



# Australia Omnibus Survey

September 2022



C|T GROUP

If you have any questions or if you would like to discuss further, please do not hesitate to call us on +61 (0) 2 9103 9200 or email [sydney@ctgroup.com](mailto:sydney@ctgroup.com)



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# Methodology



- An online survey was conducted in six markets:
  - Australia: n=2,000 residents between 11-18 July 2022
  - UK: 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. For Australia, the results are representative of age, gender, location, past vote and education.
- The maximum margin of error for this sample size is  $\pm 2.2\%$  for Australia and the UK and  $\pm 2.5\%$  for other markets at a 95% confidence level. Higher margins of error exist for smaller subsamples and net scores.
- Where appropriate, results are shown for all markets in which a particular question was asked.
- This is Round 5 of the omnibus survey in Australia. At relevant questions, results for this round are compared with those from:
  - Round 4, conducted between 22-30 January 2021 with a sample size of n=1,992
  - Round 3, conducted between 21-25 August 2020 with a sample size of n=2,011
  - Round 2, conducted between 20-23 March 2020 with a sample size of n=1,521.





# Issues

# Issues (Track)

- While cost of living is well-known to have become the key concern for Australians, healthcare is also steadily gaining in perceived importance, becoming almost as pressing as cost of living. It is clearly the number one issue for older Australians (aged 55+).
- Broader economic concerns have been redirected away from the post-COVID-19 economic recovery and creating jobs towards a strong focus on reducing the cost of living.
- While overt concerns about stopping the spread of COVID-19 have reduced substantially, these may also be driving the increased importance on access to healthcare and reducing hospital wait times as respondents potentially focus on the ability of the hospital system to absorb both seasonal flu cases and lingering COVID cases.



Below is a list of top priorities that others have told us they'd like the Federal Government to do something about. Thinking about what's happening in Australia today, please select the most & least important priority that you would like the Federal Government to do something about.

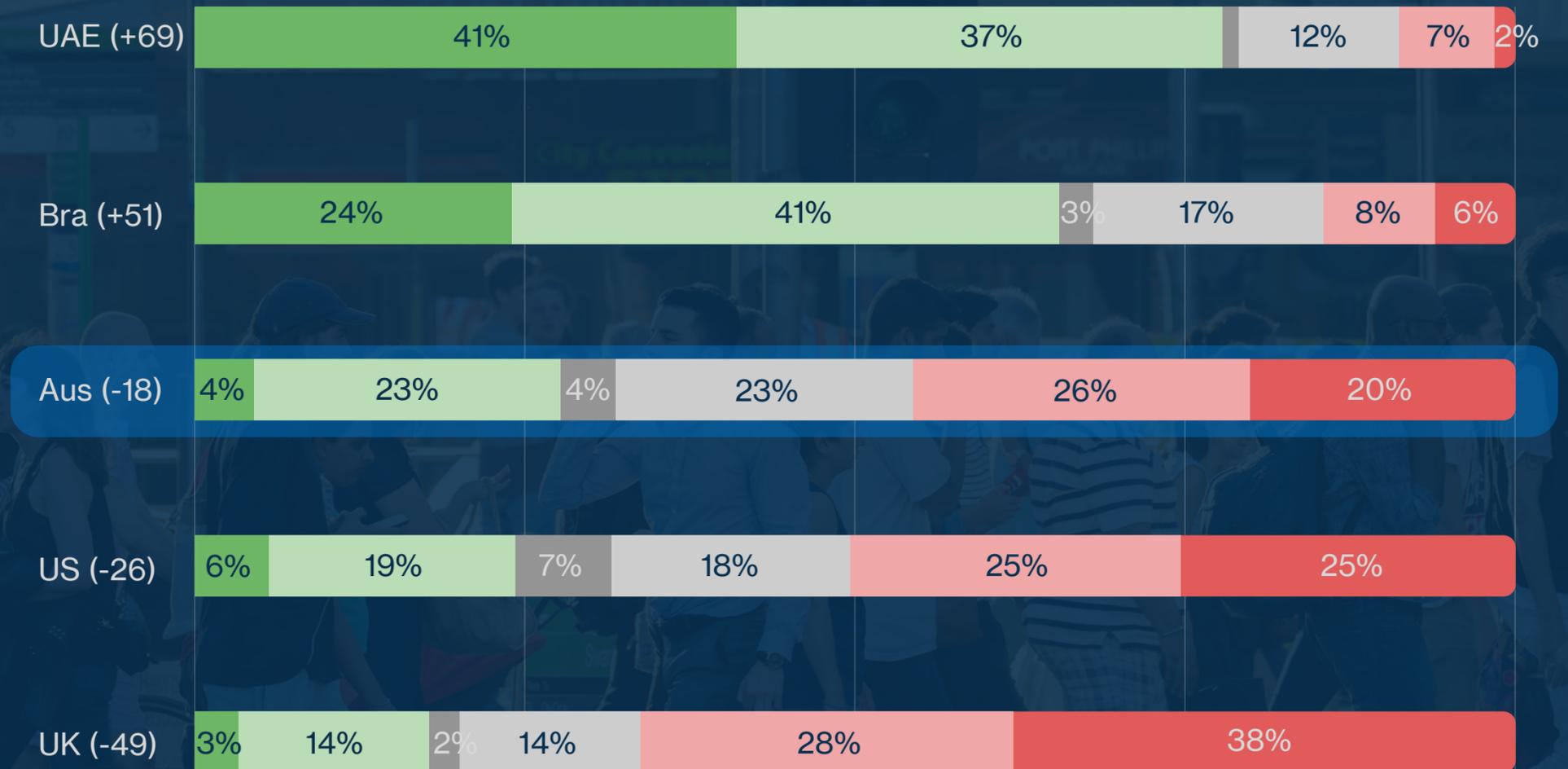
Base: All participants (Jul-22: n=2,000; Jan-21: n=1,992)  
 Note minor wording changes were made to most issues between tracks

# Economic Outlook



# Economic Outlook

- Despite the slight deterioration in economic concerns, Australians are fairly pessimistic about Australia's economy over the short to medium-term.
- This is also true for respondents in the US and the UK (who are particularly pessimistic).
- In contrast, respondents in the UAE and Brazil are considerably optimistic 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)

■ Much better ■ A little better ■ Unsure ■ About the same ■ A little worse ■ Much worse

# Finances

**save 4c**  
with your fuel discount receipt  
from participating retail outlets.  
See in store for conditions.  
per litre

Unleaded  
+ ethanol **146.9**

Diesel **123.9**

Unleaded 95 **163.9**

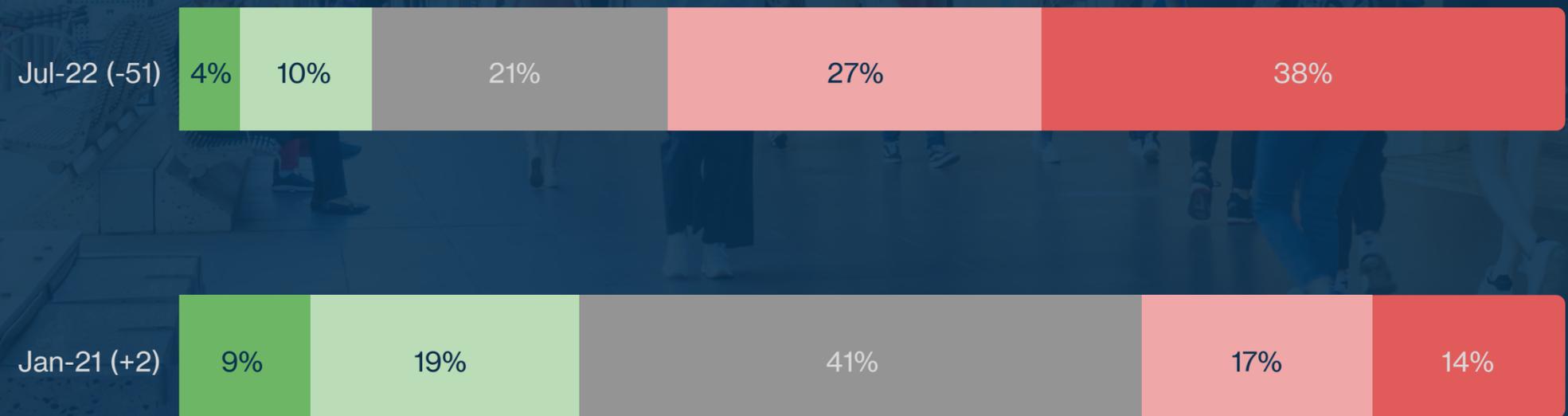
V-Power **171.9**

er



# Personal Spending/Saving (Track)

- Spending and saving patterns have dramatically changed since earlier in the pandemic.
- Where previously many Australians were saving more, now the clear majority say they have spent more than they have saved in the past 12 months (65%).
- This is seen in other markets as well.
- This is disproportionately affecting lower-income Australians (net -60pts among those with a household income under \$41,600).



