

Attitudes Towards Nuclear Power in the United Kingdom



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Survey Analysis
Accenture & Utility Week
Research June 2008

UTILITYWEEK

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Methodology

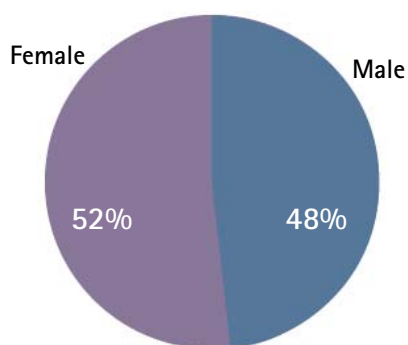
- Quantitative online survey carried out in the United Kingdom by Lightspeed Research.
 - The fieldwork took place between April 4 and April 12, 2008.
 - One thousand one hundred interviews were conducted online.
- One hundred respondents living less than 10 miles from a nuclear power plant plus 52 respondents from the general population sample living near a nuclear power plant have been incorporated (nuclear power plant employees were excluded) = Boost sample

The sample was divided as follows:

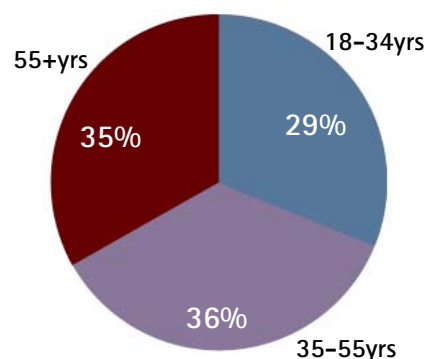
- One thousand respondents representative of the United Kingdom's population (age - gender - location - socio-economic category) = General population sample

Sample description—General population

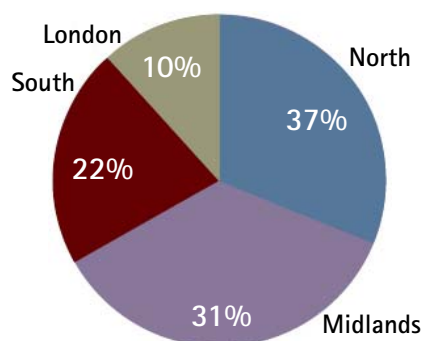
Gender breakdown



Age breakdown



Regional breakdown



North:
 Border and Scotland
 North East England
 Yorkshire

South:
 Southern
 South West England

Midlands:
 Midlands
 East of England
 Wales and the West

Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom—June 2008

Key Messages

1. Several results in this study highlight that, overall, the United Kingdom population's attitude towards nuclear power is rather positive:

- Eighty-eight percent of the respondents believe it is important that the United Kingdom reduces its reliance on fossil-fuelled generated power.
- In order to achieve this goal, 85 percent of respondents would prefer the United Kingdom to increase the use of renewable power and 33 percent want to see an increase in nuclear power. However, only 25 percent of respondents think renewables alone can fill in the gap in order to reduce the United Kingdom's reliance on fossil-fuelled generated power.
- Over half of the respondents believe that the United Kingdom should increase its nuclear power-generating capacity.
- Moreover, results show that over the past five years, support for nuclear power has increased by 30 percent.

2. The most important reasons in favour of an increase in nuclear power can also be seen as the major prerequisites for people's acceptance:

- Efficient nuclear waste-handling arrangements.
- Guarantees on nuclear safety.
- Efficient decommissioning arrangements.
- Lack of security of supply for oil and gas.

Spontaneously, respondents also mentioned that nuclear power is a cleaner energy and that the increase of nuclear power would allow the United Kingdom to be self-reliant or less reliant on other countries to provide energy.

3. The lack of confidence/evidence on nuclear safety, efficient waste handling arrangements and decommissioning arrangements also act as the main deterrent towards the increase of nuclear power along with the belief that other renewable sources of energy are available and should be investigated.

4. For the next 20 years, 51 percent of respondents said they were more concerned about an increase in carbon dioxide emissions rather than an increase in nuclear waste.

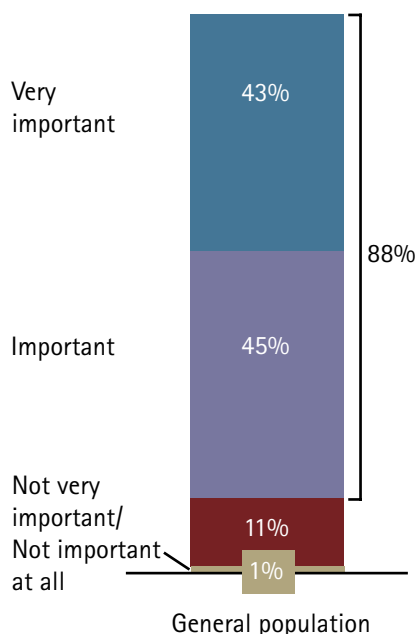
5. People living next to a nuclear plant have a more positive opinion on the future of nuclear power than the rest of the population.

6. There are gender and generational differences of opinion within the sample, with men and those older than 55 clearly more in favour of an increase in nuclear power than women and younger respondents.

Within the sample group from the general population the majority believe it is important that the United Kingdom reduces its reliance on fossil-fuelled power generation.

Question 1

How important is it to you that the United Kingdom reduces its reliance on fossil-fuelled power generation (i.e. coal, oil or gas generated power)?

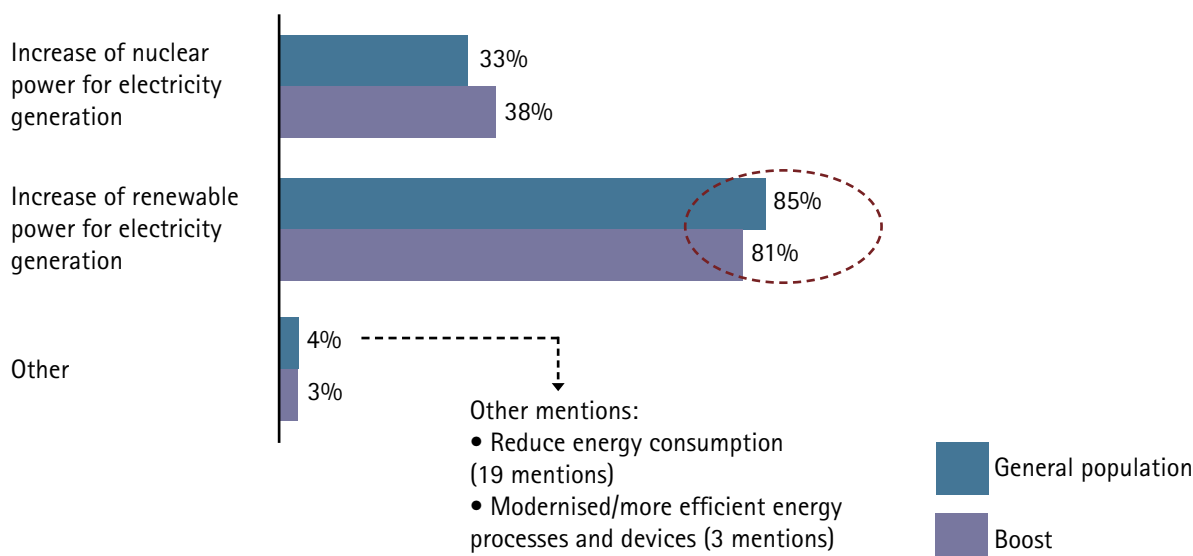


Importance of Reducing the United Kingdom's Reliance on Fossil-fuel Generated Power and Options to Achieve it

In order to reduce the United Kingdom's reliance on fossil-fuelled power generation, respondents mainly consider renewable power energy.

