

# UK Omnibus Survey

September 2022



CIT GROUP

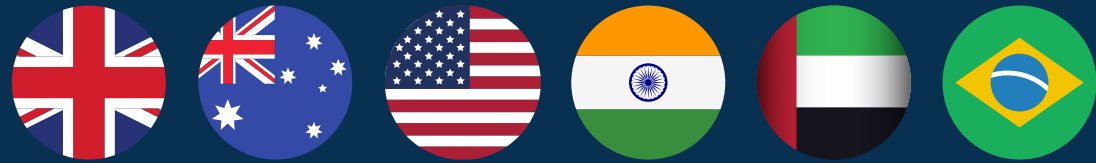


## Introduction

- Presentation of the topline results of an online survey conducted across six markets.
- This is the 5th such omnibus conducted, the first was conducted in September 2019.
- Insights provided into how and why people are thinking about their current economic circumstance, domestic and international issues, the economy, energy, climate change and media and technology companies.

- Focus will be predominantly on UK findings, but where appropriate international comparisons will be made.
- Further, detailed insights are available by contacting Mark Domitrak - Global Head of Research:  
[mdomitrak@ctgroup.com](mailto:mdomitrak@ctgroup.com)

# Research methodology



- An online survey was conducted in six markets:
  - UK: n=2,000 residents between 11-18 July 2022
  - Australia: n=2,000 residents between 11-18 July 2022
  - US: n=1,500 residents between 11-24 July 2022
  - India: n=1,500 residents between 15-24 July 2022
  - UAE: n=1,501 residents between 13-25 July 2022
  - Brazil: n=1,500 residents between 11-19 July 2022.
- The results are representative of each market (among 18+ year-olds), through sampling and weighting.
- The maximum margin of error for this sample size is  $\pm 2.2\%$  for the UK and Australia and  $\pm 2.5\%$  for other markets at a 95% confidence level. Higher margins of error exist for smaller subsamples and net scores.
- This is Round 5 of the omnibus survey in the UK. Results for this round are compared with those from Round 4, conducted between 22-30 January 2021 with a sample size of n=2,029.



Most important  
issues facing  
society today



Regular Unleaded Litre  
138.9

Regular Diesel Litre  
141.9

Shell  
V-Power  
Performance Fuels

Shell  
V-Power  
MAIN'S NO.1  
ANCE FUE  
S YOU UNBEATABL  
GINE PROTECTION  
AGAINST DEPOSIT

WELL  
Shell logo

## Cost of living, health services most important issues, followed by rebuilding economy



- Reducing cost of living is the most important issue, consistent amongst all countries surveyed, especially in the UK (23%).
- Stopping the spread of COVID-19 is now at the bottom of the issue agenda, (3%) compared to 70% 18 months ago.
- But health focus remains strong, particularly access to health care services and hospitals (12%).
- However, rebuilding the economy and creating jobs is perceived as slightly more important (16% combined).
- Women (26%) and respondents aged 35-54 (29%) are more likely to nominate cost of living as the most important issue, with the economy and jobs perceived as more important amongst respondents aged 55+ (17%) and those on medium incomes (£30K - £60K) (17%).
- Older respondents (aged 55+) are more likely to prioritise healthcare and COVID-19.

Which are the most important issues facing society today? Please select all that apply.  
Base: All participants (UK: n=2,000)

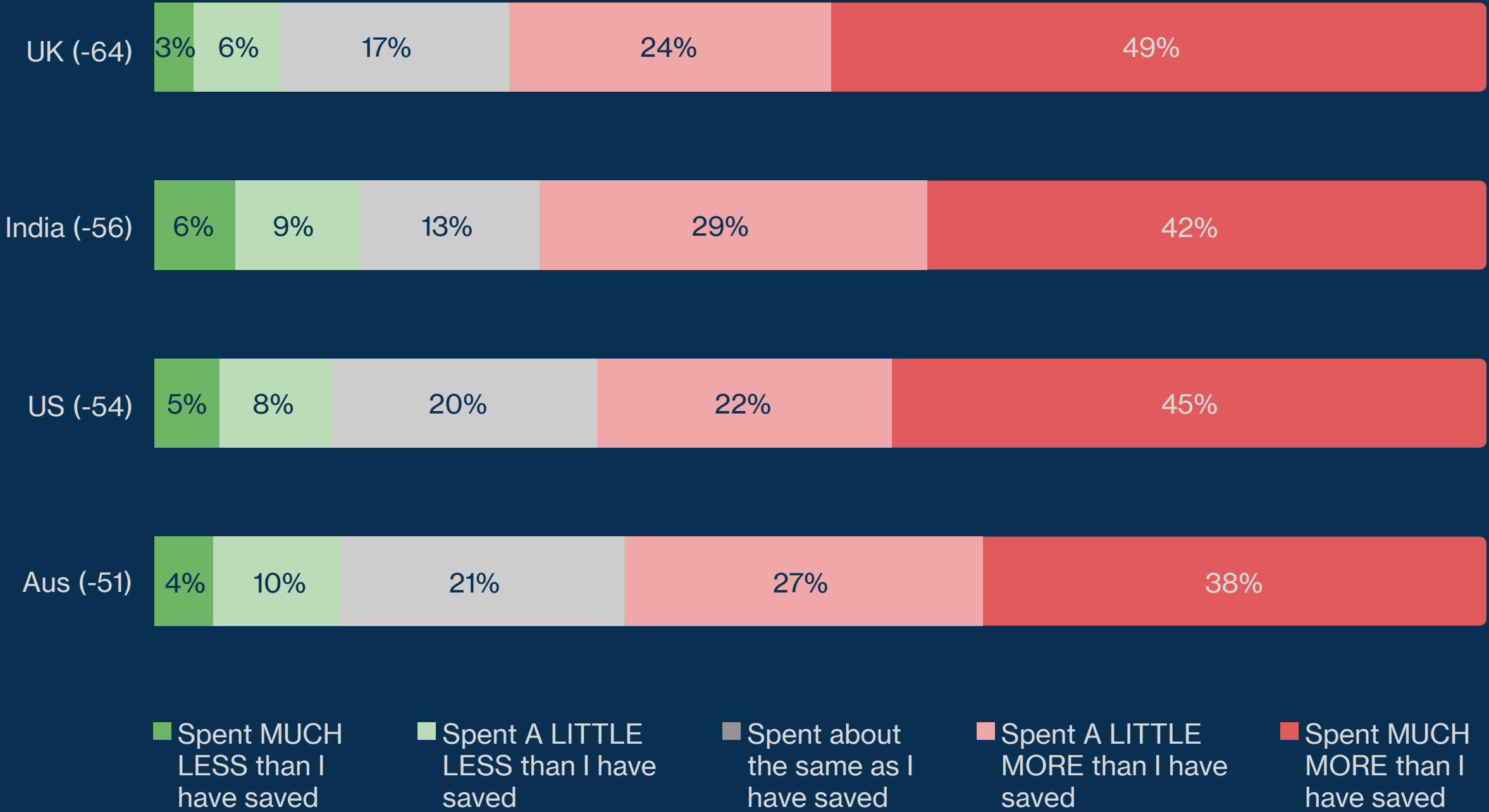
## Rising fuel prices and war in Ukraine to “blame” for price increases



- The rising price of fuel and the war in Ukraine are the dominant drivers of perceptions about increases in price.
- Women are more likely to blame the rising price of fuel (80%) and a lack of products and services due to COVID-19 (59%) for price increases, whilst men are more likely to believe that ‘green’ policies (28%) and central banks not raising interest soon enough (23%) were at fault.
- 55% believe business are to blame for increasing their prices to maintain profit margins. This is highest in the UK when compared to Australia (52%) and the US (49%).

Recent price increases have been blamed on various things Which of the following factors do you think are responsible for these increases? Please select any that apply  
 Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, India: n=1,500, UAE: n=1,501, Brazil: n=1,500)

## Spending more than saving, reverses trend from COVID



- Financial survival is the dominant financial goal for UK respondents, for the next 12 months (40%) followed by saving (32%), and paying down debt (21%).
- Almost half of respondents in the UK say they have spent much more than they have saved.
- Women and respondents aged 35-54 years are more likely to say that they have spent more than they have saved.
- By comparison, in January 2021 (-2) just 34% of respondents in the UK reported that they had spent more than they have saved, with 19% reporting that they had spent much more. 32% of respondents had saved more than they had spent.
- Respondents are not able to keep up with cost of living rises equally with those already on higher incomes far more likely to have received a pay rise than those with lower incomes.

