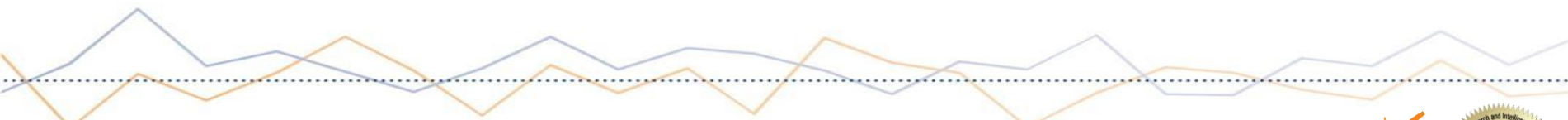




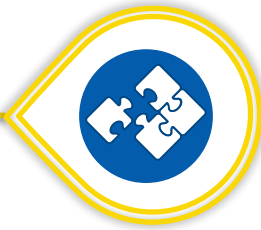
Tidal Energy Public Perception

Quantitative Research Results

Atlantic Quarterly
Spring 2017



Methodology



Random telephone survey of the general population among adult Atlantic Canadians 18+ years.



400 surveys (400 randomly selected across NS)



Final data weighted by age, gender and region.



Conducted May 4 – June 1, 2017



Margin of error +/-4.9%

Development of Tidal Energy in NS



There continues to be strong support for the development of tidal energy in Nova Scotia.

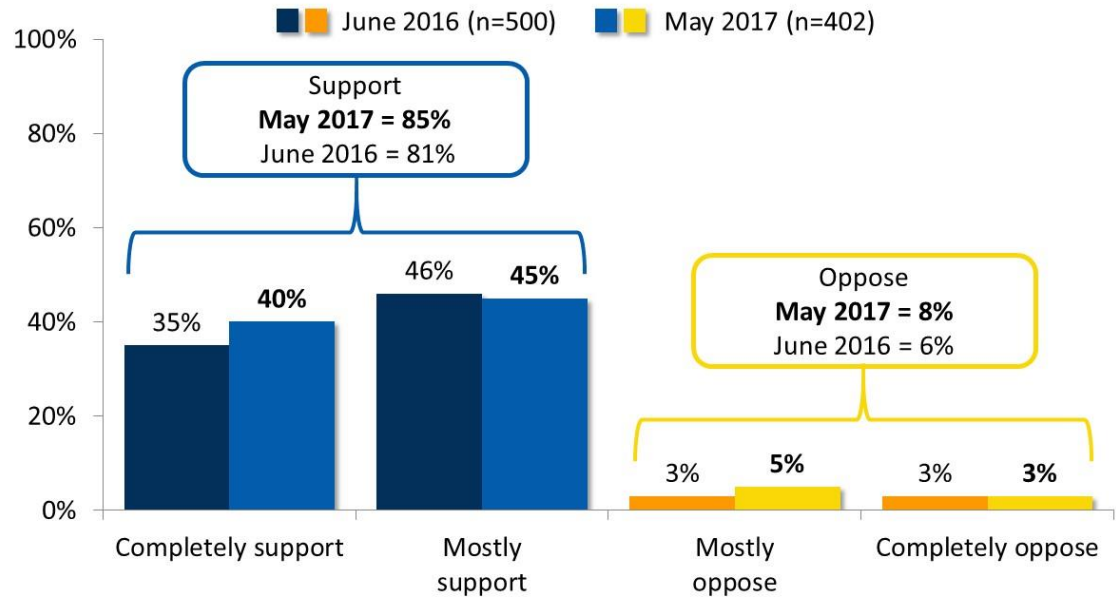
A series of questions were asked on the 2017 Q2 issue of the Atlantic Quarterly, whereby 400 random Nova Scotia residents were asked their opinion. The following slides present tracking results.

Following a brief description of how Nova Scotia currently produces energy, respondents were asked for an overall assessment of their support or opposition to tidal energy.

Overall, eight in ten Nova Scotians (85%) support tidal energy development with four in ten residents **completely** supporting such development and close to half **mostly** supporting the initiative. This level of support is consistent across regions of the province, age groups and by gender.

There is little opposition to the development of tidal energy. (Table 1)

Support of/Opposition to Development of Tidal Energy in NS



Q.1: As you may or may not be aware, Nova Scotia currently produces energy in a number of ways, including by burning coal or natural gas and by using renewable sources such as wind and hydro. Another renewable option being explored is tidal energy. All things considered, do you completely support, mostly support, mostly oppose, or completely oppose the development of tidal energy for Nova Scotia?

Support for Development of Tidal Energy



Support for the development of tidal energy continues to be primarily driven by it being a renewable or clean energy.

