

# The Energy Series: Edition Three

The Future of Energy

*Example of Findings*

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## About this Report

Energy is a complex issue in Australia. The shift to renewables will impact the lives of every Australian, and media, public and political narratives around this transition will play a significant role in helping to drive changes in behaviour.

The May 2022 federal election was a crucial hinge point in public, political and media narratives about the energy transition in Australia. Federal Labor's win, and the strong performance of the Greens and Teal Independents, provided significant weight to the idea that the Australian public were in favour of increased action on climate, and an acceleration in the energy transition.

This Energy Transition series focuses on public and political narratives on the energy transition, and explores the interplay, overlap and disconnection between political activity, media narratives, and audience response.

This series is grouped around three core themes:

- Edition One: *The Narratives of Energy Transition*.
- Edition Two: *The Politics of Energy* (the political impact and response to energy investment and policy).
- Edition Three: *The Future of Energy* (an analysis of emerging technology, voices and narratives of the future of energy).

**Edition Three: *The Future of Energy*** focuses on a detailed analysis on the future of clean energy technology, and focus on the discovery of new ideas, audiences and channels. Our analysis is through the lens of social media and key political activity from 1 July – 20 August 2023, with trend data also covering 1 January to 20 August 2023.



# KEY FINDINGS



## NO WIND IN THE SAILS

## STATE POLICY

## TECH-LESS

## VOCAL OPPOSITION

Wind has the lowest proportion of favourable coverage among major renewables, leaving Solar as the standout renewable technology in the public's eye.

Discussion of specific sectors / technology is most often driven by government policy.

Emerging technology is largely absent in public discourse about renewable technology.

Pro-fossil fuel conservatives are highly active in debate over specific renewable energy forms..

## DRIVERS OF ENERGY DISCUSSION

*This slide shows the key themes within social media discussion of the selected energy forms.*

- Discussion of more mature industries in Australia tends to be driven by government policy. Industries that are in their infancy in Australia are, understandably, covered through the lens of international examples.
- Waste and the often materials-heavy nature of renewables technology is being increasingly mentioned by detractors.
- Private investment has been largely absent from public discourse in recent months.

	SOLAR	WIND	HYDROGEN	BATTERIES	NUCLEAR	GEOTHERMAL	BIOMASS
1	Government policy or projects (state or federal)	Environmental impact (wind turbines "needing coal/diesel to function", mining, land clearing)	Government policy or projects (including federal budget)	Government policy or projects (federal, state, local)	Political debate	International experience	International experience
2	Benefits (private homeowners, effect on wholesale prices, emission reduction)	Waste & recycling	Research & development	Mining & resources (lithium, vanadium)	Cost	Research & development	Information / technology
3	Drawbacks (waste/recycling, efficiency, technology, land clearing)	Subsidies for turbine producers	Emissions reduction	Waste & recycling	Reliability	Emissions reduction	Emissions reduction
4	Statistics (power prices, solar market share, investment)	Wind farm projects (including government announcements, opportunities, community feedback)	International experience (trade, other countries using hydrogen)	Community batteries	International experience		Deforestation
5	Local/community projects	Effect on wholesale prices	Drawbacks (efficiency, cost, shipping)	Electric Vehicles	Emissions reduction		

## KEY AUDIENCE PROFILES

This section analyses social media audience profiles of discussion of key energy types, based on demographic and behavioural profiles.

### Solar

#### Affinity

The most relevant accounts the audience has affinity with

 Anthony Albanese @AlboMP 38.43%	 Elon Musk @elonmusk 48.41%
 simon holmes à court @simonahac 32.68%	 Laura Tingle @latingle 33.27%

