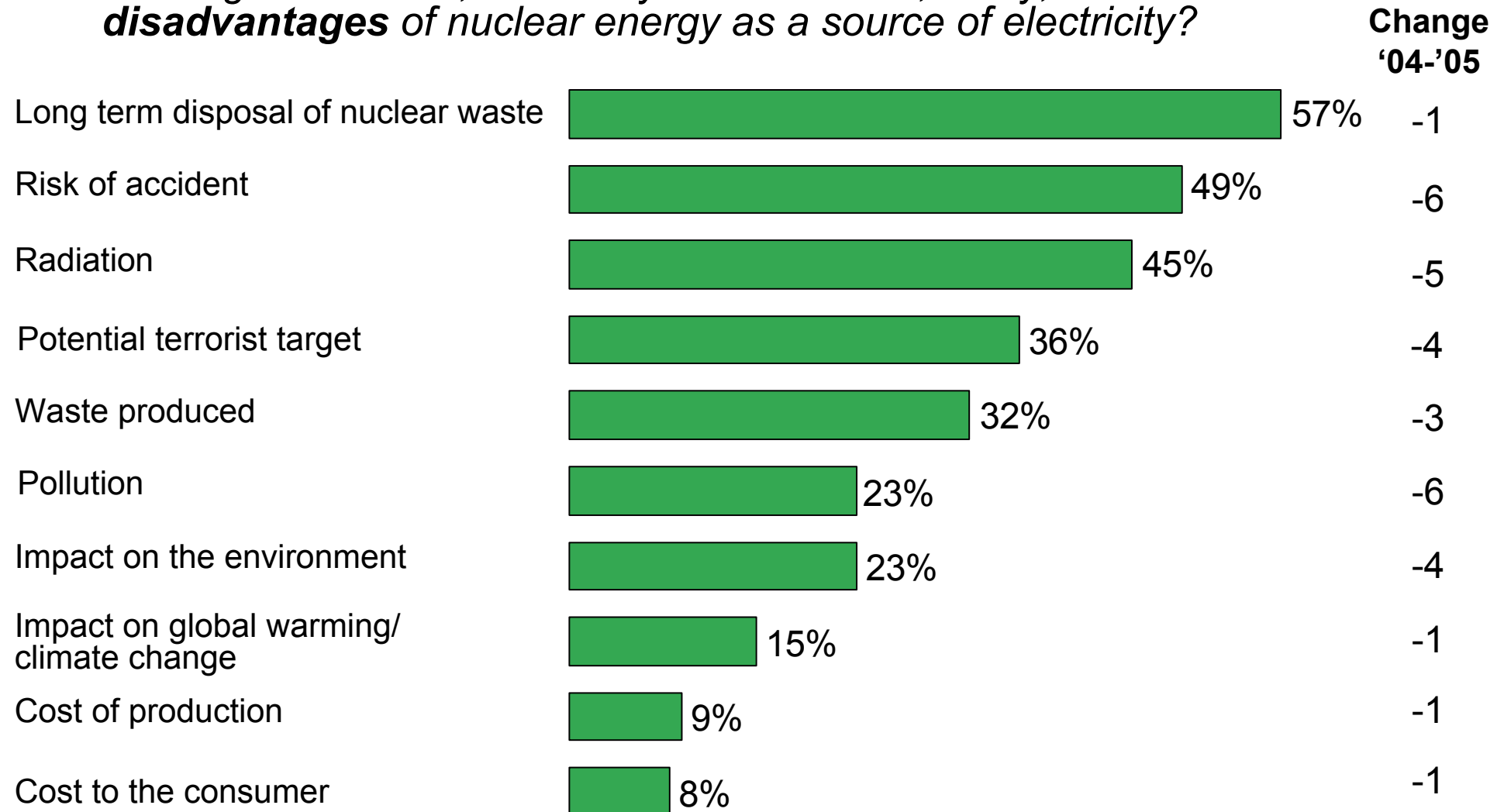
Q *Looking at this card, what do you believe are, if any, the **benefits** of nuclear energy as a source of electricity?*



Base: All General Public 2005 (2,035)

Disadvantages: Waste disposal and risks dominate, though all disadvantages less frequently mentioned

Q Looking at this card, what do you believe are, if any, the **disadvantages** of nuclear energy as a source of electricity?

