

Skeptics, Convertibles, and the Choir: How Nova Scotians Think About Renewable Energy Sources

net-zero
atlantic



mqo
RESEARCH

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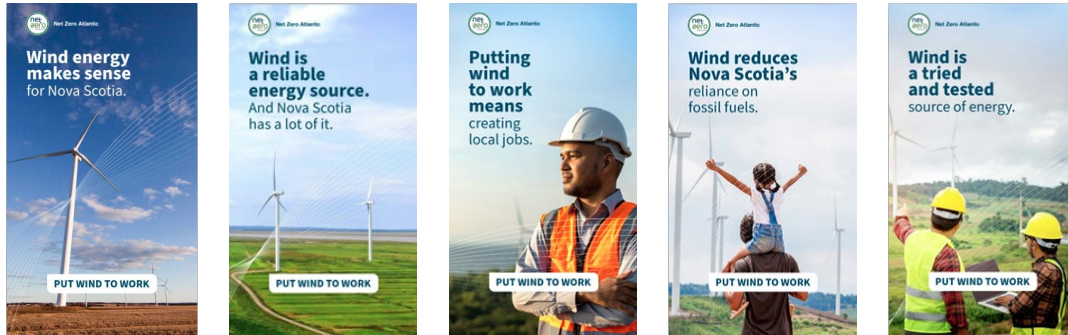
METHOD & RESPONDENTS

2024: Baseline Setting & Message Identification

Quantitative Survey, N=496 Nova Scotians, Mixed-Mode (online and telephone)

Two Online Focus Groups:

- Diverse compositions by age, gender, and region
- Living near current or near-future onshore wind energy facilities



(digital campaign)



2025: KPI Tracking & Campaign Testing

Quantitative Survey, N=602 Nova Scotians, Mixed-Mode (online and telephone)

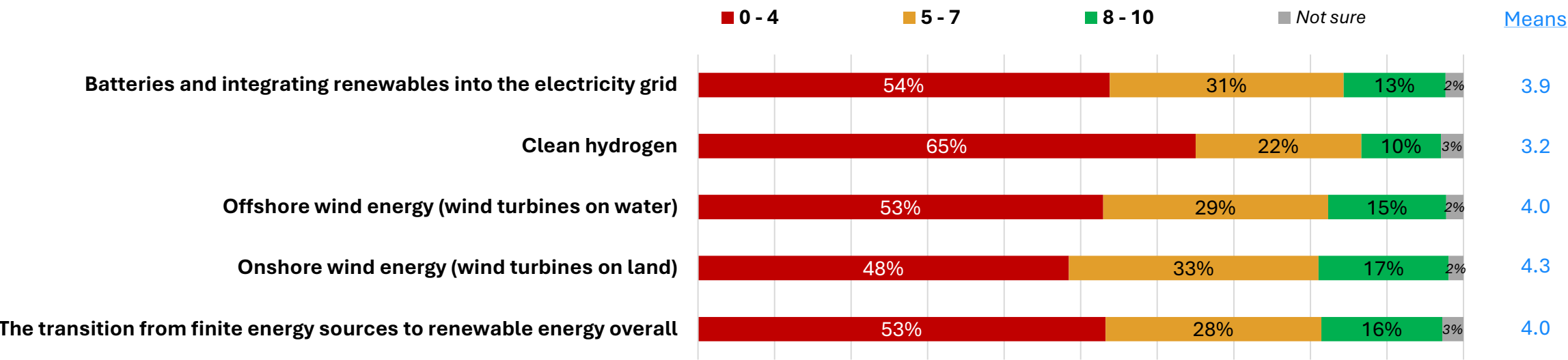
Two Online Focus Groups:

- 1 women-only group
- 1 visible minority-only group

How would you rate your current knowledge and understanding of the following topics?

0 = “Not at all knowledgeable” / 10 = “Extremely knowledgeable”