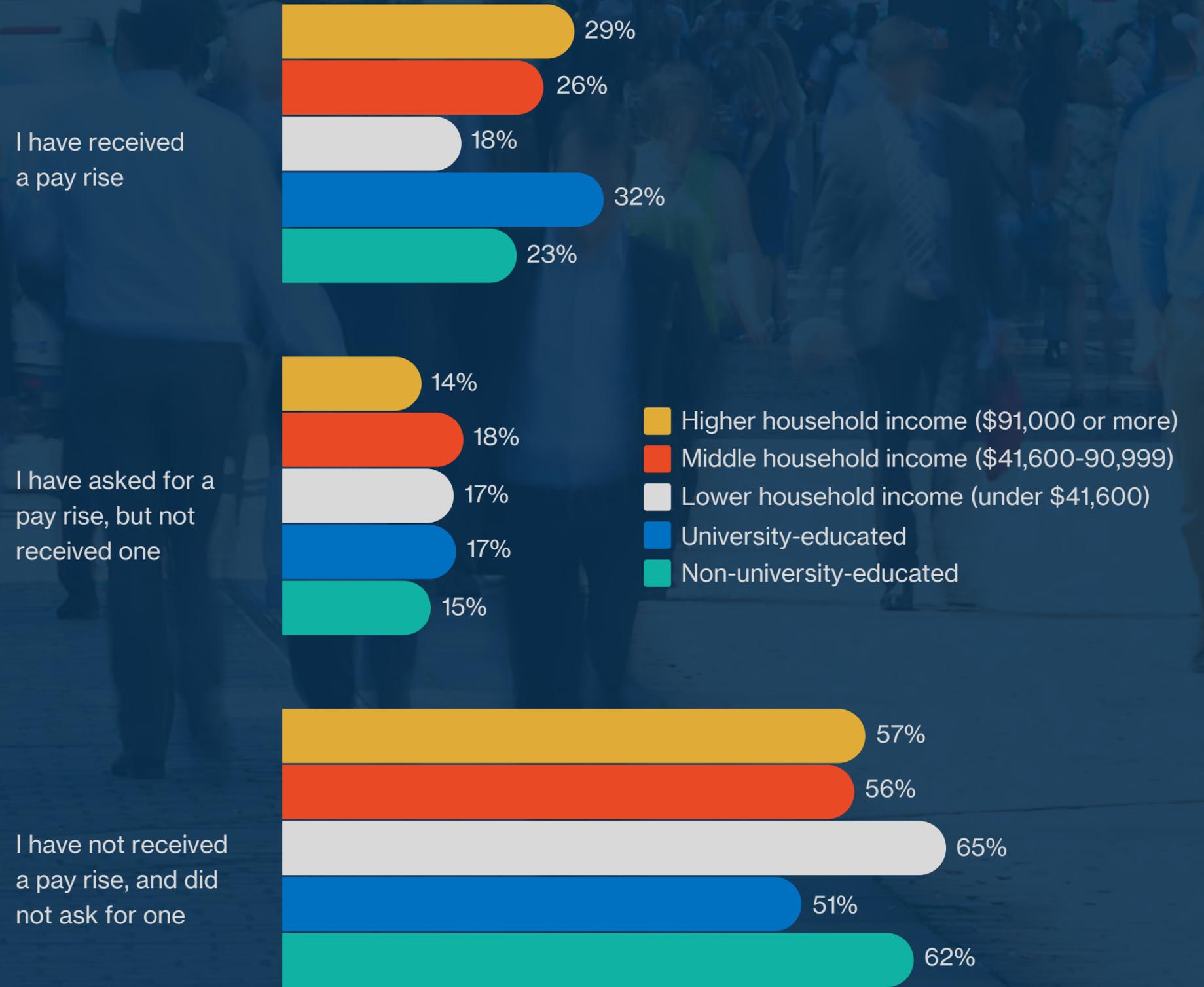
■ Spent MUCH LESS than I have saved   
 ■ Spent A LITTLE LESS than I have saved   
 ■ Spent about the same as I have saved   
 ■ Spent A LITTLE MORE than I have saved   
 ■ Spent MUCH MORE than I have saved

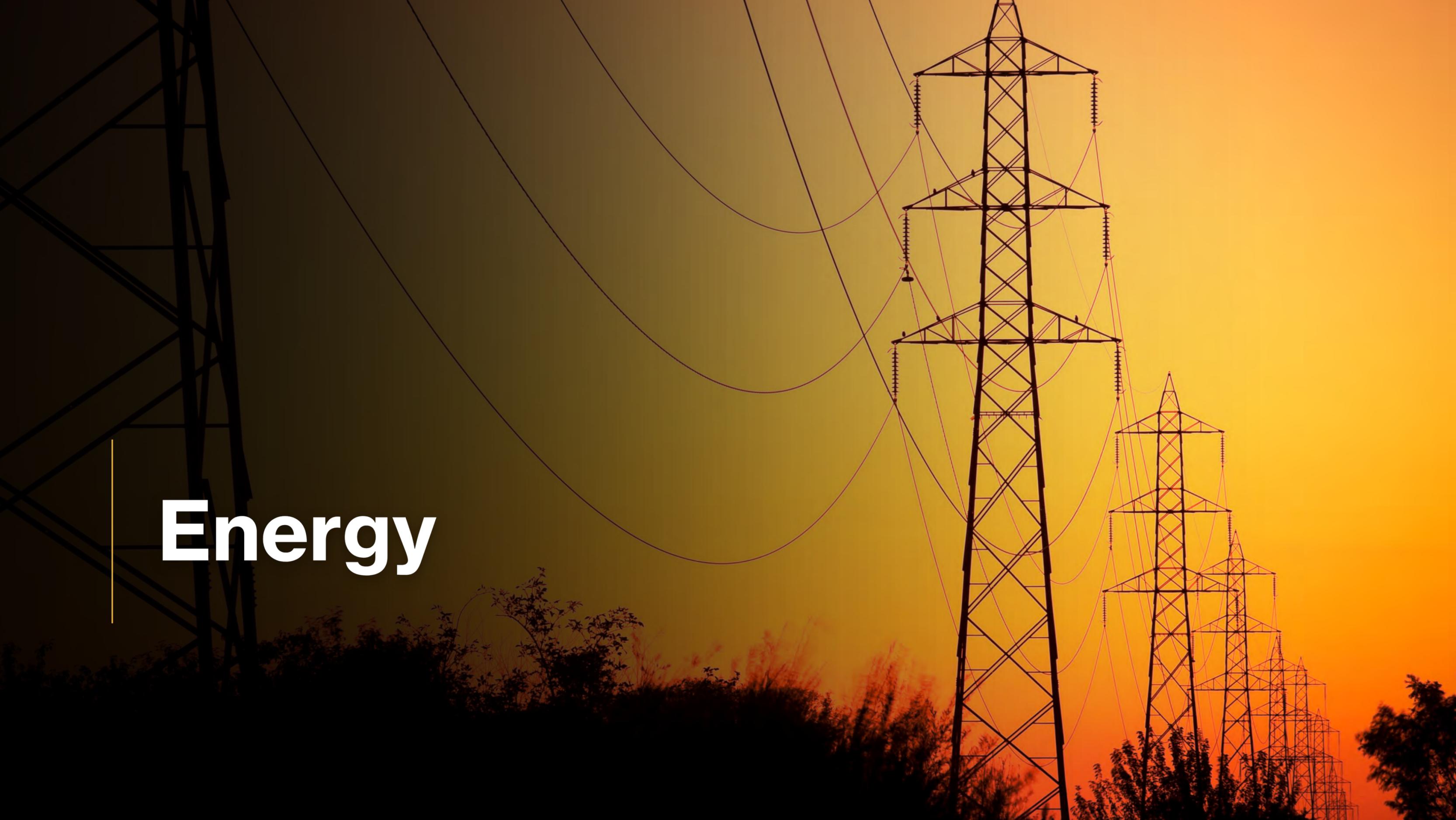
To what extent do you agree or disagree with the following statements?  
 Base: All participants (Jul-22: n=2,000; Aug-20: n=2,011)  
 Net score is agree minus disagree

# Pay Rises by Income and Education

- Many Australians are struggling to keep up with rising cost of living through corresponding pay rises.
- Those already on higher incomes are far more likely to have received a pay rise than those with lower incomes. Similarly, those with a university education are more likely to have received a pay rise.

