



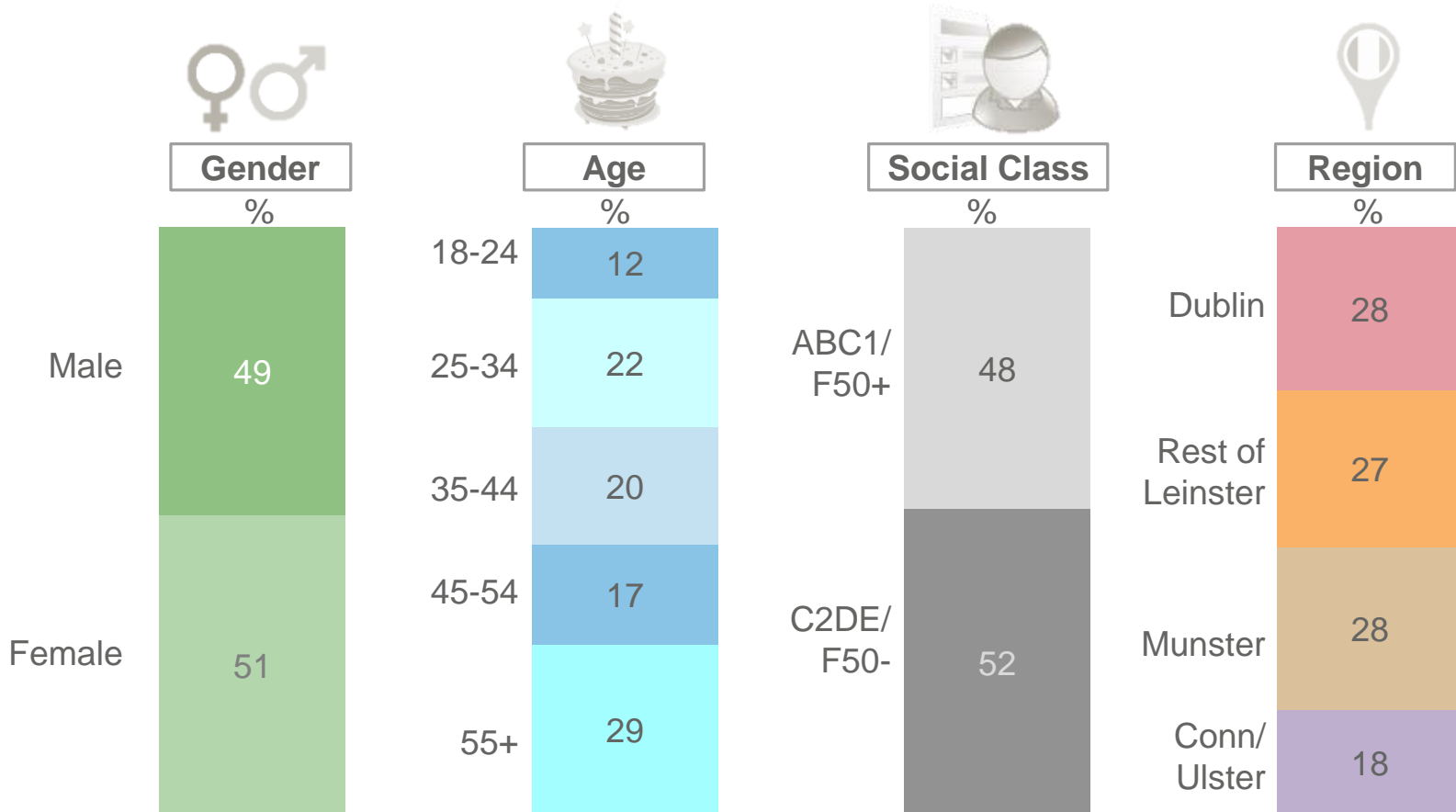
IWEA Public Attitudes Monitor 2018

A. Research Overview

- IWEA's primary purpose is to promote the use of wind power in Ireland.
- Interactions conducted omnibus research for IWEA in October 2017.
- This research represents the second research wave and research was conducted online between 5th and 12th November 2018.
- The research objective was as follows:
To measure & track perceptions and attitudes around wind energy amongst Irish adults."
- The sample of 1,015 was quota controlled and then weighted based on gender, age, social class and region to ensure a nationally representative sample.

