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RESEARCH+STRATEGY

**Mining Association of Nova Scotia (MANS) – Perceptions of
Mining and Quarrying Public Opinion Survey**

May 2024 | Confidential

Methodology



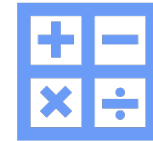
This survey was conducted from May 9 to 21, 2024. The survey was administered to a sample provided by our online research panel provider, Canadian Viewpoints.



The survey was conducted with 400 adult (18+) Nova Scotians. The data was weighted to reflect the provincial population in terms of age, gender, and region.



The questionnaire was designed by Thinkwell Research & Strategy.



The maximum margin of error for a probability sample of this size is ± 4.9 percentage points, at the 95% confidence level.

Quick Stats

BACKGROUND AND METHODOLOGY

- 400 Number of adult (18+) Nova Scotians interviewed
- 4.9 The % margin of error for a probability sample of this size, 19 times out of 20

PERCEPTIONS OF MINING AND QUARRYING

- 62/20 The % of Nova Scotians who believe the mining and quarrying sector is **important/not important** to the provincial economy
- 67/16 The % of Nova Scotians who **agree/disagree** that the sector *plays an important role in economic development in rural areas*
- 64/15 The % of Nova Scotians who **agree/disagree** that the sector *provides well-paying jobs to Nova Scotians*
- 51/21 The % of Nova Scotians who **agree/disagree** that the sector *operates its mines and quarries safely*
- 42/31 The % of Nova Scotians who **agree/disagree** that the sector *operates in an environmentally responsible manner*
- 50/19/31 The % of Nova Scotians (including 'leaners') with a **positive/negative/neutral** view of the mining and quarrying sector

SUPPORT FOR MINING AND QUARRYING ACTIVITY

- 65/16 The % of Nova Scotians who **support/oppose** the mining of *critical minerals* in the province
- 71/16 The % of Nova Scotians who **support/oppose** the mining of *gold* in the province
- 54/22 The % of Nova Scotians who **support/oppose** the mining of *uranium* in the province

Most Important Issue Facing Nova Scotia

Housing (access, cost, etc.), health care, and the overall cost of living dominate the list of issues seen as the most important facing the province today. There is a notable generation gap on this question, with younger (under 35) Nova Scotians significantly more concerned about housing issues (56%) than others.

Q. Let's begin...In your opinion, what is the most important issue facing Nova Scotia today?

	%
Housing/Affordable housing	31% ↑
Health care	27% ↑
Cost of living	26% ↑
Homelessness	6% ↓
Taxes	5% ↓
Jobs	4% ↓
The economy	4% ↓
Poverty	2% ↓
Immigration (too high)	2% ↓
Climate/environment	2% ↓
Crime/public safety	1% ↓
Other	6% ↓

State of the Province Ratings

When asked to rate specifics, Nova Scotians are not especially positive about their province at the present time. They assign the highest marks for the quality of the environment. Conversely, they are least positive about the unemployment picture and economic opportunities outside of Halifax.

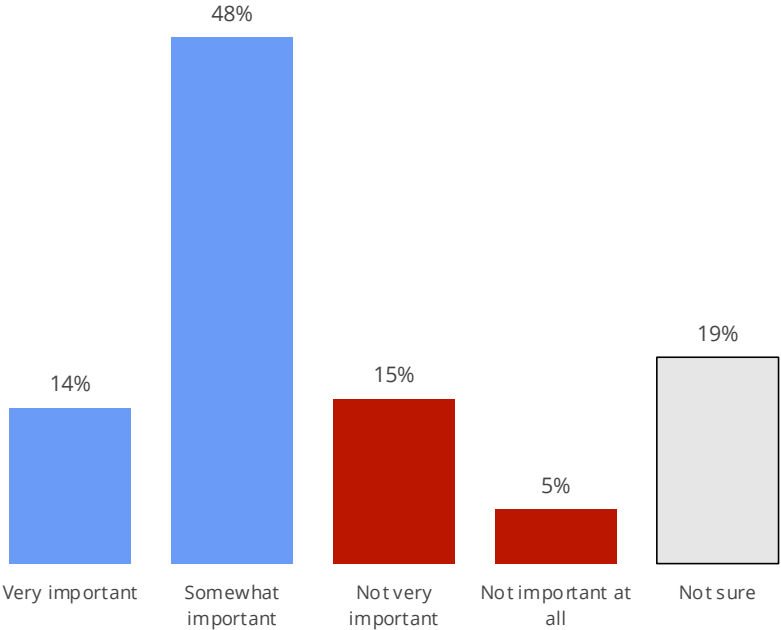
Q. And how would you rate the current state of the province in the following areas?