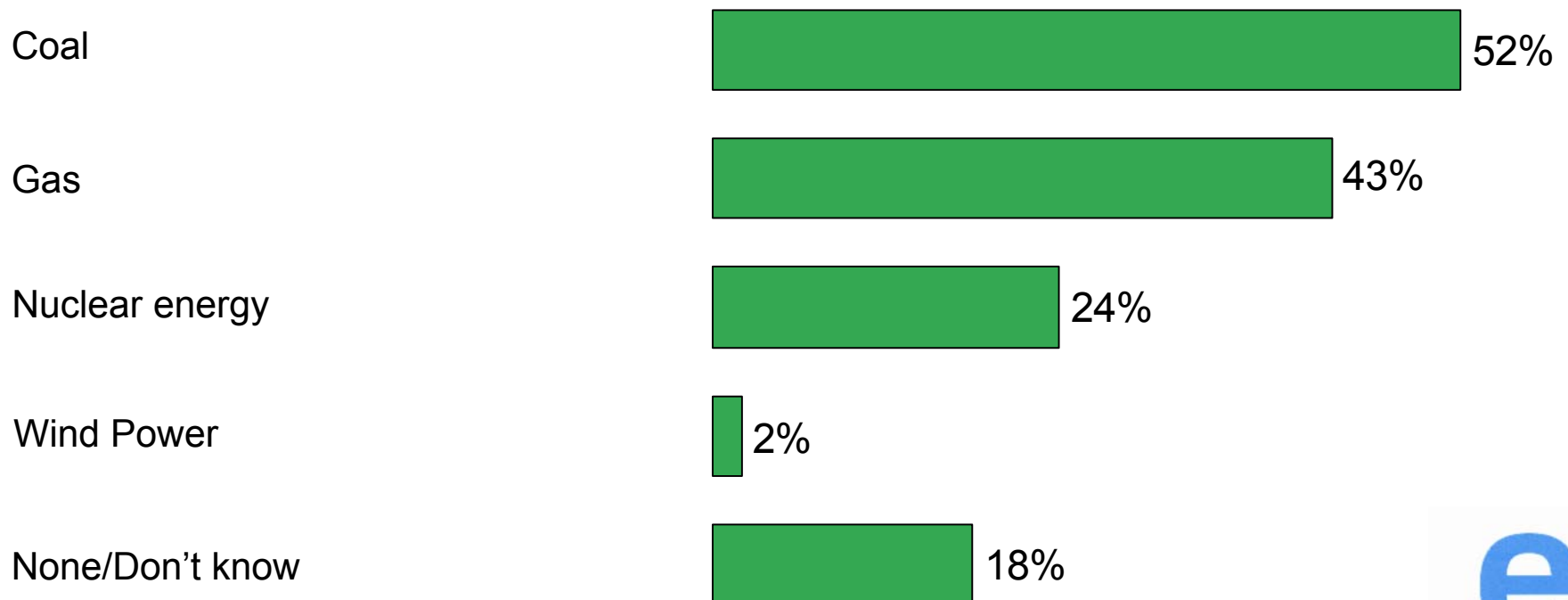


Base: All General Public 2005 (2,035)

Beliefs – CO₂

Q *All methods of electricity generation have some sort of disadvantage. For each of the disadvantages I read out, could you please tell me which of the methods of electricity generation on this card it applies to in your opinion, You may mention as many as you like?*

G. *Causes global warming by giving out carbon dioxide.*

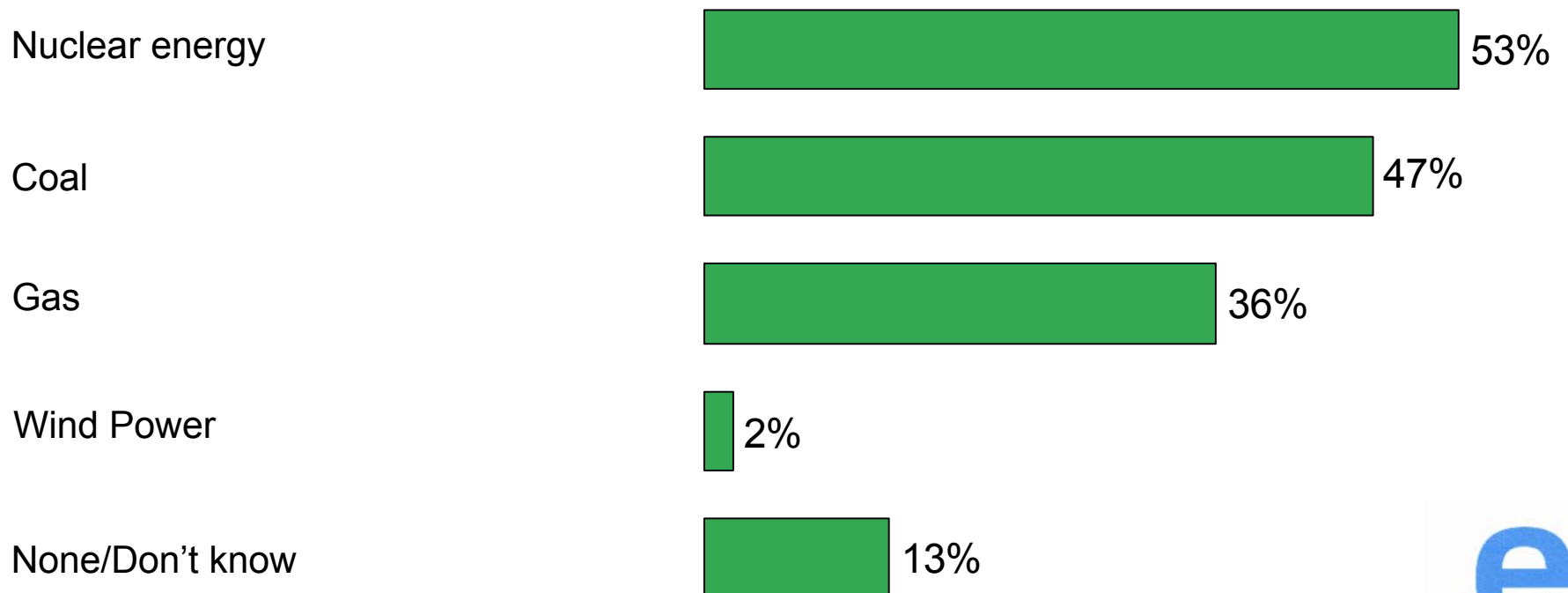


Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

Beliefs - pollution

Q *All methods of electricity generation have some sort of disadvantage. For each of the disadvantages I read out, could you please tell me which of the methods of electricity generation on this card it applies to in your opinion, You may mention as many as you like?*