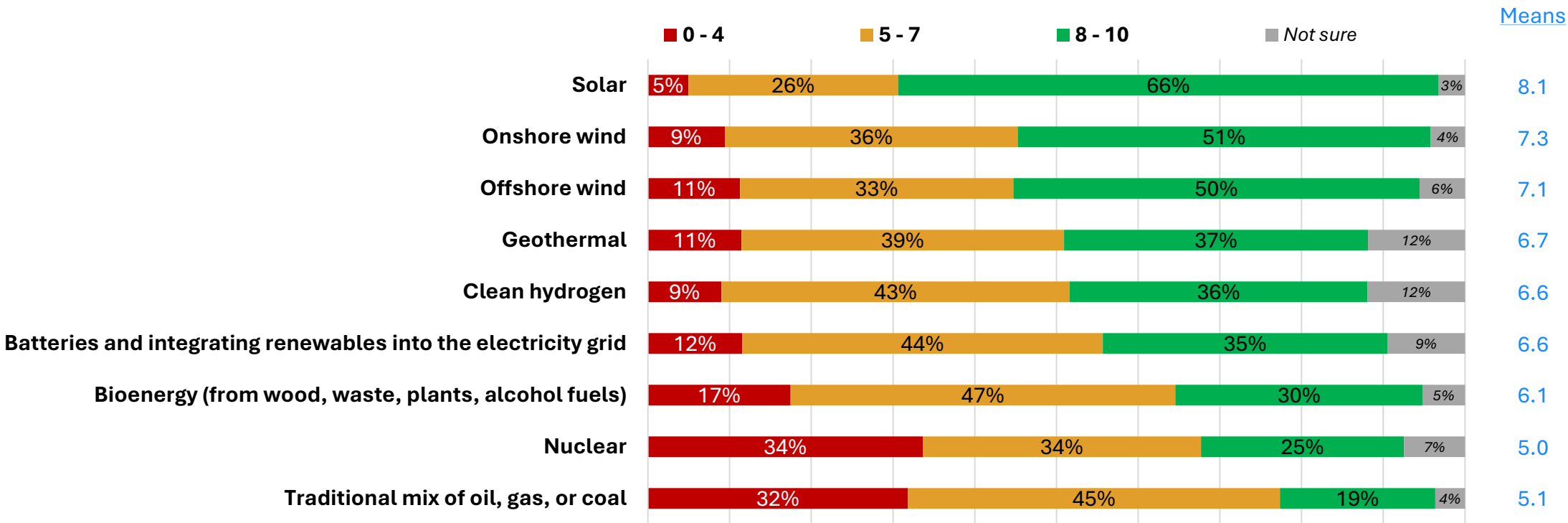
Nova Scotians gave themselves low scores in terms of their level of knowledge and understanding across all tested renewable energy topics.



To what extent do you support new developments for the following energy sources in Nova Scotia?

0 = “Strongly oppose” / 10 = “Strongly support”

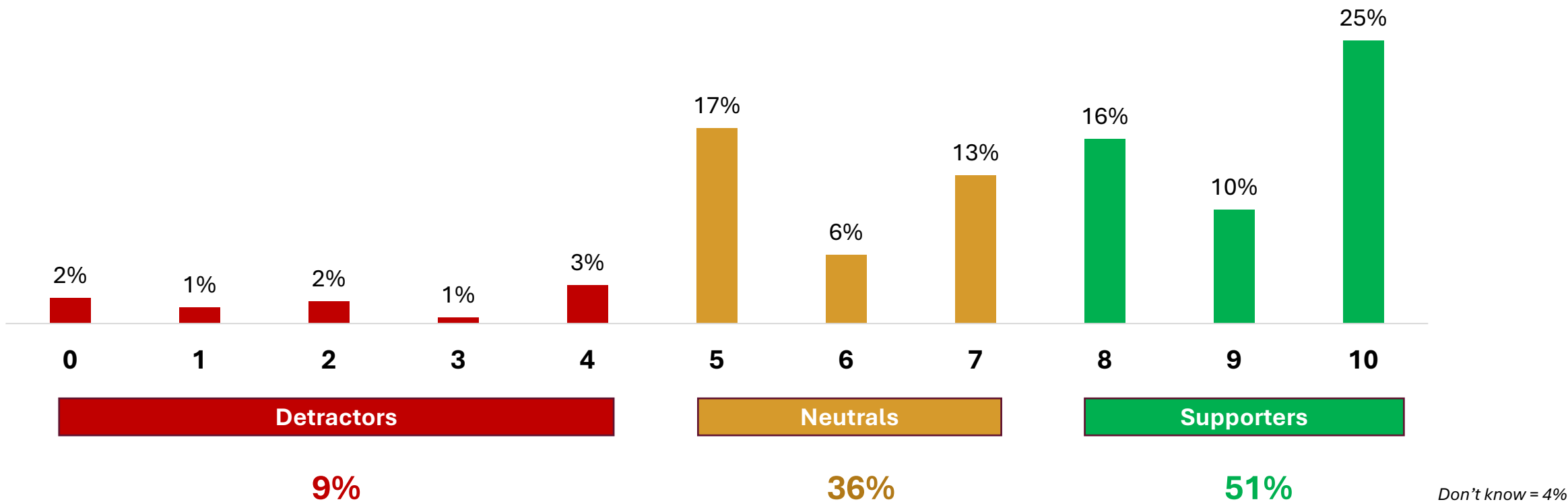
Nova Scotians indicated strong support for new developments of most renewable energy sources. Solar and wind enjoyed the strongest support – with majorities giving these sources a support score of 8 or higher out of ten.



To what extent do you support new developments for the following energy sources in Nova Scotia?