Question 2/3

What actions should be considered to reduce our reliance on fossil-fuelled power generation (i.e. coal, oil or gas generated power)?

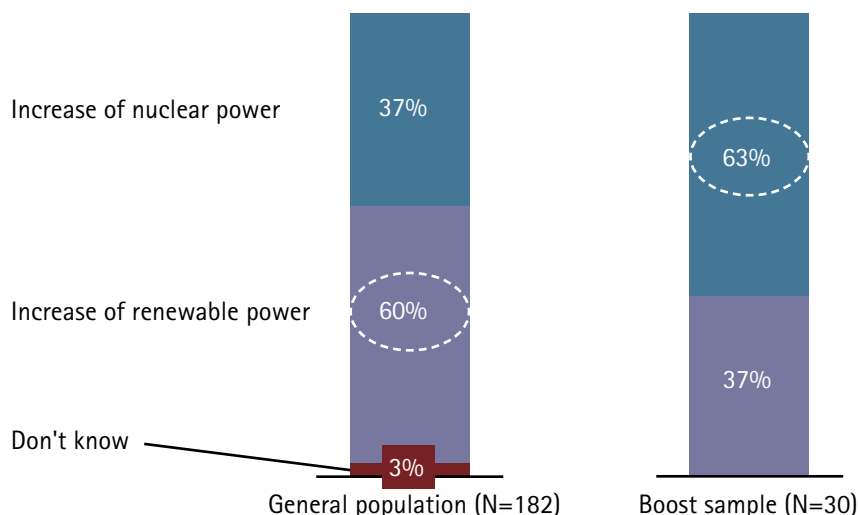


When asked to choose between nuclear and renewable power, there is a clear gap between the general population sample more in favour of renewable power and the boost sample more in favour of nuclear power.

Responses drawn from respondents who favoured both nuclear and renewable power.

Question 4

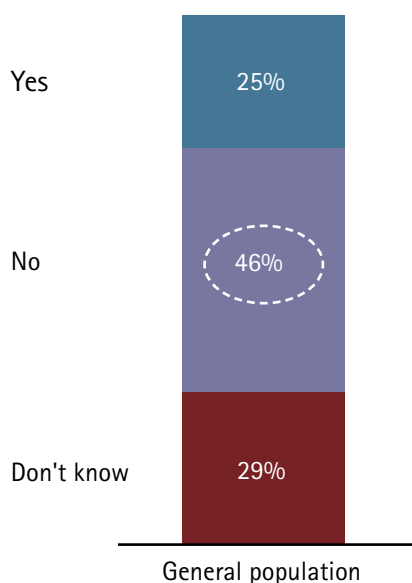
Which of the following generating options would you prefer to see fill in the gap in order to reduce the United Kingdom's reliance on fossil-fuelled power generation?



Overall, almost half of the respondents do not think renewables alone can fill in the gap in order to reduce the United Kingdom's reliance on fossil-fuelled power generation.

Question 5

Do you think that renewables alone can fill in the gap in order to reduce the United Kingdom's reliance on fossil-fuelled power generation?

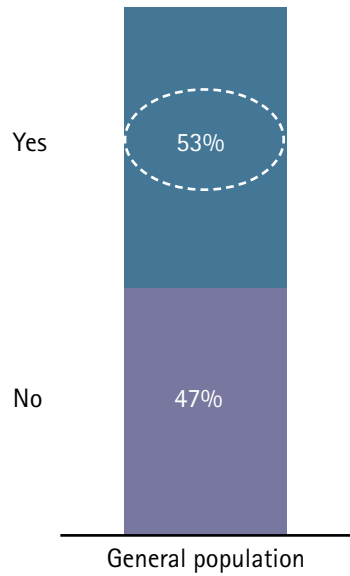


Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Half of the respondents think that the United Kingdom should increase its nuclear power-generating capacity.

Question 6

Do you think that the United Kingdom should increase its nuclear power-generating capacity?



Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Focus on Gender and Age

Males, as well as those 55 years and older are most in favour of the United Kingdom's increase of nuclear power-generating capacity.

Question 6

Do you think that the United Kingdom should increase its nuclear power-generating capacity?

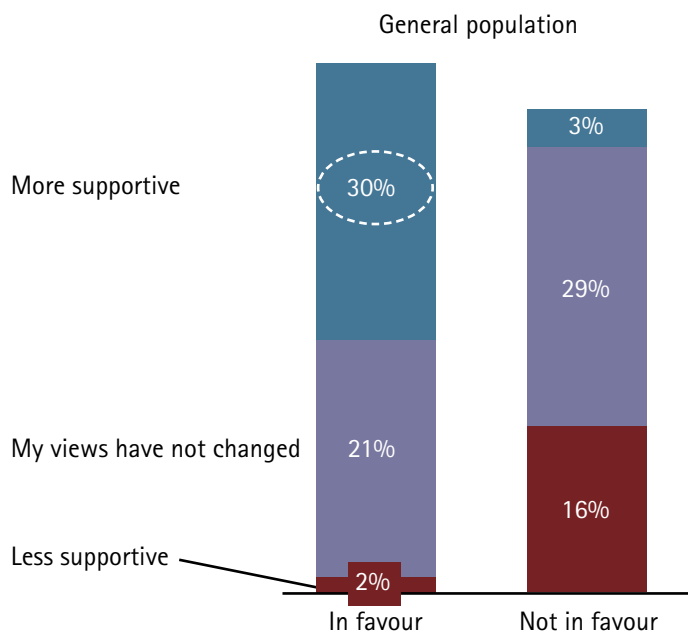
		General population	
		Yes	No
Gender	Male	68%	32%
	Female	38%	62%
Age	18-34	54%	46%
	35-55	44%	56%
	55+	60%	40%

*No significant difference between regions or socio-economic categories

In the past five years, support for nuclear power has increased by 30 percent.

Question 7

Are you now more or less supportive of an increase of the United Kingdom's nuclear power-generating capacity than five years ago?



Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008



Important Reasons in Favour of Increasing the United Kingdom's Nuclear Power-generating Capacity

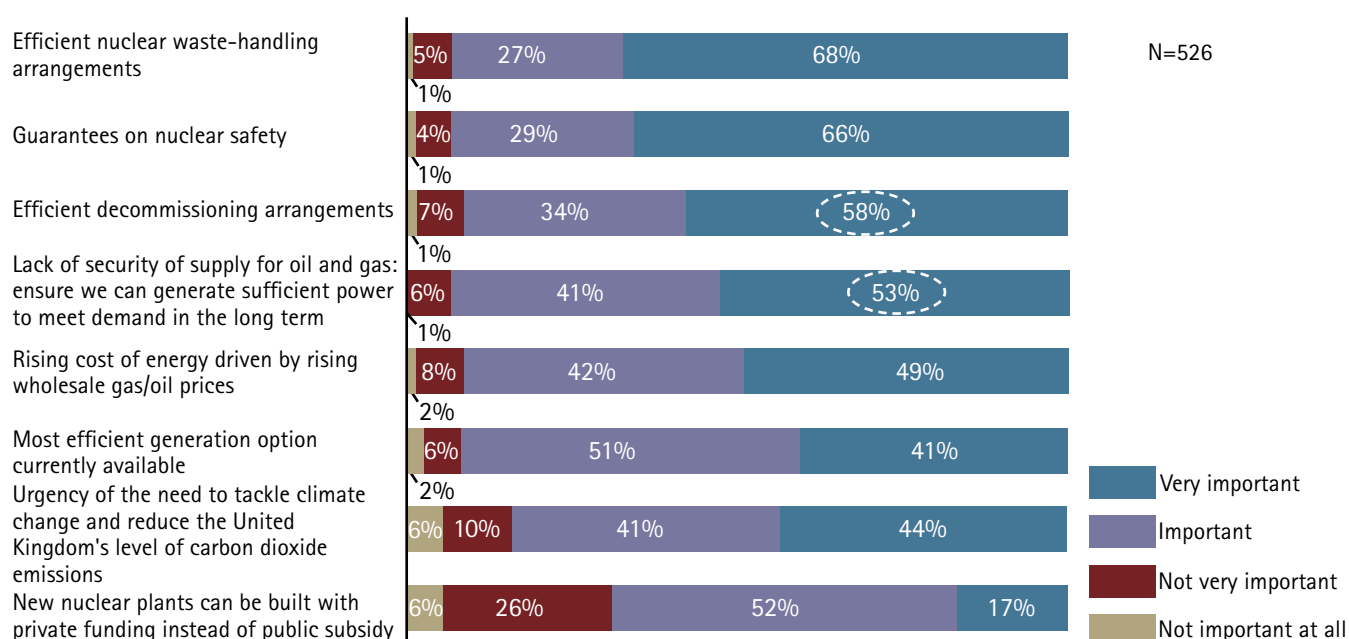
For two respondents out of three among this group, the most important reasons in favour of increasing the United Kingdom's nuclear power-generating capacity are: efficient nuclear waste-handling and guarantees on nuclear safety.