Thinking about the last few months, which of the following applies to you?  
 Base: Participants who are employed (n=1,123)



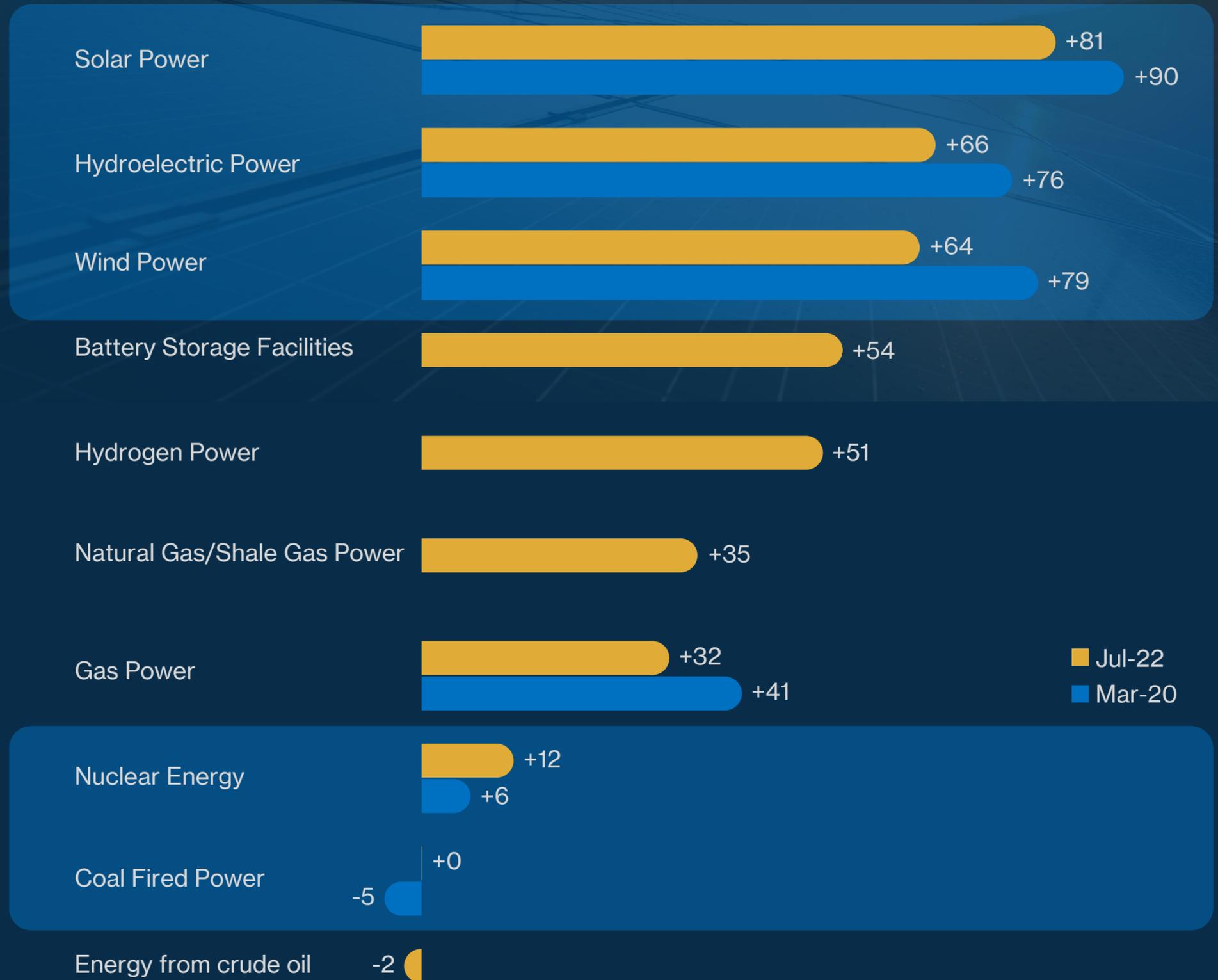
A photograph of several high-voltage power transmission towers and their associated power lines, silhouetted against a bright orange and yellow sunset sky. The towers are arranged in a receding line from the foreground to the background. The power lines are visible as thin, dark lines stretching across the sky. The overall mood is industrial and serene.

# Energy

## Support for Energy Sources: Net Supportive (Track)

- There has been a fairly dramatic change in how Australians perceive energy sources since the start of 2020.
- Support for renewables has softened, while support for coal has increased (net +5pts).
- Australians are net neutral toward oil, rather than generally opposed.
- Support for nuclear energy has also increased (net +6pts).

To what extent do you support or oppose the use of the following energy sources to generate power in Australia?  
Base: All participants (Jul-22: n=2,000; Mar-20 n=1,521)  
Net score is support minus oppose



# Energy Nationalism

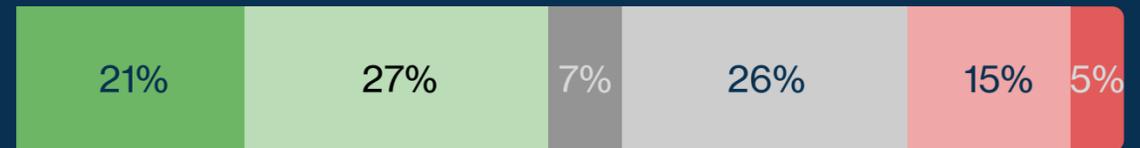
Australia should not be reliant on other countries to supply its energy needs (+65)



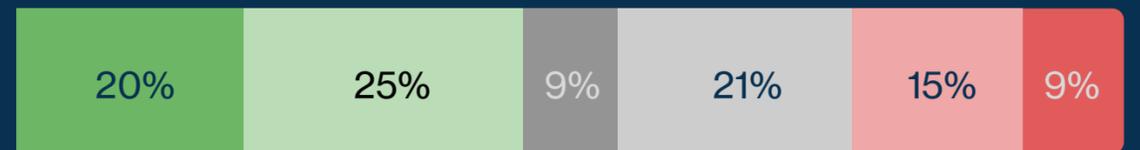
The Australian Government should legislate that a minimum amount of the gas and coal Australia produces stays in Australia (+54)



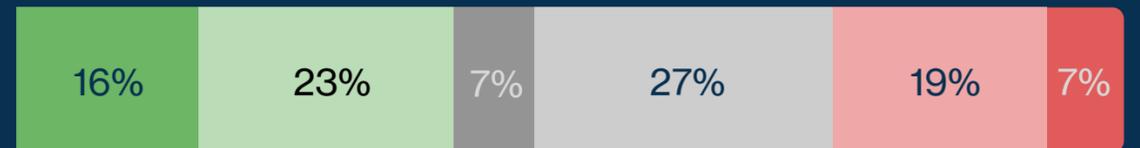
Australia should keep all of the gas it produces, rather than sending it overseas (+28)



Cost of living pressures have been made worse by the world trying to transition to renewable energy sources too quickly (+21)



Australia should keep all of the coal it produces, rather than sending it overseas (+13)



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

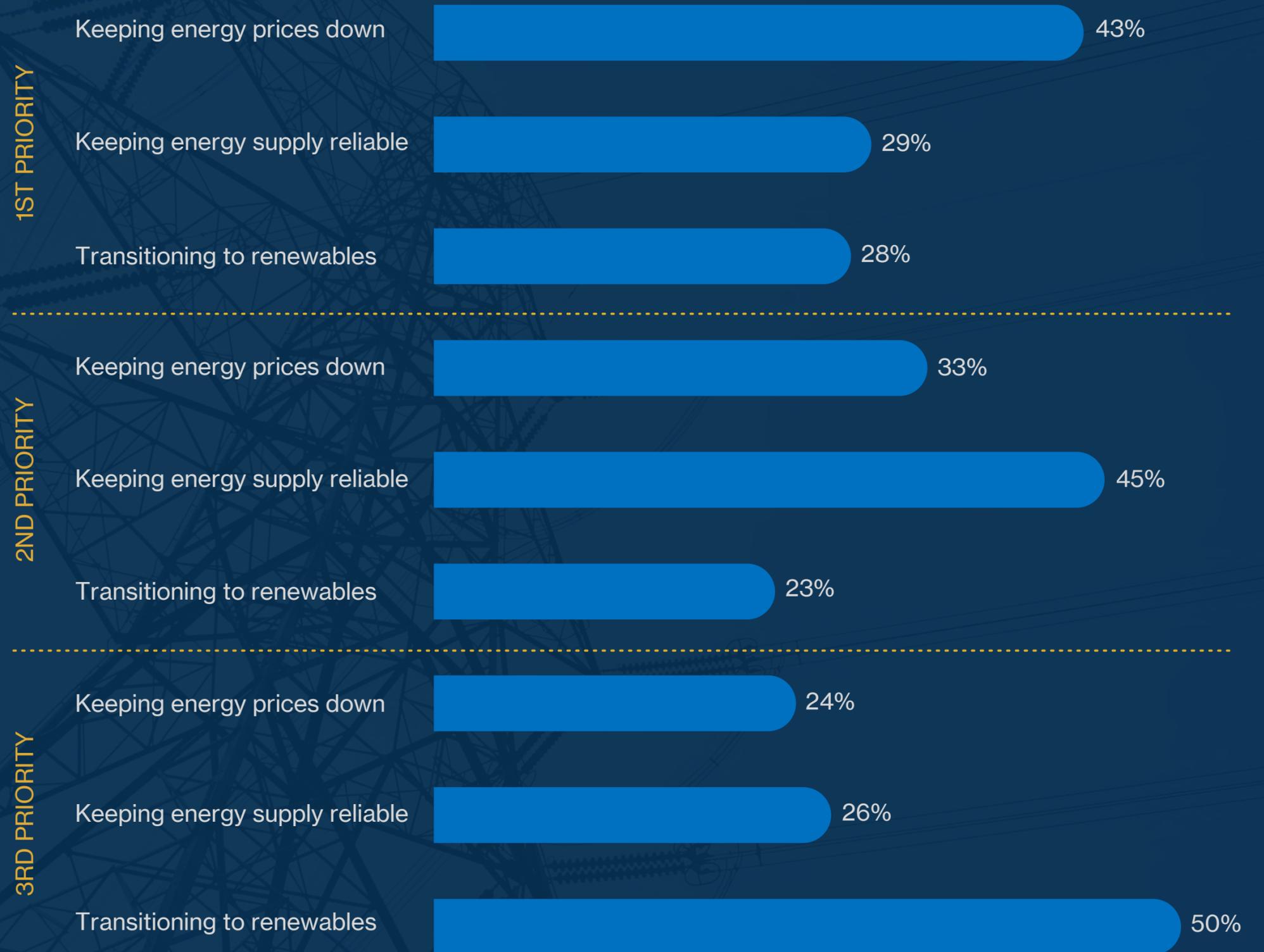
- The softening of support for renewables likely reflects wide agreement that cost-of-living pressures, as salient as they are, have been exacerbated by trying to switch to renewables too quickly.
- There is a strong sentiment of energy nationalism, with high agreement that the Federal Government should legislate that a minimum amount of resources produced should stay in Australia. These attitudes also reflect global sentiment in the context of rising cost of living.
- Older Australians are the most likely to agree with all statements (except for keeping all coal).

