C|T GROUP

Energy: Public perceptions trends and future policy

Research conducted by **CT Group**

Energy and Sectors

About CT Group

C|T Group is an global consultancy that uniquely combines research, intelligence, campaigns, and advisory services, to deliver the results our clients need.

With decades of experience securing successful outcomes in every corner of the world and across multiple sectors and markets, CT Group understands the importance of clear information, actionable insight and results-focused strategies.

> We are trusted advisors to business, political leaders, private family offices and corporations. We operate around the world, with a team of international, multilingual staff, with cutting- edge technology integrated across all activities.

We offer a proven methodology for problem-solving: The CT Way.

C|T GROUP

Energy and Sectors

Methodology

This data provides insight from research studies conducted by CT Group from July 2022 and the subsequent 9 months.

A nationally representative survey was fielded online with 18+ year-old members of:

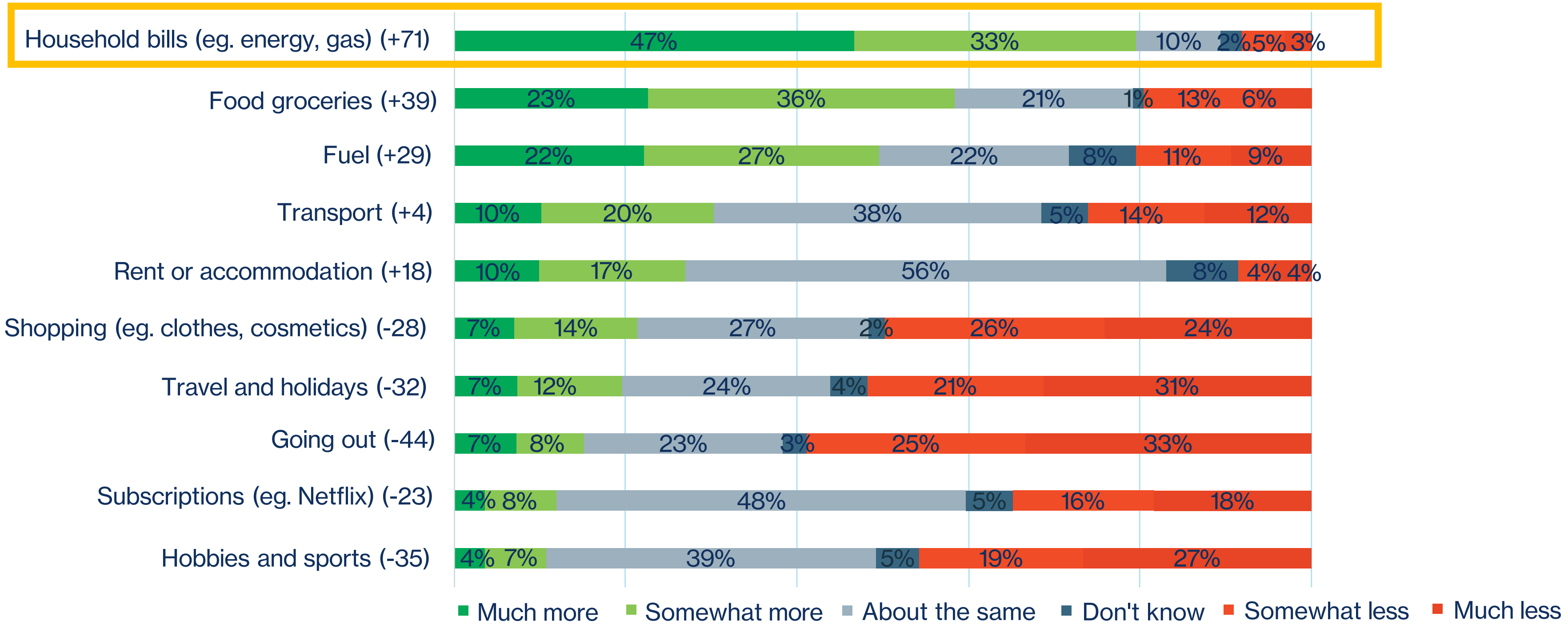
- the UK general population.
- The size of this survey yields a maximum margin of error of +/- 2.2% at a 95% confidence.
- interval, although note that margins of error vary by question and analysis group.
- Minimum quotas according to the latest ONS local figures were applied by age, gender, region, education and past vote with weighting applied where necessary to ensure the collection of a nationally representative sample.

Cost of living dominate concerns

Spending priorities

And again, thinking about the next 12 months, are you likely to spend more or less on each of the following?

Household bills and specifically energy are areas people expect to spend the most on in the next 12 months.