[Onshore wind]

0 = “Strongly oppose” / 10 = “Strongly support”



You rated your support for new wind energy developments in Nova Scotia as [rating].
Can you tell us why you gave this rating? [Coded Open-End Responses]

9%		36%		51%	
Detractors		Neutrals		Supporters	
Negative impacts on local wildlife, landscapes and people	39%	Neutral or Need More Information	22%	Environmental Benefits	52%
Economic and Cost Concerns	19%	Environmental Benefits	17%	Abundance of Wind Resource in Nova Scotia	19%
Doubts about efficiency and reliability	16%	Negative impacts on local wildlife, landscapes and people	9%	Economic and Cost Benefits	10%
Neutral or Need More Information	11%	Abundance of Wind Resource in Nova Scotia	8%	Neutral or Need More Information	6%
Economic and Cost Benefits	5%	Economic and Cost Benefits	5%		
Environmental Benefits	5%	Economic and Cost Concerns	5%		
		Doubts about efficiency and reliability	3%		

A plurality of *neutrals* mentioned that they gave a neutral rating due to needing more information about wind energy.

Unprompted, both *neutrals* and *supporters* mentioned they believe that Nova Scotia has an abundance of wind resource suitable for energy generation.

Detractors had concerns about impacts of this technology and doubts about effectiveness.



The following are some potential benefits of increasing onshore wind energy production in Nova Scotia. Before today, were you aware of these benefits?

COLS:

- 01. I was aware of this benefit
- 02. I was not aware of this
- 03. I don't think this would be a benefit

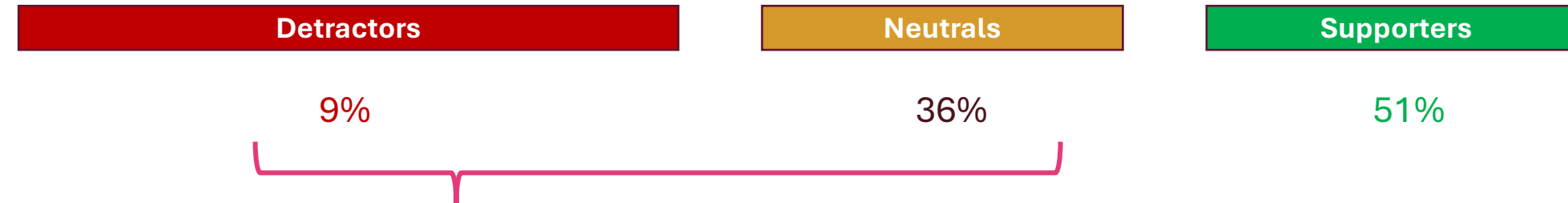
ROWS [ROTATE]:

- a. Less reliance on imported energy
- b. More renewable energy to benefit the environment
- c. Economic growth in our community
- d. Job creation in our community
- e. Revenue for our Province from exporting stored renewable energy

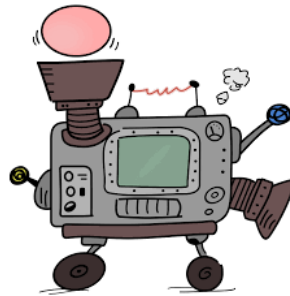
How do each of these potential benefits of new onshore wind energy projects in Nova Scotia change your level of support for such wind initiatives?

[SCALE: "0 = No change" to "10 = Strongly increase my support"]





[Presented with Benefits]



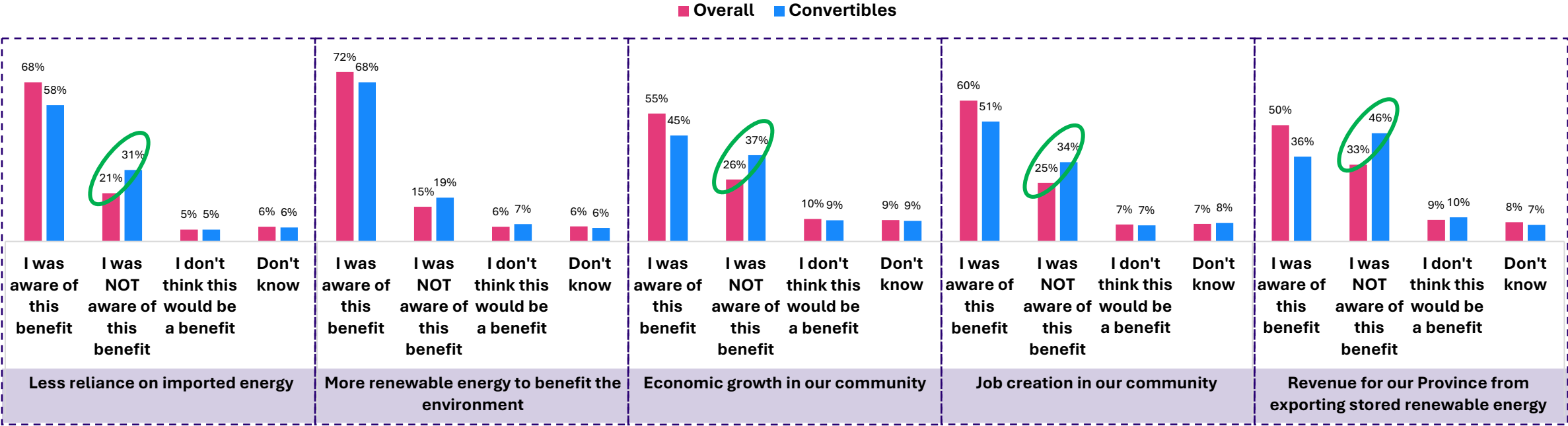
↑ support:
30% of population
are “convertible”