J. *Causes dangerous pollution.*

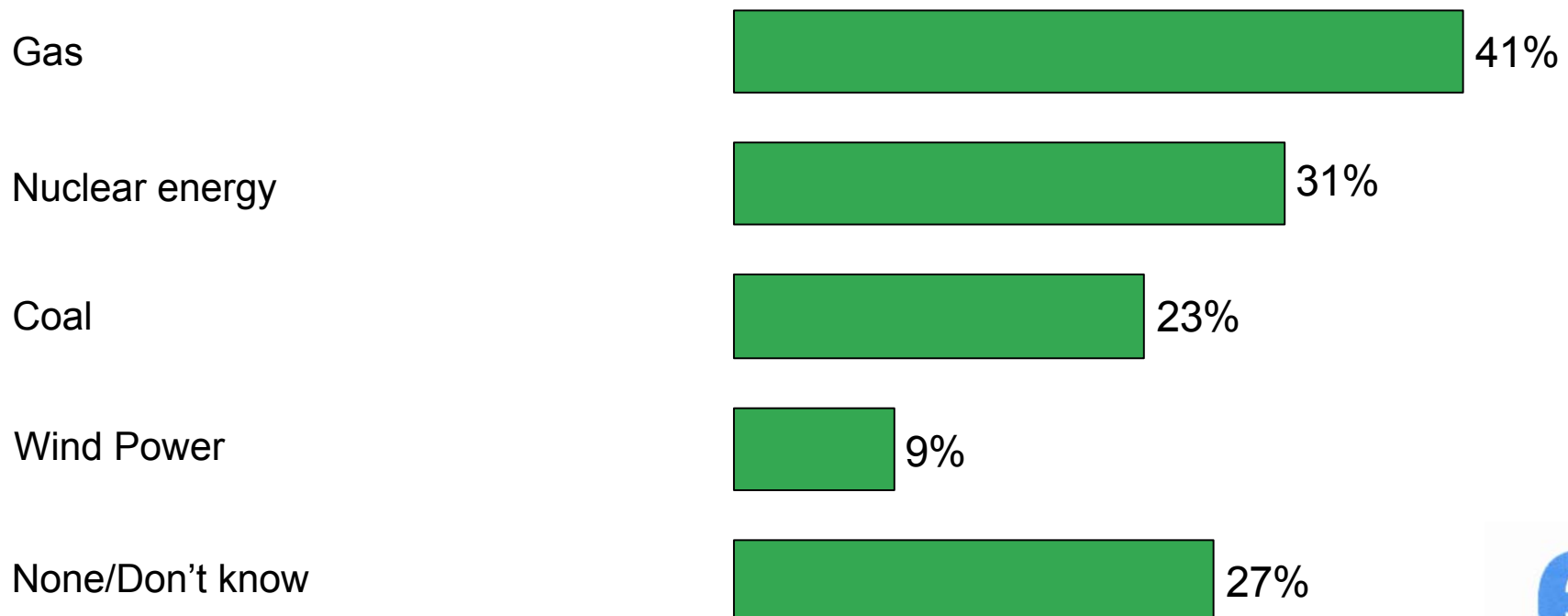


Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

Beliefs - cost

Q *All methods of electricity generation have some sort of disadvantage. For each of the disadvantages I read out, could you please tell me which of the methods of electricity generation on this card it applies to in your opinion, You may mention as many as you like?*