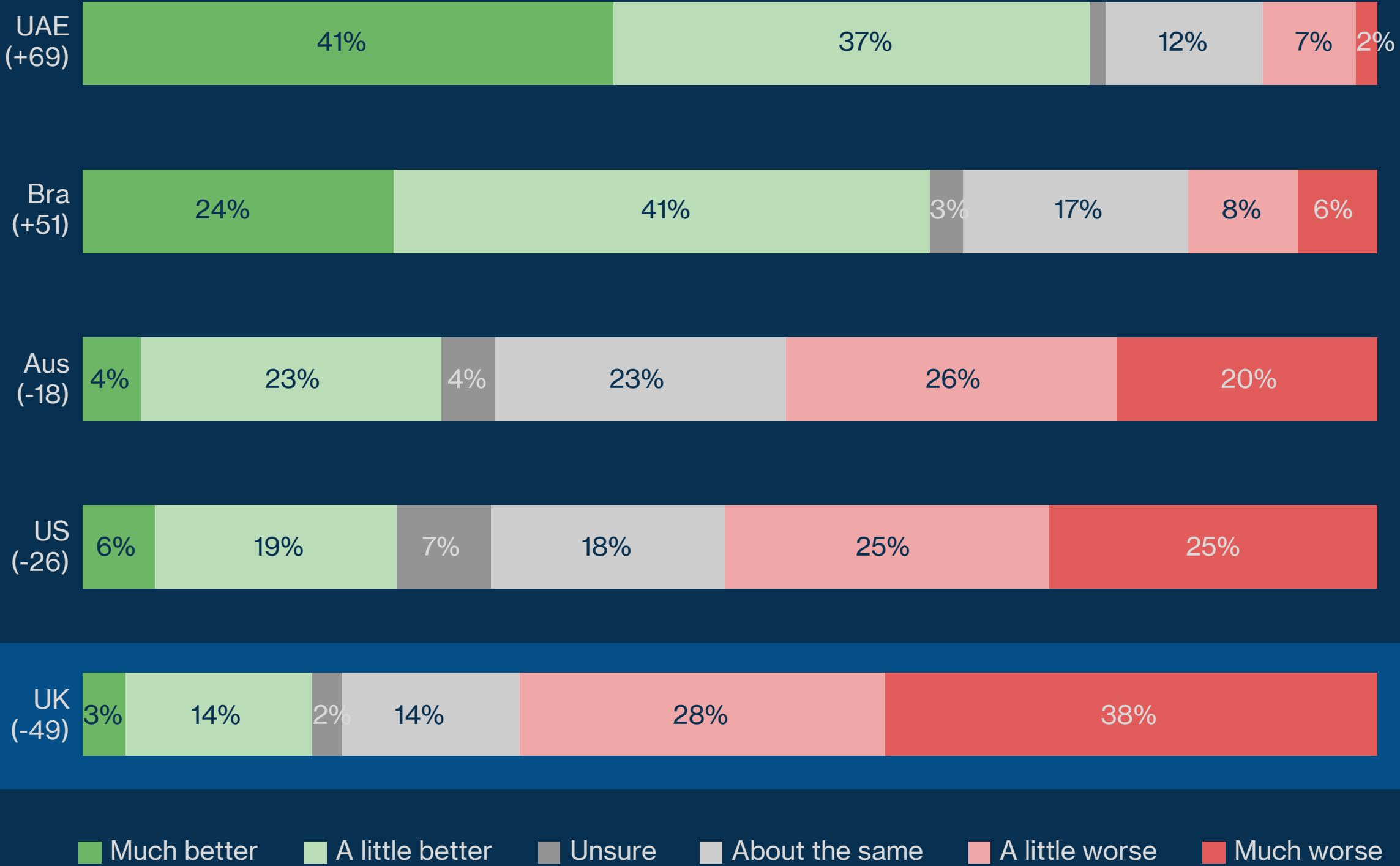
During the past 12 months or so, do you feel that you have spent more than you have saved, or saved more than you have spent?  
 Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, India: n=1,500, UAE: n=1,501, Brazil: n=1,500)  
 Net in brackets (spent more minus spent less)

# Economic outlook





# UK respondents most pessimistic about the economy

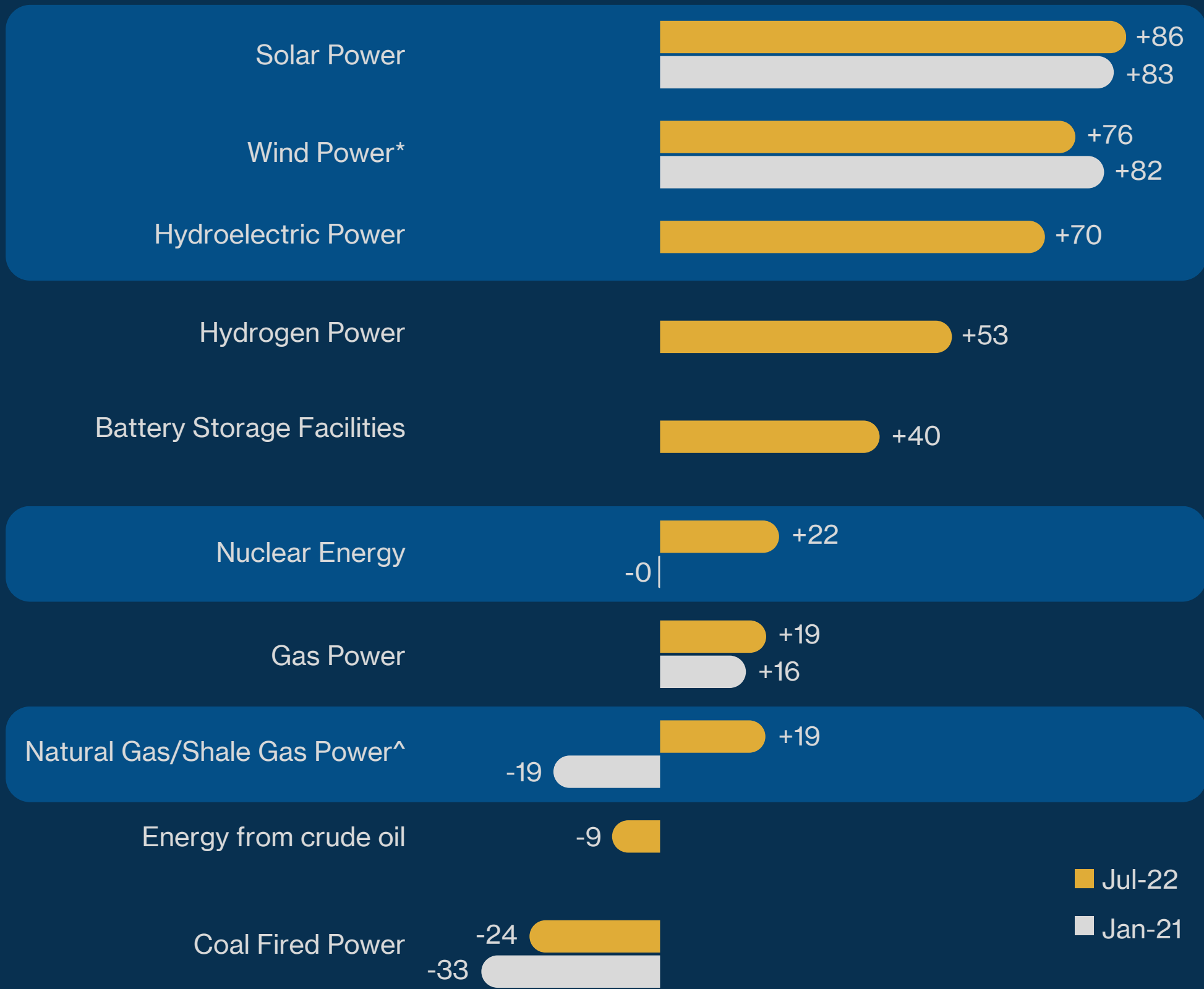


- UK respondents have the most pessimistic outlook for the economy for the coming 12 months (66% total worse).
- However, economic outlook is correlated with age, with older respondents aged 35-54 (71% total worse) and 55+ the most pessimistic (70% total worse).
- 18-34 year olds are the least pessimistic, despite over half still having a negative economic outlook (56% total worse).
- In contrast, respondents in the UAE and Brazilians are considerably net positive about the economic futures of their countries.