To what extent do you support or oppose the use of the following energy sources to generate power in Australia?  
 Base: All participants (Jul-22: n=2,000; Mar-20 n=1,521)  
 Net score is support minus oppose

# Energy Policy Priorities

- Keeping prices down is clearly the greatest priority for energy for Australians (and in other markets), with renewables less important.
- Reliability is also more important than renewables, overall.
- This policy preference is consistent across countries.

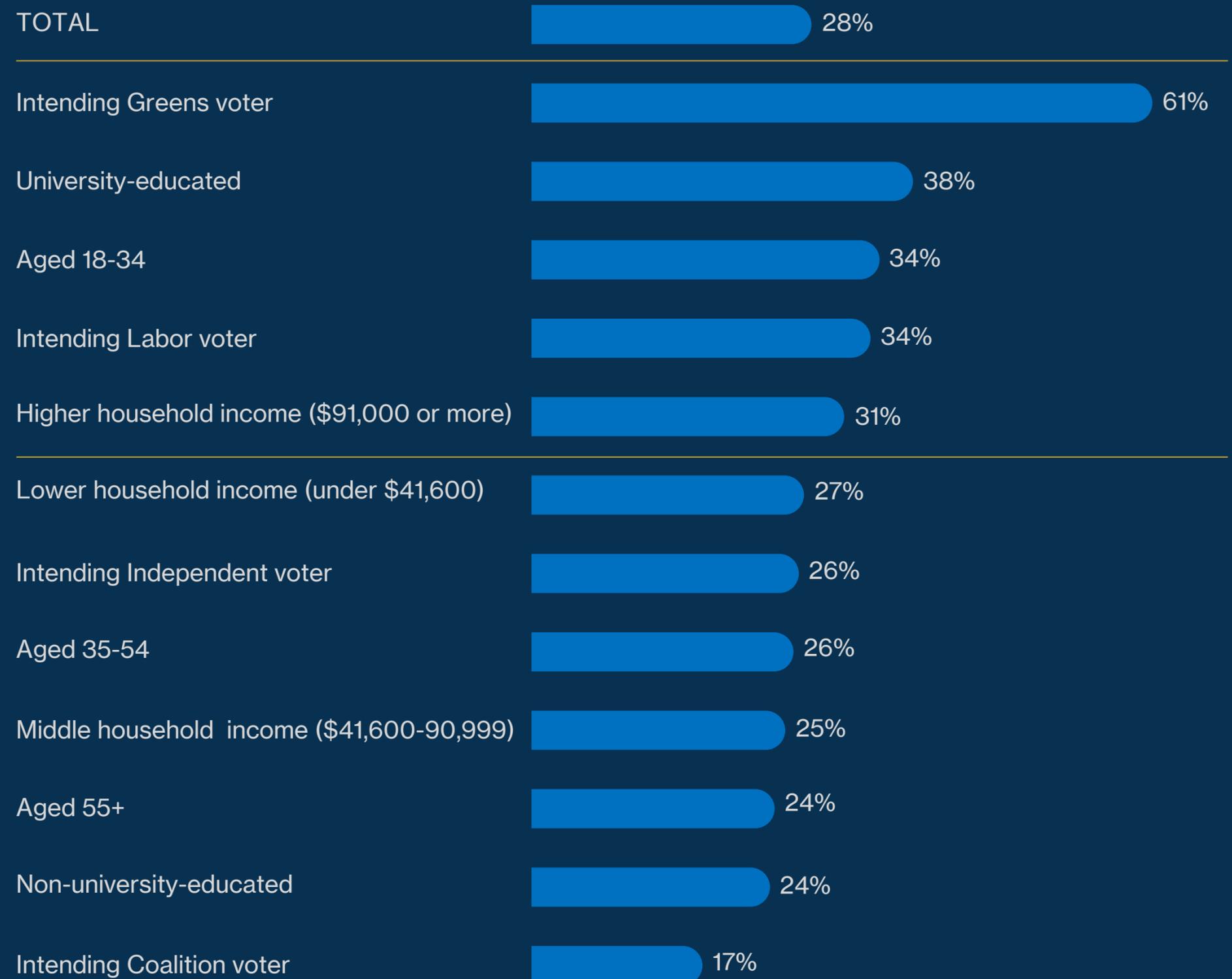
Thinking about the future of Australia's energy supply, which of these do you think the Australian Government should prioritise first? Which should it prioritise second? And which should it prioritise last?  
Base: All participants (n=2,000)



# 'Transitioning to Renewables' as Highest Priority by Demographic

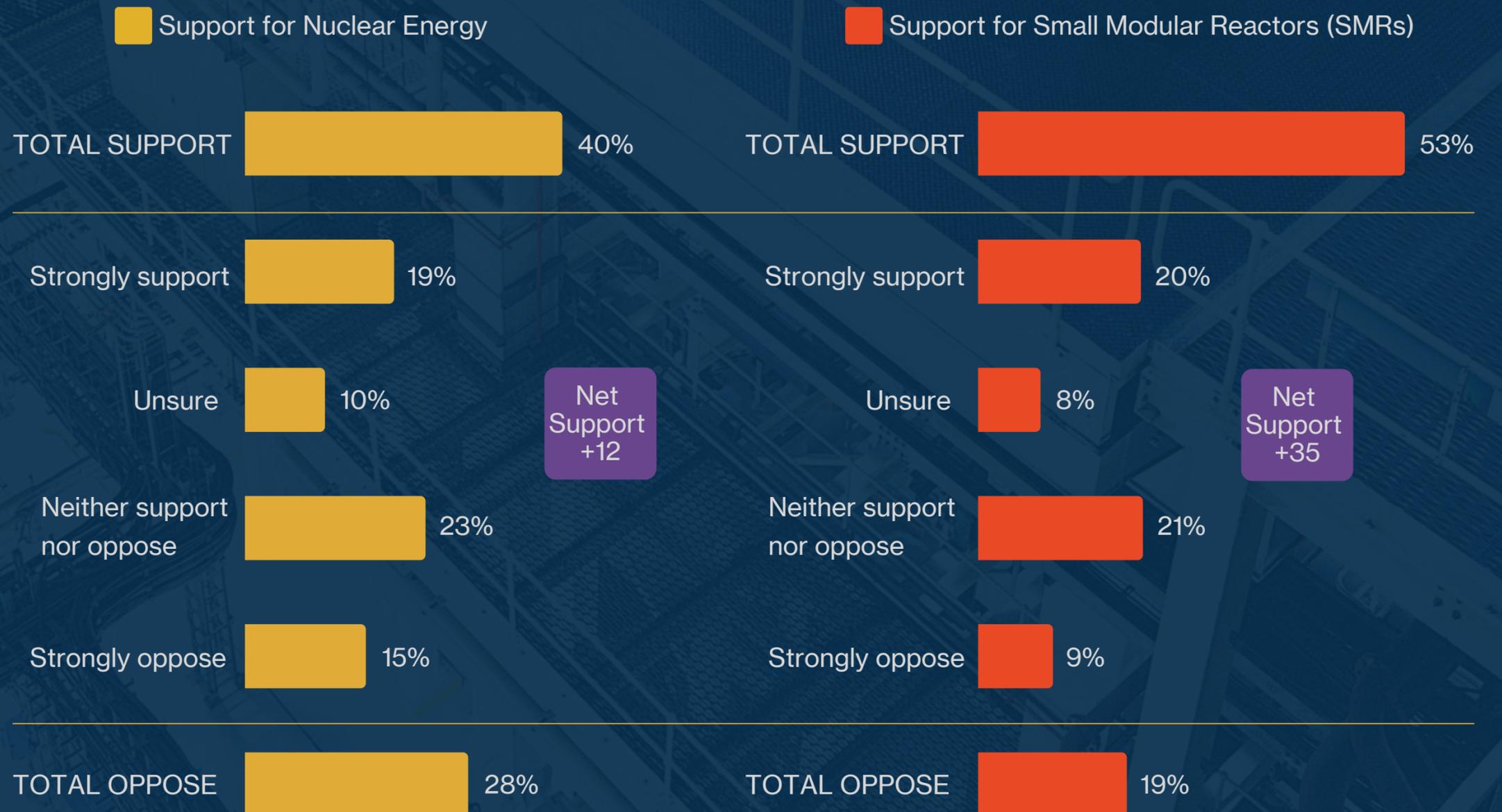
- Priority for renewables clearly splits the population.
- It is a key differentiator between Greens, Labor and Coalition voters, between age groups, between education levels and between income groups.

