

Public Support for the Continuation of Uranium Mining in Saskatchewan

SITUATION SUMMARY

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Public Support for the Continuation of Uranium Mining in Saskatchewan

In November 2018, Fast Consulting conducted a public opinion survey for Cameco Corporation and Orano Canada to measure public support for the uranium mining industry in Saskatchewan. Our firm has been conducting annual public opinion surveys for Cameco since 1990 and for Cameco and Orano jointly since 1998.

The 2018 survey was conducted by telephone (both landline and mobile) and online with a representative sample of 1,119 Saskatchewan residents. The province was divided into geographic sampling regions to ensure proportionate representation.

In addition to the province-wide sample, 250 surveys were conducted in communities and reserves in northern Saskatchewan (Northern Administration District). This enables us to report on the perceptions of northern residents and to draw more reliable conclusions for this cohort. The northern oversample is not factored into the provincial estimates beyond its proportionate weight.

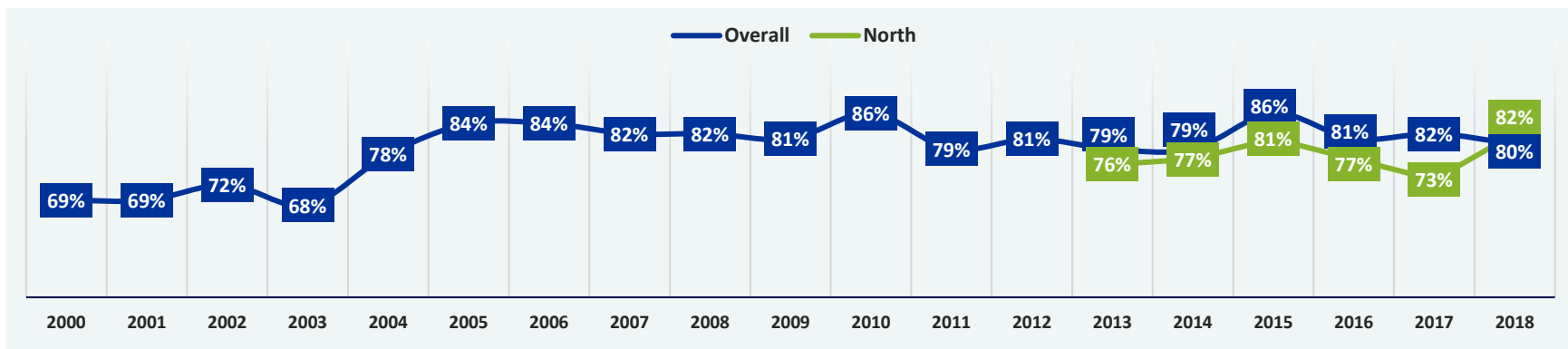
Support Remains Strong

2018 survey results confirm a high level of support for the continuation of uranium mining in the province:

- 80% of respondents province-wide support uranium mining in northern Saskatchewan, including 38% who strongly support the industry. This is in line with 82% in 2017.
- 82% of Northern respondents support the uranium mining industry (43% strongly supportive), up from 73% in 2017.

Although annual surveys show fluctuations in support, the rise and fall is within a relatively limited range. The current level of support is consistent with the long-term trend.

