

# Navigating the Cost of Living Crisis in Europe

A Comparative Study  
by More in Common

2 September 2022



# About More in Common

More in Common is an **international initiative** set up in 2017 to build societies that are stronger, more united, and more resilient to the increasing **threats of polarisation and social division.**

We work with a wide range of groups in civil society, politics, government, business, faith, education, philanthropy and the media to connect people across lines of division.

**More in Common** has teams in France, Germany, the United Kingdom, Poland and Spain as well as the United States.

For more information please visit  
[www.moreincommon.com](http://www.moreincommon.com) or contact  
us at [contact@moreincommon.com](mailto:contact@moreincommon.com)





# Cost of Living Survey Methodology: End of July 2022



<b>Country Scope</b>	France, Germany, Poland, United Kingdom	
<b>Sample Sizes</b>	France, Germany, UK: N=2,000 per country; margin of error +/- 2%; Poland: N=1,000; margin of error +/- 3% (MOE is higher for subgroups.)	
<b>Research Partner</b>	<b>YouGov</b>	
<b>Fieldwork dates</b>	<b>France:</b> 19-26 July, 2022 <b>Germany:</b> 19-25 July, 2022 <b>Poland:</b> 18-21 July, 2022 <b>UK:</b> 19-21 July, 2022	See Appendix for dates of previous survey waves
<b>Fieldwork Method</b>	Online survey using quotas and weights to achieve demographic and political representation of adult populations	
<b>Key Details</b>	Surveys are a mix of common and tailored, nationally specific questions. In some cases, numbers do not add up to 100% due to rounding.	

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# Key findings



- **People everywhere are feeling the sting of rising prices.** The crisis is personally impacting everyone across the UK, France, Germany and Poland where it is the top issue on people's minds. Many are already struggling to cope; having to draw from savings or skip meals, particularly among disengaged and low-trust segments of the population. The vast majority believe this won't be a short crisis, with many seeing no end in sight. **Russia** is seen as mostly to blame for the crisis, but energy companies and national government are also seen as responsible. Support for the war in **Ukraine** remains fairly high, although nearly one in three Poles and Germans think their government is doing too much for Ukraine.
- **Trust in government's abilities to handle the crisis is low.** A perception that governments are not on top of the crisis has set in and will likely only get worse with winter approaching. How governments handle the crisis in the coming weeks may have lasting effects not just on their popularity but on trust in the system as a whole. Most people don't trust any political party to deal with the crisis but opposition parties are making gains everywhere, including populists and authoritarian parties such as the National Rally in France, which is seen as most trustworthy.

# Key findings



- **Unprecedented inflation could threaten social cohesion in Europe.** Coming on the heels of COVID-19, people in all countries are worried about potential social upheaval, fearing protests, strikes and people going hungry over the winter as price increases bite even further. Yellow Vest-type movements may be poised to return.
- **The crisis has not diminished people's resolve on climate goals, far from it.** Policies in favour of renewables – now seen as a way to save money and achieve energy independence receive clear support from the public, although that may be short lived especially among many low-trust groups who prefer climate commitments be put on hold.
- **Policies to deal with the crisis must bridge the short and the long term.** People are prepared to make sacrifices and pay high prices but they need to see both clear short-term relief and society-wide change to lock in long-term support. Many need immediate relief before they can look ahead. Policies that garner the most support combine short term solutions (tax cuts, price caps, taxing windfall profits and providing free alternatives to driving) as well as clear plans for long term investments.