As a consequence, efficient nuclear waste-handlings and guarantees on nuclear safety act as the major prerequisites for people's acceptance towards the increase of nuclear power.

Fifty-eight percent of respondents also consider the efficient decommissioning arrangements and one respondent out of two consider the lack of security of supply for oil and gas as a very important reason.

Question 8

Please evaluate the following reasons in favour of increasing the United Kingdom's nuclear power-generating capacity?



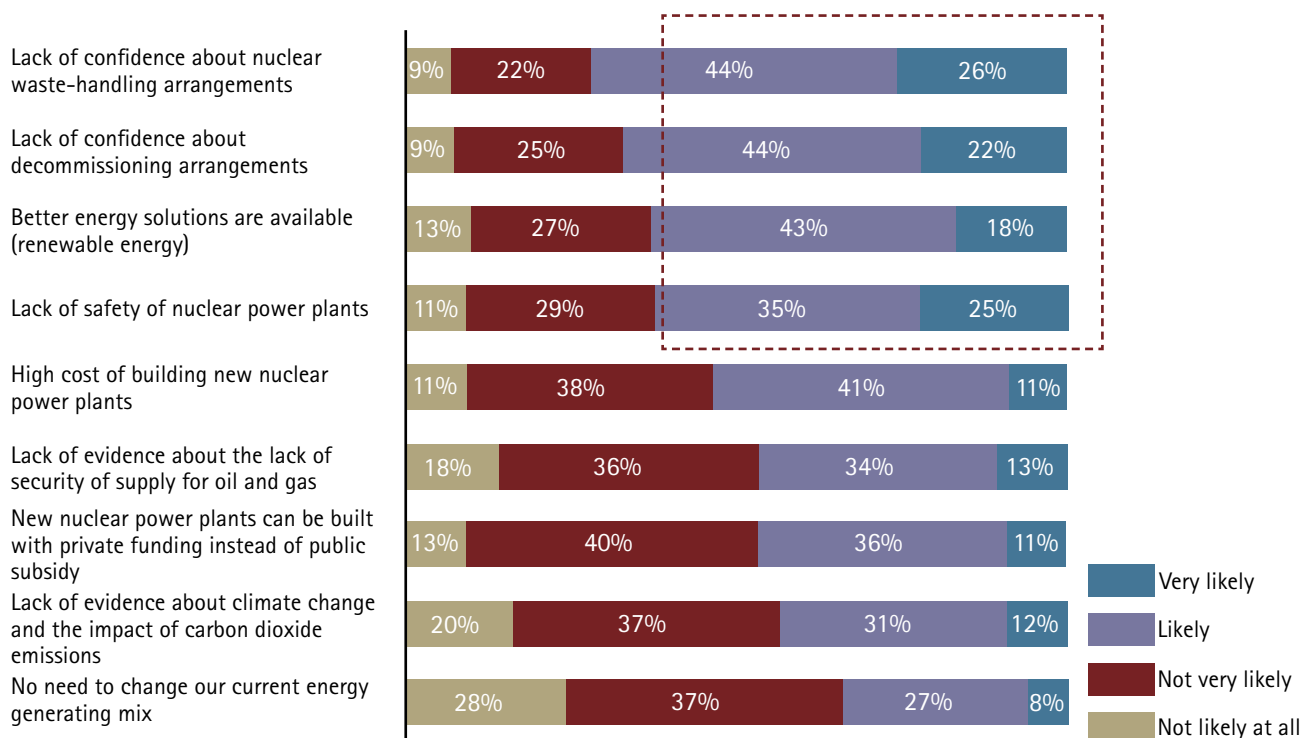
Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Major concerns for 60 percent of respondents and above in this pool would come from the lack of confidence about nuclear waste-handling and decommissioning arrangements, the lack of safety of nuclear plants and the availability of better energy solutions.

Responses drawn from respondents who think the United Kingdom **should increase** its nuclear power-generating capacity (N=526).

Question 9

Would any of the following elements make you question the United Kingdom's need to increase its nuclear power-generating capacity?

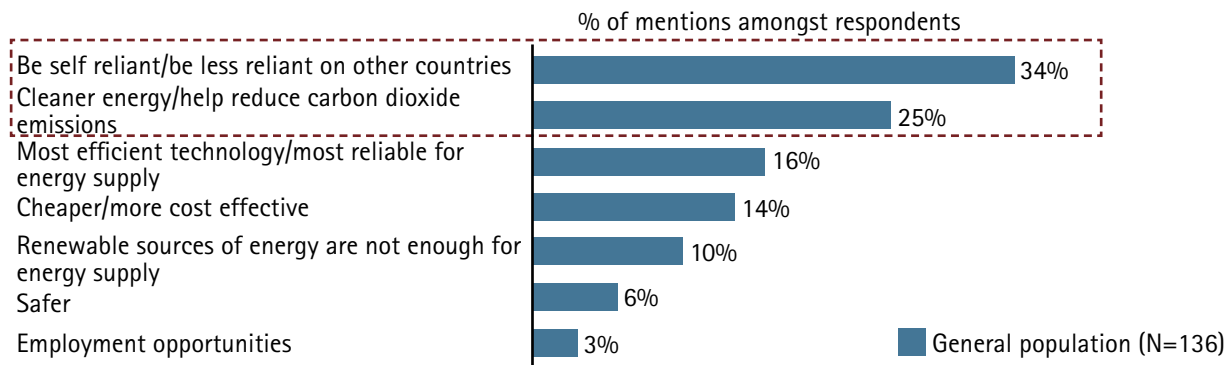


Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Other reasons in favour of increasing the United Kingdom's nuclear power-generating capacity cited spontaneously are: be less reliant on other countries for providing energy, and cleaner energy.

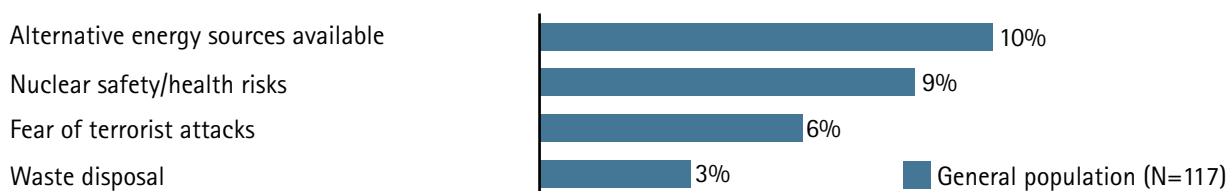
Question 8

Other reasons in favour of increasing the United Kingdom's nuclear power-generating capacity?