Thinking about the future of Australia's energy supply, which of these do you think the Australian Government should prioritise first? Which should it prioritise second? And which should it prioritise last?  
 Base: All participants (n=2,000)



# Support for Nuclear Energy and Small Modular Reactors

- As shown earlier, support for nuclear energy has increased (net +6pts).
- There is also substantial support for SMRs, with support levels higher than for nuclear energy overall.



To what extent do you support or oppose the use of the following energy sources to generate power in Australia? [Participant presented with benefits of SMRs over traditional nuclear reactors]. Having read this, to what extent do you support or oppose the use of Small Modular Reactors (SMRs) to generate power in Australia?  
 Base: All participants (n=2,000)  
 Net score is support minus oppose

# International Issues and Defence



# Important International Issues (Track)



- Where trade was previously a primary concern, this has subsided, replaced by concern about war and conflict.
- Australians remain highly concerned about China, just as much as they were 18 months ago.
- Older Australians (aged 55+) and intending Coalition voters are the most concerned (61% and 51% respectively view China's rising global influence as important).
- In addition, favourability toward China remains extremely low (-53pts).
- Respondents in the UK and US are less concerned about China (28% view this as important in each country), likely due to their geographic distance. However, Indians are similarly concerned about China (37%).
- It is possible that, while China remains on the radar, concerns have shifted slightly away from potential economic coercion from China toward military conflict (with the war in Ukraine making war in general more salient).

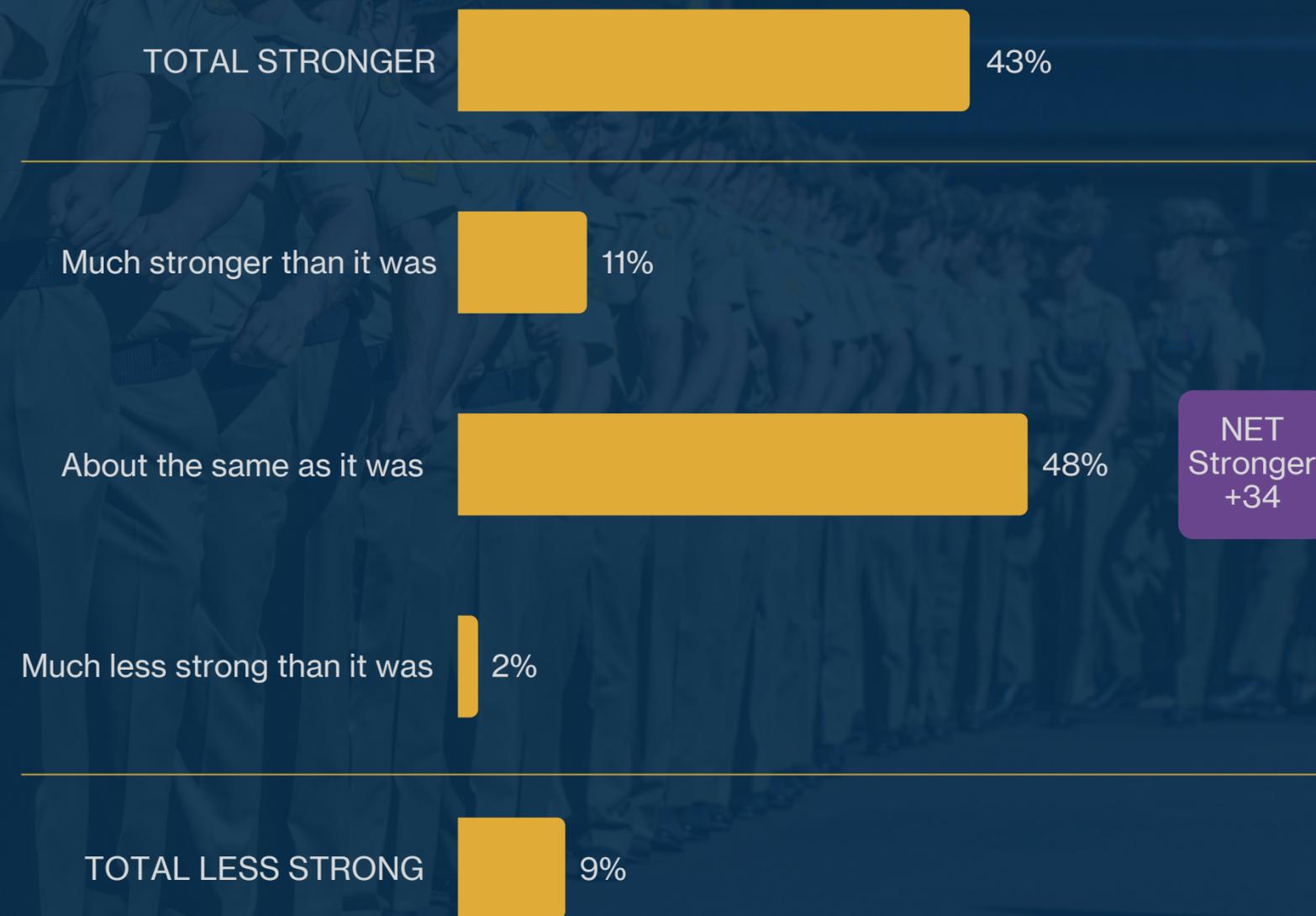
Which of the following international issues do you view as important right now?  
 Base: All participants (Jul-22: n=2,000; Jan-21: n=1,992)

# Perceived Threat to Australia from Other Nations

- Reflecting concern about warfare, close to half of Australians think the threat from other nations is now stronger than it was 12 months ago.

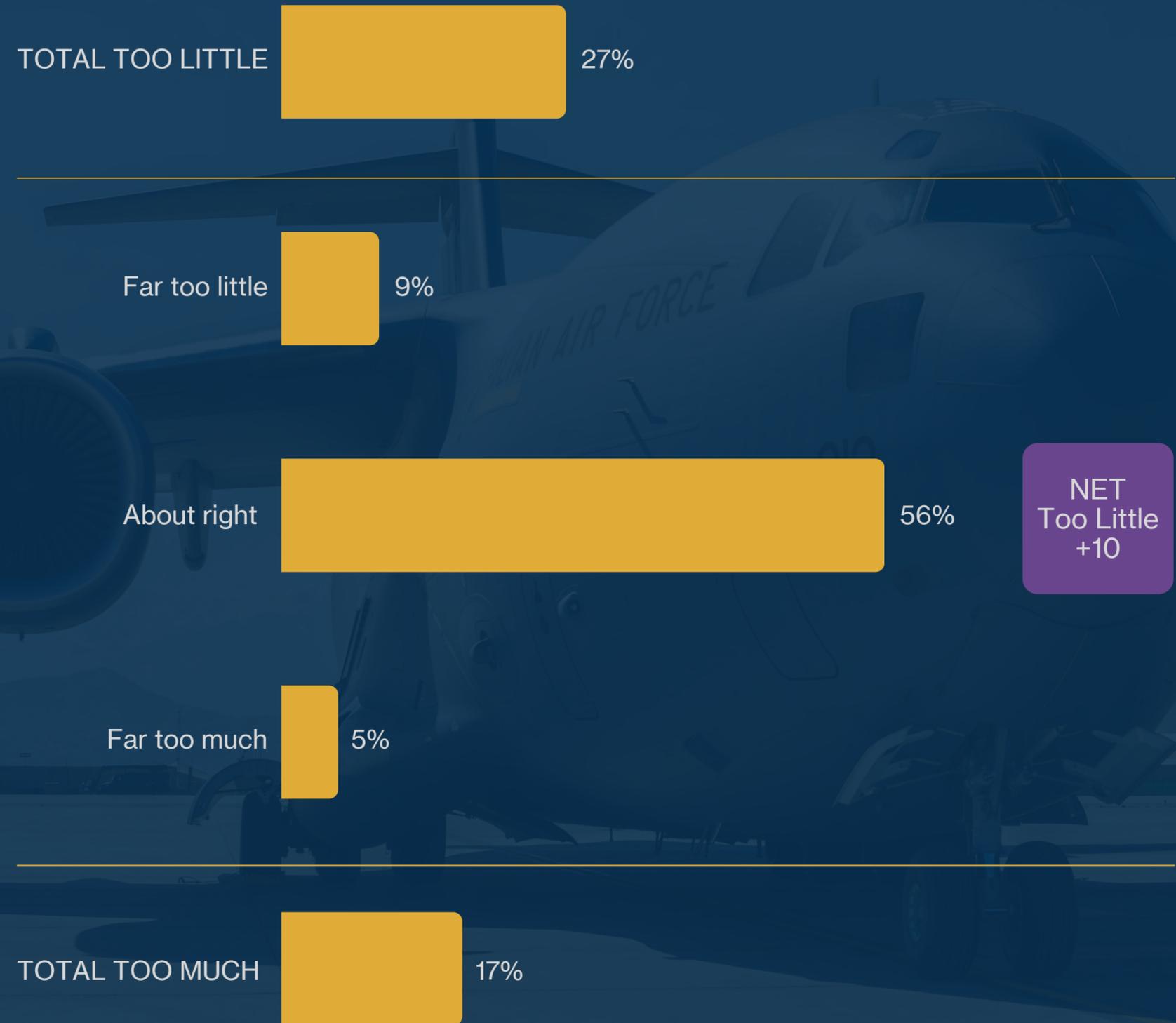
Compared with 12 months ago, would you say the threat to Australia from other nations is now...  
Base: All participants (n=2,000)  
Net score is stronger minus less strong