Thinking about the coming 12 months, how do you expect the national economy to change during that period?  
 Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, UAE: n=1,501, Brazil: n=1,500)  
 Net score in brackets (better minus worse)

A photograph of two large, cylindrical cooling towers from a nuclear power plant. The towers are dark blue and stand against a dramatic sky at sunset or sunrise, with warm orange and yellow light on the right and darker, cloudy areas on the left. The towers are emitting a thick plume of white steam or smoke that rises into the sky. The overall mood is industrial and atmospheric.

**Energy**



## Increase in support for nuclear and gas energy

- UK respondents are far more positive about nuclear energy to generate power, than they were in January 2021.
- Men (+44) are significantly more likely to support nuclear energy when compared to women (+0).
- Nuclear energy was supported in all countries surveyed other than Brazil (-17). India (+58) and the UAE were particularly supportive (+45).
- Support levels for renewables and gas power remain roughly as they were in January 2021, and are similarly high when compared to other markets.
- The UK is the most net opposed to crude oil (-9) and coal (-24) out of all countries surveyed. Comparatively the US is net supportive of crude oil (+17), and both Australia (+0) and the US (+0) are net neutral towards coal.

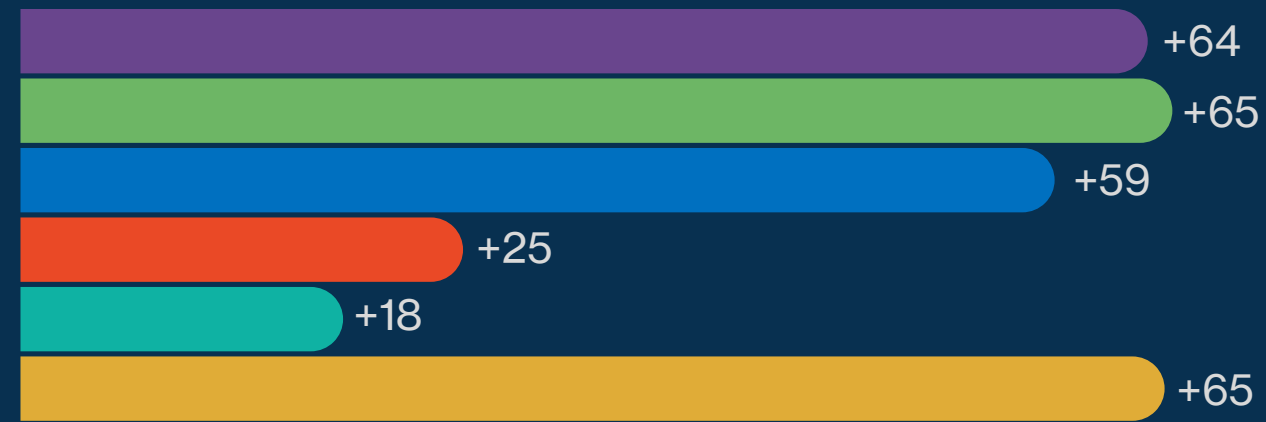
To what extent do you support or oppose the use of the following energy sources to generate power in the [Country]?

Base: All participants (Jul-22: n=2,000; Jan-21: n=2029) Net score is support minus oppose

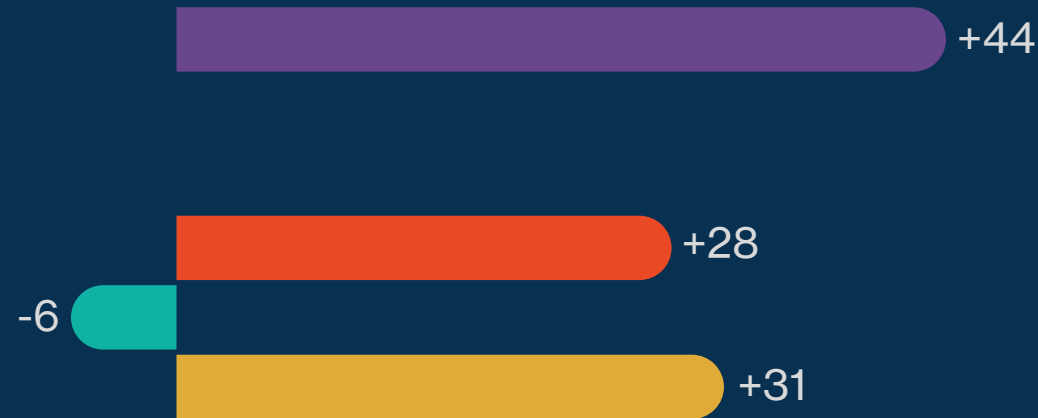
\*Note: Wind Power is an average of Onshore Wind Power and Offshore Wind Power in 2022.

^Note: Natural Gas/Share Gas Power asked as Shale Gas Power in 2021.

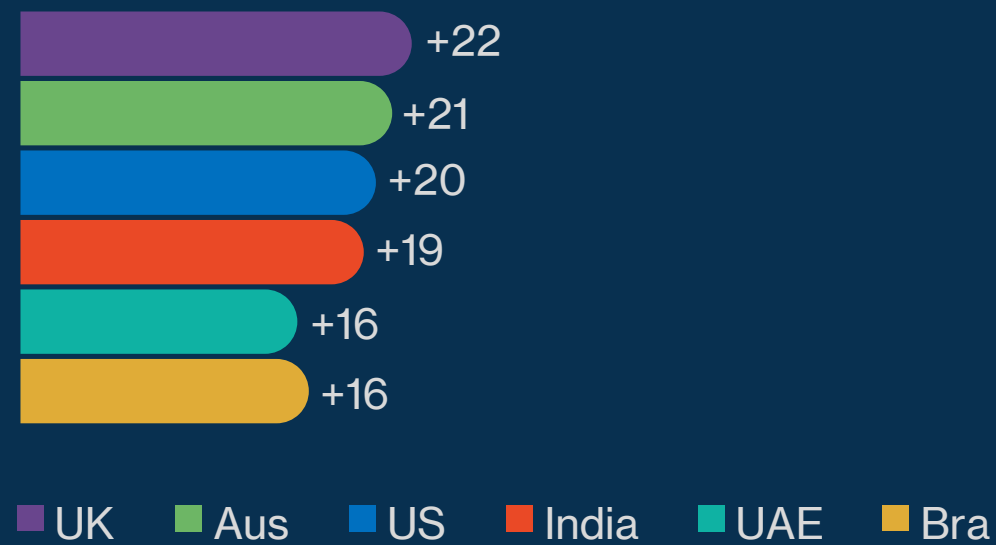
[Country] should not be reliant on other countries to supply its energy needs



[Country] should keep all of the fuel and energy it produces, rather than sending it overseas



Cost of living pressures have been made worse by the world trying to transition to renewable energy sources too quickly