B. Sample Profile

Base: All adults 18+ - 1,015



Responses were quota controlled and weighted to ensure a reliable nationally representative sample.

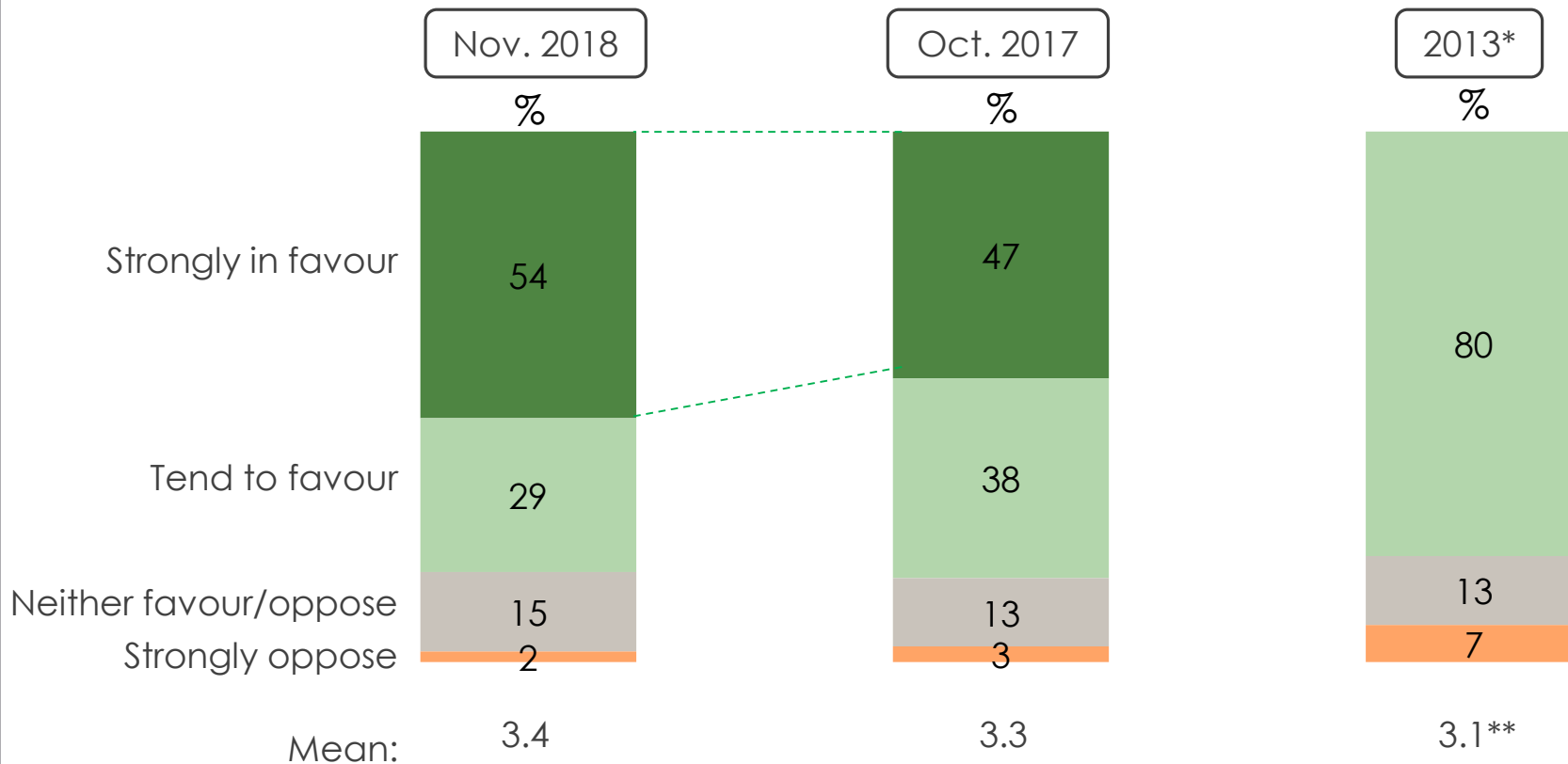


Main Findings



Attitudes to Wind Power

Base: All adults 18+ - 1,015