Compared with 12 months ago, would you say the threat to Australia from other nations is now...



# Appropriateness of Australia's Spending on Defence

- Australians tend to support the country's current level of defence spending (which has recently increased), although there is fairly substantial appetite for increasing this further.
- Tied to this, Australians are strongly favourable toward the defence industry (net +39pts favourable).



[Participant given context on Australia's defence spending as a proportion of GDP relative to some other countries].  
In your opinion, is Australia's spending on defence ...  
Base: All participants (n=2,000)  
Net score is too little minus too much

A large, modern glass building with the Google logo prominently displayed on its facade. The building is surrounded by lush greenery, including trees and bushes. The sky is clear and blue. The Google logo is in white, set against the dark blue glass. The building's reflection is visible in the glass panels.

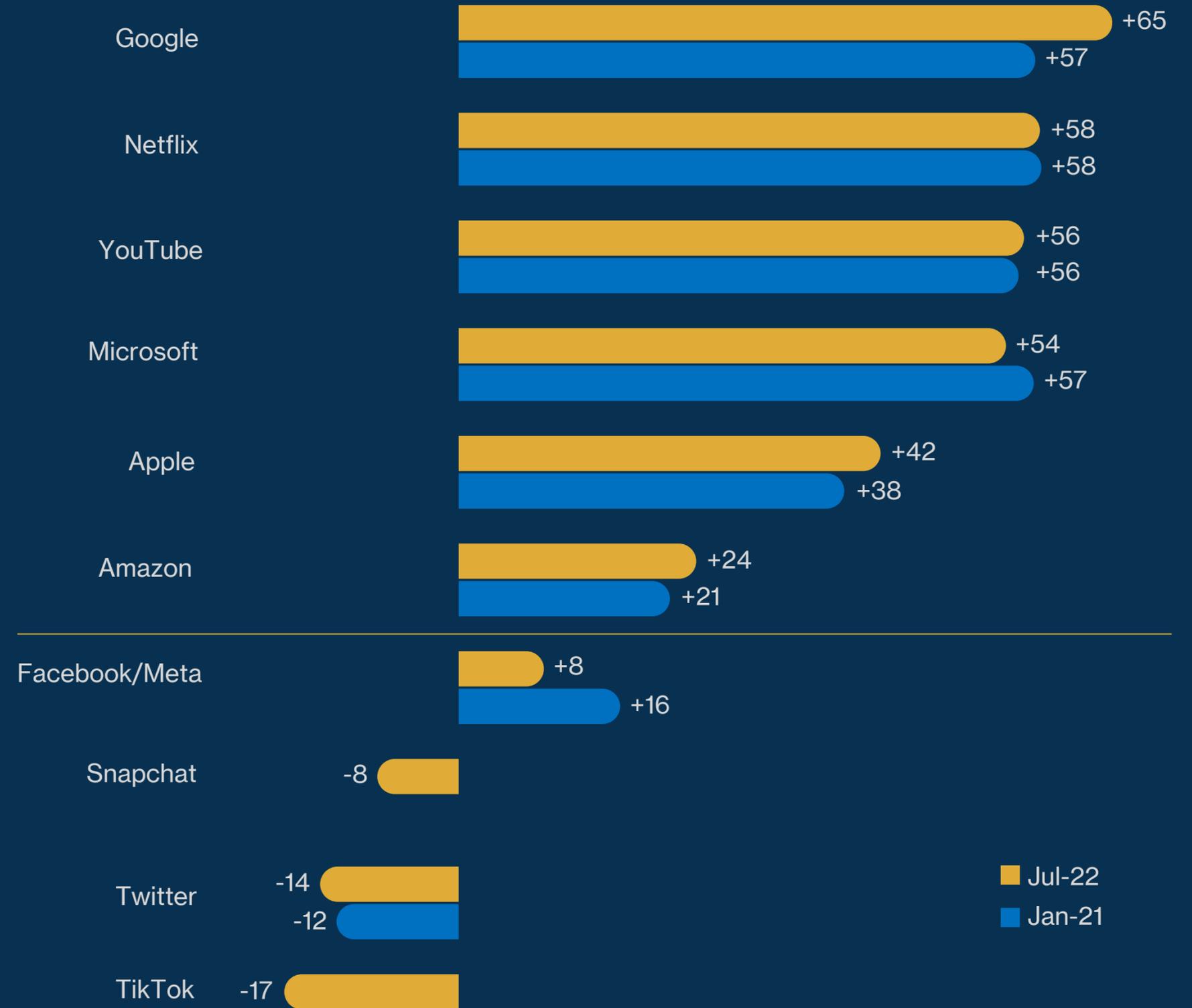
Google

**Big Tech  
& Media**

# Big Tech Favourabilities: Net Favourable (Track)

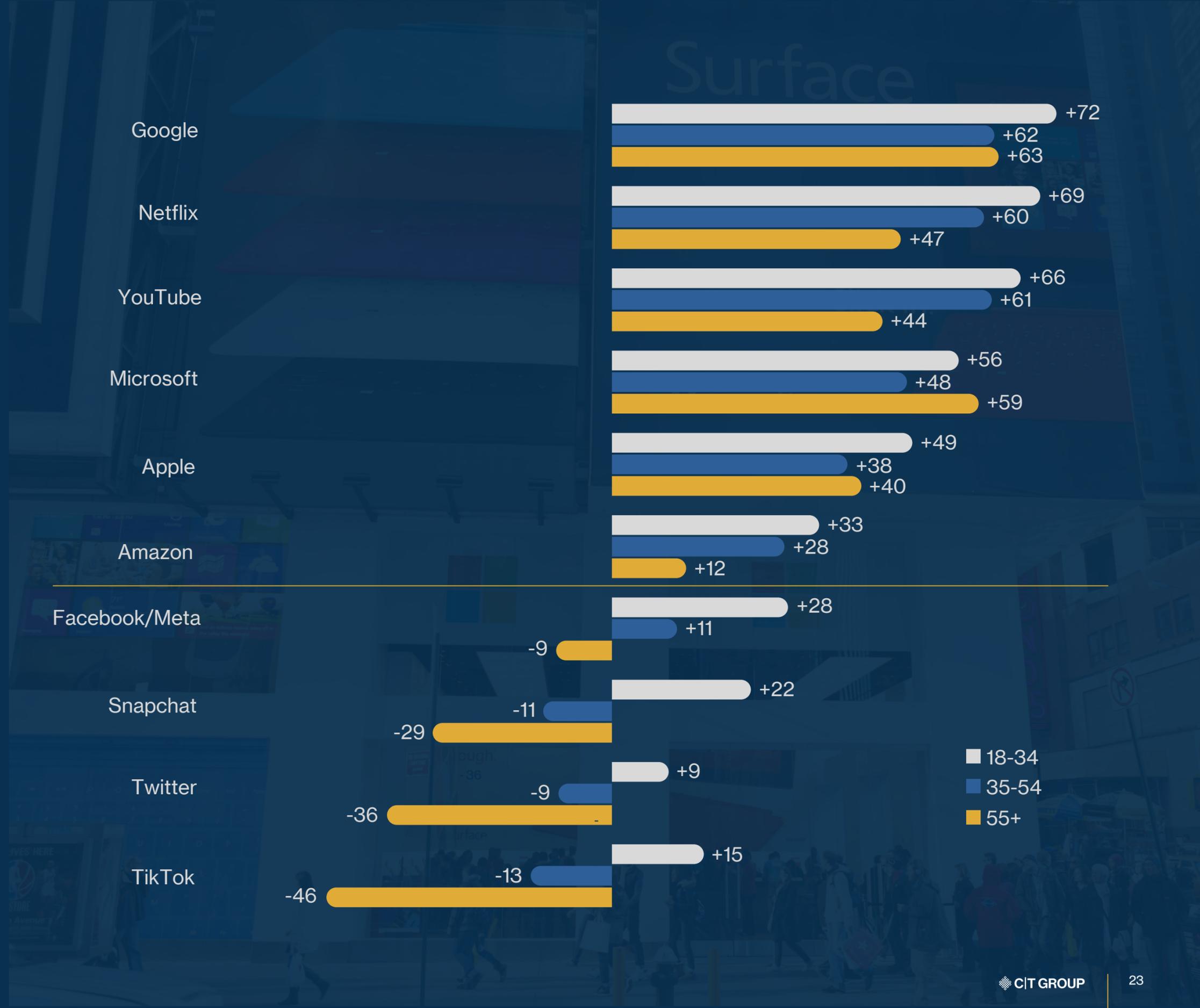
- While 'big tech' companies are often grouped together in public debate, the public clearly differentiate between more 'traditional' tech companies (software, e-commerce and entertainment) and social media platforms. While the former enjoy very strong reputations and these continue to strengthen (e.g., Google's growth in favourability), the latter are perceived fairly poorly.
- This is true in all markets.