# More in Common's Segmentation

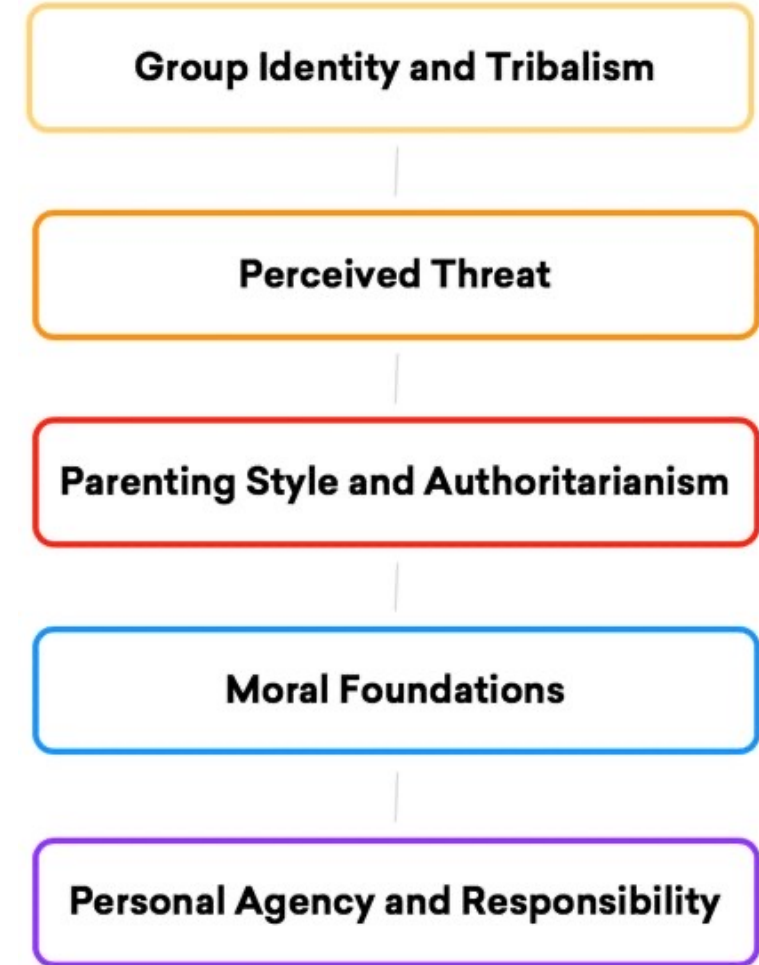
Please skip ahead to slide 12  
if you are familiar with the  
segmentation.





# About the segmentation used in this survey

- In France, Germany and the UK, More in Common has developed nationally relevant values-based segments.
- These are created entirely from questions around five areas of **core beliefs**, drawn from social psychology: group identity and tribalism, perceived threat, parenting style and authoritarianism, moral foundations, personal agency and responsibility.
- No demographic information (race, class, or gender) is used for the segmentation, though the segments created through this process often have demographic differences.
- Segmentation shows that values and beliefs are powerful in influencing how individuals form opinions about issues and their behaviour. Often, the segments are more predictive of beliefs than any other metric.





# More in Common's segmentation



Across countries, we see similar types of groups:

- **Politically—oriented segments** tend to have the strongest opinions and dominate the public conversation. They can sometimes be polarising forces in societies as they have firmly-held ideological stances which they like to actively advance.
- **Stabilising segments** are generally satisfied with the system and most likely to have an optimistic view on society. They sometimes live in a comfortable bubble.
- **Disengaged segments** are the least integrated groups. They tend to be the most precarious, which might be a reason they find less time to interact with their local communities, let alone politics or civic life.
- **Low-trust segments** cut across the left-right spectrum as well as the engaged-disengaged. They tend to have a high sense of victimhood and heightened threat perception. **Understanding their priorities and concerns is key to gaining support for the important policy changes needed to tackle shared challenges and the biggest issues of our times.** These groups can be decisive in elections.

# More in Common's segmentation in France



**Disillusioned Activists** are ideologically-driven and sensitive to issues of social justice. They feel alienated in this fight and are unhappy with the way things are going in France