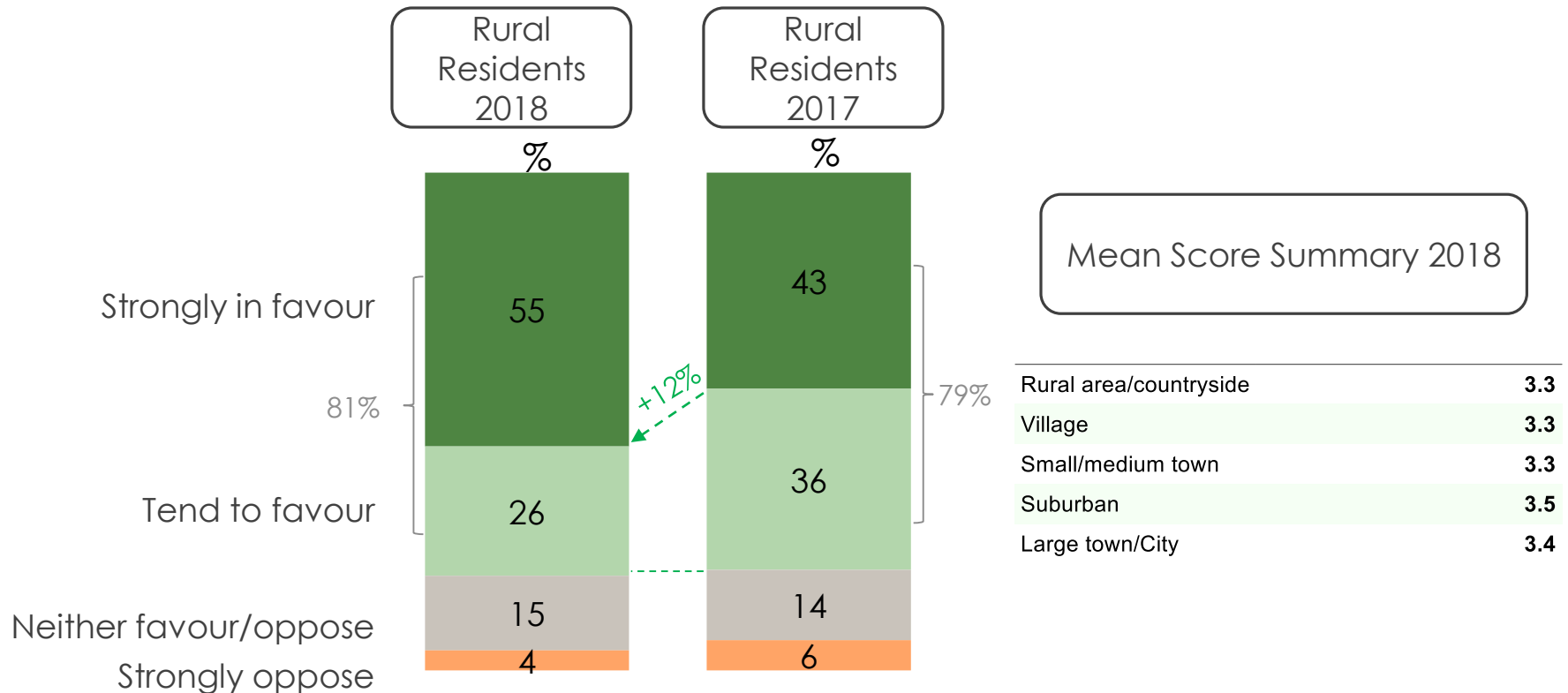
Favourability towards wind continues to consolidate. While the total number in favour remains steady at just over 4 in 5, 7% have shifted from 'tending to favour' wind power (3) into being 'strongly in favour' (4).