“Convertibles” are people with moderate to **lower levels of support** for new onshore wind energy developments but **are open to increasing their support** due to recognized **benefits like job creation, local economic growth, and provincial revenue.**

Unlike non-supporters, they exhibit a willingness to be persuaded if their concerns about property values, noise pollution, and environmental impacts are adequately addressed.

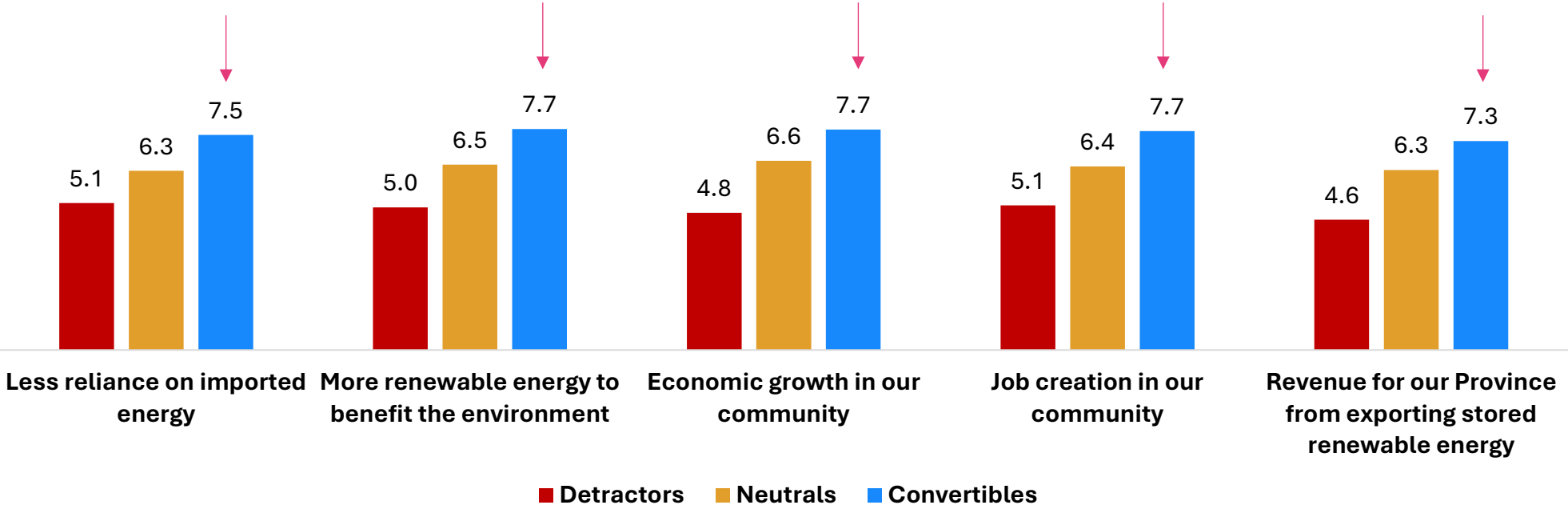
The following are some potential benefits of increasing onshore wind energy production in Nova Scotia.
Before today, were you aware of these benefits?

When presented with potential benefits of increasing onshore wind energy production in Nova Scotia, compared with the general population, the *Convertibles* audience tended to be less aware of – but did not reject – benefits related to economic return to the province and its communities.



How do each of these potential benefits of new onshore wind energy projects in Nova Scotia change your level of support for such wind initiatives?
[among those not “Don’t Believe” for each benefit]
0 = “No change in my support” / 10 = “Strongly increases my support”