Question 9

Other elements which could make you question the United Kingdom's need to increase its nuclear power-generating capacity?



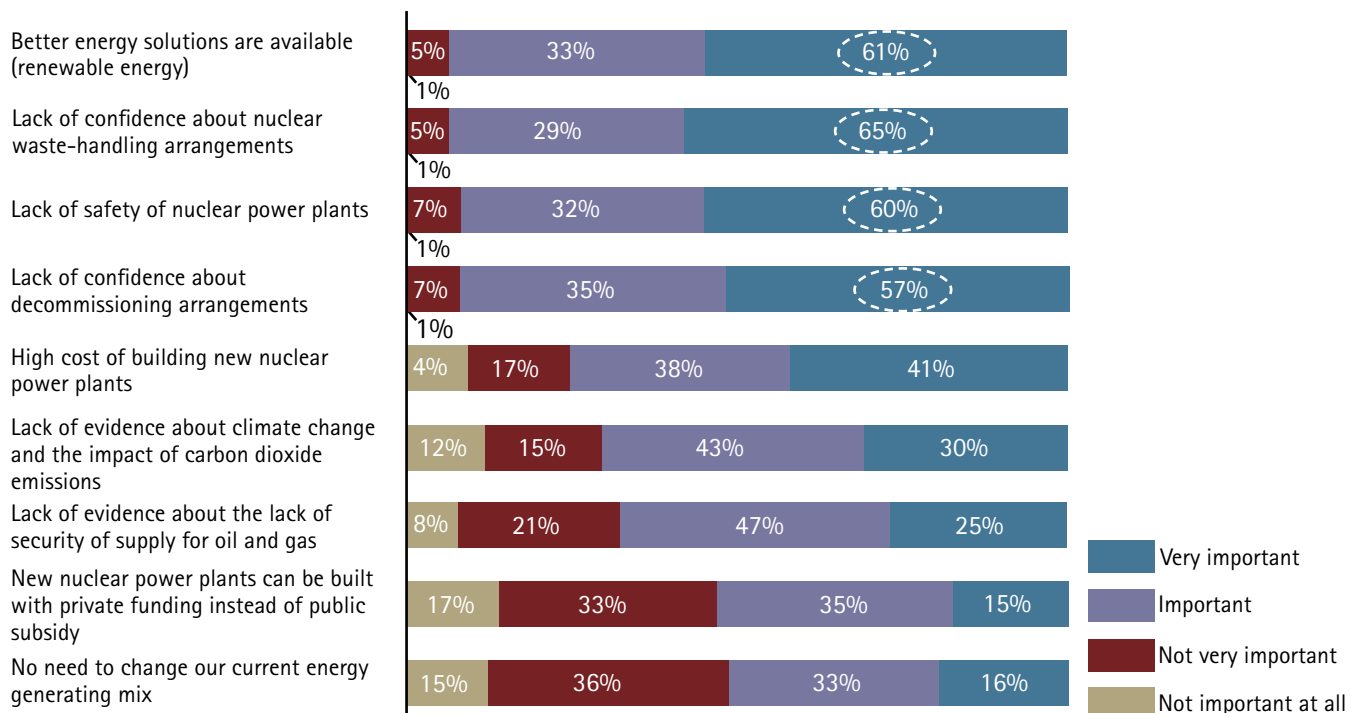
Important Reasons Against Increasing the United Kingdom's Nuclear Power-generating Capacity

The most important reasons against increasing the United Kingdom's nuclear power-generating capacity are: better energy solutions available, lack of confidence about nuclear waste-handling and decommissioning arrangements, and lack of safety of nuclear power plants.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=474).

Question 10

Please evaluate the following reasons against increasing the United Kingdom's nuclear power-generating capacity?



Focus on Gender and Age

Overall, respondents of 55 or older hold a stronger position than younger respondents against the increase of nuclear power, particularly on waste-handling, nuclear safety and decommissioning arrangements.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=474).

Question 10

Please evaluate the following reasons against increasing the United Kingdom's nuclear power-generating capacity?

% of respondents who cited 'Very important' as a reason	General population	Male	Female	18-34	35-55	55+
Lack of confidence about nuclear waste-handling arrangements	65%	66%	64%	52%	65%	77%
Better energy solutions are available (renewable energy)	61%	63%	61%	58%	66%	59%
Lack of safety of nuclear power plants	60%	55%	63%	41%	64%	74%
Lack of confidence about decommissioning arrangements	57%	55%	58%	37%	59%	73%
High cost of building new nuclear power plants	41%	44%	40%	30%	44%	49%
Lack of evidence about climate change and the impact of carbon dioxide emissions	30%	23%	33%	23%	33%	31%
Lack of evidence about the lack of security of supply for oil and gas	25%	23%	25%	16%	24%	34%
No need to change our current energy generating mix	16%	19%	15%	9%	22%	15%
New nuclear power plants can be built with private subsidy instead of public subsidy	15%	17%	15%	12%	17%	16%

* No significant difference between socio-economic categories

Focus on Regions

Respondents in the Midlands region seem more concerned about nuclear waste-handling and decommissioning arrangements than respondents in the South or in London.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=474).

Question 10

Please evaluate the following reasons against increasing the United Kingdom's nuclear power-generating capacity?

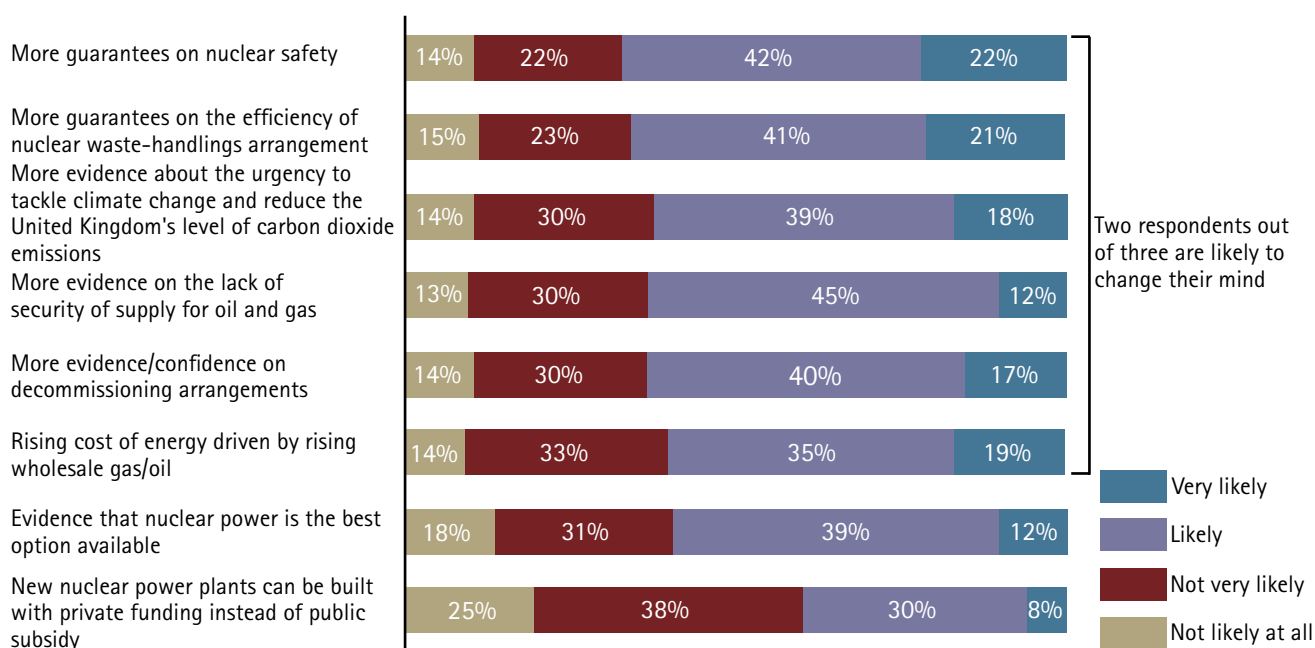
% of respondents who cited 'Very important' as a reason	General population	North	Midlands	South	London
Lack of confidence about nuclear waste-handling arrangements	65%	64%	70%	61%	58%
Better energy solutions are available (renewable energy)	61%	60%	64%	59%	65%
Lack of safety of nuclear power plants	60%	62%	62%	56%	58%
Lack of confidence about decommissioning arrangements	57%	55%	62%	52%	54%
High cost of building new nuclear power plants	41%	42%	43%	41%	33%
Lack of evidence about climate change and the impact of carbon dioxide emissions	30%	30%	36%	24%	21%
Lack of evidence about the lack of security of supply for oil and gas	25%	23%	29%	26%	14%
No need to change our current energy generating mix	16%	16%	16%	14%	21%
New nuclear power plants can be built with private subsidy instead of public subsidy	15%	15%	14%	18%	14%