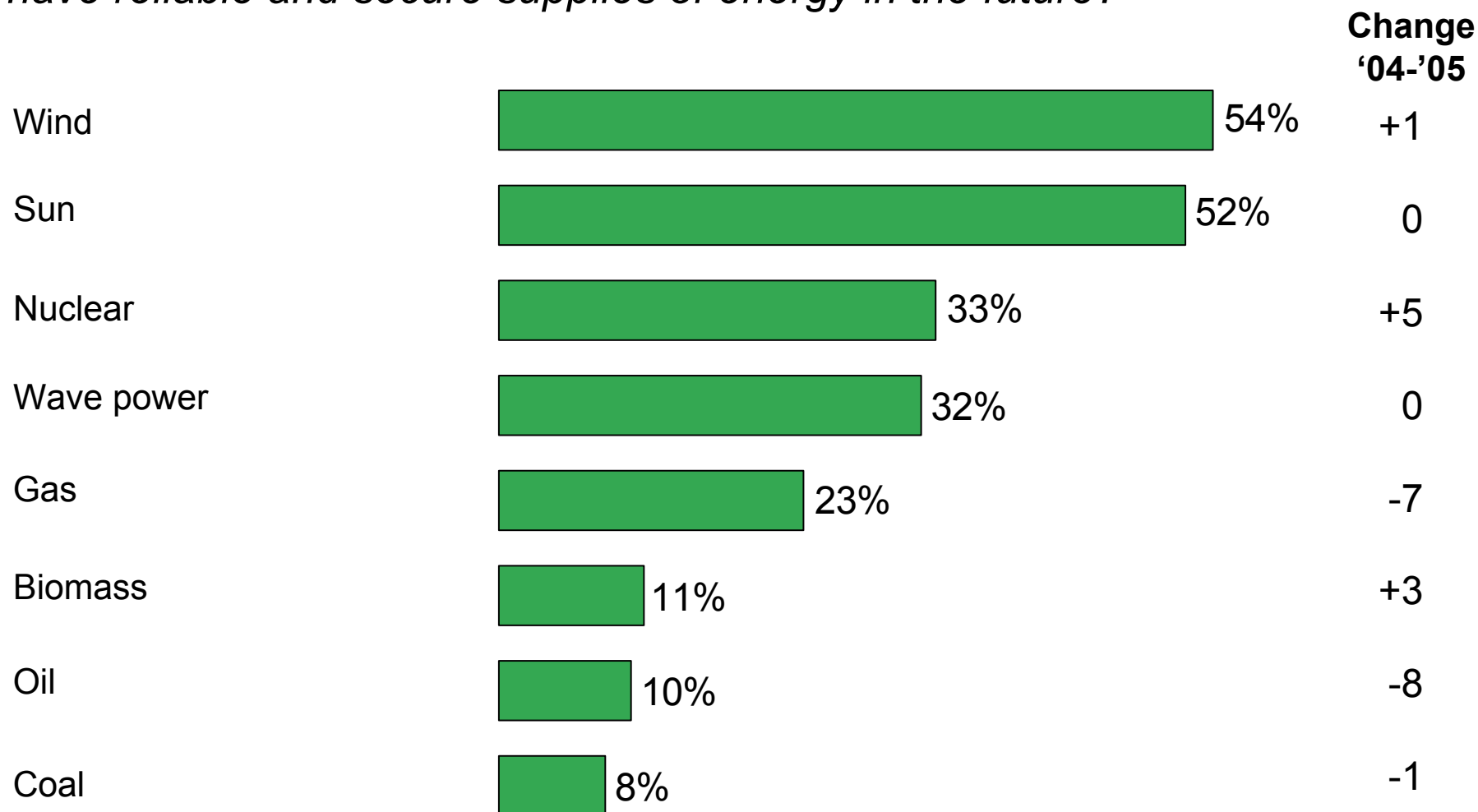
C. *The cost is too high.*



Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

Nuclear moves up the table as gas and oil decline, but wind and solar dominate

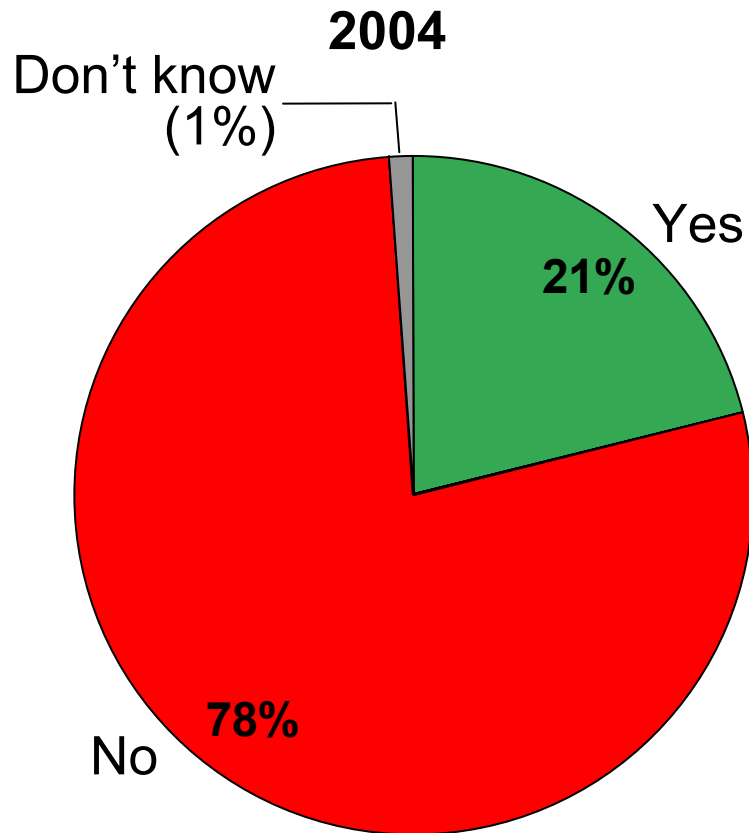
Q Which of these energy sources do you think can do most to help ensure we have reliable and secure supplies of energy in the future?