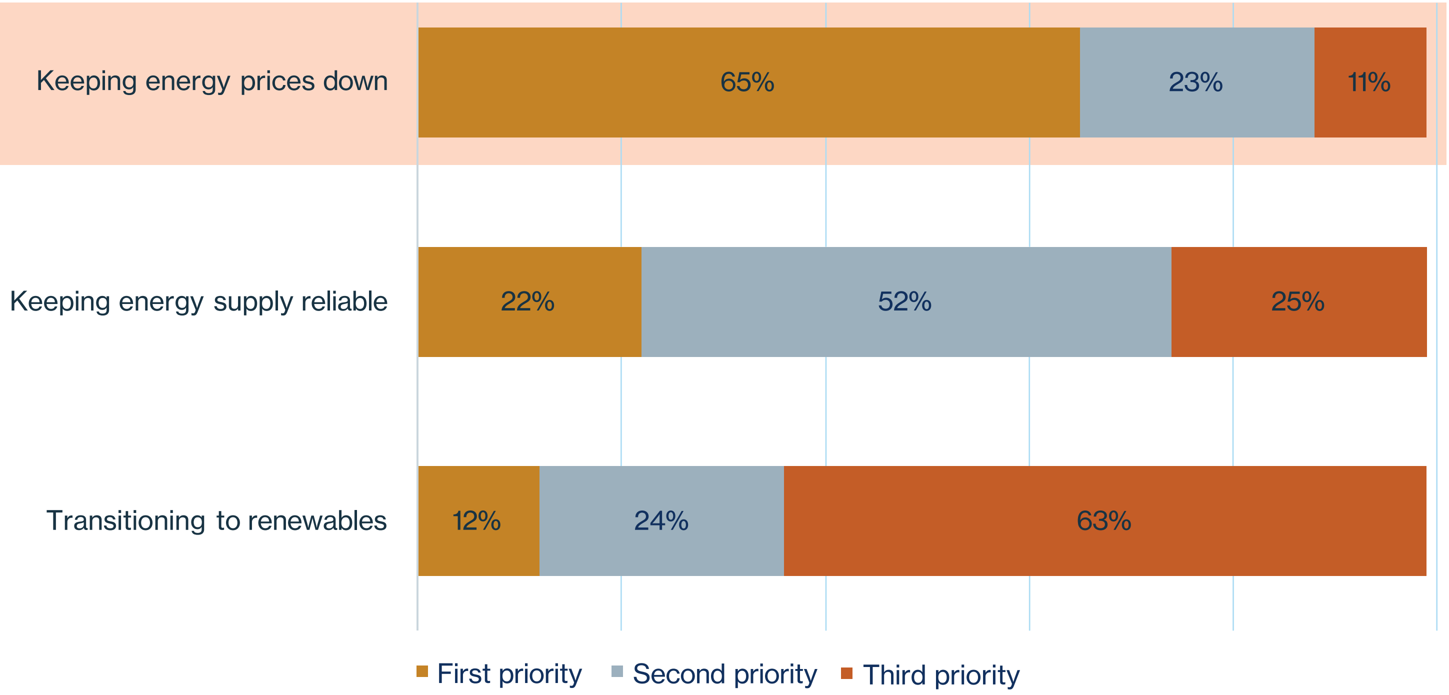


Top energy priority - keep prices down

Government energy priorities

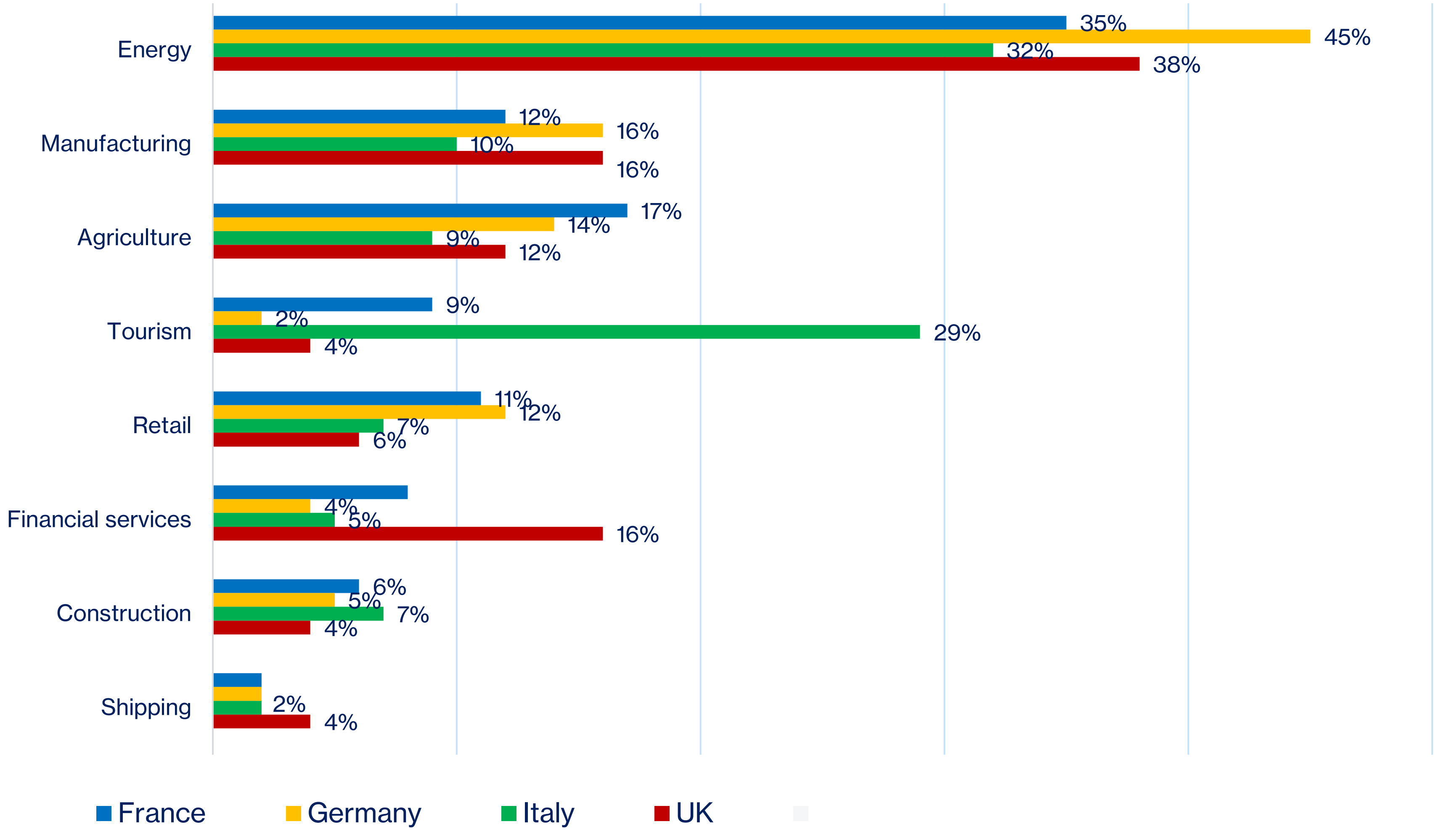
Thinking about the future of the UK's energy supply, which of these do you think the UK Government should prioritise first?
Which should it prioritise second? And which should it prioritise last?

The majority believe keeping energy prices down should be the government's first priority, with those aged 35-54 most likely to support this. This reinforces energy pricing as the most pressing concern among the UK public.