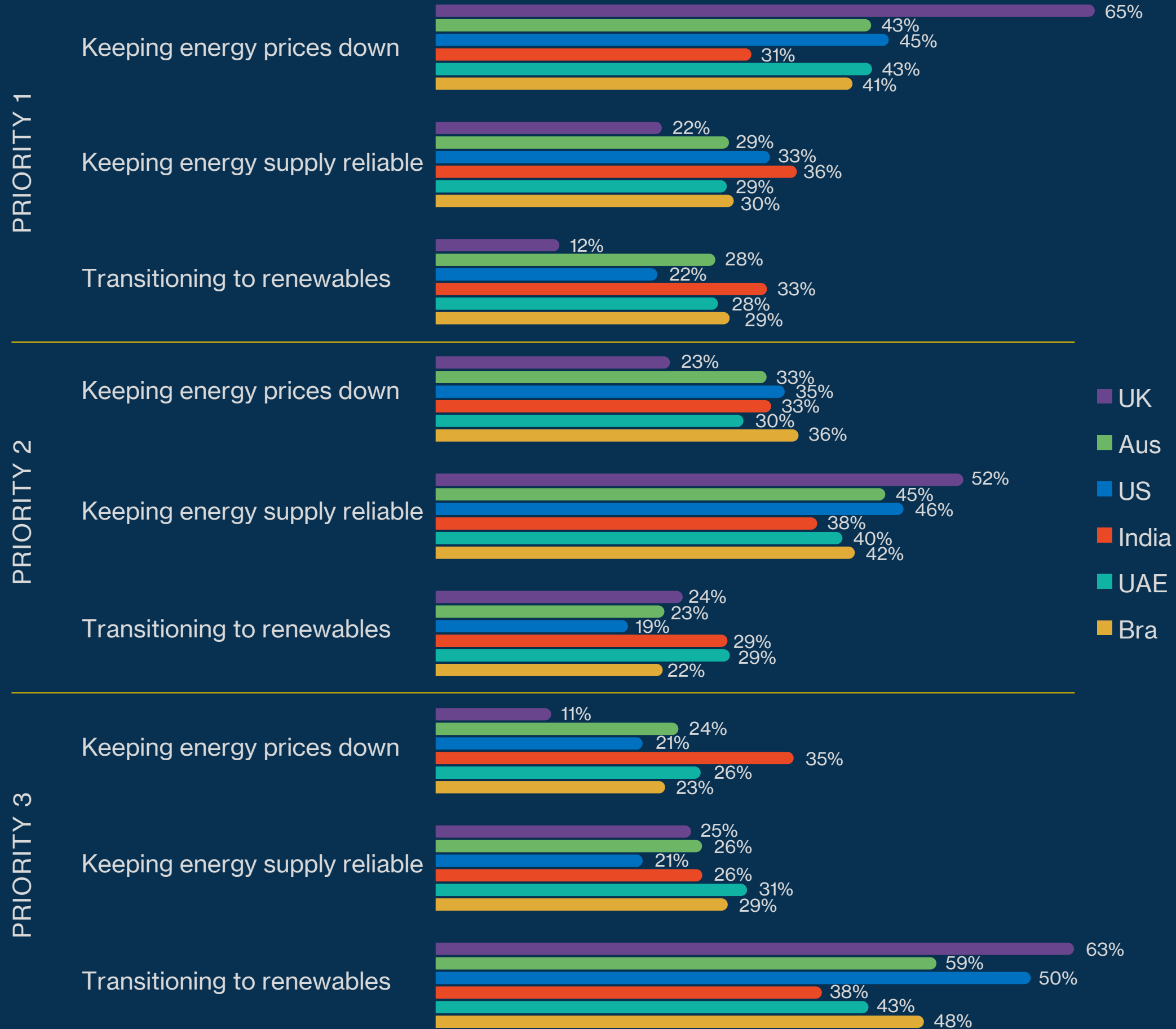


UK Aus US India UAE Bra

## Desire for greater local energy dependence

- There is strong desire from participants in the UK and other markets for their countries not to be reliant on other countries for their energy needs.
- There is also strong desire for the UK to keep fuel and energy locally rather than exporting it.
- In all countries, participants net agree that cost of living pressures have been exacerbated by switching to renewables too quickly.

To what extent do you agree or disagree with each of the statements below?  
 Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, India: n=1,500, UAE: n=1,501, Brazil: n=1,500)  
 Net score is agree minus disagree



## Keeping energy prices down should be govt. priority

- Keeping prices down is the predominant issues UK respondents believe the government should prioritise (65%).
- Respondents aged 35-54 were the most likely to say that keeping prices down is their first priority (72%).
- This is followed by keeping energy supply reliable (52%) with transitioning to renewables a third priority (63%).
- Perceptions driven by increases in energy bills and cost of living in the UK .
- In all markets, reliability is more important than the renewable transition.
- However, in the UK, close to twice as many participants prioritise reliability than prioritise renewables.
- 42% of respondents in the UK primarily see the Government as being responsible for keeping costs down, up 12pts from 2021 when the Government was seen to share responsibility with regulators and energy producers.

Thinking about the future of the [Country]'s energy supply, which of these do you think the [Country] Government should prioritise first? Which should it prioritise second? And which should it prioritise last? Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, India: n=1,500, UAE: n=1,501, Brazil: n=1,500)

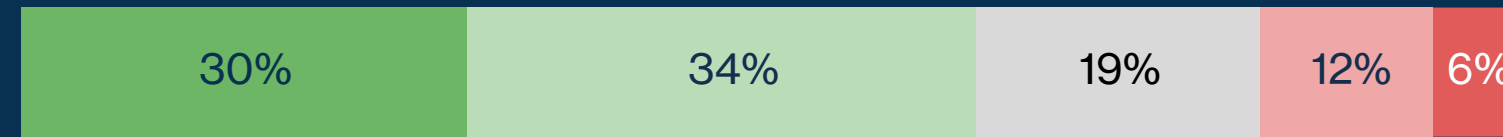


**Climate  
Change**

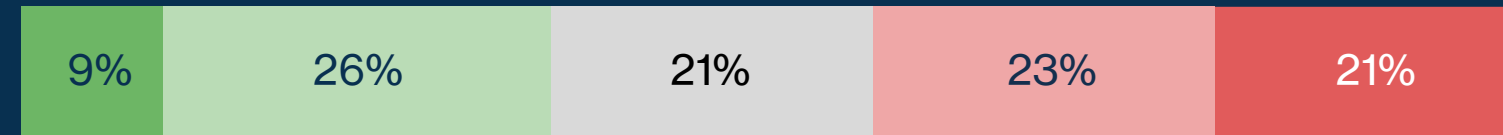
## Support for climate change investment price dependent

### Support for the UK Government Increasing Investment in Tackling Climate Change ...

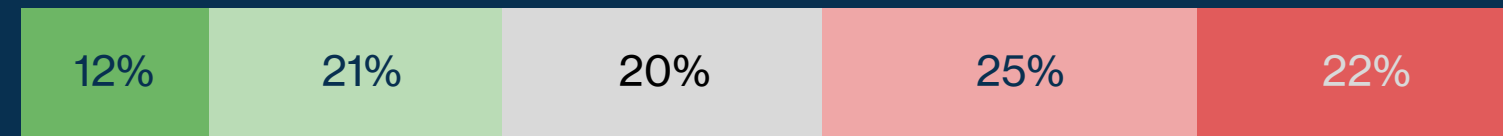
To what extent do you support or oppose the UK Government increasing investment in tackling climate change? (+46)



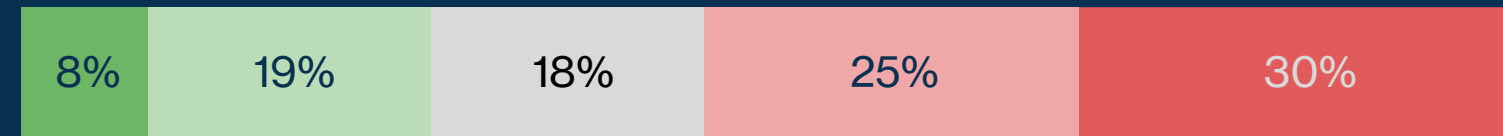
...even if it means a temporary increase in taxes for the average taxpayer of £15 per month (£180 per year) for the next few years? (-8)



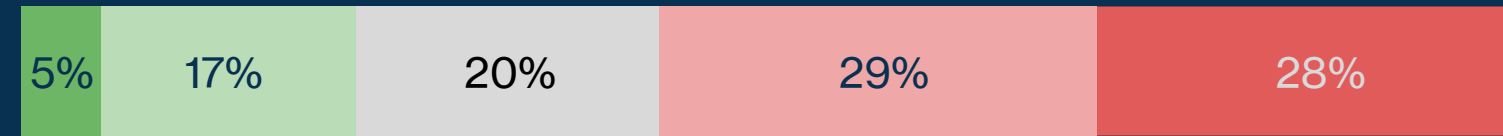
...even if it means a permanent increase in taxes for the average taxpayer of £15 per month (£180 per year)? (-15)



...even if it means a temporary increase in taxes for the average taxpayer of £100 per month (£1,200 per year) for the next few years? (-27)



...even if it means a permanent increase in taxes for the average taxpayer of £100 per month (£1,200 per year)? (-35)