Row %	Poor (1)	2	3	4	Excellent (5)	Depends/Not sure	Average
The environment	9% ↓	12% ↓	37%	28% ↑	6% ↑	8% ↓	3.1 ↑
Overall quality of life	7% ↓	20%	38%	25% ↑	4%	7% ↓	3.0 ↑
Supporting industries important to the clean energy sector	8% ↓	16%	37%	17%	4%	18% ↑	2.9 ↑
Unemployment	16% ↑	25% ↑	28% ↓	16%	2%	13%	2.6 ↓
Economic opportunity in regions outside of Halifax	20% ↑	24% ↑	30%	9% ↓	2%	15%	2.4 ↓

Importance of Mining and Quarrying to Nova Scotia

More than six in ten Nova Scotians believe that the mining and quarrying sector is either very (14%) or somewhat (48%) important to the economy of Nova Scotia. Only one in five disagree, and a similar proportion are unsure.

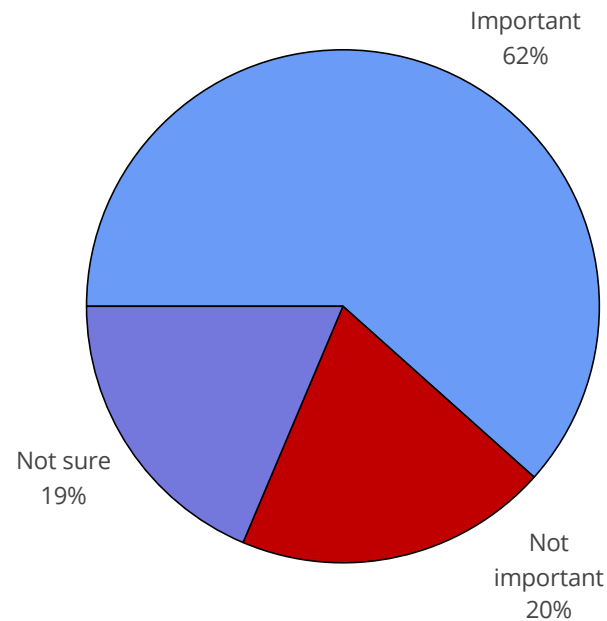
Q. And moving now to economic issues...Overall, how would you rate the importance of the mining and quarrying sector to the economy of Nova Scotia?



Importance of Mining and Quarrying to Nova Scotia - Aggregated

When the results are aggregated, 62% of Nova Scotians rate the sector as important to the provincial economy, versus 20% who believe it is not important (a ratio of more than 3-to-1). Demographically, men (74%) and Cape Bretoners (74%) are the most likely to say the sector is important for the province.

Q. Overall, how would you rate the importance of the mining and quarrying sector to the economy of Nova Scotia?



Perceptions of Mining and Quarrying in Nova Scotia - Specifics

Nova Scotians also express positive views of the mining and quarrying sector when asked to rate it in specific areas. Majorities of Nova Scotians agree that the sector plays an important role in economic development in rural areas (67% agree), provides well-paying jobs to Nova Scotians (64%), and operates safely (51%). The results, however, are closer with respect to operating in an environmentally responsible manner (42% agree; 31% disagree).