Energy currently most important industry

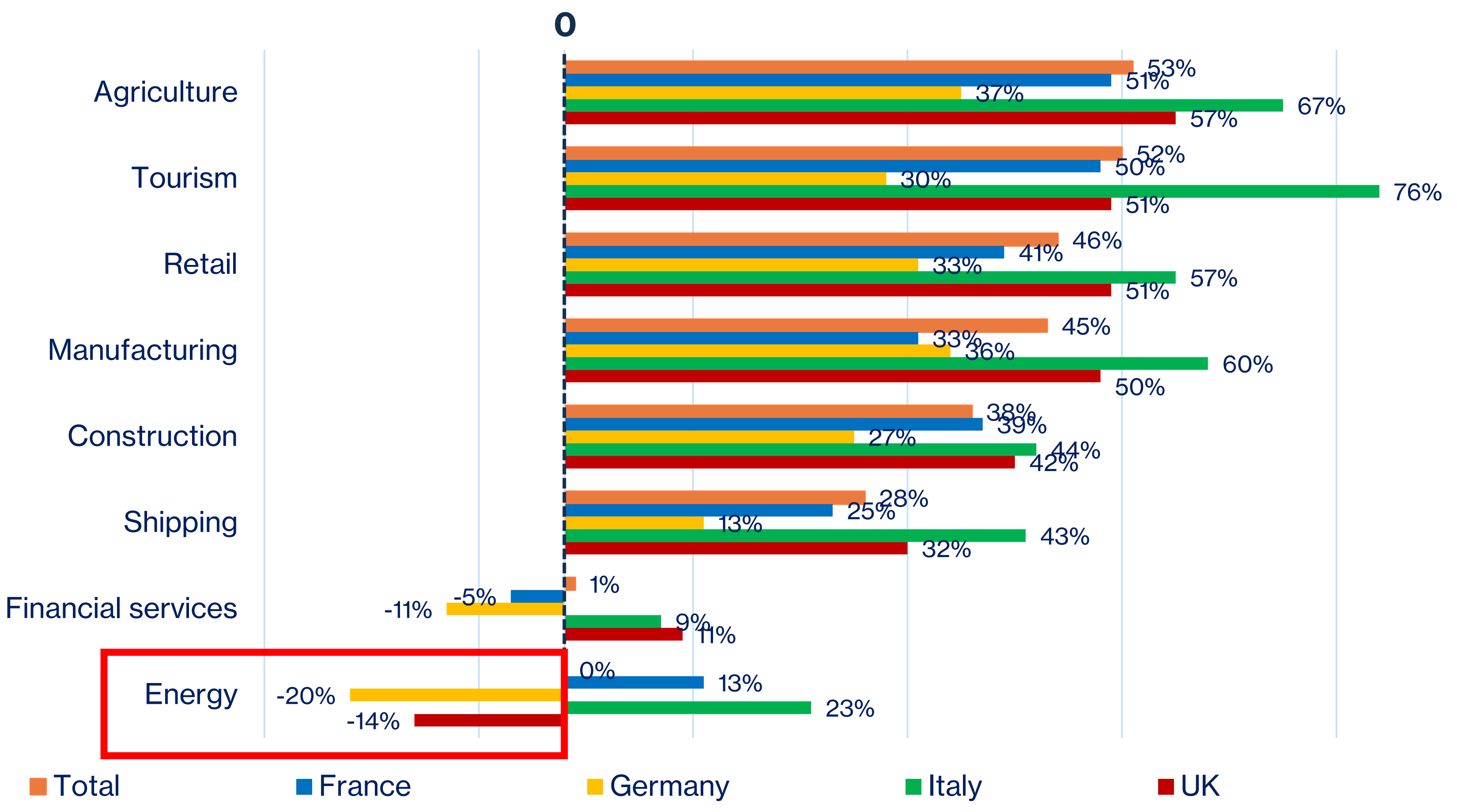
Most important industry – ranked 1st



Importance not translate into a favourable perceptions

Industry favourability

(net favourability = total favourable – total unfavourable)



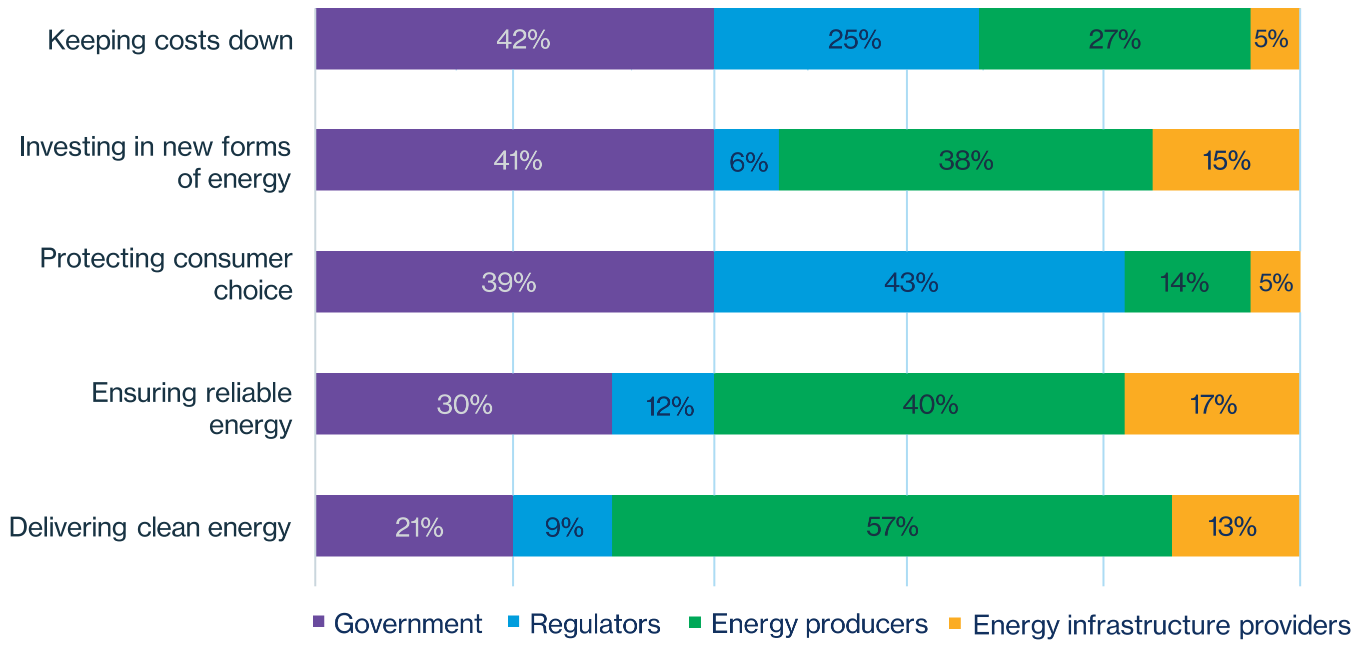
Please indicate if you have a favourable, neutral or unfavourable view of each of the industries listed below.