More evidence and guarantees are likely to make two respondents out of three, who currently do not think the United Kingdom should increase its nuclear power-generating capacity, change their mind.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=474).

Question 11

Would any of the following elements make you change your mind, i.e. make you consider the increase of nuclear power-generating capacity in the United Kingdom as an option?

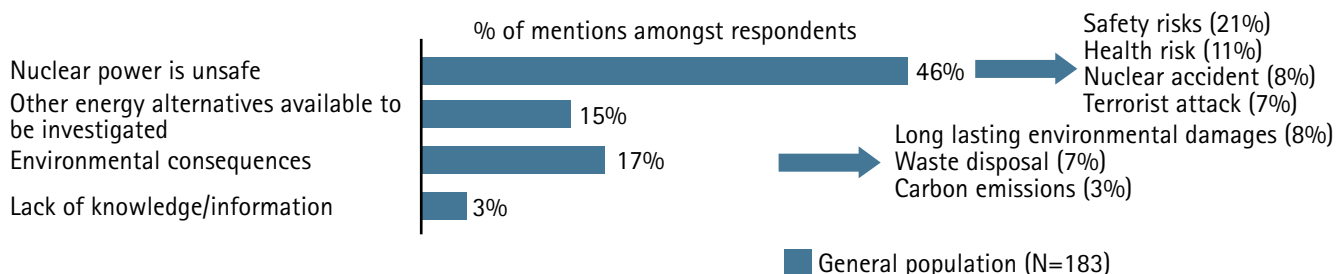


Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Among other reasons against increasing the United Kingdom's nuclear power-generating capacity, respondents emphasise their lack of confidence regarding safety and environmental consequences of nuclear power.

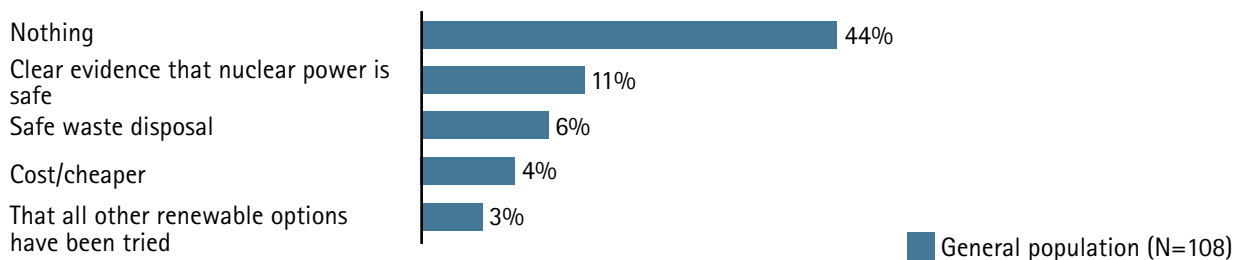
Question 10

Other reasons against increasing the United Kingdom's nuclear power-generating capacity?



Question 11

Other elements which could make you change your mind, i.e. make you consider the increase of nuclear power-generating capacity in the United Kingdom as an option?



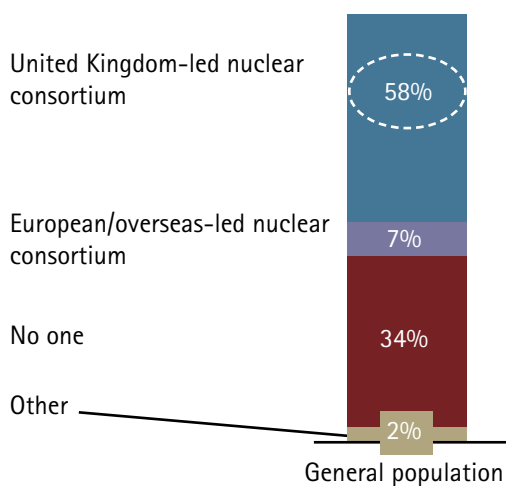
Public Opinion Towards Nuclear Consortium and Impact on Government Action

The majority of respondents say they trust United Kingdom-led consortiums to deliver safe nuclear power plants.

Almost half of the sample considers that public opinion can influence government policy on new nuclear power build.

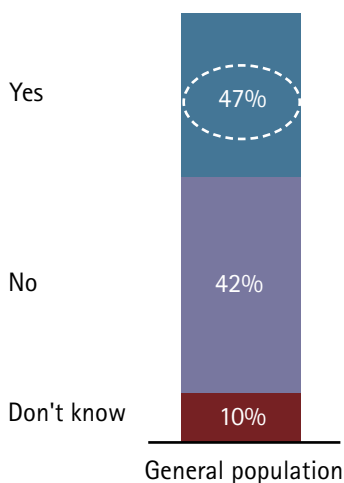
Question 12

Who do you trust most to deliver safe new nuclear power plants?



Question 13

Do you think that public opinion can influence government policy on new nuclear power build?

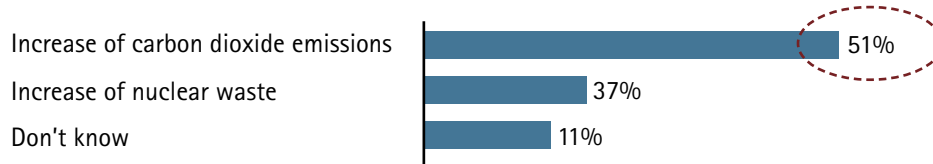


Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

Overall, respondents seem more concerned by the increase of carbon dioxide emissions than the increase in nuclear waste.

Question 14

Which of the two following elements make you the most concerned for the next 20 years?