Support for the Uranium Mining Industry in Saskatchewan, 2000-2018



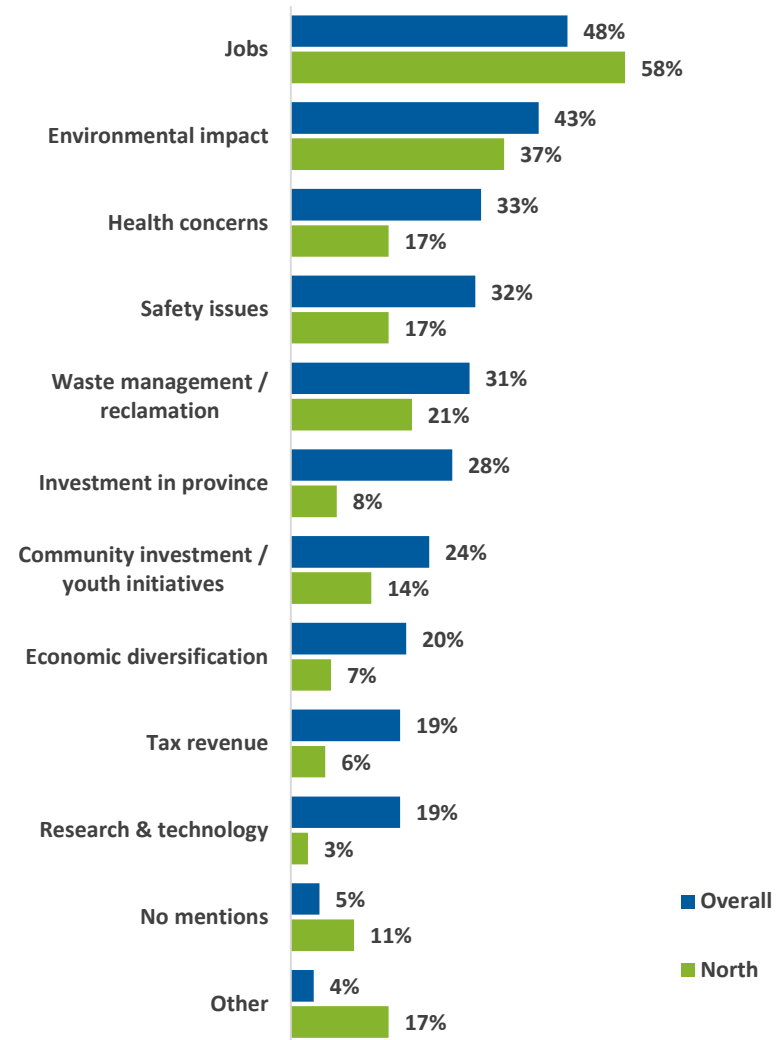
Awareness

- ▶ Province-wide, 81% of respondents are aware of Cameco, including 46% who are ‘very aware’. This is consistent with 2017.
- ▶ In the North, 93% of respondents are aware of Cameco, including 66% who are ‘very aware’. This is up from 82% last year.

Important Issues

- ▶ When asked to think about what’s important to them in relation to the province’s uranium mining industry, jobs tops the list at 48% province-wide and 58% in the North.
- ▶ Environmental impact is cited second-most frequently at 43% province-wide and 37% in the North.
- ▶ Health concerns and safety issues appear to be equally important as they are cited by 33% and 32% province-wide and 17% in the North.
- ▶ Province-wide respondents are more likely than Northern respondents to cite waste management/reclamation (31% vs. 21% North), investment in province (28% vs. 8% North), community investment/youth initiatives (24% vs. 14% North), economic diversification (20% vs. 7% North), tax revenue (19% vs. 6% North) and research & technology (19% vs. 3% North).

Important Issues Related to Uranium Mining Industry



*Multiple response allowed

9 out of 10 Think Industry Is Important to SK

- ▶ Province-wide, 61% of respondents think the uranium mining industry is extremely/very important to Saskatchewan's economy and another 29% think it is moderately/somewhat important. This is consistent with previous years.
- ▶ In the North, 64% of respondents think the uranium mining industry is extremely/very important to Saskatchewan's economy and another 24% think it is moderately/somewhat important.

9 out of 10 Think Industry Is Important to North

- ▶ In the North, 69% think the industry is extremely/very important to Indigenous communities in northern Saskatchewan, while another 22% think it is moderately/somewhat important.
- ▶ Province-wide, 60% think the industry is extremely/very important to Indigenous communities in northern Saskatchewan, while another 24% think it is moderately/somewhat important.

Positive Impact on Northern Communities

- ▶ Nine out of 10 Northerners (86%) are aware the uranium mining industry provides education and training opportunities for northern residents; 81% say this is extremely/very important.
- ▶ Eight out of 10 Northerners are aware the uranium mining industry offers high school scholarship programs for northern students (84%) and partnerships with northern educational institutions (79%); similar percentages say this is extremely/very important.

- ▶ Six out of 10 (64%) Northerners are aware the uranium mining industry builds infrastructure (such as cell phone towers) also used by northern communities; even more (72%) say this is extremely/very important.

Conclusion

The 2018 provincial survey clearly indicates that the uranium mining industry continues to hold a place of importance in the minds of Saskatchewan residents. Support remains high among survey respondents both province-wide and in the North, despite significant challenges being faced by the industry due to persistent low uranium prices on the international market. These challenges have resulted in employment reductions, particularly in the North, from the suspension of mining production at Rabbit Lake and McArthur River and processing at Key Lake.

The continued high level of public support measured in this survey is the result of the perception among Saskatchewan residents that the primary companies operating in the industry (Cameco Corporation and Orano Canada) continue to operate safely and responsibly, while contributing positively to the province.

Perceptions regarding the importance of the uranium mining industry to Saskatchewan's economy also remains high—almost all residents province-wide and in the North think the industry is important to the provincial economy and to Indigenous communities in Northern Saskatchewan.