Q.1 To what extent are you in favour of, or opposed to, the use of wind power in the republic of Ireland?

** Based on Ipsos MRBI fact sheet on IWEA website, date based on date uploaded to site. **estimated mean score based on midpoint of combined 3/4 ratings.*

Favourability X Residence

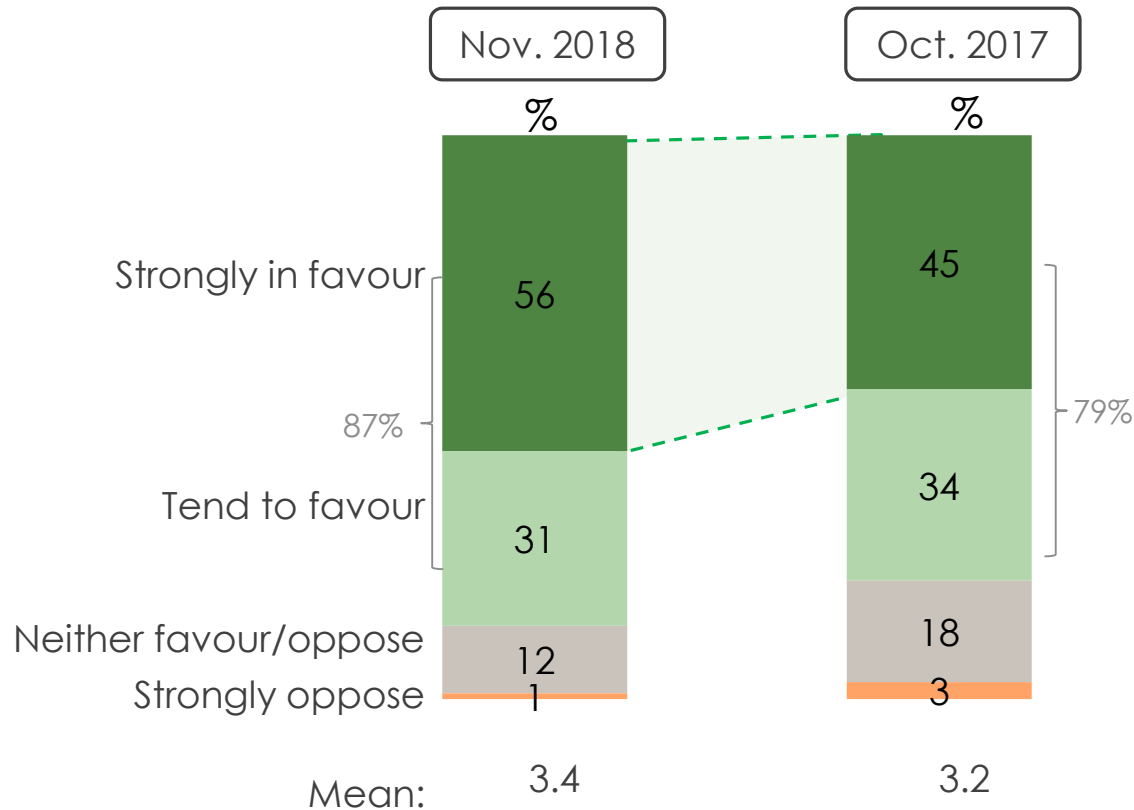
Base: All rural residents (231)



Same trend evident amongst rural residents as with the total sample – whilst the total numbers of those in favour remain broadly in line with previous wave, a significant shift (1 in 8) have moved from tending to favour wind power to being strongly in favour of wind power.