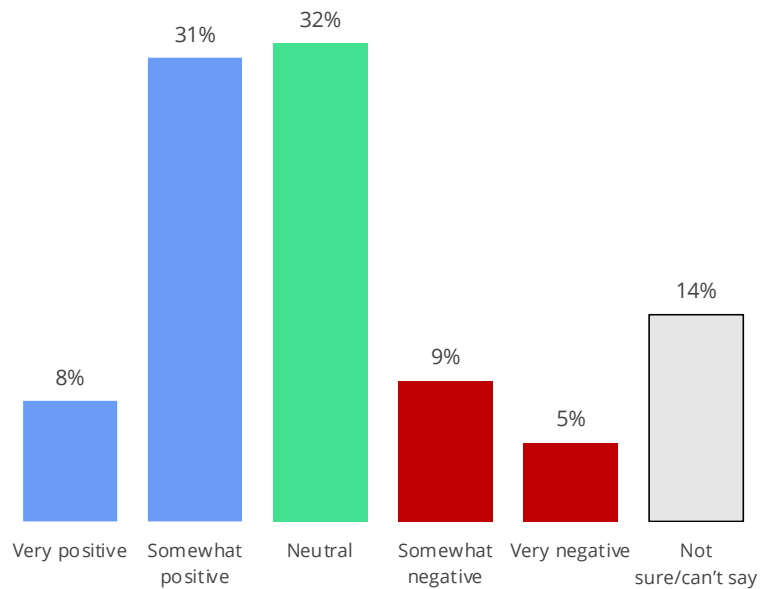
Q. And please indicate the extent to which you agree or disagree with the following statements about the mining and quarrying industry in Nova Scotia? The industry....

Row %	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	DNK
Plays an important role in economic development in rural areas of Nova Scotia	17% ↑	50% ↑	12%	4% ↓	17% ↓
Provides well-paying jobs to Nova Scotians	17%	47%	10% ↓	5%	22%
Operates its mines and quarries safely	12%	39%	15%	6%	28%
Operates in an environmentally responsible manner	8% ↓	34% ↓	18% ↑	13% ↑	28% ↑

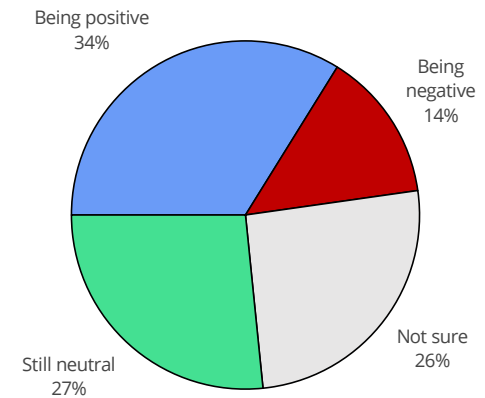
Overall Perceptions of Mining and Quarrying in Nova Scotia

About four in ten Nova Scotians have either a very (8%) or somewhat (31%) positive view of the mining and quarrying sector in the province. Nearly one-third (32%) have a neutral view. When 'neutral' respondents are asked a follow-up question, 34% of this group *lean* in a positive direction towards mining and quarrying, while 14% *lean* negative.

Q. And on a related topic...Overall, how would you describe your opinion of the mining and quarrying sector in Nova Scotia?



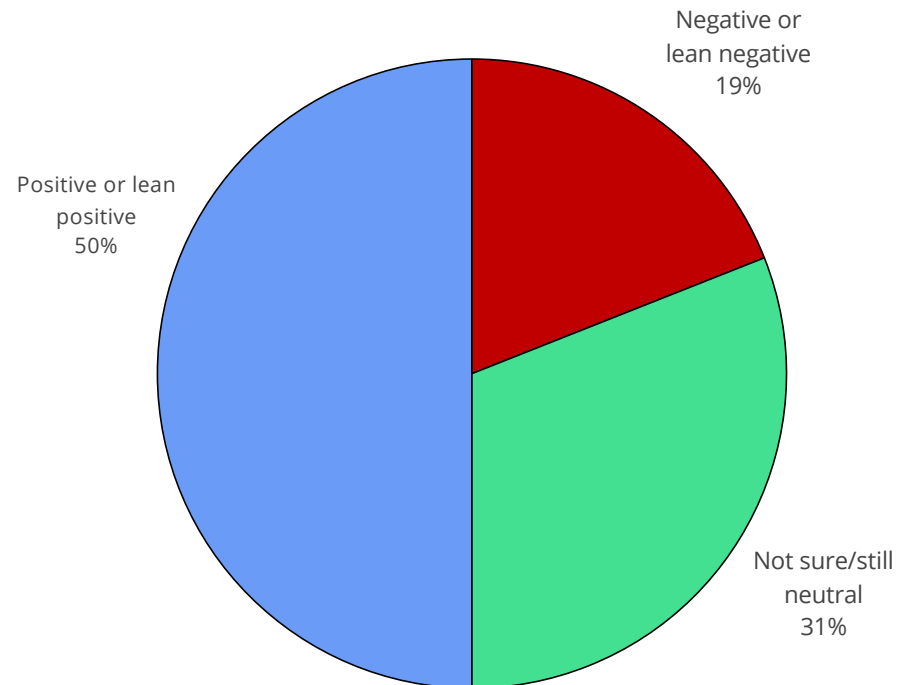
Q. **[IF NEUTRAL]** Although you may have a neutral opinion, would you be more likely to lean toward....? [n=130]



Overall Perceptions of Mining and Quarrying in Nova Scotia - Aggregated

When the results of the previous two questions are combined, a total of 50% of Nova Scotians have either a positive view of the mining and quarrying sector (or lean in that direction), versus only 19% with a negative view. Close to one-third (31%) are still neutral or unsure.

