



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 2019, 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 2019 survey was conducted by telephone and online with a representative sample of 1,022 Saskatchewan residents. The province was divided into geographic sampling regions to facilitate proportionate representation.

In addition to the province-wide sample, 289 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.

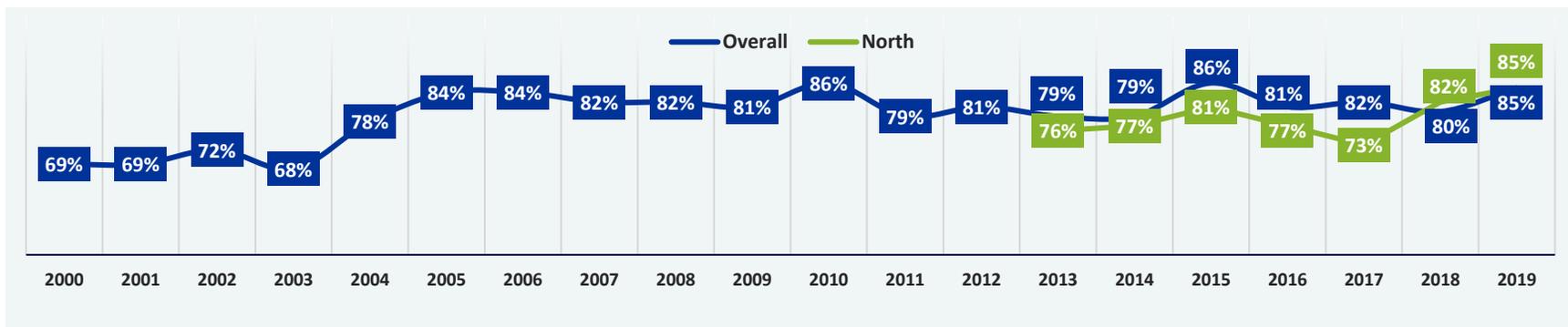
SUPPORT REMAINS STRONG

2019 survey results confirm strong support for the continuation of uranium mining in the province:

- ▶ 85% of respondents province-wide support uranium mining in Saskatchewan, including 41% who strongly support the industry. This is up from 80% a year ago.
- ▶ 85% of Northern respondents support the industry (48% are strongly supportive), up from 82% in 2018.