Indigenous Vs Imported Energy

Base: All adults 18+ - 1,015



Mean Score Summary 2018

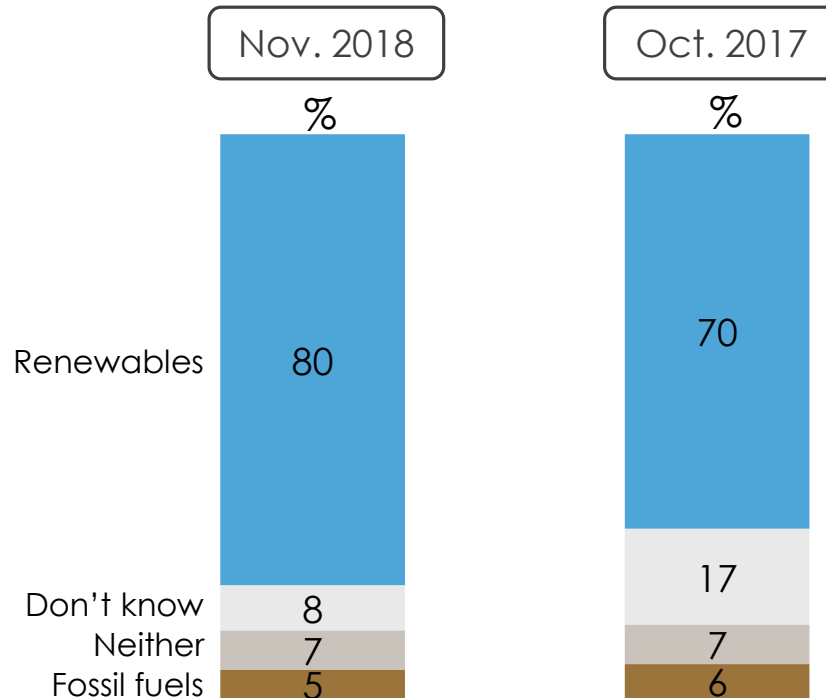
Rural area/countryside	3.5
Village	3.4
Small/medium town	3.3
Suburban	3.5
Large town/City	3.4

Highest mean scores amongst rural residents and city dwellers.

The total number in favour (strongly + tending to be in favour) of indigenous energy has risen + 8% while those strongly in favour of indigenous energy sources has risen +11% versus 1 year ago.

Indigenous Vs Imported Energy

Base: All adults 18+ - 1,015



4 in 5 would now prefer to power their home with renewable energy – this is +10% rise versus 2017, while the number who ‘don’t know’ know has registered a parallel drop (-9%) versus 2017.