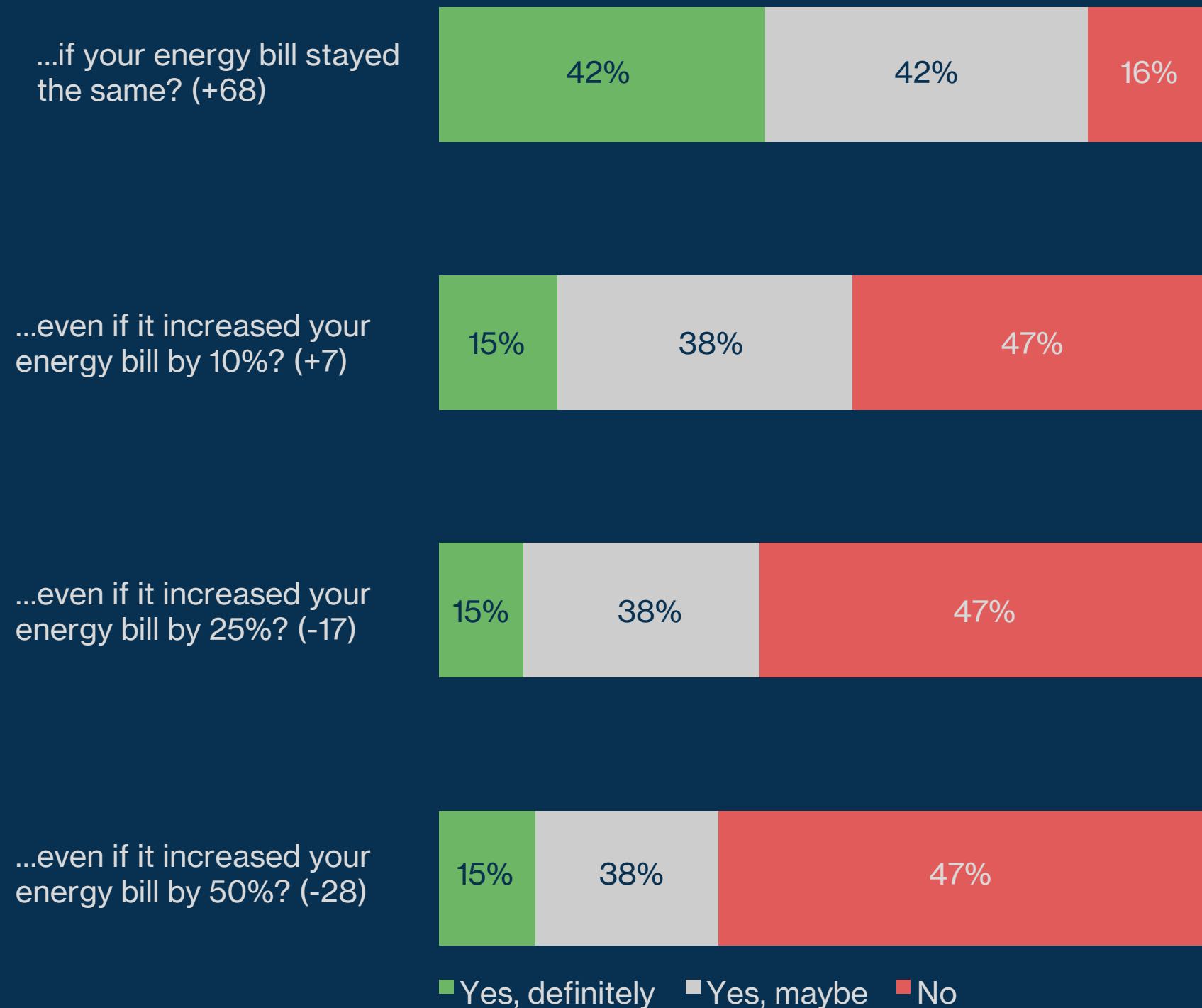
■ Strongly support   
 ■ Somewhat support   
 ■ Neutral support nor oppose   
 ■ Somewhat oppose   
 ■ Strongly oppose

To what extent do you support or oppose the following statement?  
 Base: RCT whereby all participants (n=2,000) were randomly shown one statement each  
 Net score in brackets (support minus oppose)

- A Randomised Control Trial (RCT) was conducted, where one of five versions of a statement were shown to participants at random.
- Overall there is strong support for the UK Government investment to tackle climate change (+46), however support becomes opposition once increases in taxes are proposed.
- Initial support for climate change investment without costs imposed is higher amongst younger respondents (+52), however decreases rapidly when permanent costs are imposed.
- When a temporary tax increase is imposed, younger respondents are net neutral (+1) towards an increase of £15 per month, but net opposed (-17) if this increases to £100 per month.
- High income respondents are net neutral towards temporary increases to tax of either £15 per month (-0) or £100 per month (-1), however, are similarly net opposed to permanent increases.

# Support for green energy minimum also price dependent

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



- A Randomised Control Trial (RCT) was conducted, where one of four versions of a statement were shown to participants at random.
- Overall people support mandating a minimum level of green energy usage if energy bills stay the same (+68) and do not support it if increases are 25% or over.
- Younger respondents remain net supportive of the Green Energy minimum, both initially (+76) and at each tested stage of increase to energy bills (10% increase: +19, 25% increase: +8, and 50% increase: +3).
- Older respondents and middle-income households are unsupportive of the Green Energy minimum when there is any increase to energy bills.
- Higher-income British households are net supportive of the Green Energy minimum if energy bills increase by 25% (+28), however are net unsupportive of a 50% increase (-13).

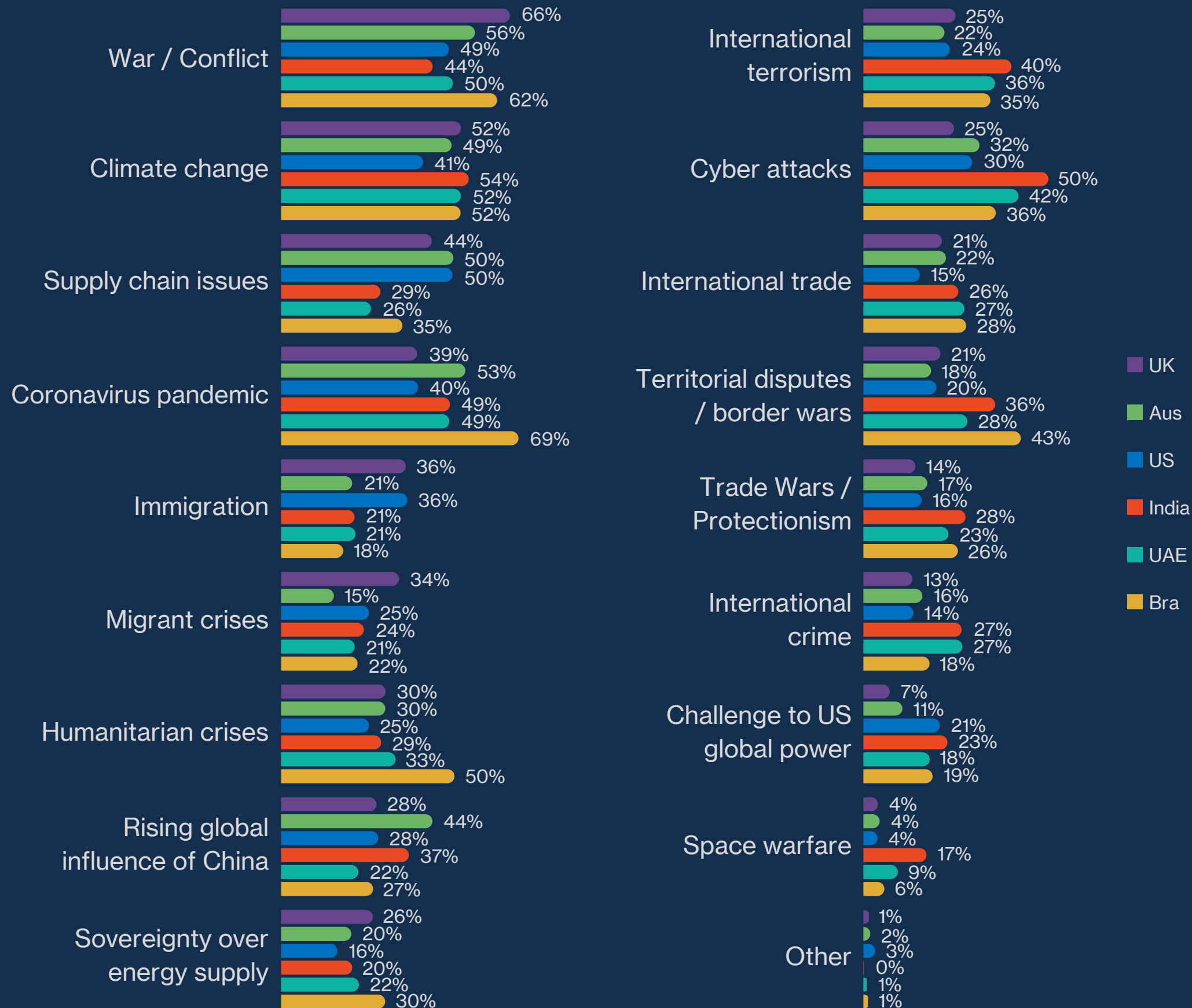
Would you support or oppose the government mandating a minimum level of green energy usage in your household...  
 Base: RCT whereby all participants (n=2,000) were randomly shown one statement each  
 Net in brackets (yes minus no)