Q. And on a related topic...Overall, how would you describe your opinion of the mining and quarrying sector in Nova Scotia?



Reasons for Positive/Negative Views of Mining and Quarrying

Not surprisingly, positive views of the sector are most likely to be grounded in the economic benefits it provides (general economic benefits, and the creation of well-paying jobs). Negative views tend to be environmentally focused, or centre around safety concerns.

Q. Why would you say you have a **positive** view of the mining and quarry sector in Nova Scotia? [n=154]

Economic benefits	28% ↑
Creates Jobs	27% ↑
Need the resources/minerals for clean energy, etc.	14%
Good paying jobs	12%
Heard positive things/nothing negative	12%
History of mining in NS	7%
Important industry to province	6%
Mining safe/safer than in the past	6% ↓
Environmentally responsible	5% ↓
Helps rural NS	2% ↓
Other	3% ↓
No comment/no answer	8%

Q. Why would you say you have a **negative** view of the mining and quarry sector in Nova Scotia? [n=58]

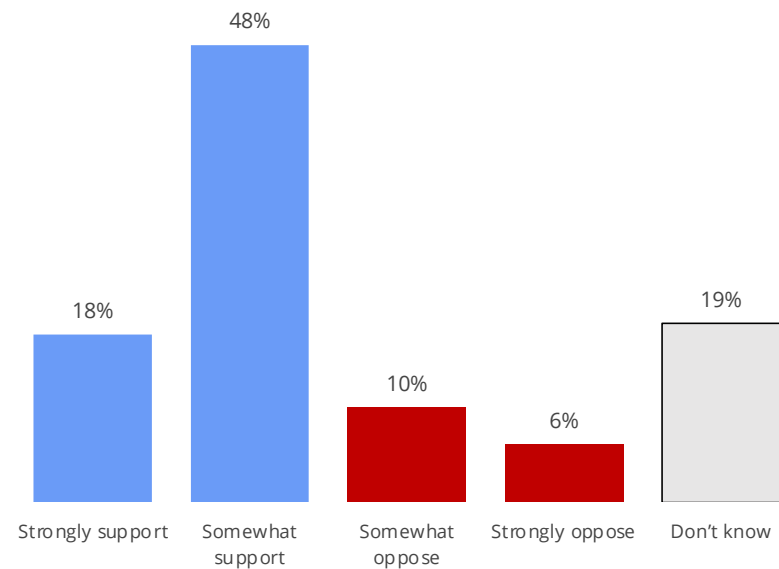
Environmental damage/effects	49% ↑
Dangerous/unsafe/bad history	24% ↑
Profits/money leaves NS	8%
Hear negative things/nothing positive	5%
Unattractive/destroys habitat	5%
Companies leave/cleanup required	5%
Fracking mentions	3%
Disruptions (noise, road damage, etc.)	3%
Not the right future for NS	3% ↓
Other	5%
No comment/no answer	8%

Although both men and women are most likely to cite economic considerations, women (22%) are more likely than men (7%) to say they have a positive view of mining and quarrying because it produces the resources needed for the clean energy sector.

Views of Critical Minerals Mining

About two-thirds of Nova Scotians either strongly (18%) or somewhat (48%) support the mining of critical minerals in Nova Scotia. Only in one in six are either somewhat (10%) or strongly (6%) opposed, while another 19% are unsure.