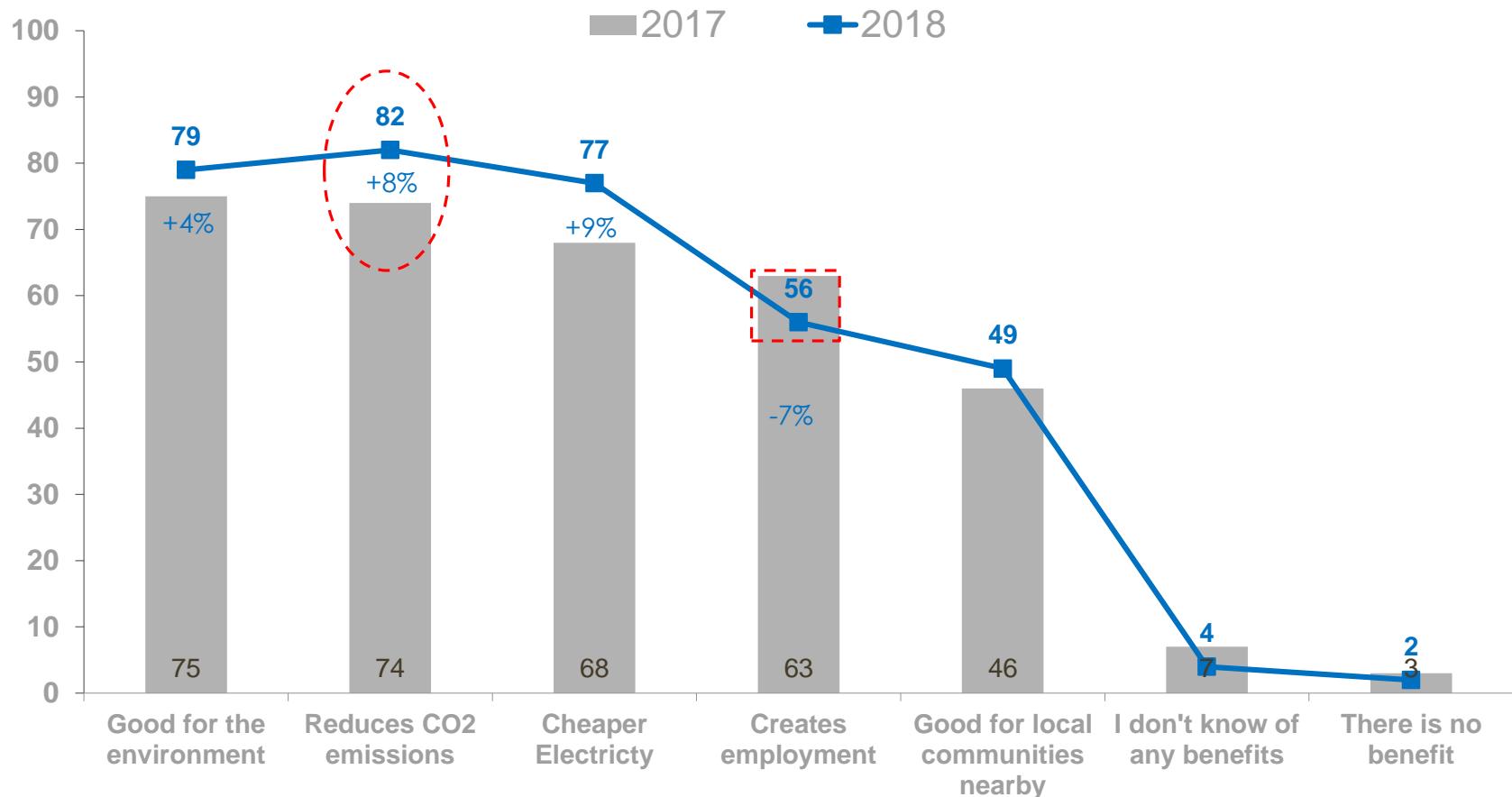
Renewables Preference X Residence Area

Residence Area	Renewable energy (%)	Notes
Rural	77%	
Village	82%	Significantly lower
Small/medium town	75%	
Suburban	89%	Significantly higher
Large town/City	81%	

Highest preferences for renewables amongst suburban dwellers, while those in small/medium towns show least preference for renewables. Rural dwellers do not differ from the mean to a statistically significant degree.

Benefits of Wind Power

Base: All adults 18+ - 1,015

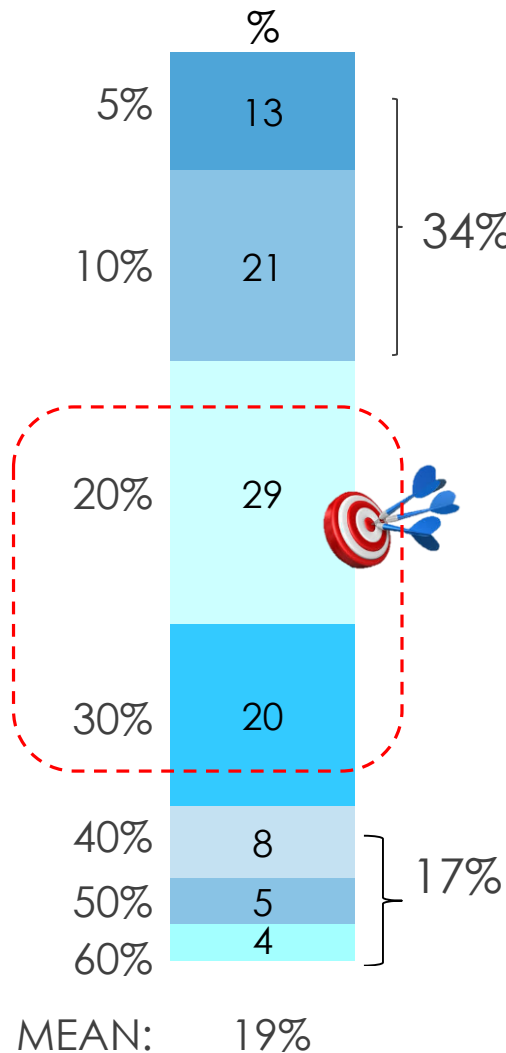


The specific benefit 'reduction in CO2 emissions' was recognised by over 4 in 5 Irish adults this year, versus 3 in 4 in 2017. That was closely followed by 'good for the environment' and 'cheaper electricity'. Weaker recognition of employment benefits this year versus 2017.