From the list of organisations below can you please select whether you have a favourable or unfavourable view of each.  
Base: All participants (Jul-22: n=2,000; Mar-20 n=1,521)  
Net score is favourable minus unfavourable



# Big Tech Favourabilities: Net Favourable by Age

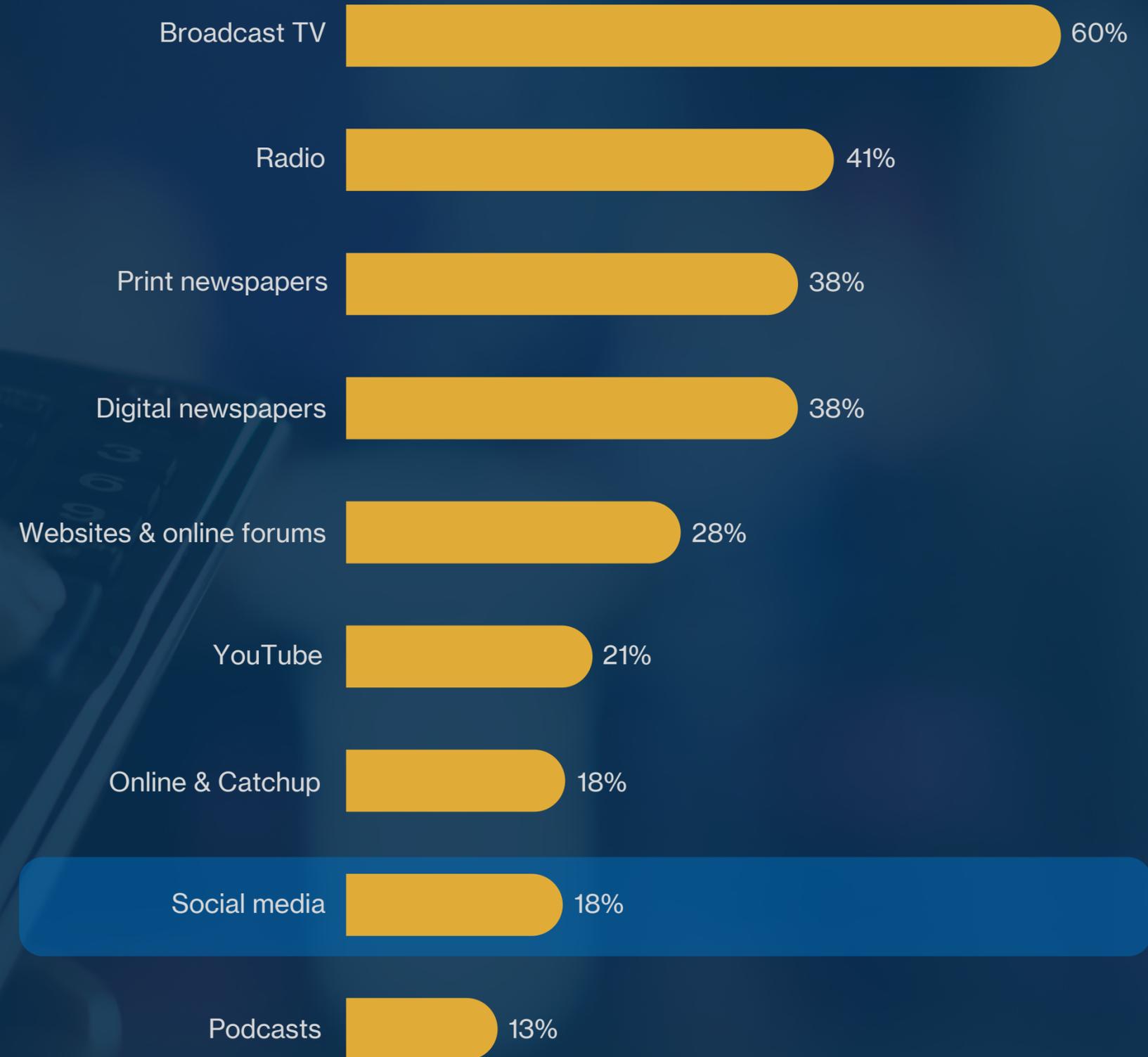
- The discrepancy between the reputations of software, e-commerce and entertainment tech companies and social media platforms stems from low favourability toward social media platforms among older Australians.



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 is favourable minus unfavourable

# Trust in Media Sources

- Low favourability toward social media is influenced by the lack of trust in the content on these platforms. This is true in all markets.
- Traditional media sources are the most trusted, along with institutional journalism. Again, this is true in all markets.
- Older Australians are the least trusting of social media and all other digital sources, while being the most trusting of broadcast TV, radio and print newspapers.

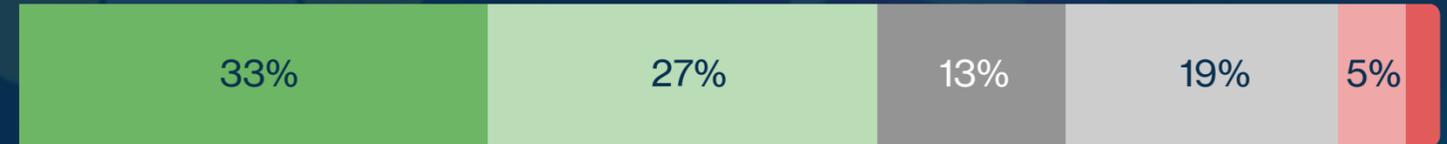


Of the following media types, which do you trust as credible and trustworthy sources of news and information?  
Base: All participants (n=2,000)

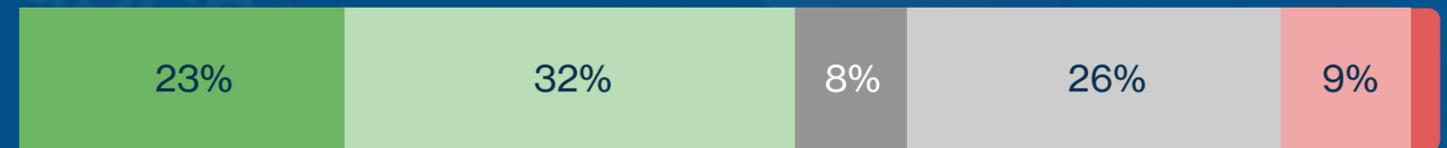
# ARGUMENTS AGAINST BIG TECH

- Low favourability toward social media also stems from concerns about content control and privacy.
- These concerns are prevalent in all markets (although those in Australia, the UK and the US show greater concern about privacy than those in India, UAE and Brazil).