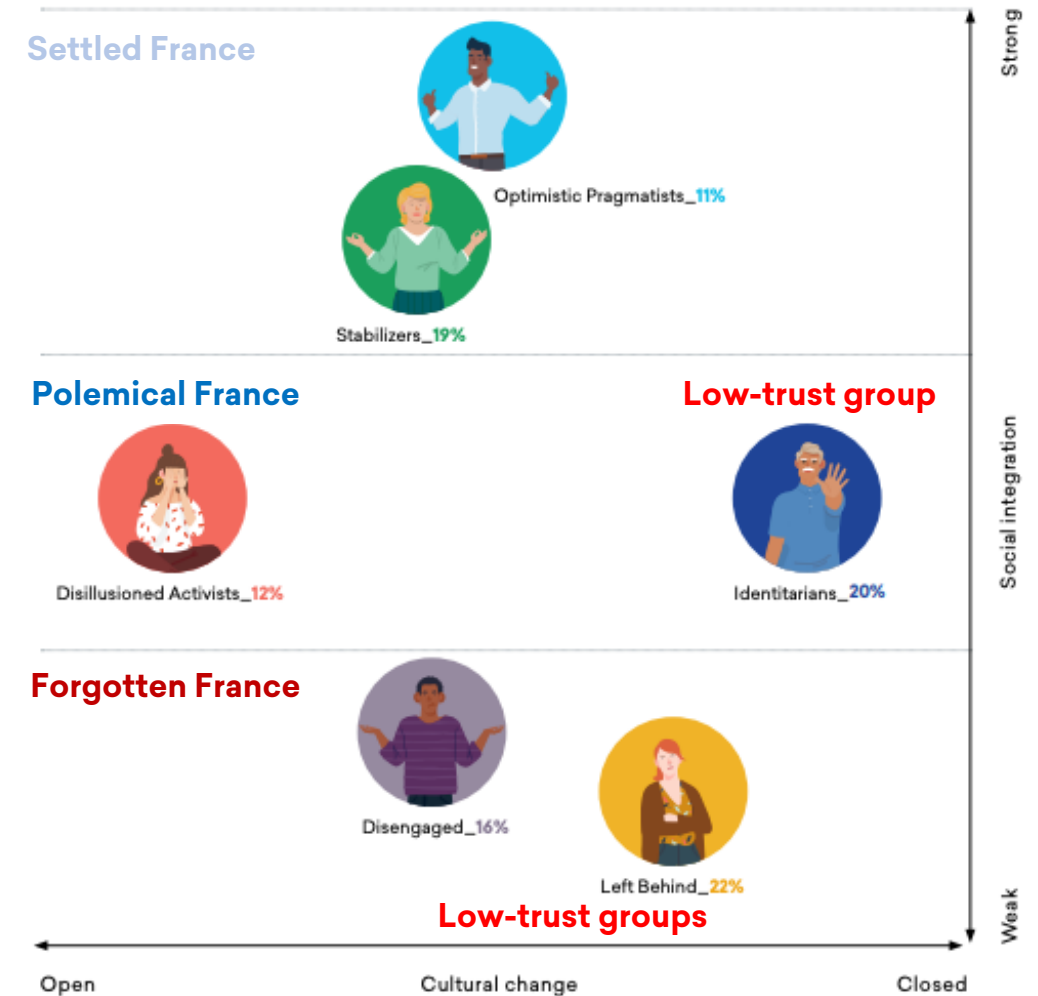
**Identitarians** feel their way of life is being threatened. Above all, they value law and order

**Stabilizers** believe in compromise and solidarity. They are more moderate in their views and are active in their local communities

**Optimistic Pragmatists** are confident things are going in the right direction. They are idealistic but believe the system works

The **Disengaged** see a lot wrong with the world but have too much going on to take the fight up themselves. They are detached from others in society, as well as politics

The **Left Behind** feel angry at the system and are resentful of others. They think everyone is doing better than them