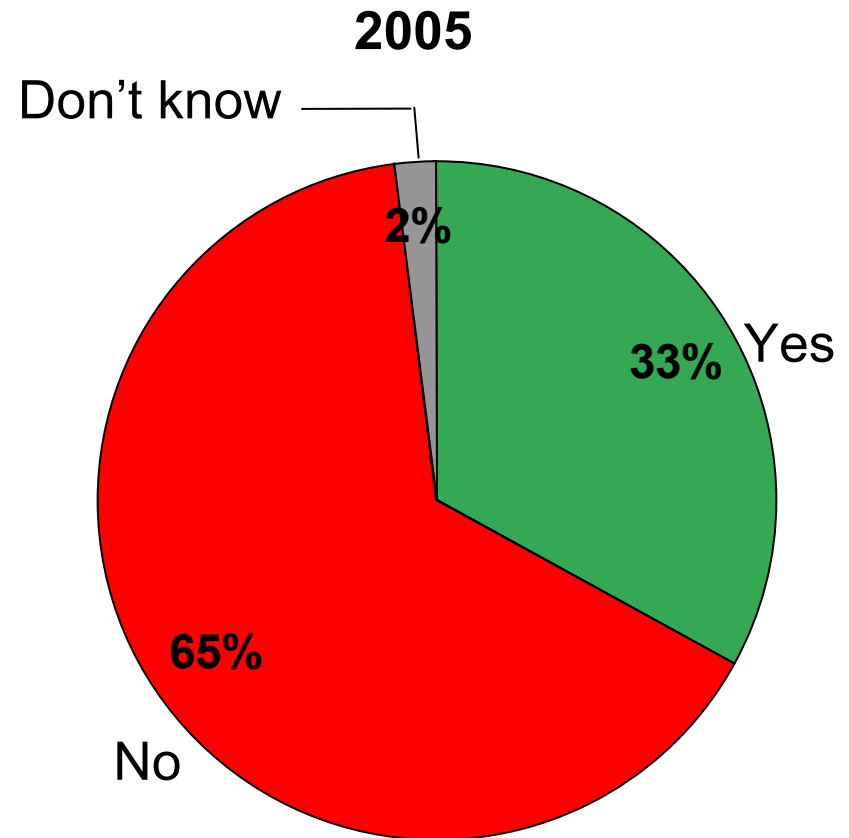
Base: All General Public (982), 2005

Increasing awareness of energy gap

Q *As our nuclear power stations come to the end of their lives and are closed, there will be an energy gap, by 2020, which will need to be filled with new electricity generating capacity. Have you heard anything about this before?*



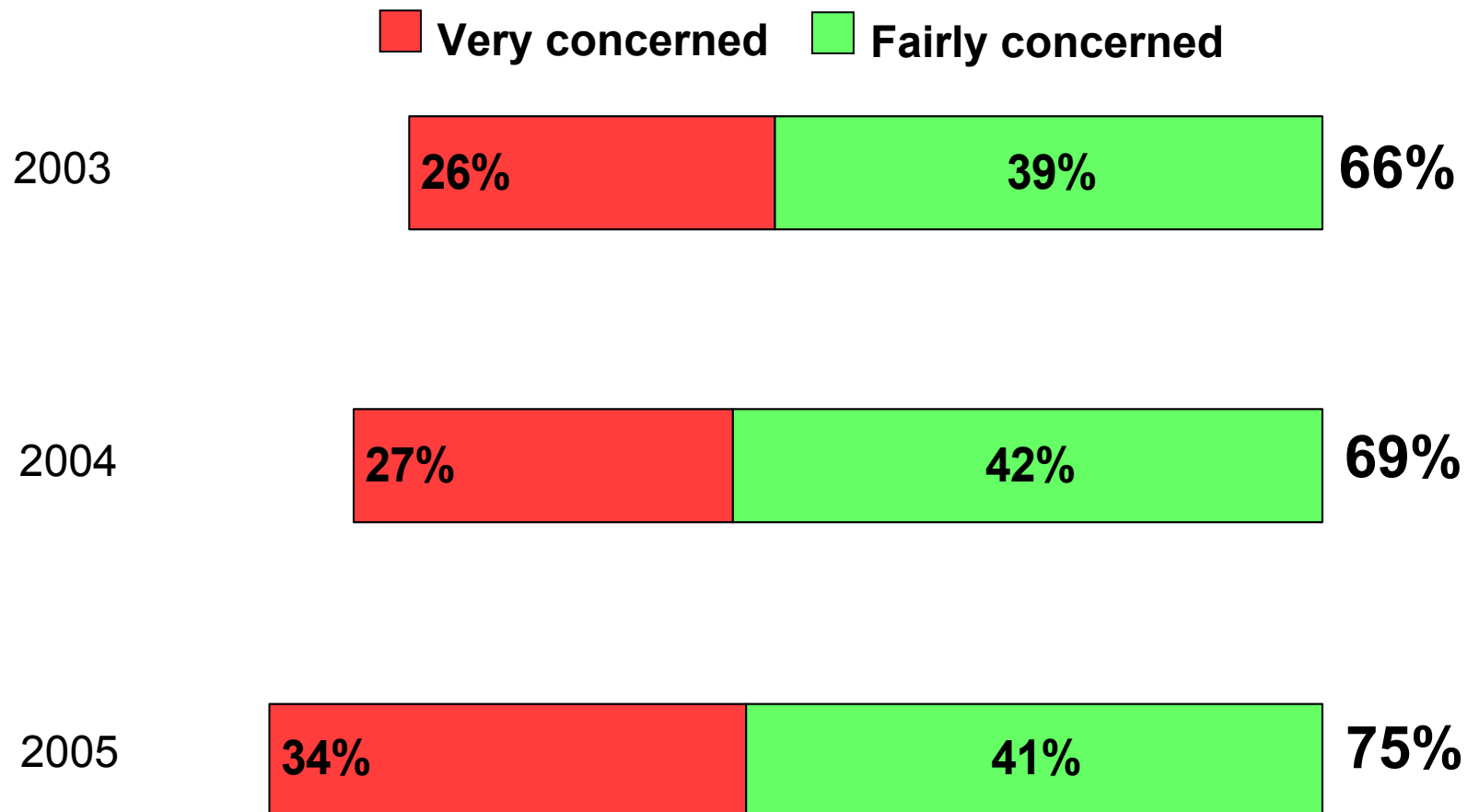
Base: All General Public 2004 (975)