Government and energy providers have role to play

Energy responsibility

Which of the following has the greatest responsibility for...

While the government is seen to have a responsibility to keep energy costs down, and a shared responsibility with energy producers to invest in new forms of energy, it is the energy producers who are seen to need to deliver clean energy, rather than through public expenditure.

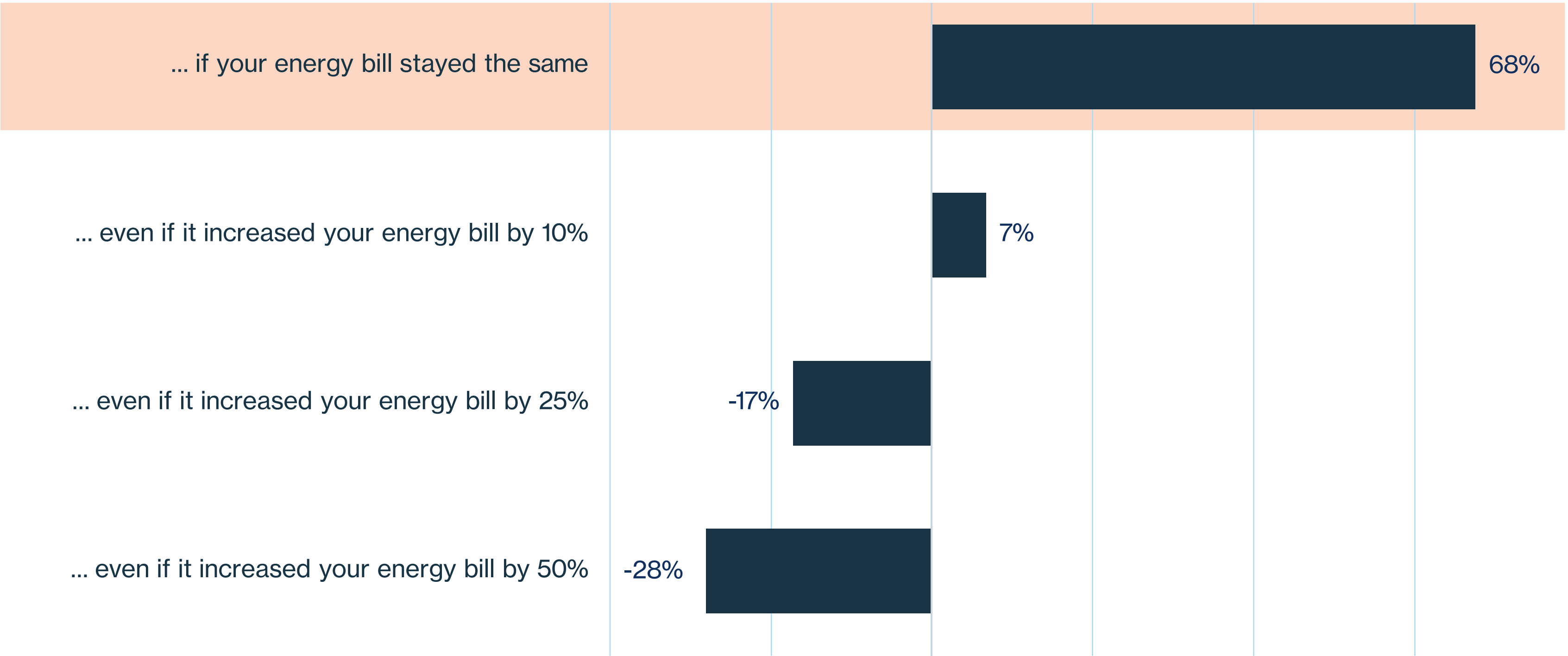


Support for green energy tempered by increase costs

Green energy support

Would you support or oppose the government mandating a minimum level of green energy usage in your household...