# Most important International Issues

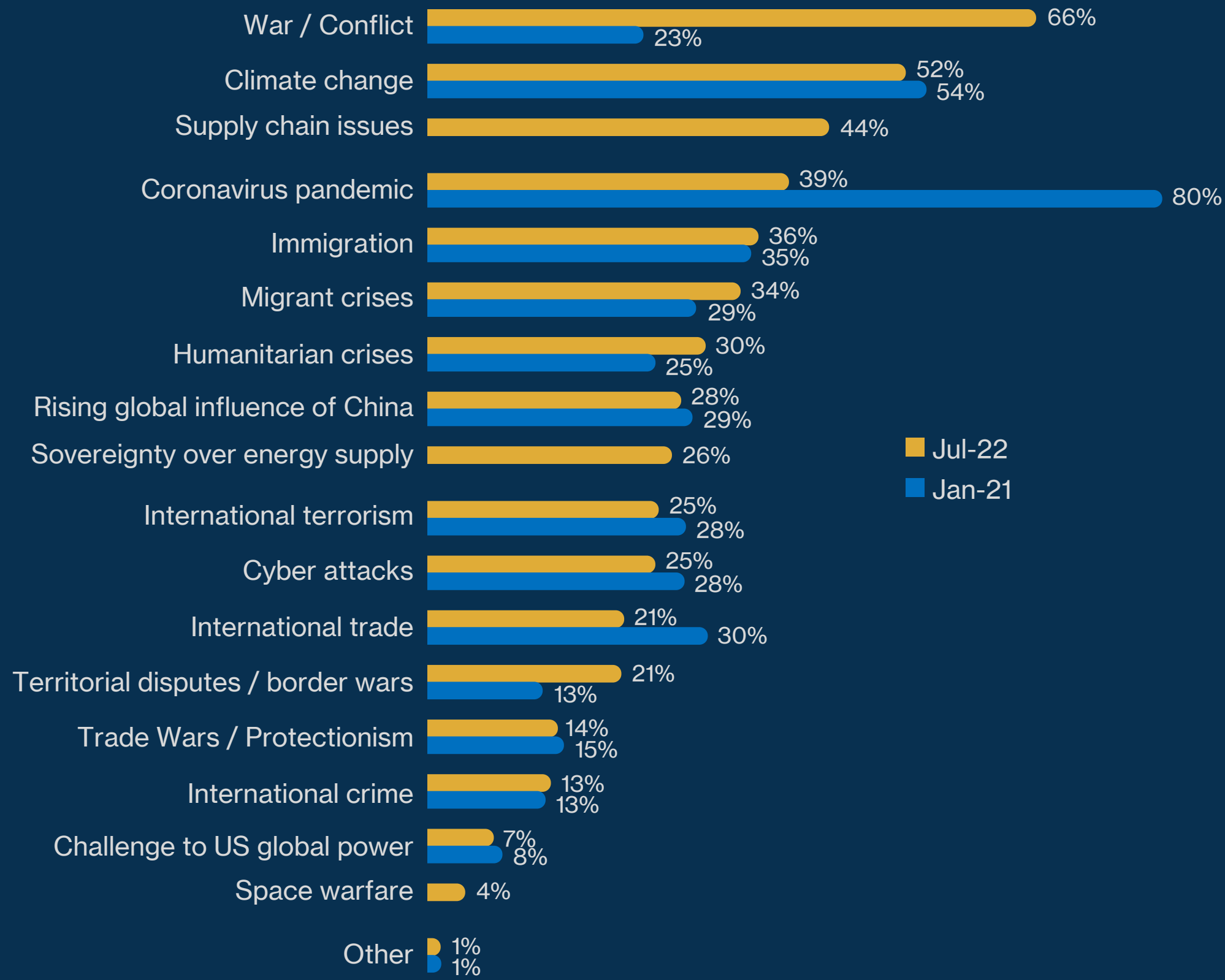
## War and climate change most important international issues



- Whilst war and conflict, climate change and COVID-19 are seen as top international issues in all markets, British respondents are particularly concerned about war/conflict (possibly reflecting the proximity of the UK to Ukraine and the impact thereof).
- Concerns about war/conflict are particularly driven by those aged 55+ (76%) however younger respondents aged 18-34 (56%) are also concerned.
- Clearly UK respondents believe climate change is more an international issue than it is a local issue that needs to be addressed.
- Women (56%) and degree educated respondents (57%) are the most likely to be concerned about climate change.
- Supply chain issues, cyber attacks and humanitarian issues are also fairly concerning in all markets.
- While immigration is a lower priority issue in most markets, it is a key issue for British respondents and Americans (with 'migrant crises' being a fairly major issue in the UK as well).

Which of the following international issues do you view as important right now?  
 Base: All participants (Australia: n=2,000, UK: n=2,000, US: n=1,500, India: n=1,500, UAE: n=1,501, Brazil: n=1,500)

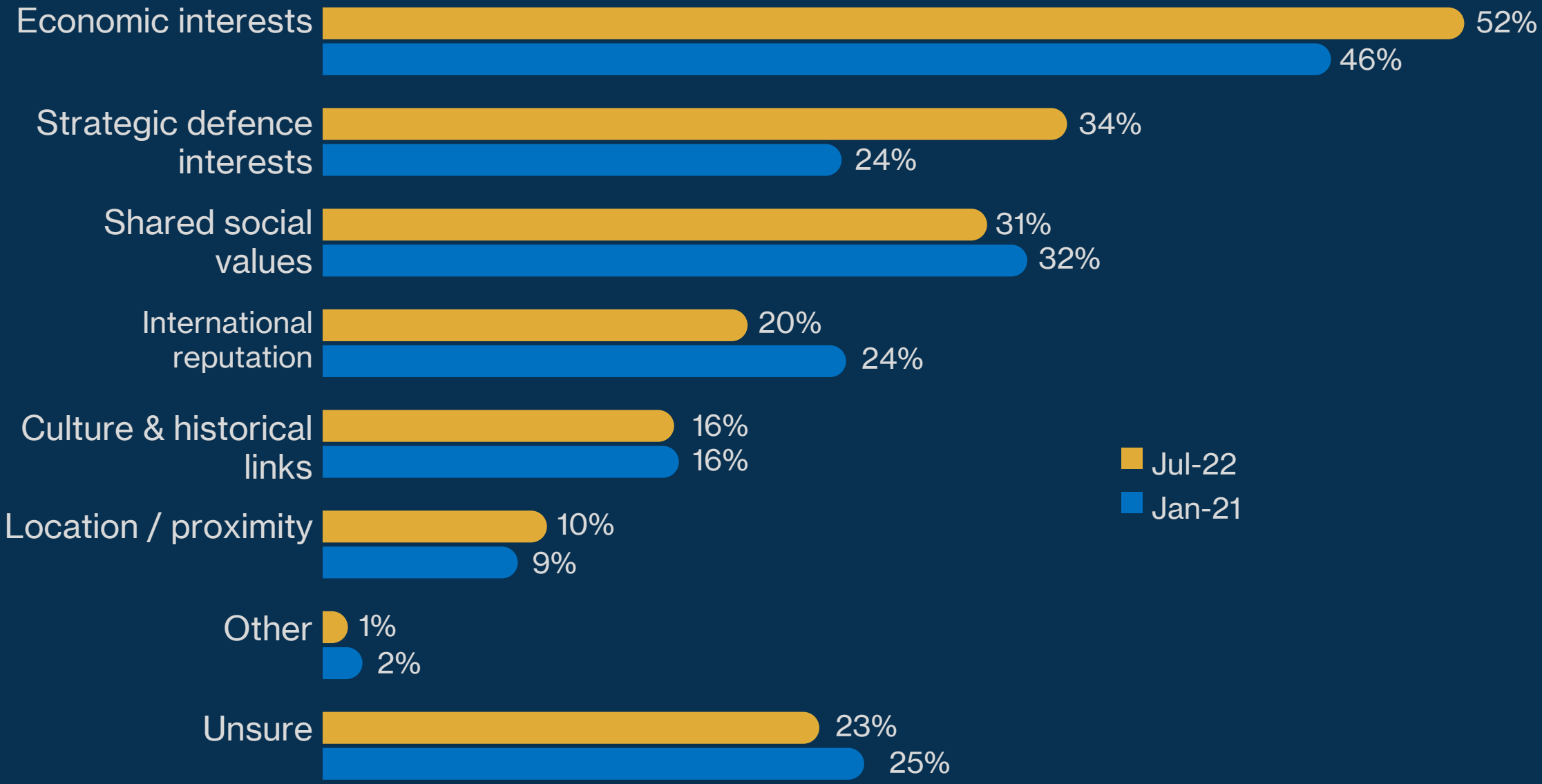
# War dominant international issue



- Respondents are particularly concerned about war and conflict when compared to January 2021 and other markets surveyed, likely due to the proximity of the UK to Ukraine and the impact thereof.
- The increase in importance placed on war/conflict is correlated with age, with respondents aged 55+ seeing the greatest increase (+53% 76%), vs those aged 35-54 (+42% to 64%), and those aged 18-34 (+29% to 56%).
- The importance placed on COVID-19 has declined significantly since January 2021, though still remains a key issue.
- The importance placed on climate change has decreased for those aged 55+ (-6% to 54%) and 35-54 (-1% to 51%), though increased slightly for those aged 18-34 (+1% to 51%).