Base: All General Public 2005 (982)

growing even before the Ukrainian crisis

Q *By 2020, about three-quarters of the UK's electricity will be produced from gas, most of which will have to be imported. How concerned are you about this, if at all?*

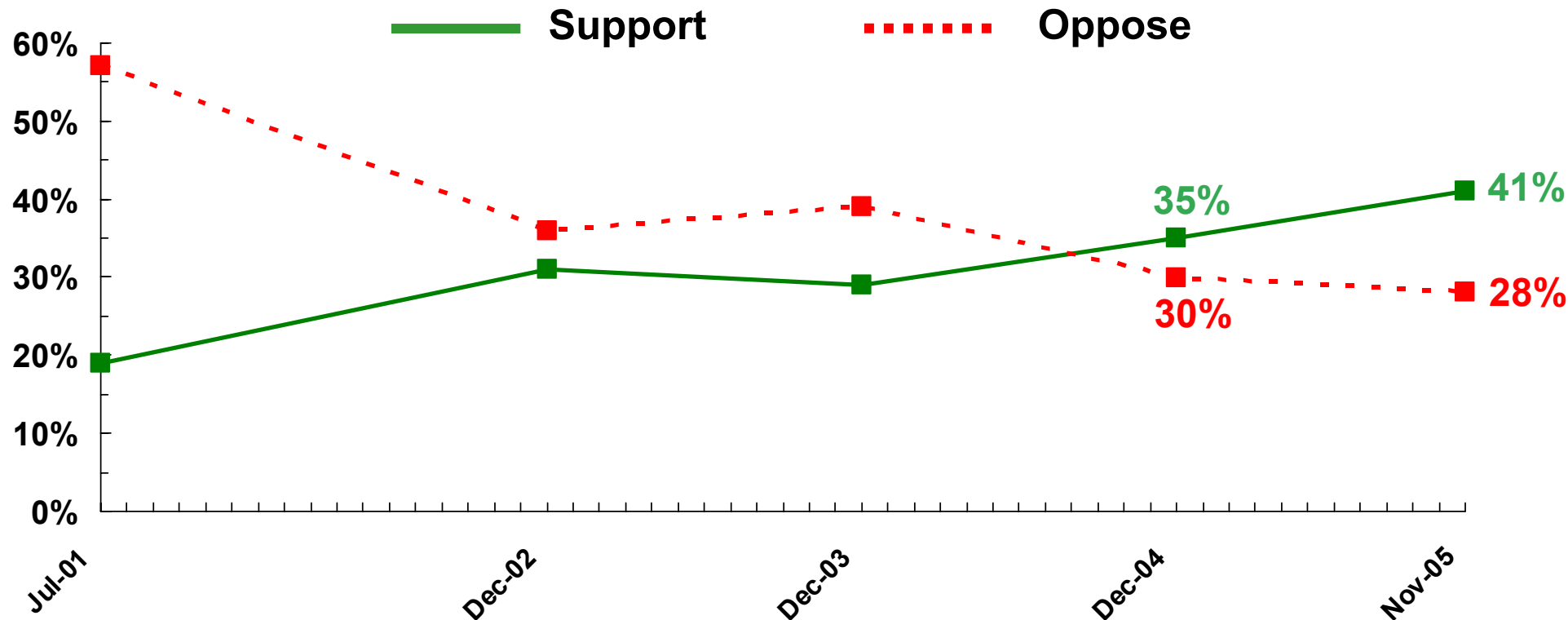


Base: All General Public (982), Nov 2005

Attitudes to Replacement Newbuild

Net support for newbuild now established

Q To what extent would you support or oppose the building of new nuclear power stations in Britain **TO REPLACE** those that are being phased out over the next few years? This would ensure the same proportion of nuclear energy is retained.



Base: All General Public c2,000

* Wording in 2001 was "To what extent would you support or oppose the building of new nuclear power stations in Britain?"

Levels of Support for Nuclear Energy Policy

Support

**Change
'04-'05**

Oppose

Building new nuclear power stations to REPLACE those that are being phased to over the next few years



+6

-2



Building new nuclear power stations to INCREASE the proportion of nuclear energy that we use