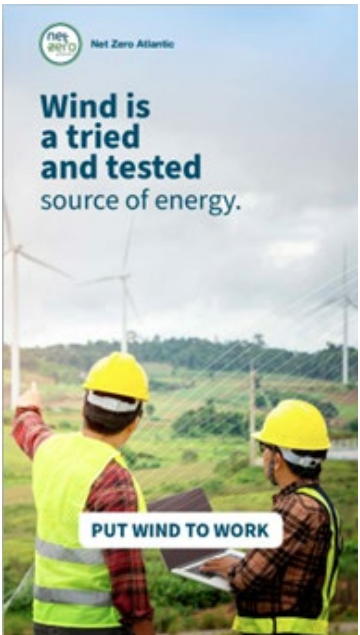
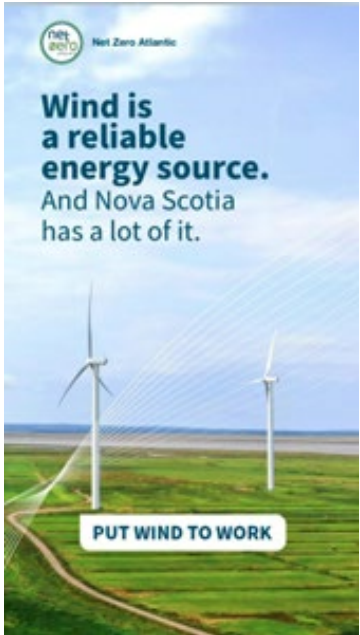
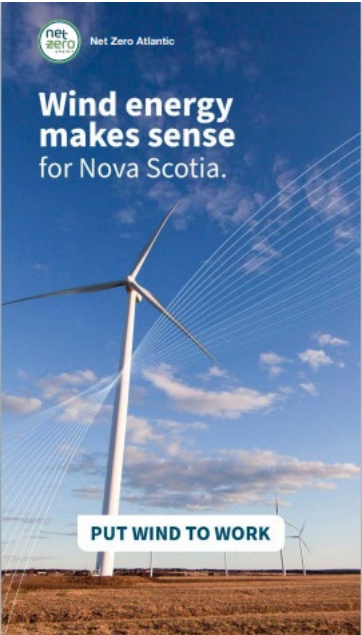
The *Convertibles* audience were much more likely than other *Detractors* and *Neutrals* to indicate that the various benefits of onshore wind energy projects would increase their support for new projects.



Mean scores (0 to 10)

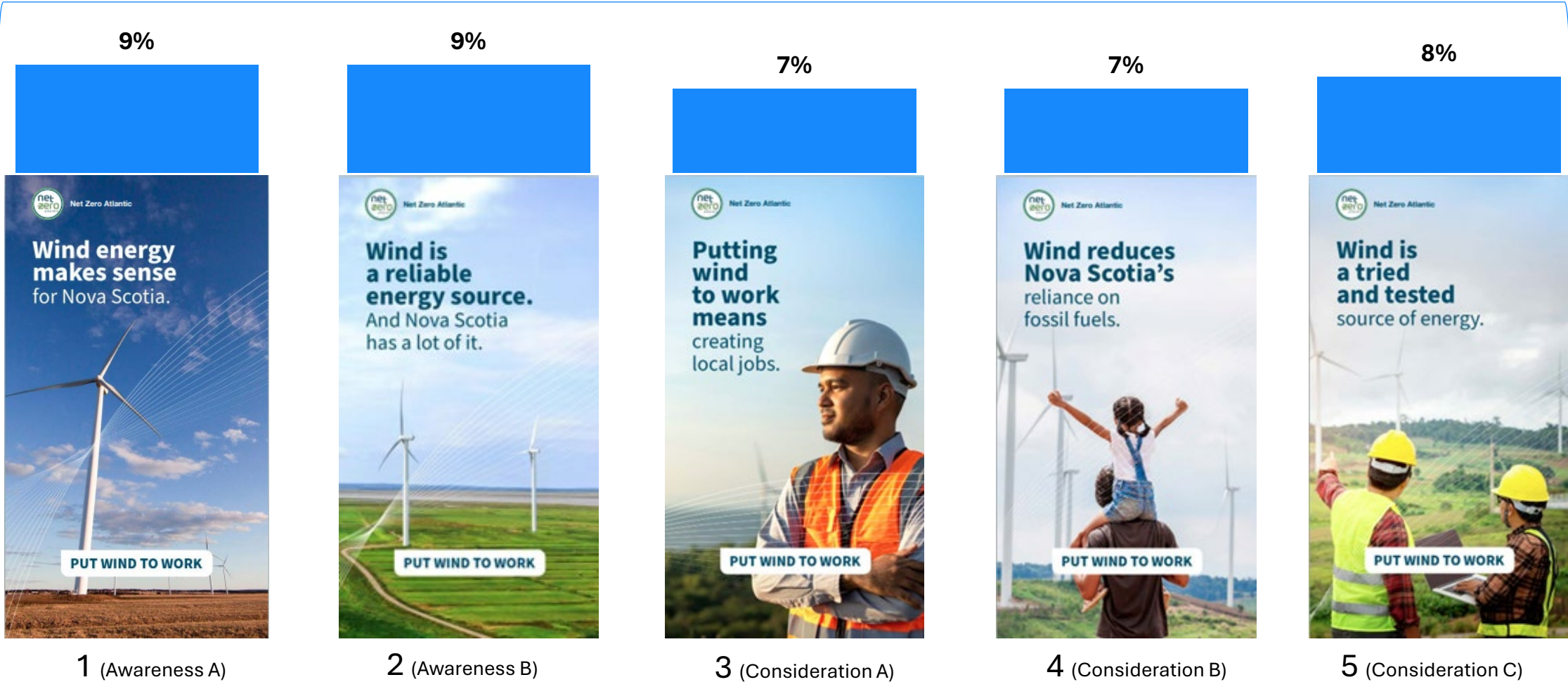


RESULTING CAMPAIGN: *Put Wind to Work*



Before today, have you ever seen this ad?