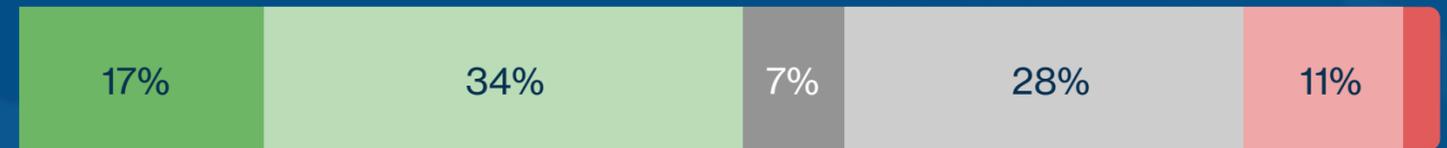
Big tech companies do not pay enough tax locally (+53)



Big tech companies have too much of a say over which types of content appear on their platforms and which don't (+43)



Big tech companies cannot be trusted to use Australians' personal data in a responsible way (+37)



There is not enough competition in the digital services and platforms market (+11)



■ 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 (favourable minus unfavourable)



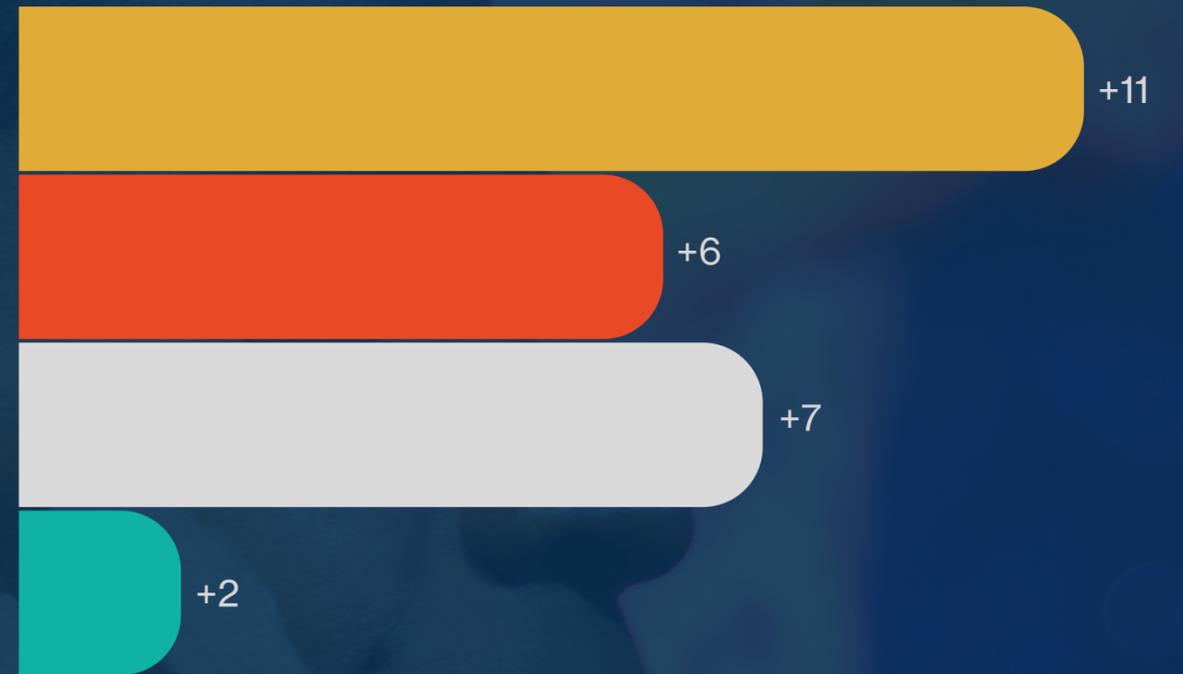
# Industry Reputation with Aboriginal and Torres Strait Islander People

# Industry Reputation with Aboriginal and Torres Strait Islander People

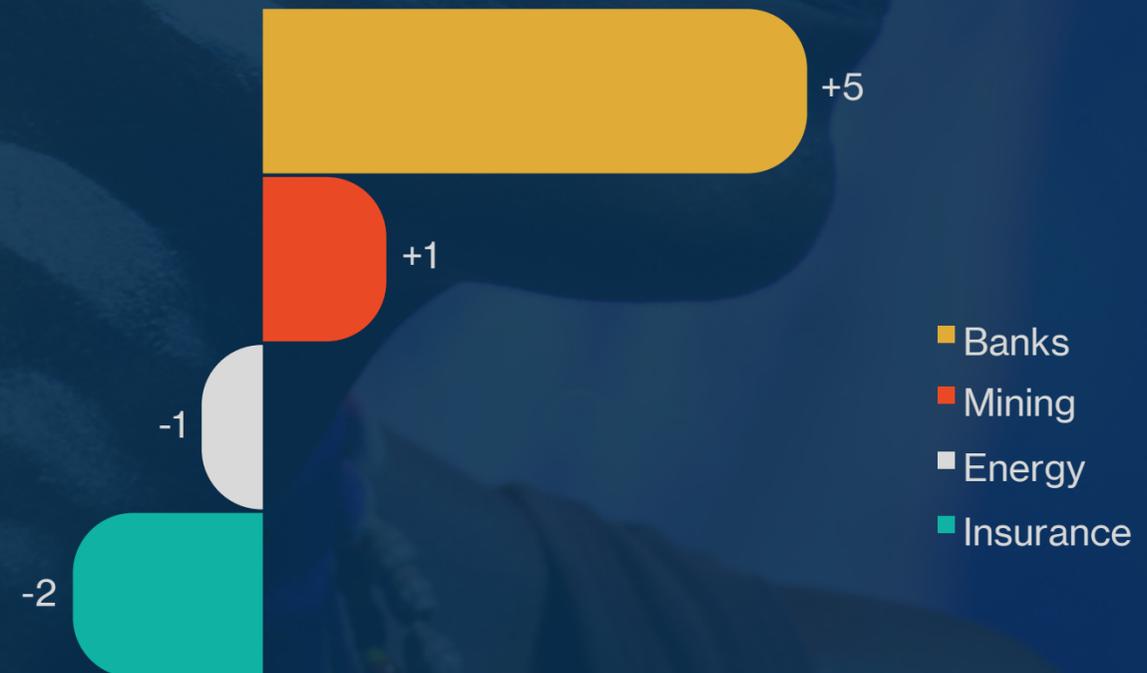
- While there is scope for improving perceptions, mining companies are seen to be performing reasonably well overall in their dealings with Aboriginal and Torres Strait Islander people.

How well would you say the following types of companies are currently performing in terms of the aspects below?  
 Base: All participants shown 'mining' and randomly shown a type of company using a Randomised Control Trial (Australia: n=2,000)  
 Net score is well minus poorly

Maintaining positive relations with Indigenous communities around their operations



Addressing the concerns of Indigenous Australians



■ Banks  
 ■ Mining  
 ■ Energy  
 ■ Insurance

# Mining Company Reputation

- In the US and Brazil, perceptions of mining companies' reputation with Indigenous peoples is weaker compared to Australia.

How well would you say the following types of companies are currently performing in terms of the aspects below?  
 Base: All participants shown 'mining' and randomly shown a type of company using a Randomised Control Trial (Australia: n=2,000)  
 Net score is well minus poorly





# Values

# Values: Net Agreement (Track)

- There has been an increase in support for immigrants being free to move to Australia and work over the course of the pandemic. This may reflect well-reported labour shortages in many industries.
- Australians are the most supportive of immigrants of the countries surveyed (Americans are +12 net supportive and respondents in the UK are -3).
- Support for foreign intervention in conflicts has also increased, potentially as a result of the war in Ukraine.

The government should take major industries, such as water and the railways, back into public ownership



Protecting animal rights is as important as protecting human rights



Possessing cannabis for personal use should NOT be a criminal offence



Good parents sometimes have to smack their children



The death penalty should be an option for the most serious crimes



Immigrants should be free to move to Australia and work



It is usually better for western countries to intervene in foreign conflicts than to do nothing



All good morals are grounded in religious teachings



■ Jul-22  
■ Aug-20

To what extent do you agree or disagree with the following statements?  
Base: All participants (Jul-22: n=2,000; Aug-20: n=2,011)  
Net score is agree minus disagree



## Summary

While cost of living sits atop the issue agenda for Australians, healthcare is also steadily gaining in perceived importance since the start of 2021.

The economic recovery is becoming less salient, although Australians are pessimistic about the future of Australia's economy.

Spending levels relative to saving have dramatically increased, as the cost-of-living rises.

Lower income households are disproportionately affected by cost-of-living rises, saving less of their money and being less likely to have received a pay rise to counter inflation.

Attitudes toward immigration have changed, with Australians now substantially net supportive of immigrants being free to move to Australia to work, likely reflecting concerns about labour shortages.

War and conflict is now the most pressing international issue. Australians see the threat from other nations increasing, and overall desire additional military expenditure.

Support for western countries intervening in foreign conflicts has increased. As China's rising influence remains a key concern, and Australians continue to be deeply unfavourable toward China.

Support for renewable energy has softened, with support for coal increasing. This reflects high agreement with both Australia needing to be self-reliant for its energy needs and cost-of-living pressures being exacerbated by trying to switch to renewables too quickly. It also reflects the transition to renewables being a lower order priority than keeping prices down and reliability high. These attitudes are seen in other countries as well.

Support for nuclear energy has increased, and Australians show strong support for Small Modular Reactors.

The public clearly differentiate between more 'traditional' tech companies (such as software and hardware companies), which have strong reputations, and social media platforms, which have relatively weak reputations.

These weak reputations reflect low trust in these sources (especially around privacy), as well as these companies having too much of a say over the content on their platforms.

While there is scope for improved perceptions, Australian mining companies are seen to be performing reasonably well in their dealings with Indigenous Australians. This includes being far ahead of their counterparts in the US and Brazil.



**C|T GROUP**

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