+3

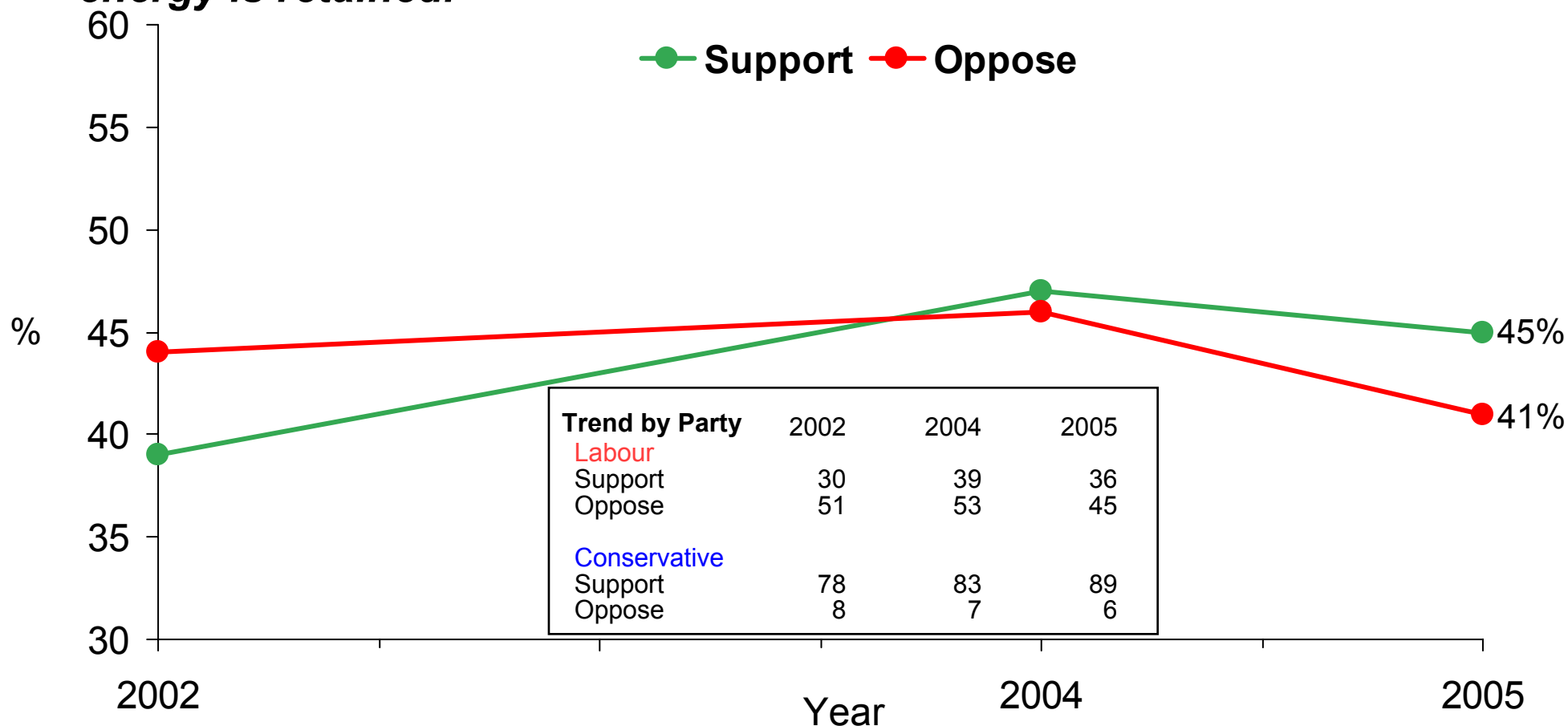
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Base: All General Public 2005 (2,035)

Attitudes to Newbuild – Trend among MPs

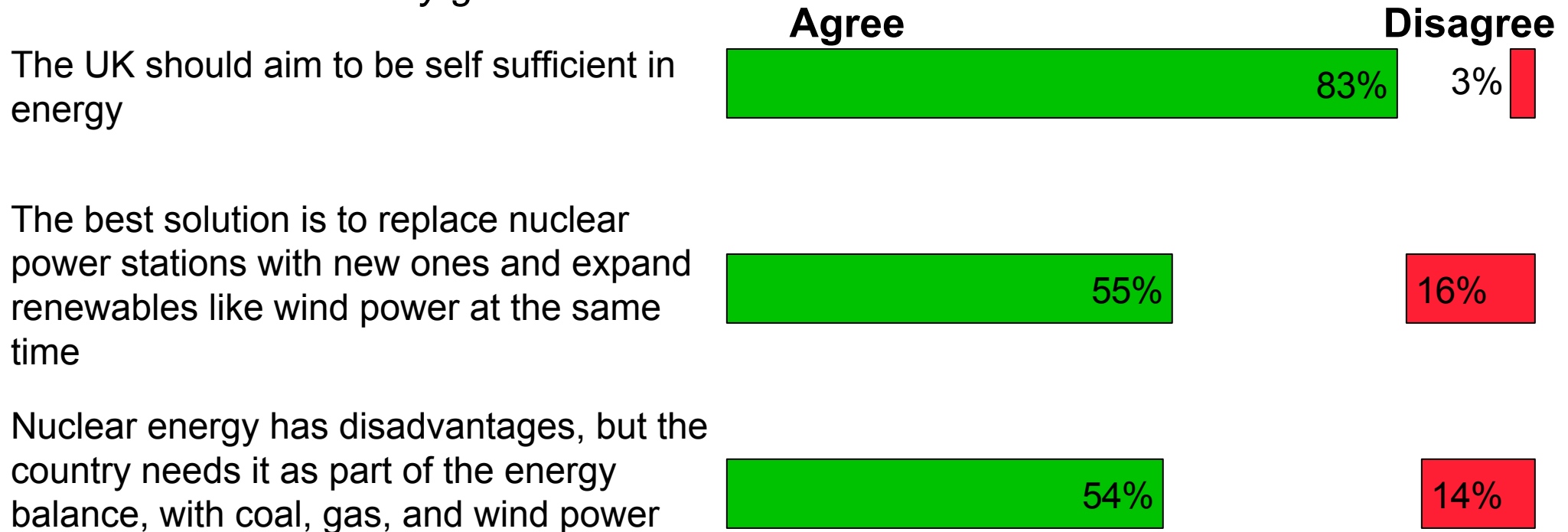
Q *To what extent do you support or oppose the building of new nuclear power stations in Britain to replace those being phased out over the next few years? This would ensure the same proportion of nuclear energy is retained.*