Given the pressures of the cost of living crisis, respondents are reluctant to support increases to their energy bill, even though they support green energy. This is especially true for those aged 55 or over.



(Net support = total support – total oppose)

Wind and solar farms

C|T GROUP

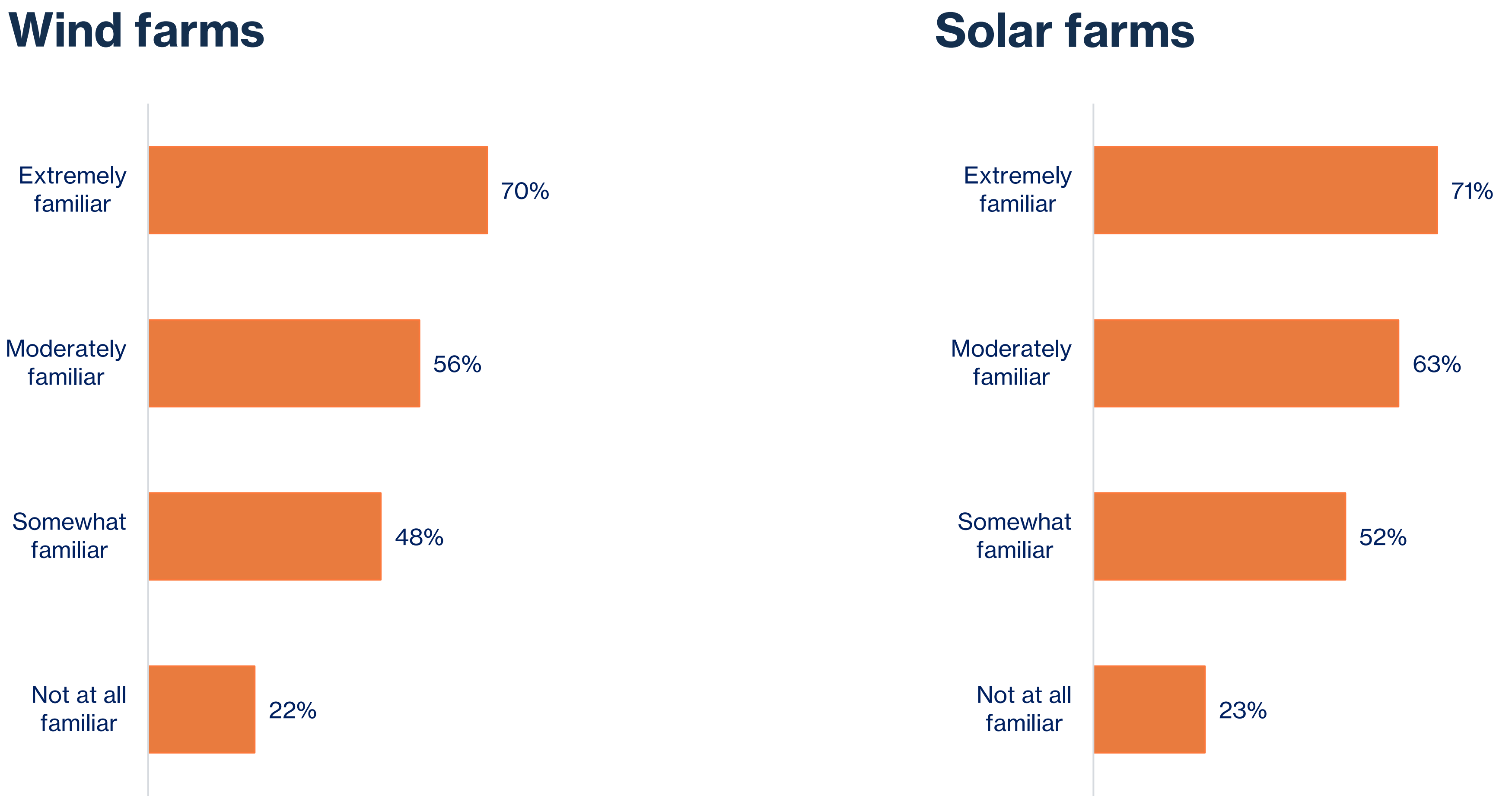
C|T GROUP

Energy and Sectors

Is support for wind and solar farms in the UK

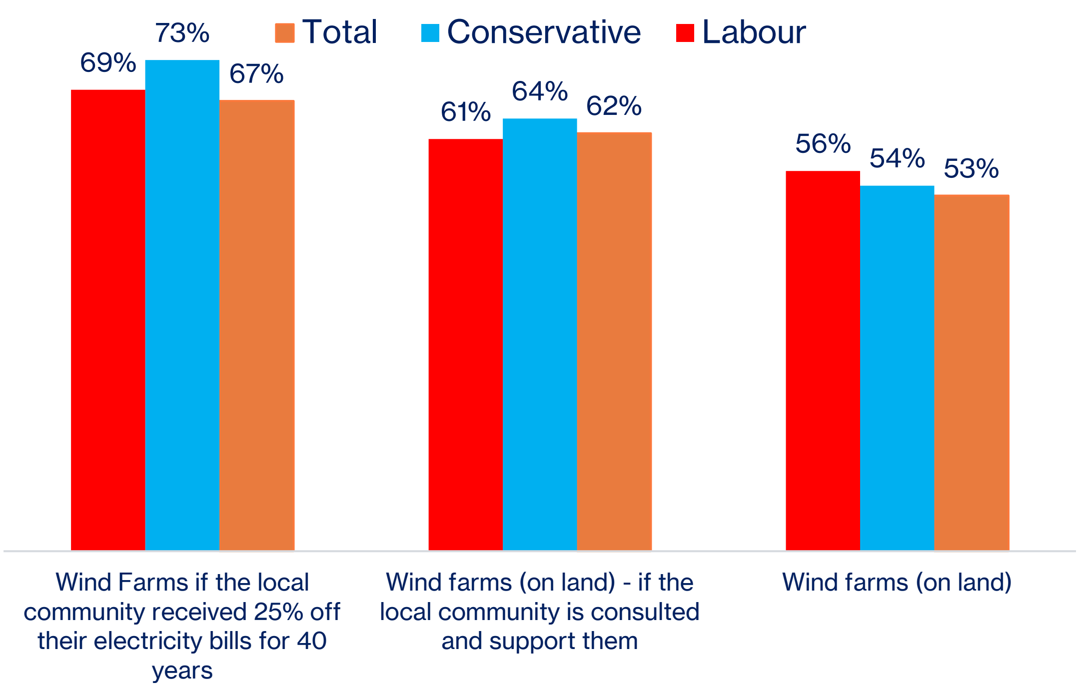
- Strong support for solar farms and wind farms as the following energy sources to generate power in the UK.
- Those most likely to be supportive will be of an older generation +44 located in the SW of England.
- Consultations with the local community noticeably increases advocacy.
- Assurances linked to costs and improving local economic and conditions specifically employment also improve perceptions.
- There is clear causation of those who are more familiar with sector are likely to be favourable towards it.
- Indicating growth in awareness and understanding could grow favourability.
- The audience least likely to be familiar are women, those below 34 years old and from the South East of England.