#### Trusted Brands

The most influential brands for the audience

 Australian News	 ABC News	 Guardian Australia
 PRGuy	 The Chaser	

#### Leaders:

Climate-focused organisations

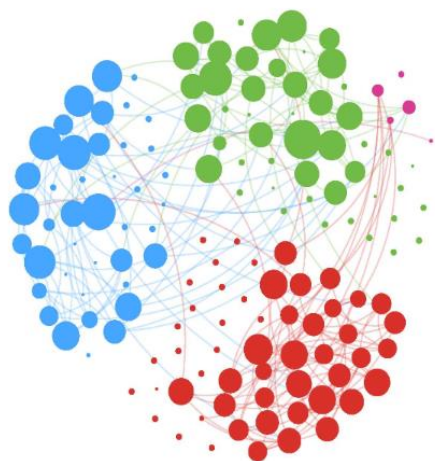
- Discussion is largely affirmative, driven by a mix of climate-focused organisations followed by pro-renewables individuals.
- Advocates note the rare opportunity Australia has to greatly increase solar capacity due to a suitable climate and land mass.
- However, there are counterarguments from pro-fossil fuel groups, politicians and everyday Australians. Recent narratives have revolved around the “pointlessness” of using fossil fuels to make solar panels and components.

#### Leading Voices

- 1 ABC News
- 2 Sky News Australia
- 3 Simon Holmes á Court
- 4 Rita Panahi
- 5 RenewEconomy

#### Audience Segments

The distinct segments within the audience, based on demographic and behavioural profile



<b>Australian Conservative</b>	<b>33.4%</b>	<p><b>Interested in:</b> Travel; sports; law, government and politics; news.</p> <p><b>Most influenced by:</b> Avi Yemini (@OzraeliAvi), Craig Kelly (@CKellyUAP), Rita Panahi (@RitaPanahi), Malcolm Roberts (@MRobertsQLD), Pauline Hanson (@PaulineHansonOz).</p>
<b>Climate Science &amp; Politics</b>	<b>30.2%</b>	<p><b>Interested in:</b> Travel; science; business &amp; industrial; law, government &amp; politics.</p> <p><b>Most influenced by:</b> Clean Energy Council (@cleannrgcouncil), Giles Parkinson (@GilesParkinson), Beyond Zero Emissions (@beyondzeronews), Solar Citizens (@solarcitizens), Kane Thornton (@kanethornton).</p>
<b>Social Justice Advocates</b>	<b>26.0%</b>	<p><b>Interested in:</b> Travel; law, government &amp; politics; science; pets.</p> <p><b>Most influenced by:</b> Ewart, Dave (@davidbewart), Jenny Frecklington-Jones #VoteYes (@JonesHowdareyou), Aaron Dodd, Vote YES (@AaronDodd), Politic@I Spinner (@lesstenny), stranger (@stragerous10).</p>
<b>Investment Insights</b>	<b>3.1%</b>	<p><b>Interested in:</b> Travel; finance; business &amp; industrial; sports.</p> <p><b>Most influenced by:</b> Assad Tannous (@AsennaWealth), John Quakes (@quakes99), Tolga Kumova (@KumovaTolga), Small Caps (@SmallCapsASX), Gigi Penna (@giginator_).</p>

Carbon Capture, Utilisation and Storage

Wind

Nuclear

Hydrogen

## United Kingdom



While the UK is aiming to hit net zero by 2050, the Climate Change Committee (CCC) reported decreased confidence that the country will achieve its medium-term targets, and warned the UK is losing its position as a world leader on green technology. UK Prime Minister Rishi Sunak subsequently granted licences over 100 new North Sea oil and gas explorations, and hinted he would like the UK to use all of its oil and gas reserves, and that he would licence the controversial Rosebank oil field, the largest in the UK.

The UK partly funds new green technology through the Contracts for Difference (CFD) Scheme. CFDs provide protection for developers from volatile wholesale prices, to incentivise investment in renewables via a series of auctions. The fifth auction is currently ongoing and has committed:

- £170m of government investment for established technology, including offshore wind
- £35m for emerging technologies
- £10m for tidal.

The fourth auction, the largest so far, had £285m of total investment into green energy.

The UK is investing heavily in **Carbon Capture, Utilisation and Storage** (CCUS), with the government committing a total of £20bn in CCUS. When Sunak announced the new oil and gas exploration, he also confirmed two new CCUS clusters in Teesside and the Humber, Acorn and Viking. These are two of four clusters confirmed by the government.