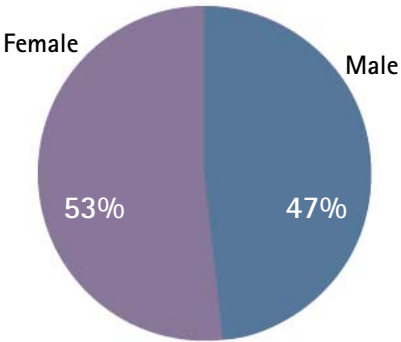




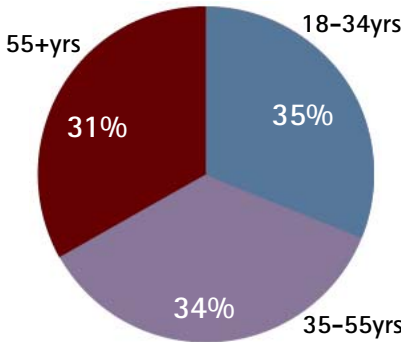
Appendix: Boost Sample Description & Boost Sample Results

Sample description–Boost

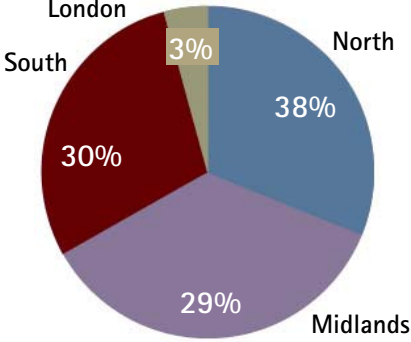
Gender breakdown



Age breakdown



Regional breakdown



North:
 Border and Scotland
 North East England
 Yorkshire

South:
 Southern
 South West England

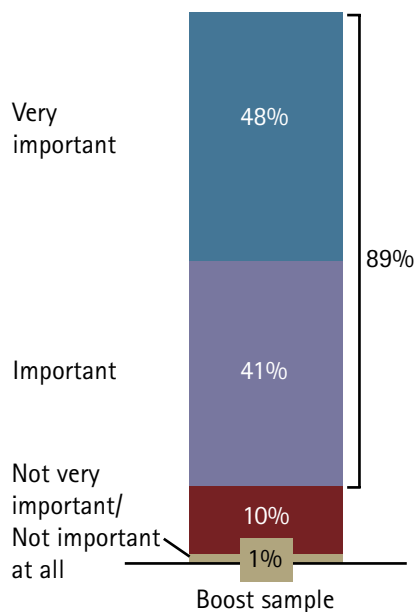
Midlands:
 Midlands
 East of England
 Wales and the West

Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

The large majority of United Kingdom respondents living near a nuclear power plant believe it is important that the United Kingdom reduces its reliance on fossil-fuelled power generation.

Question 1

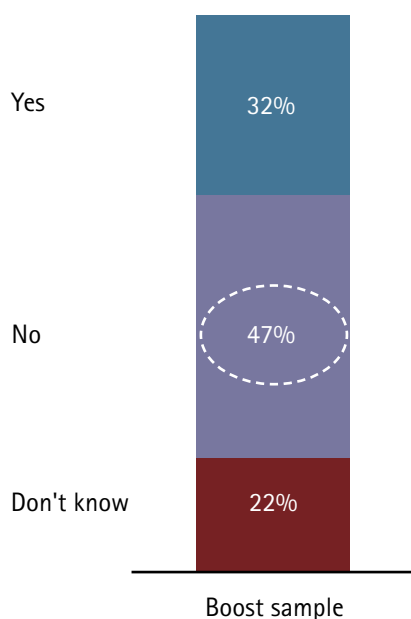
How important is it to you that the United Kingdom reduces its reliance on fossil-fuelled power generation (i.e. coal, oil or gas generated power)?



Almost half of the respondents in this group do not think renewables alone can help reduce the United Kingdom's reliance on fossil-fuelled power generation.

Question 5

Do you think that renewables alone can fill in the gap in order to reduce the United Kingdom's reliance on fossil-fuelled power generation?

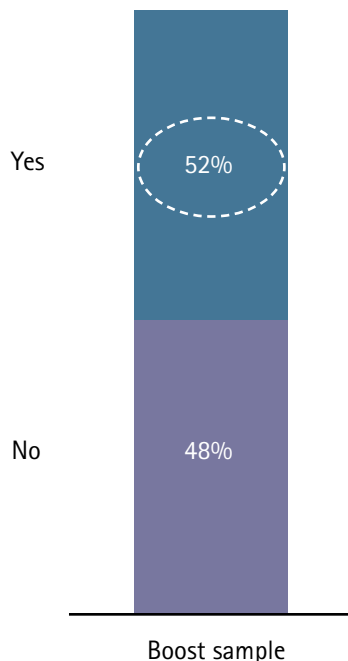


Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

One respondent out of two living near a nuclear power plant thinks that the United Kingdom should increase its nuclear power-generating capacity.

Question 6

Do you think that the United Kingdom should increase its nuclear power-generating capacity?



Males as well as those 55 years and older are most in favour of the United Kingdom's increase of nuclear power-generating capacity.

Question 6

Do you think that the United Kingdom should increase its nuclear power-generating capacity?

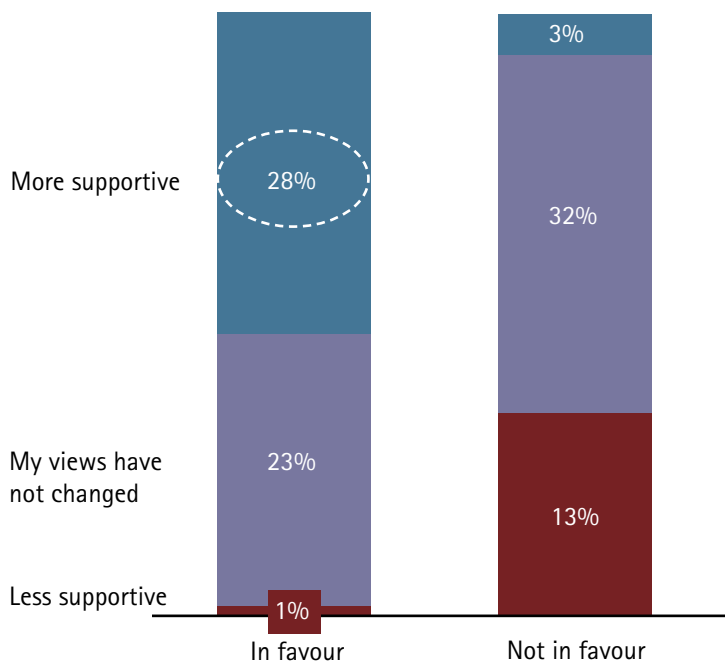
		Boost sample	
		Yes	No
Gender	Male	75%	25%
	Female	31%	69%
Age	18-34	57%	43%
	35-55	38%	62%
	55+	62%	38%

*No significant difference between socio-economic categories

In the past five years, support for nuclear power has increased by 28 percent.

Question 7

Are you now more or less supportive of an increase of the United Kingdom's nuclear power-generating capacity than five years ago?



Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

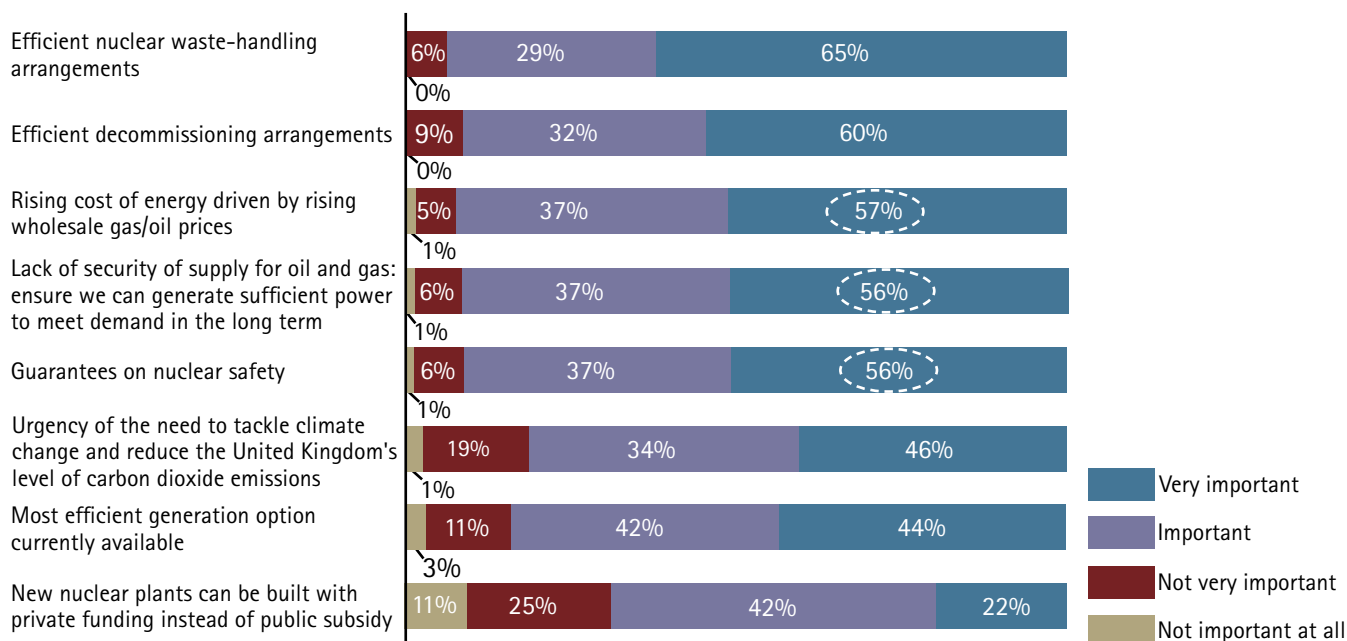
For respondents who are living near a nuclear power plant, the two most important reasons in favour of increasing the United Kingdom's nuclear power-generating capacity are: efficient nuclear waste-handling and decommissioning arrangements.

Responses drawn from respondents who consider the United Kingdom **should increase** its nuclear power-generating capacity (N=79).

One respondent out of two also consider the rising cost of energy, the lack of security for oil and gas and guarantees on nuclear safety as very important.

Question 8

Please evaluate the following reasons in favour of increasing the United Kingdom's nuclear power-generating capacity?

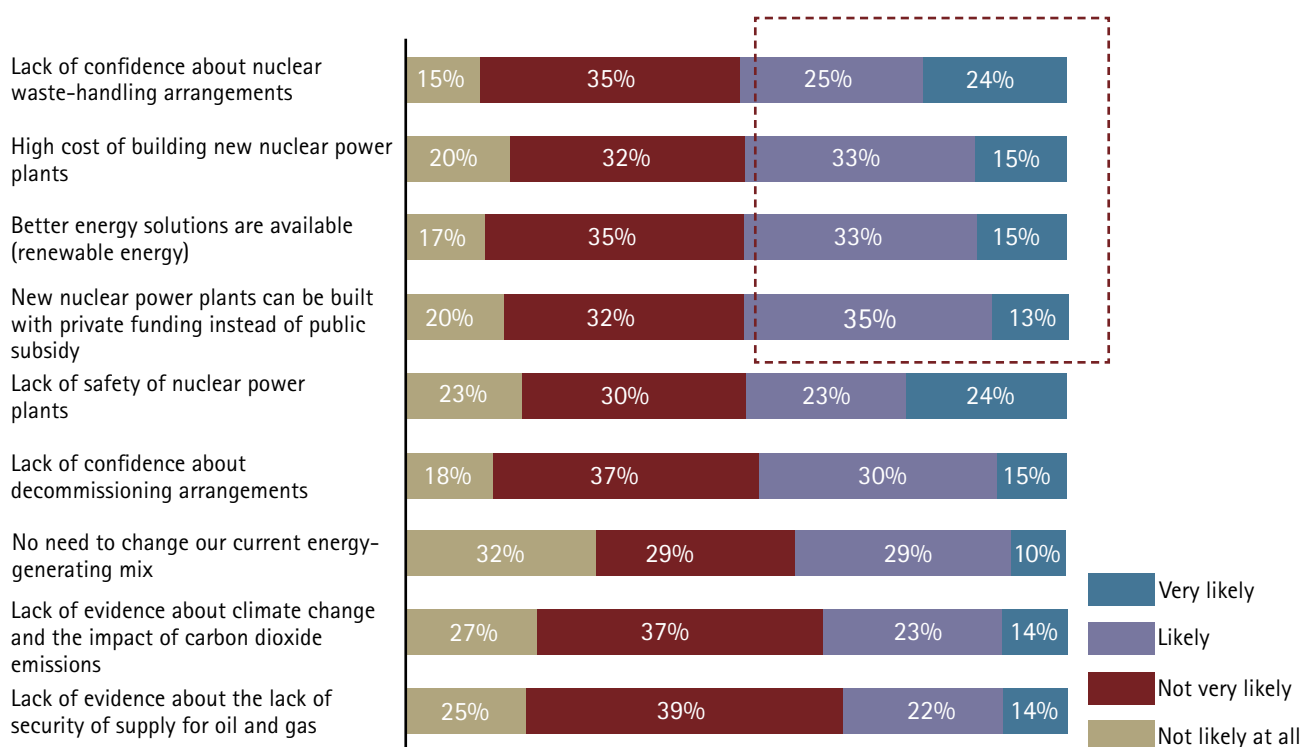


For one respondent out of two, major concerns about the increase of nuclear power-generating capacity would come from: lack of confidence about waste-handling arrangements, high cost of building power plants, better energy solutions available and new nuclear power plants being built with private funding instead of public subsidy.

Responses drawn from respondents who think the United Kingdom **should increase** its nuclear power-generating capacity (N=79).

Question 9

Would any of the following elements make you question the United Kingdom's need to increase its nuclear power-generating capacity?