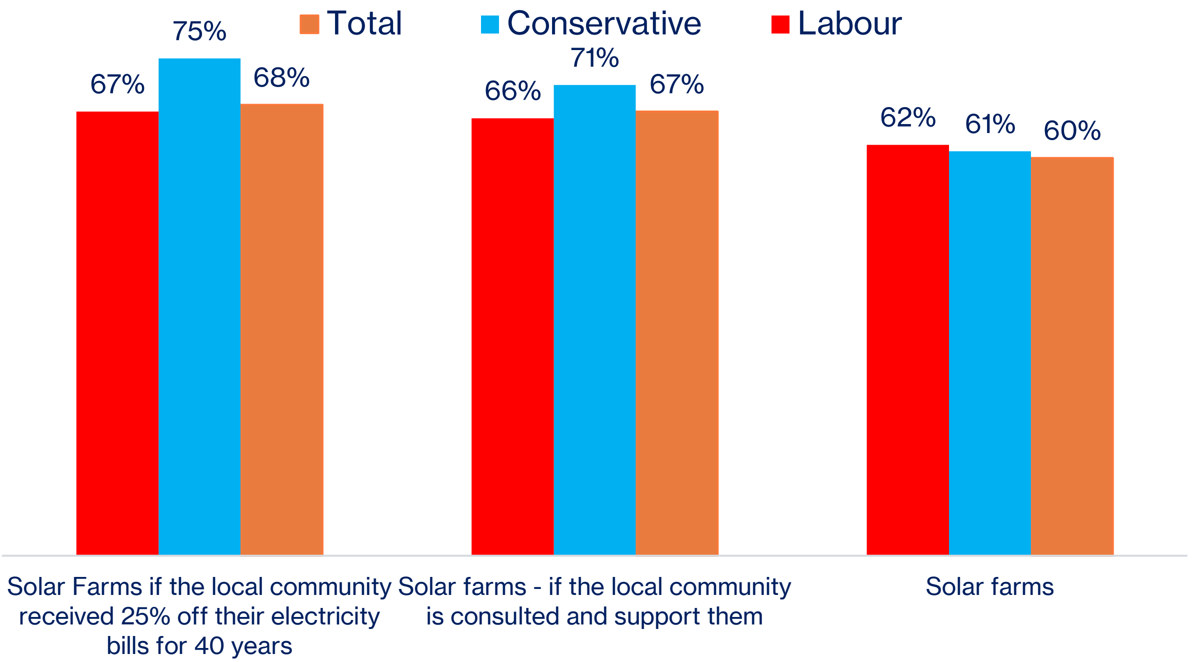
Familiarity leads to increased support



(net favourability = total favourable – total unfavourable)

Support by vote





Do you support, or oppose the following initiatives.

5 key take outs

1. Cost of living dominates – support for alternative energy tempered by personal cost.

2. Community looking to energy producers and infrastructure providers to produce reliable and clean energy.

3. Awareness of energy sector does not necessarily translate into support.

4. Engagement with the community does increase support.

5. Opportunity exists to define the energy debate and community perceptions.

Potential narrative

Cost of living pressures continue to negatively impact the global economy, and the UK is no exception.

The Ukraine war has reinforced, for many countries, the importance of energy security and energy self sufficiency to buffer against any such price shocks in the future.

Renewable energy can play a role in delivering our future energy needs, with energy producers and infrastructure providers having a key, leadership role to play.

But in playing that role, the sector must ensure our energy needs are reliable and - most importantly - keep costs down.

If we want to be in control of our future energy needs, and avoid future price increases, now is the time to make the investment needed.

Now is the time to build the wind and solar farms we need, to not only create the jobs of today but to help build the communities for the future.

Working with the local community and giving back to the regions we operate in, energy producers and infrastructure providers can help build a better, reliable, cheaper energy future.

CIT GROUP

What others say

CT Group

“CT Group provide a genuinely unique service. They have pioneered a powerful and compelling methodology and are market leaders. Put simply, Gavin Stollar is the only practitioner in this field who I know from first-hand experience has been able to make a very real and very worthwhile difference to the outcome of projects – he is second to none and leads a great team.”

Christopher Katkowski KC | Landmark Chambers

“The CT Group team have been an invaluable asset to our business as we have grown. They have provided insight, strategy and commercial precision to the challenges we have faced as a fledgling two-year-old tech-start up. Not only have the CT team supported us with senior advice and input from inception but their knowledge and ability to navigate and deliver in the local authority space whilst also identifying synergies for our business in the wider UK and global infrastructure marketplace has stood them apart from all others.”

Chris Pateman-Jones | CEO, Connected Kerb

“CT Group are our go to advisers in the strategic communications advisory space. Their input is incisive, always research based and highly effective. They approach problem solving unlike any other agency we have worked with and where deployed are trusted advisers to us and our investment partners.”

Siôn Jones | Chief Operating Officer, Equitix Investment Management Limited

Contacts

CT Group

Gavin Stollar
Sector Lead, Real Estate and Infrastructure
e gstollar@ctgroup.com

John Walker
Head of UK and Europe Real Estate and Infrastructure
e jwalker@ctgroup.com

Asia Pacific

Sydney
Level 30, 20 Bond Street,
Sydney, NSW 2000, Australia
t +61 (0) 2 9103 9200
e sydney@ctgroup.com

Canberra
Suite 11, 18 National Circuit,
Barton 2600, ACT, Australia
t +61 (0) 26 273 5447
e canberra@ctgroup.com

Hobart
EMRS
56 Main Road, Moonah,
TAS 7009, Australia
t +61 (0) 3 6211 1222
e enquiries@emrs.com.au

Europe

London
6 Chesterfield Gardens, London,
W1J 5BQ, United Kingdom
t +44 (0) 207 318 5770
e enquiries@ctgroup.com

Milan
Via Michele Barozzi 2,
Milan 20122, Italy
t +39 (0) 2 7600 4581
e milan@ctgroup.com

North America

Washington
1401 New York Avenue NW,
Suite 925, Washington D.C.
20005, USA
t +1 (202) 921 6991
e washington@ctgroup.com

India

Mumbai
1520-C, Level 15,One BKC
Bandra Kurla Complex,
Bandra East, Mumbai,
Maharashtra, 400051, India
t +91 989 215 0000
e india@ctgroup.com

The Middle East

Dubai
Unit 09, Level 5, Gate
District Building 05, Dubai
International Financial Centre
Dubai, United Arab Emirates
e enquiries@ctgroup.com

C|T GROUP

ctgroup.com