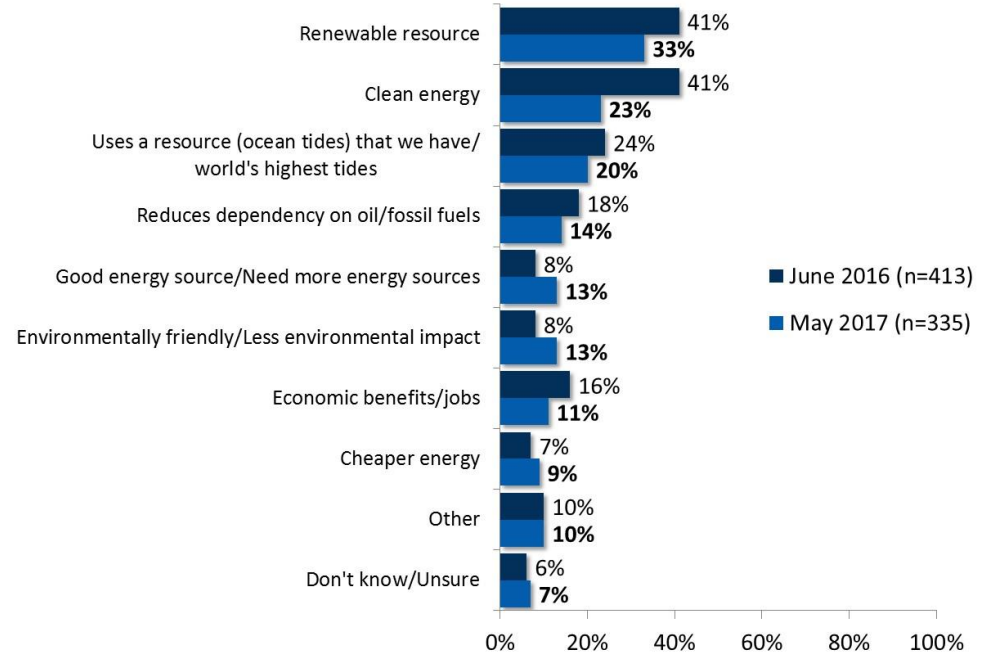
Those who support the development of tidal energy (n=335) were asked why they felt that way. Overall, residents primarily attribute their support to the fact that tidal energy is a renewable resource or a clean energy.

Two in ten Nova Scotians support the concept because it makes use of a resource that Nova Scotia has, while more than one in ten like that the energy source reduces the province's dependence on fossil fuels or provides an alternate energy source.

While economic benefits and jobs are noted by one in ten, it is clearly environmental reasons that are most prevalent. (Table 2a)

Reasons for Supporting Development of Tidal Energy

Among Those Who Support Development of Tidal Energy
Total Unaided Mentions



Q.2: [IF 'COMPLETELY SUPPORT' OR 'MOSTLY SUPPORT' IN Q.1] Why do you support the development of tidal energy?
Probe: Any other reasons?

Opposition Towards Tidal Energy in NS



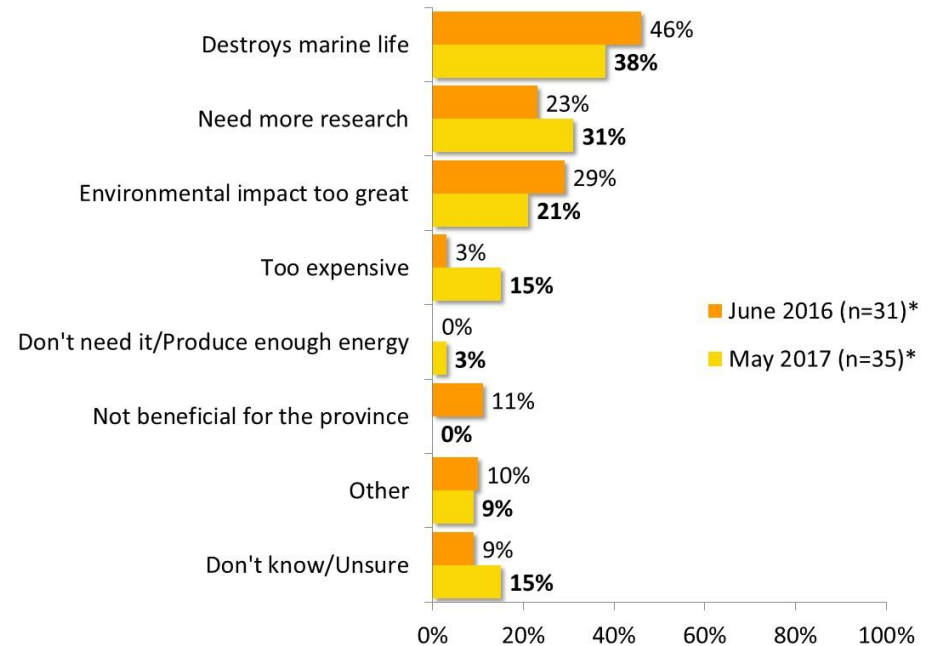
Opposition, though limited, centers on concerns about destruction of marine life and general negative environmental impacts, as well as a need for further research.

Consistent with previous findings, few (n=35) oppose the development of tidal energy, and opposition among this group is primarily attributed to a concern that the project will destroy marine life.

Other reasons for opposing the development (mentioned by only a few) include the need for more research, that the environmental impacts are too great, that it needs more research, or that it is too expensive. (Table 2b)

Reasons for Opposing Development of Tidal Energy

Among Those Who Oppose Development of Tidal Energy
Total Unaided Mentions



Q.2: [IF 'MOSTLY OPPOSE' OR 'COMPLETELY OPPOSE' IN Q.1] Why do you oppose the development of tidal energy?
Probe: Any other reasons? *Caution small sample size.