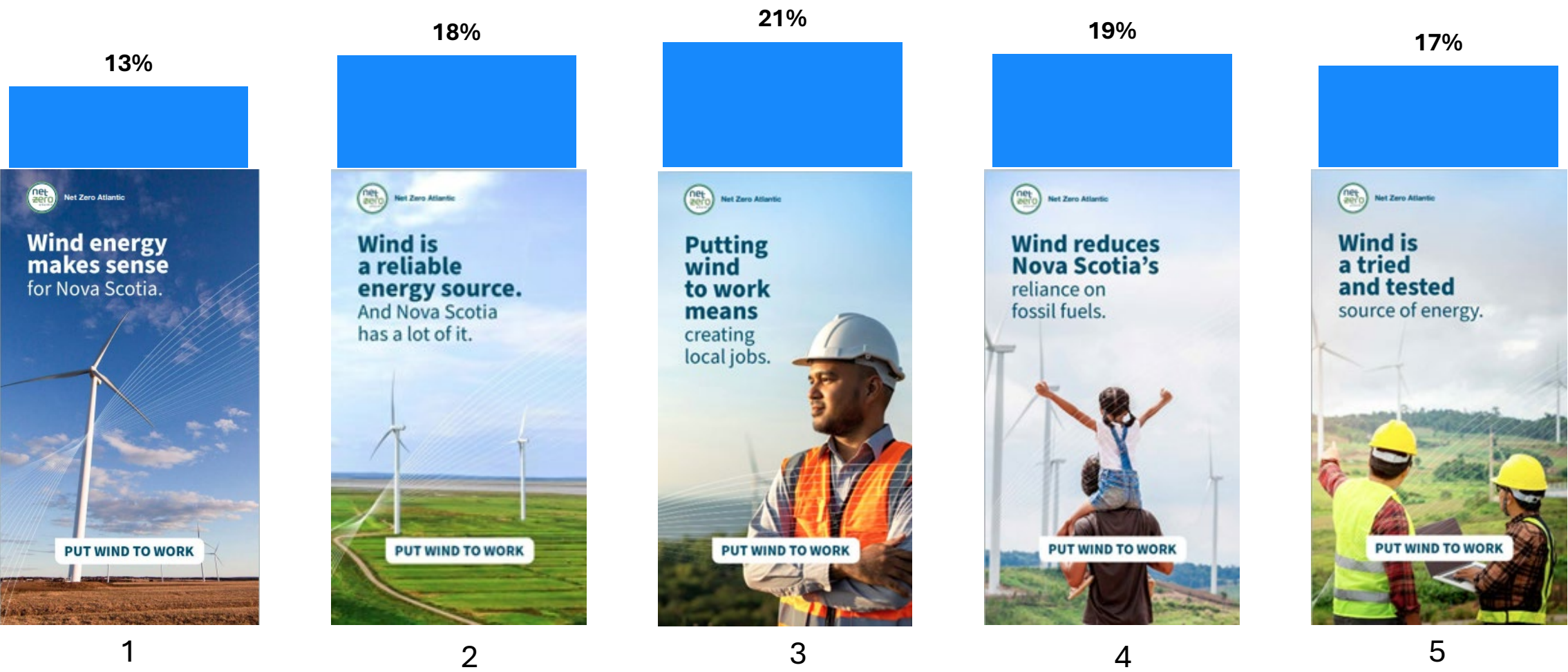
21% saw at least one of the ads



Proportion of Nova Scotians Who Had Seen Each Ad Before (n=402, Online Sample Only)

Did this ad bring to your attention anything new that you didn't think about before you saw it?

Around two-in-ten (21%) of Nova Scotians indicated that the ads brought attention to something they didn't know about wind energy in Nova Scotia.