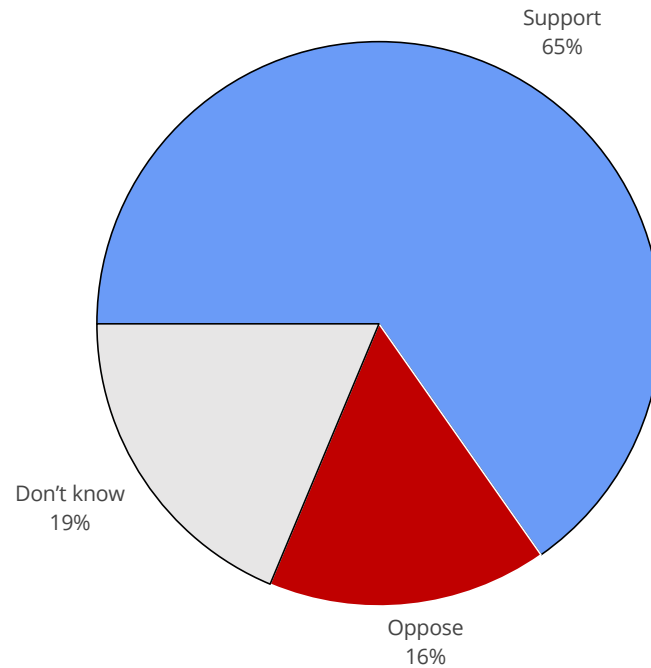
Q. As you may or may not know, the transition from fossil fuels to clean energy sources will depend on critical energy transition minerals. Minerals – such as copper, lithium, nickel, cobalt – are essential components in many of today's rapidly growing clean energy technologies, from wind turbines and solar panels to electric vehicles. The International Energy Agency (IEA) estimates that supply of critical minerals must increase by 6 times by 2050 to achieve the climate change goals established through international agreements. To what extent do you support or oppose the mining of critical minerals in Nova Scotia?



Views of Critical Mineral Mining - Aggregated

When the results are aggregated, support for the mining of critical minerals outpaces opposition by nearly 50 percentage points (65%-16%), or a ratio of about 4-to-1. Demographically, support is highest among men (71%) and the highest income earners (78%).

Q. To what extent do you support or oppose the mining of critical minerals in Nova Scotia?

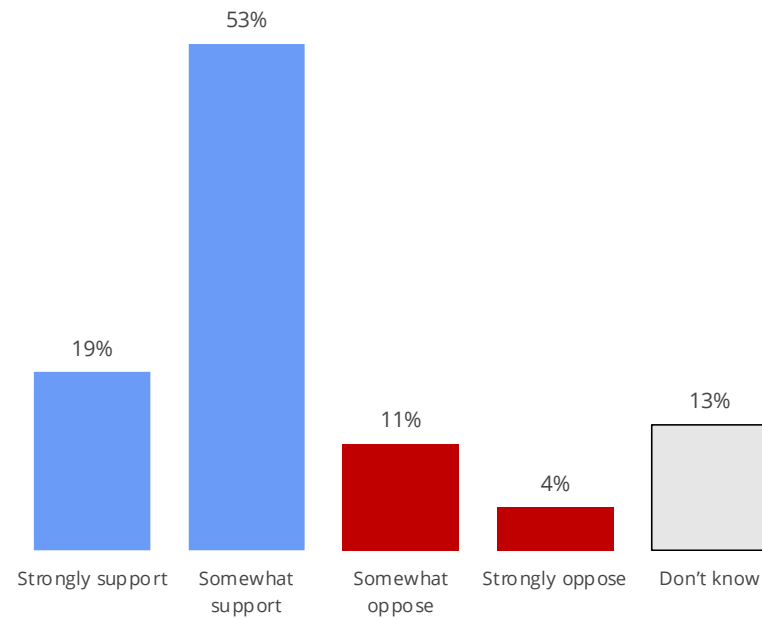


Note: Support total does not equal sum of support bars on previous page, due to rounding

Views of Gold Mining

A strong majority of Nova Scotians either strongly (19%) or somewhat (53%) support the mining of gold in the province, while only in six are either somewhat (11%) or strongly (4%) opposed). The remaining 13% are unsure.