The UK Government has also invested in offshore **wind**. The UK has a target of 50GW of energy capacity from offshore wind by 2030, which includes a target of 5GW of floating offshore wind. Investment includes £31m of direct funding for new offshore wind technology in January 2022. There has been an effective moratorium on onshore wind in the UK since 2016, with developers having to demonstrate community support for a project before it begins. In December 2022, the prospect of an embarrassing loss on an amendment to the Levelling Up Bill forced the government to change its position, promising to consult on onshore wind farm construction. This consultation has gone ahead, although some Conservatives have accused the government of inaction. In July 2023, Conservative MP Sir Alok Sharma, who was COP26 President, tabled an amendment on the Energy Bill to lift key restrictions on development of onshore wind.

In the 2023 budget, the government announced the creation of Great British Nuclear to encourage private **nuclear** investment. This body was officially launched in July, with a competition for small modular reactor technology, as well as a £157m grant package that included £77m for advanced nuclear business development and up to £58m for the design of an advanced modular reactor. The UK Government also provides a yearly budget of £316m to UK Atomic

Energy Authority, which is working on the production of nuclear fusion power plants for later UK green energy targets.

The UK is aiming for 10GW of energy from **hydrogen** by 2030. This will be assisted by the Net Zero Hydrogen Fund, which will run between 2022 and 2025, and is worth up to £240m.

While the UK Government has planned to stop the use of **coal** from October 2024, controversy arose over the planned opening of Whitehaven Coal Mine, the first coal mine to open in the UK in over 30 years. However, the opening of the coal mine was rejected in a vote in the House of Lords.

The **Scottish Government** is aiming for net zero emissions by 2045, five years earlier than the UK Government. It currently has around 13.4GW of renewable energy generation capacity and wants to add more than 20 GW of additional low-cost renewable electricity generation capacity by 2030. Over a parliamentary term, the Scottish Government has announced investments of around £5bn in the net zero energy economy. To achieve its net zero targets, the Scottish Government has:

- Committed over £100m to make Scotland a leading hydrogen producer, aiming for a total of 5GW of hydrogen production by 2030.
- Promised to at least double onshore wind capacity to between 16 and 20GW by 2030.

The Scottish Government also supports the implementation of CCUS in Scotland, but does not have the regulatory levers to achieve this.

**Wales** currently generates 55% of its electricity from renewable sources, and the Welsh Government has set a target of meeting 100% of its energy from renewable sources by 2035. From 2017–2022, the government invested £90m in Welsh Government Energy Service projects, to support green energy investment.

The **Northern Irish Climate Change Act** of 2022 set out key targets for the nation, including net zero emissions by 2050 and a 48% reduction in emissions by 2030. While direct investment from the Northern Irish Government has been limited due to the shutting down of the executive, the government recently announced a £3m investment in geothermal energy.



# METHODOLOGY

## Scope

This report analyses social media conversation focused emerging sectors and technology within the energy transition in Australia. Detailed data for this report was sourced from the period 1 July – 20 August 2023. Trend data covers 1 January – 20 August 2023.

Coverage volumes and content are based on the Pulsar audience intelligence platform. The content sourcing is based on keyword lists focusing on a combination of general terms relevant to energy transition (e.g. industry sectors, industry group, stakeholders, energy investment, climate policy, etc.).

This report on the the audiences that contribute to social media discourse about growing energy sectors that may play a role in Australia's decarbonisation process.

## Social Media

We used analysis of keywords from a sample of over **65,000** social media conversations, to ensure we understand:

- Key drivers of discussion (political movements, industry and market announcements, regulators, communities, research, activism etc.);
- Points of view and messaging being driven across conversation online;
- Key voices/influencers, organisations and political figures that drive public and political narratives across the topic;
- Public discussion – analysis of online conversation on the energy transition;
- Key drivers of conversation; and
- What are the commonalities between those discussing energy transition topics.

## Political Activity

The political analysis team have international expertise in mapping political activity and key stakeholders.

The stakeholder identification seen in this research is a combination of analysis of political documents and statements, key media and social media content, and the patterns seen overseas in similar discussions. They are not a map of all stakeholders, but ones that are considered worthy of highlighting in the context of this discussion.