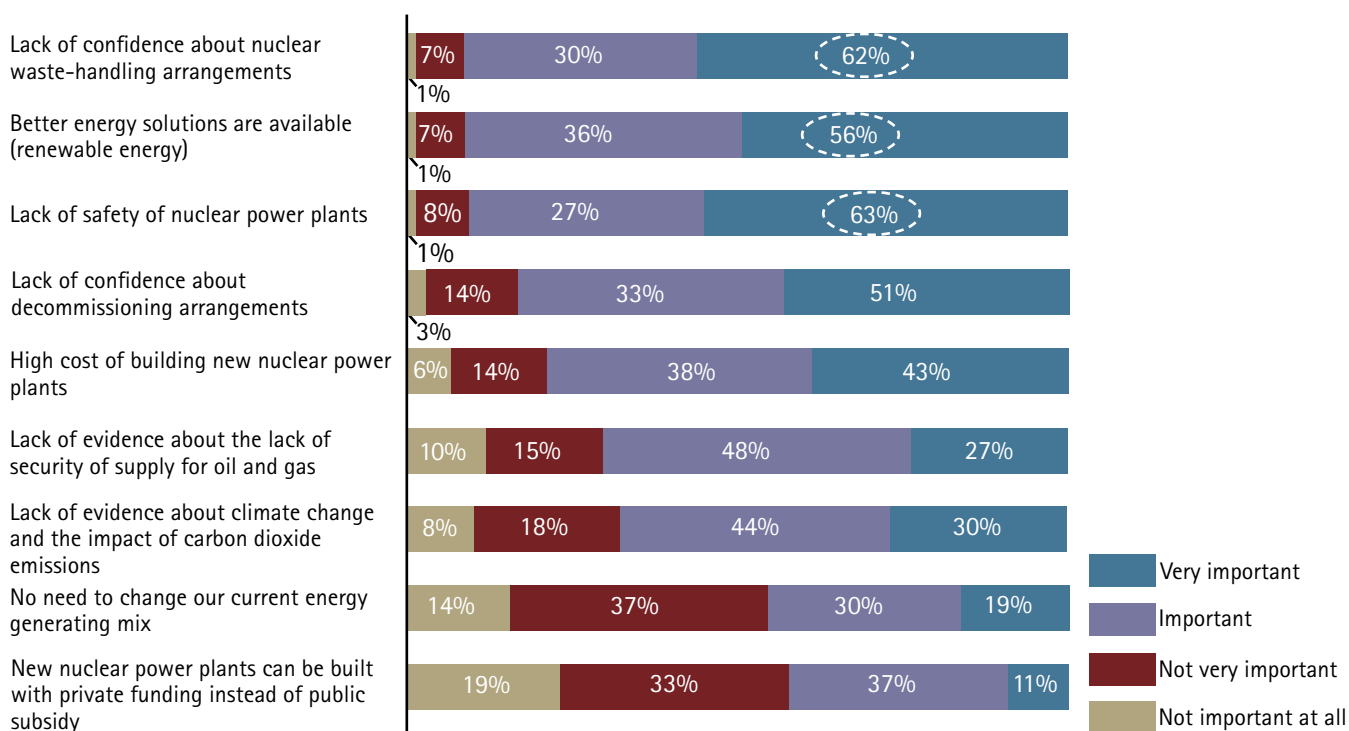
Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

For the majority of respondents, the main reasons against increasing the United Kingdom's nuclear power-generating capacity are: lack of confidence about nuclear waste-handling arrangements, better energy solutions available and lack of safety of nuclear power plants.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=73).

Question 10

Please evaluate the following reasons against increasing the United Kingdom's nuclear power-generating capacity?



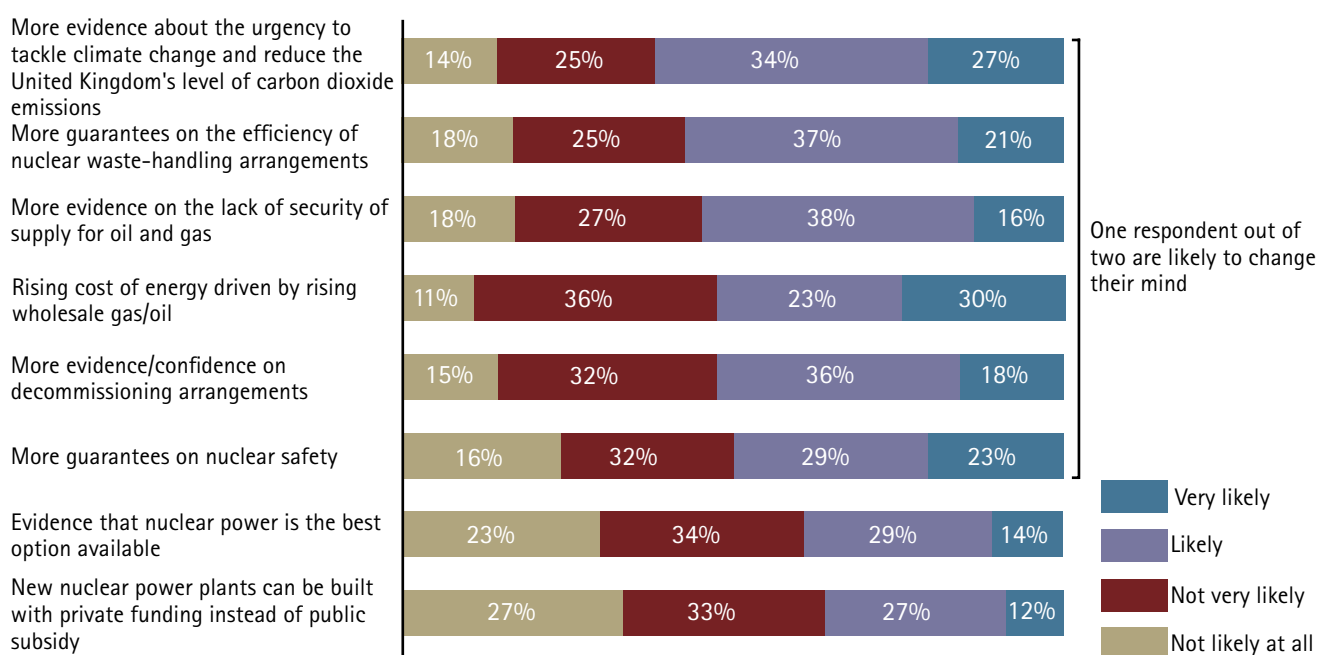
Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

However, results show that more evidence and guarantees on the following elements could make one respondent out of two shift its position.

Responses drawn from respondents who think the United Kingdom **should not increase** its nuclear power-generating capacity (N=73).

Question 11

Would any of the following elements make you change your mind, i.e. make you consider the increase of nuclear power-generating capacity in the United Kingdom as an option?



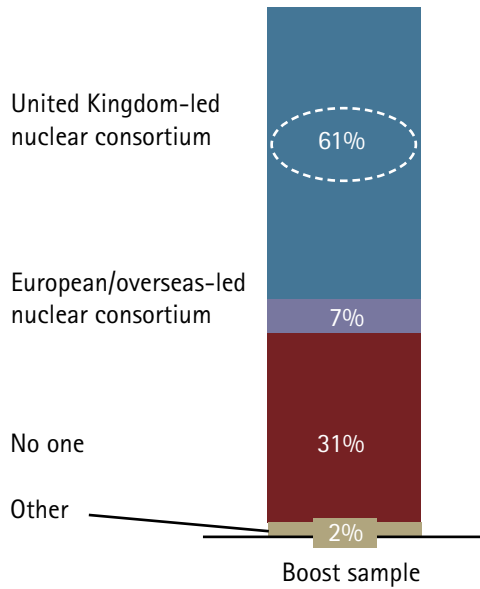
Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

The majority of respondents say they trust United Kingdom-led consortiums to deliver safe nuclear power plants.

Almost half of the boost sample considers that public opinion can influence government policy on new nuclear power build.

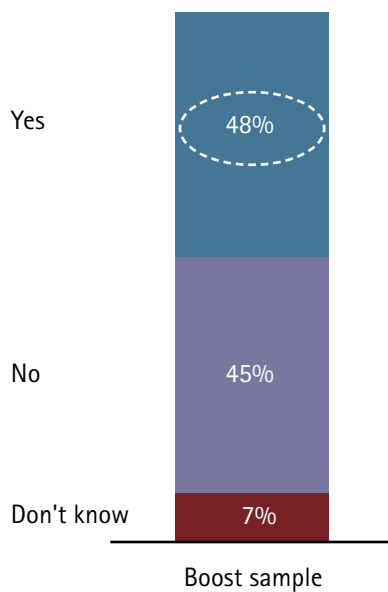
Question 12

Who do you trust most to deliver safe new nuclear power plants?



Question 13

Do you think that public opinion can influence government policy on new nuclear power build?



Overall, respondents living near a nuclear power plant seem more concerned by the increase of carbon dioxide emissions rather than the increase of nuclear waste.

Question 14

Which of the two following elements make you the most concerned for the next 20 years?



Source: Accenture & Utility Week Survey on Attitudes Towards Nuclear Power in the United Kingdom–June 2008

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