Q.4 In your opinion, what are the benefits of wind energy (choose up to 5)?

Knowledge of Current Wind Outputs

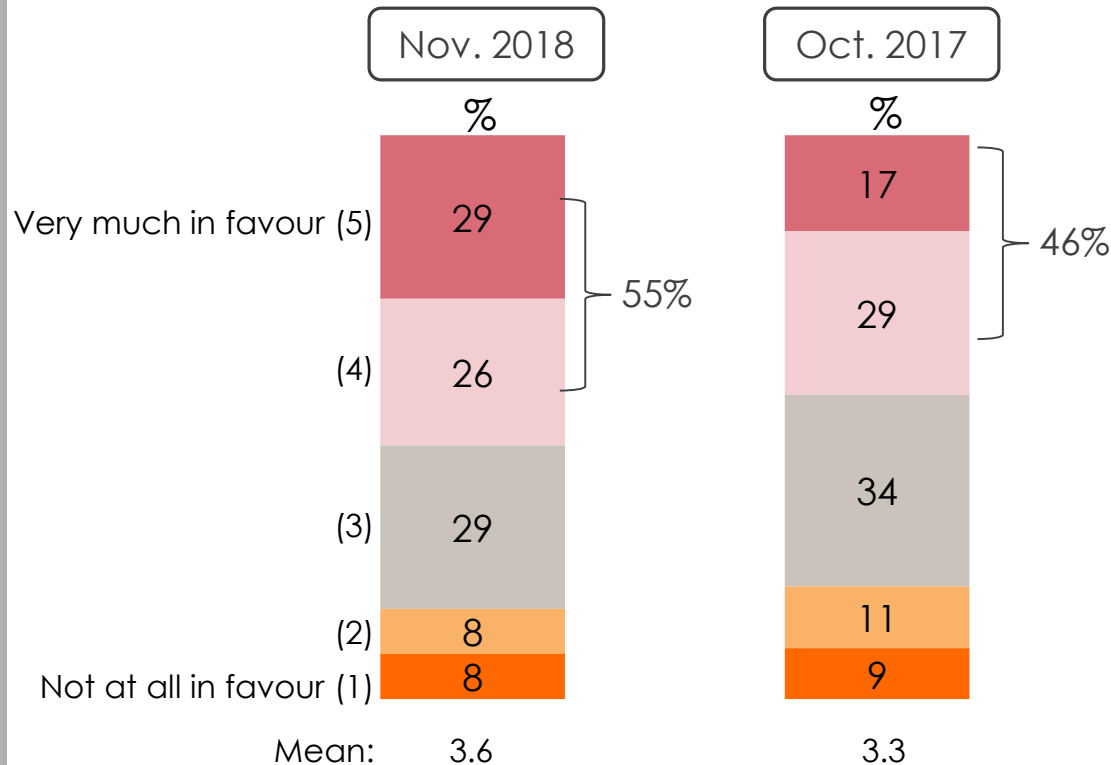
Base: All adults 18+ - 1,015



Over 1 in 3 under-estimated this, while 3 in 10 guessed circa 20%, and a further 1 in 5 guessed 30%. The average estimate was 19%.

Attitude to Windfarms in Area

Base: All adults 18+ - 1,015



Increase of +9% in those in favour of a windfarm in their area versus 2017.

Mean Score 2018

How would you feel about having a wind farm set up in your local area?

Rural area/countryside	3.6
Village	3.6
Small/medium town	3.6
Suburban	3.6
Large town/City	3.7

No significant differences in favourability across residence areas.



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