Which of the following international issues do you view as important right now?  
 Base: All participants (Jul-22: n=2,000, Jan-21: n=2,029)

## Economic interests increased as what should guide foreign policy



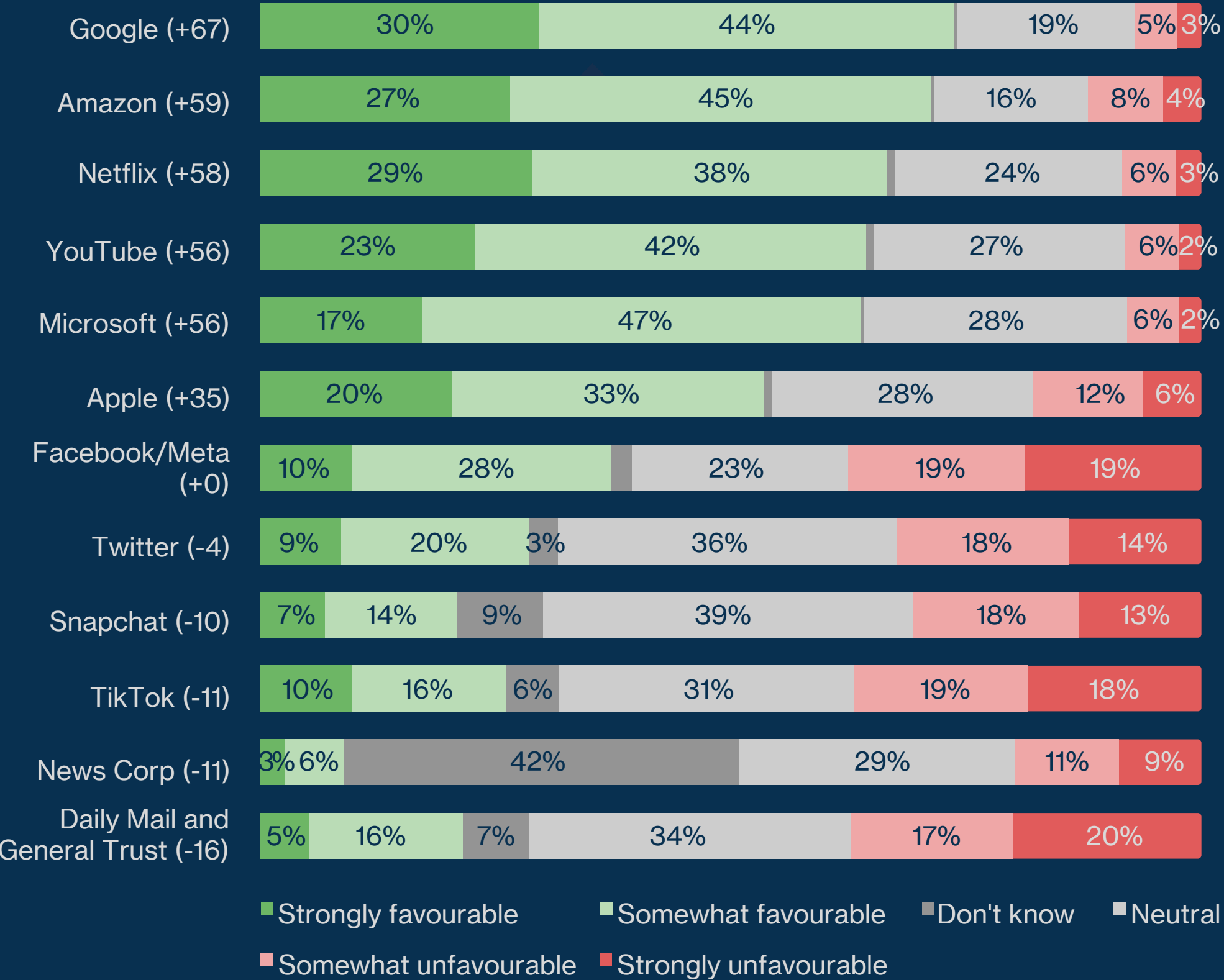
What should guide [Country]'s foreign policy?  
 Base: All participants (Jul-22: n=2,000, Jan-21: n=2,029)

- Given economic challenges at home, respondents believe economic interests should drive the UK's foreign policy, followed by strategic defence interests.
- Whilst all respondents agree that economic interests should guide foreign policy, men (58%), those aged 35-54 (57%), and respondents on middle incomes (56%) were the most likely to say economic interests.
- Respondents aged 55+ (43%) and those on higher incomes (45%) were more likely to say strategic defence interests.



# Attitudes to big tech & media

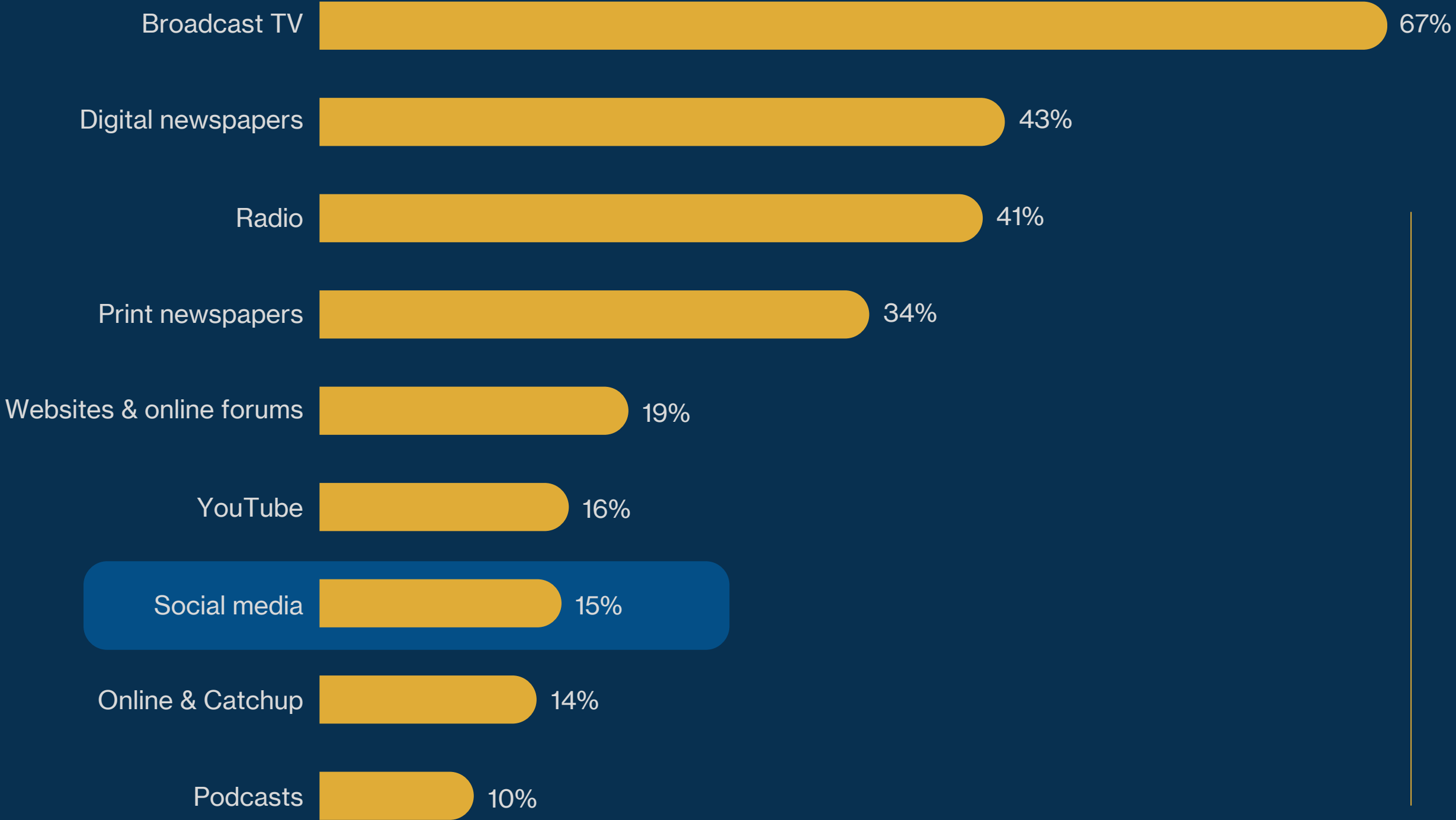
# Perceptual differences between social media platforms and other tech companies