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, 2000-2019

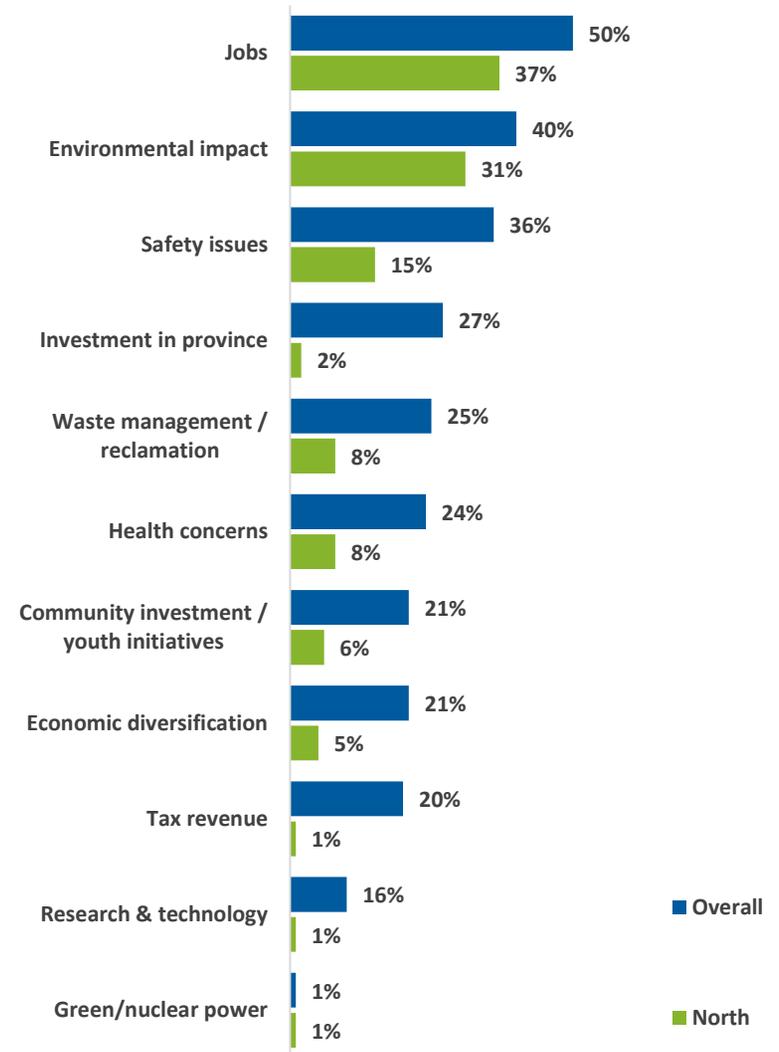


Important Issues

Q. What issues are important to you when you think about the uranium mining industry in Saskatchewan?

- The issues respondents identify as important to them when thinking about Saskatchewan’s uranium mining industry are generally consistent from year to year.
- In 2019, as in previous years, jobs tops the list at 50% province-wide and 37% in the North.
- Environmental impact (40% overall, 31% North) and safety issues (36% overall, 15% North) round out the top three mentions.
- Approximately a quarter overall cite investment in province (27%), waste management/reclamation (25%) and health concerns (24%). Approximately a fifth cite community investment/youth initiatives (21%), economic diversification (21%) and tax revenue (20%).

Jobs, Environment Are Most Important Issues

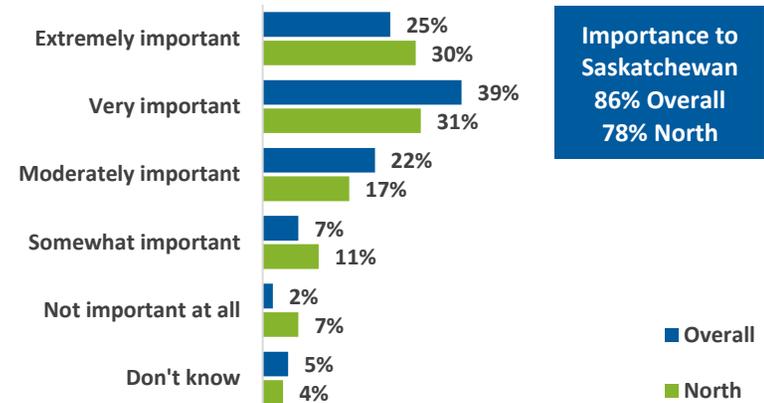


**Multiple response allowed*

8 OUT OF 10 THINK INDUSTRY IS IMPORTANT TO SK

- Province-wide, 86% of respondents think the uranium mining industry is important to Saskatchewan’s economy, including 64% who think it is extremely/very important.
- In the North, 78% of respondents think the uranium mining industry is important to Saskatchewan’s economy, including 61% who think it is extremely/very important.

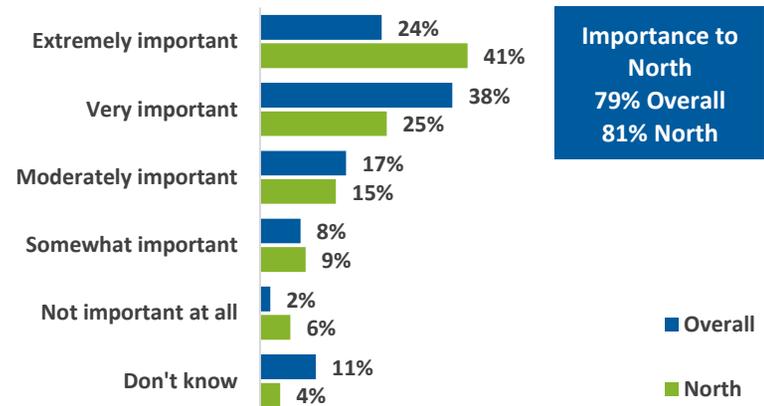
Majority Think Industry Is Important to SK



8 OUT OF 10 THINK INDUSTRY IS IMPORTANT TO NORTH

- Province-wide, 79% of respondents think the uranium mining industry is important to the economy and Indigenous communities of Northern Saskatchewan, including 62% who think it is extremely/very important.
- In the North, 81% of respondents think the uranium mining industry is important to the economy and Indigenous communities of Northern Saskatchewan, including 66% who think it is extremely/very important.

Majority Think Industry Is Important to the North



POSITIVE IMPACT ON NORTHERN COMMUNITIES

- ▶ Northerners' awareness of the industry's impact on northern education, training and infrastructure is generally high and aligns with perceived importance of these things.
 - 88% are aware the uranium mining industry provides education & training for northern residents. This aligns with 80% who think this is extremely/very important.
 - 84% are aware the industry offers partnerships with northern educational institutions vs. 74% who think this is extremely/very important.
 - 83% are aware the industry has high school scholarship programs for northern students vs. 78% who think this is extremely/very important.
 - 82% are aware the industry builds mining roads and infrastructure also used by northern residents; 70% think this is extremely/very important.
- ▶ More than half (57%) of Northerners are aware of collaborative agreements between Cameco, Orano and some northern communities. The large majority (84%) of them agree the communities benefit.

CONCLUSION

The 2019 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—the majority of residents province-wide and in the North think the industry is important to the provincial economy and to Indigenous communities in Northern Saskatchewan.