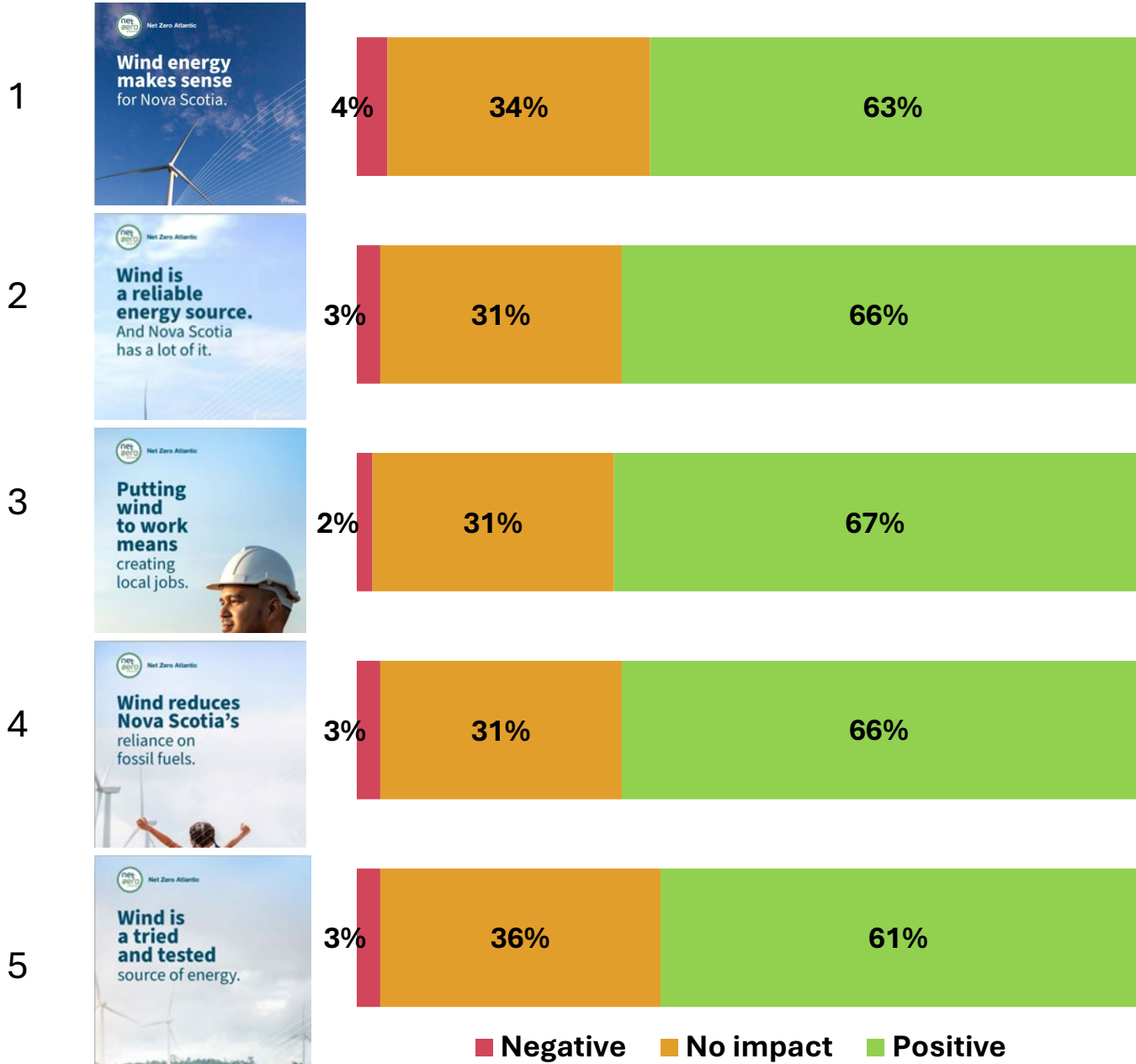
Proportion of Nova Scotians Who Indicated Ads Brought Attention To Something New (n=402, Online Sample Only)

Ad Impact on Feelings

Proportion of Nova Scotians Who Indicated How Ads Impacted Their Feelings About Wind Energy In NS (n=402, Online Sample Only)