- While 'big tech' companies are often grouped together in public debate, the public clearly differentiate between social media platforms and other tech companies. While the former enjoy very strong reputations, the latter are perceived relatively poorly.
- The discrepancy between the reputations of tech companies and social media platforms stems from low favourability toward social media platforms among older respondents - Facebook (-17), Snapchat (-29), Twitter (-30), and TikTok (-39).
- In all markets, Google and YouTube (owned by Google) have the strongest reputations among big tech companies.
- Big Tech is less loved at home in the US than abroad in other markets surveyed.

From the list of organisations below can you please select whether you have a favourable or unfavourable view of each.  
 Base: All participants (n=2,000)  
 Net score in brackets (favourable minus unfavourable)

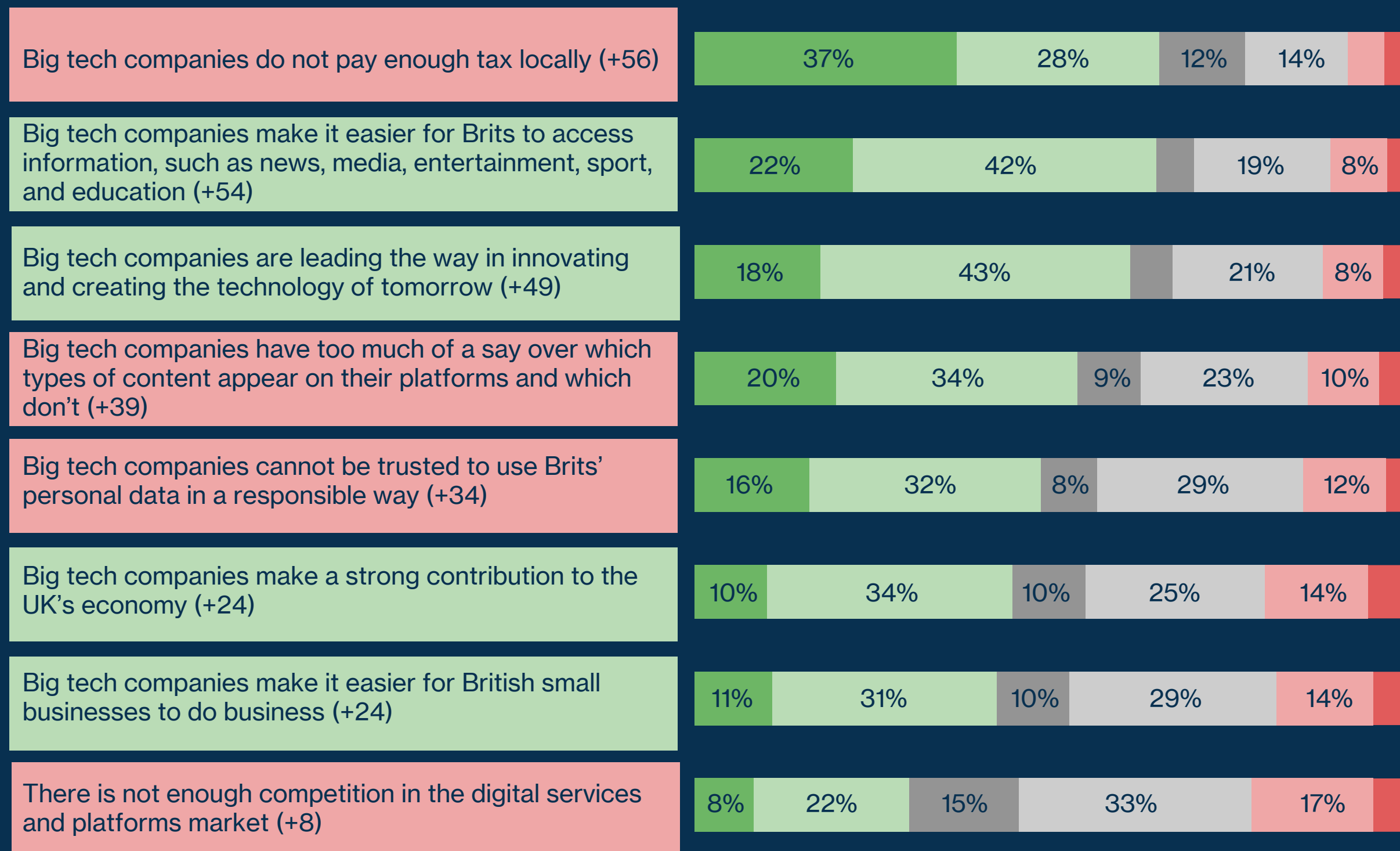
# Traditional media most trusted



- Traditional media sources are the most trusted, along with institutional journalism. Again, this is true in all markets.
- Older respondents are the least trusting of social media and all other digital sources, while being the most trusting of broadcast TV, radio and print newspapers.

Of the following media types, which do you trust as credible and trustworthy sources of news and information?  
Base: All participants (n=2,000)

## Mixed perceptions about big tech companies



■ Strongly agree 
 ■ Somewhat agree 
 ■ Unsure 
 ■ Neither agree nor disagree 
 ■ Somewhat disagree 
 ■ Strongly disagree

To what extent do you agree or disagree with each of the statements below?  
 Base: All participants (n=2,000)  
 Net score in brackets (agree minus disagree)

- Low favourability toward social media also stems from concerns about content control and privacy.
- These concerns are prevalent in all markets (although those in the UK, Australia, and the US show greater concern about privacy than those in India, UAE and Brazil).
- Positive argument for big tech companies link these platforms with their ability to enable individuals to access information more readily and provide technological leadership and innovation.

■ Argument For Big Tech  
■ Argument Against Big Tech





# Summary

## Top 8 takeouts

- 1.** Cost of living is the dominant issue facing UK respondents, driving attitudes towards energy dependency and action on climate change.
- 2.** Economic recovery after the pandemic and jobs is also important, but UK respondents are the most net pessimistic about their economy when compared to other markets surveyed.
- 3.** Respondents believe the rising price of fuel and other essential commodities, as well as the war in Ukraine, as the primary factors responsible for price increases, and in response individuals are reducing their spending on everyday goods and discretionary items.
- 4.** Spending levels relative to saving have dramatically increased as the cost-of-living rises. Respondents are not able to keep up with the cost of living rises equally, with those already on higher incomes more likely to have received a pay rise than those with lower incomes.
- 5.** Despite thinking environmental policies are to blame for increased prices, respondents still want action on climate change and support moves to renewables – but do not support it if it means increased prices or taxes. Rather, climate change is perceived to be an international issue that needs to be dealt with.
- 6.** There has been a fairly dramatic change in how respondents perceive non-renewable energy sources since the start of 2021, particularly gas and nuclear which have seen increased net support. This is likely driven by cost-of-living pressures resulting in a desire to keep prices down, for which respondents increasingly see the Government as responsible for.
- 7.** War and conflict is now the most pressing international issue. Respondents are particularly concerned, likely due to the proximity of the UK to Ukraine.
- 8.** Traditional media is most trusted over social media platforms and online platforms for as credible and trustworthy sources of news and information.

A blurred background image of a conference room. Several people are visible, with their hands raised in the air, suggesting an interactive session or a Q&A period. The room has large windows on the right side, and the overall lighting is soft and professional.

# Q&A



**CIT GROUP**