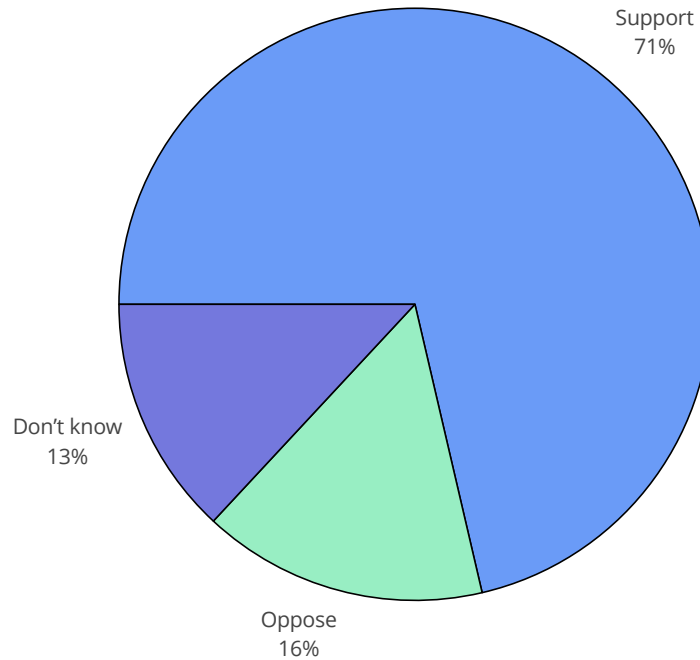
Q. Another mineral important to the clean energy transition is gold. Gold is used in computer chips, which help electric vehicles (EVs) run safely and efficiently. A typical EV contains about 2000 computer chips that run the car's systems, more than double the amount used in traditional cars. To what extent do you support or oppose the mining of gold in Nova Scotia?



Views of Gold Mining - Aggregated

When the results are aggregated, support for the mining of gold outpaces opposition by 55 percentage points (71%-16%), or a ratio of almost 4.5-to-1. Gold mining support is highest among men (80%) and Cape Bretoners (83%).

Q. To what extent do you support or oppose the mining of gold in Nova Scotia?

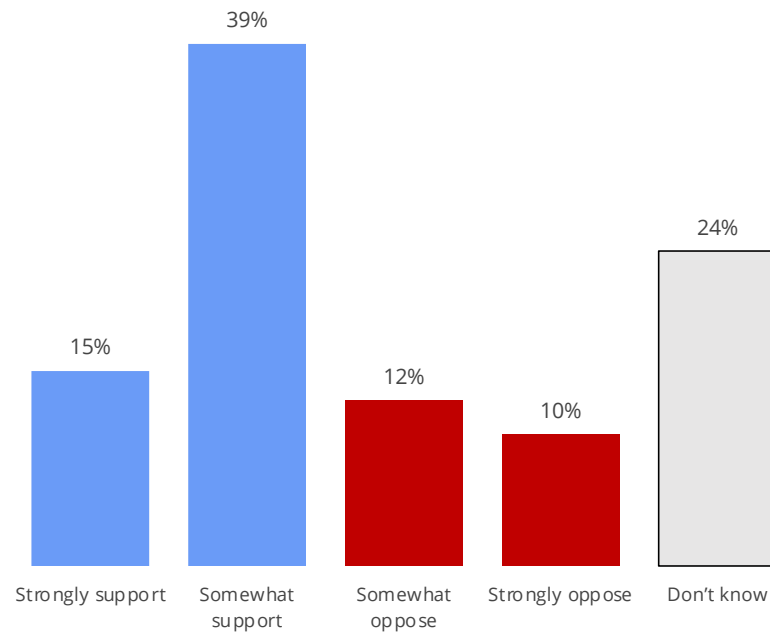


Note: Support total does not equal sum of support bars on previous page, due to rounding

Views of Uranium Mining

A majority of Nova Scotians also either strongly (15%) or somewhat (39%) support the mining and exploration of uranium in the province. Less than one-quarter either somewhat (12%) or strongly (10%) oppose it, and the remaining 24% are uncertain.

Q. Several countries around the world, including Canada have committed to increasing their nuclear power generation in order to achieve reductions in their carbon emissions. Nuclear energy provides vast quantities of energy without generating any greenhouse gas emissions. This will help them achieve their 'Net Zero' goals, whereby their economy either emits no greenhouse gas emissions or offsets its emissions through various means. The key fuel in generating nuclear power is uranium. To what extent do you support or oppose the mining and exploration of uranium in Nova Scotia?



Views of Uranium Mining - Aggregated

When the results are aggregated, support for the mining and exploration of uranium outpaces opposition by more than 30 percentage points (54%-22%), or a ratio of almost 2.5-to-1. Men (70% support) are the most enthusiastic.

Q. To what extent do you support or oppose the mining and exploration of uranium in Nova Scotia?