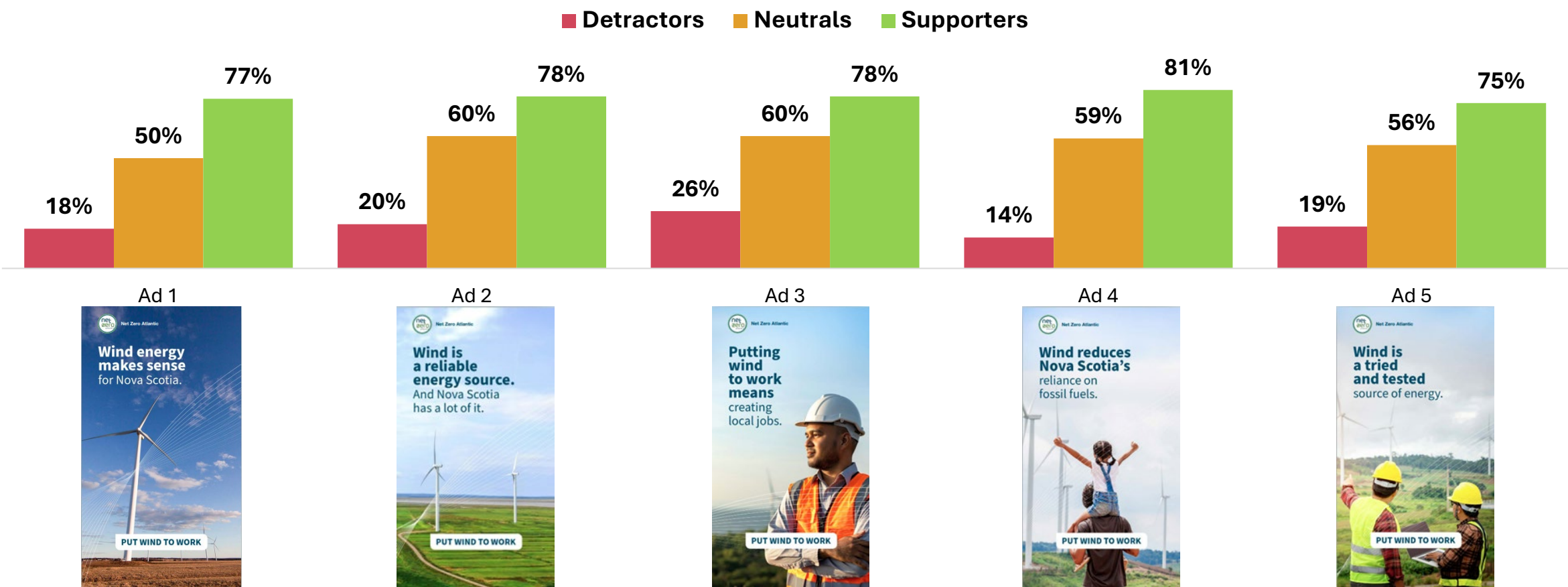
How does this ad and its message impact your feelings about wind energy in Nova Scotia?

Overall, all ads in the campaign had a positive impact on feelings about wind energy among a majority of Nova Scotians.



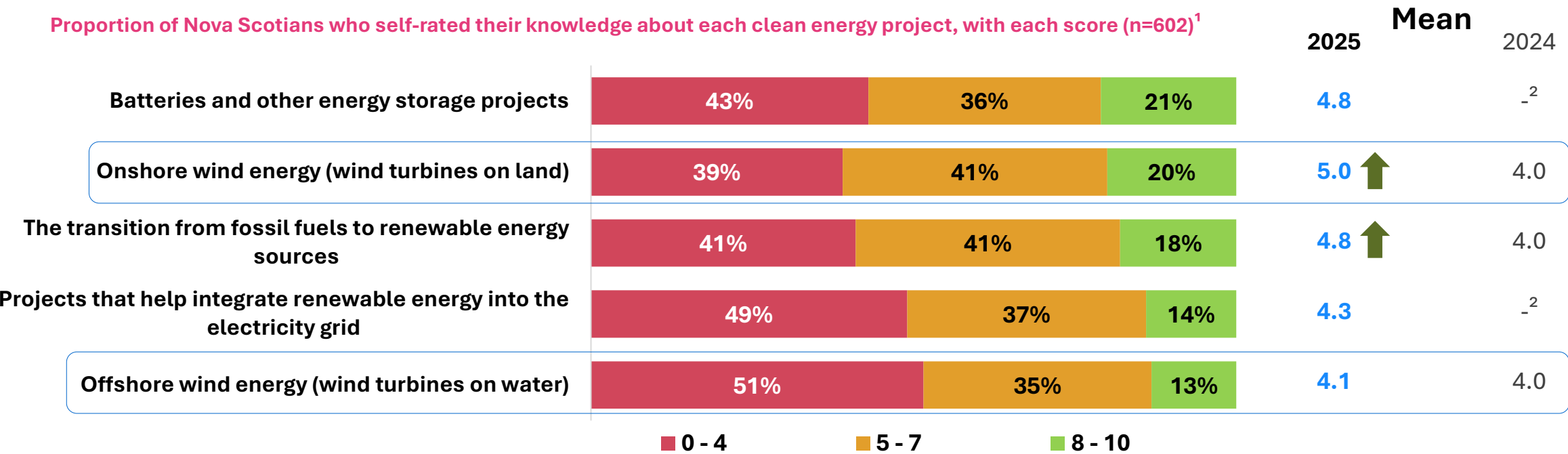
In general, all ads made most of the offshore wind energy supporters and neutrals feel more positive about wind energy, indicating that the ads help to move the needle in how Nova Scotians feel about wind energy once they see the ads.

Proportion of Nova Scotians Who Indicated Ads Made Them Feel More Positive About Wind Energy By Different Support Levels (n=402, Online Sample Only)



Knowledge About Wind Energy and Other Energy Sources

Overall, Nova Scotians feel more knowledgeable about onshore wind energy in 2025 (5.0) than they did in 2024 (4.0) when comparing the self-rated mean knowledge score.



Small but consistent movement toward greater degrees of support across the continuum.