Base: All MPs (93), Labour MPs (50), Conservative MPs (27) asked, Summer 2005

Alternative framing of the issues

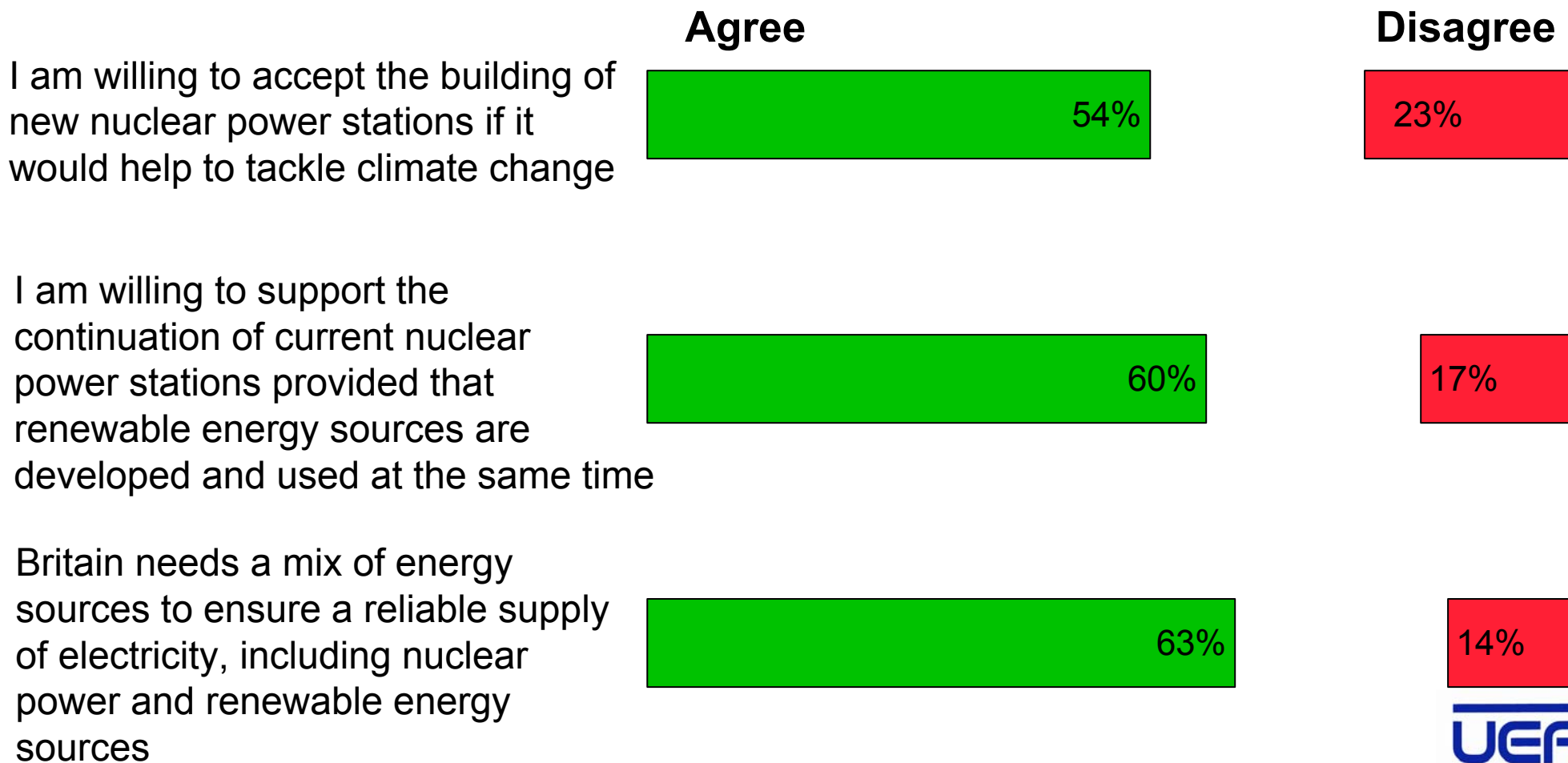
Q *To what extent do you agree or disagree with each of these statements about electricity generation?*



Base: Ipsos MORI/EDF Survey 1,931 adults 21-27 October 2005

UEA Research Findings

Q *To what extent do you agree or disagree with each of the following statements?*



Base: 1,491 adults 1 Oct-6 Nov 2005

Key Findings and Implications

Key Findings

- The public has warmed further towards nuclear energy since 2004, as climate change has seized the media agenda
- Labour MPs have also become more positive and the House is now equally split
- Renewables remain most popular, but there is increasing acceptance that nuclear energy should be part of the future energy balance
- Awareness of the looming energy gap is growing, as is concern about dependence on gas imports
- Support for replacement newbuild is up again this year – there is now net support. But support is qualified: proportions are reversed for actual expansion of nuclear share

Implications

- Individual surveys may show differing levels of support for newbuild – depends on the context and framing; what is indisputable is the trend towards more positive views
- However the nuclear argument has not been won; substantial opposition remains, and cost may be emerging as a perceived source of weakness
- Misconceptions and incomplete knowledge also colour the debate
- The public is starting to think about the bigger picture and may be looking for integrated, balanced solutions within a joined-up strategy



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