# More in Common's segmentation in Germany



**The Open** value self-expression, open-mindedness and critical thinking

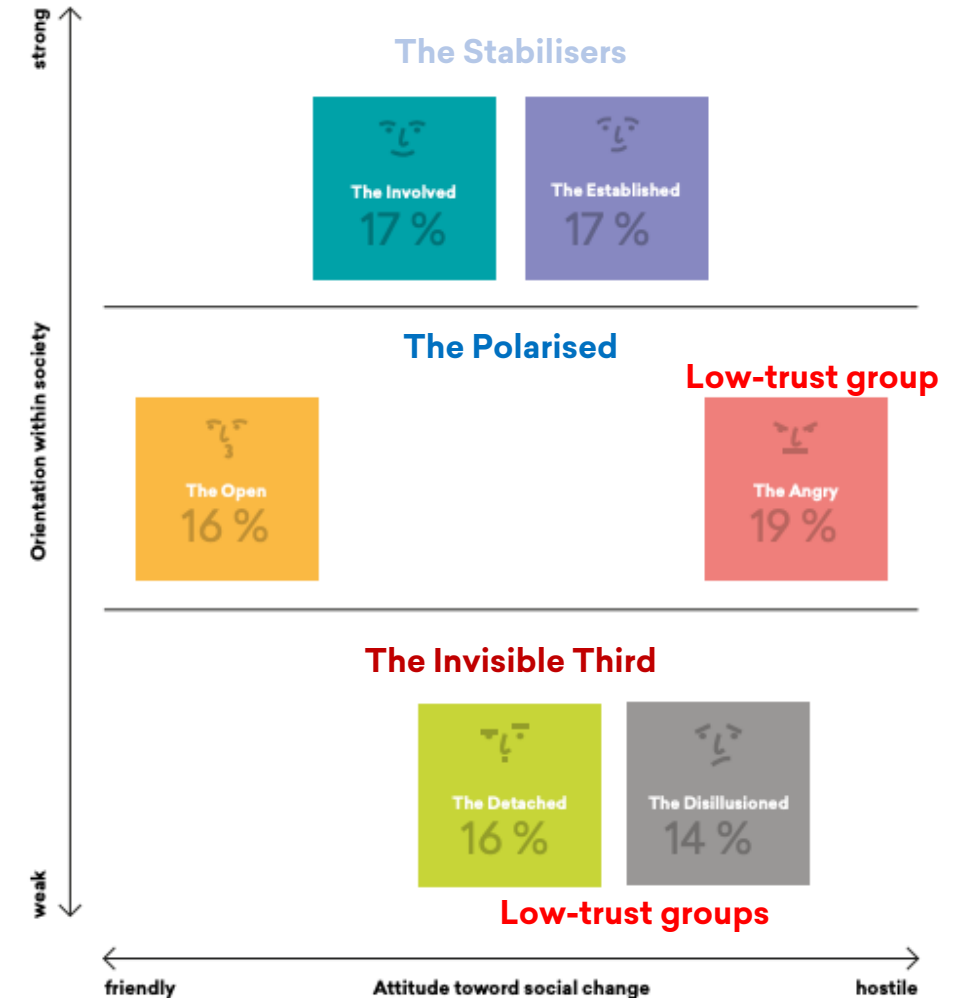
**The Involved** are civic-minded and active democrats, value togetherness, and are willing to defend progressive social achievements

**The Established** value reliability and social harmony and are most likely to feel satisfied with the status quo

**The Detached** value success and personal advancement, are less likely to think in abstract societal terms or to be interested in politics

**The Disillusioned** have lost a sense of community and long for recognition and social justice

**The Angry** value order and control in national life, are angry at the system, and have very low levels of trust



# More in Common's segmentation in the UK

## Progressive Activists



...a group for whom politics is an important part of their identity and who seek to correct longstanding injustices

**Politically-oriented**

## Civic Pragmatists



...a group that cares about others, at home or abroad. They wish for less conflict and more compromise

**Stabilising**

## Disengaged Battlers



... a group that are just getting by. They blame the system for its unfairness, but not other people

**Low-trust group**

## Established Liberals



...a group that has done well and means well towards others, but also sees a lot of good in the status quo

**Stabilising**

## Loyal Nationals



...a patriotic group, who worry that our way of life is threatened and also feel our society has become more unfair

**Low-trust group**

## Disengaged Traditionalists



...a group that values a well-ordered society and prides in hard work. They want strong leadership that keeps people in line

**Low-trust group**

## Backbone Conservatives



... a group who are proud of their country, optimistic about Britain's future outside of Europe, and who keenly follow the news

**Politically-oriented**



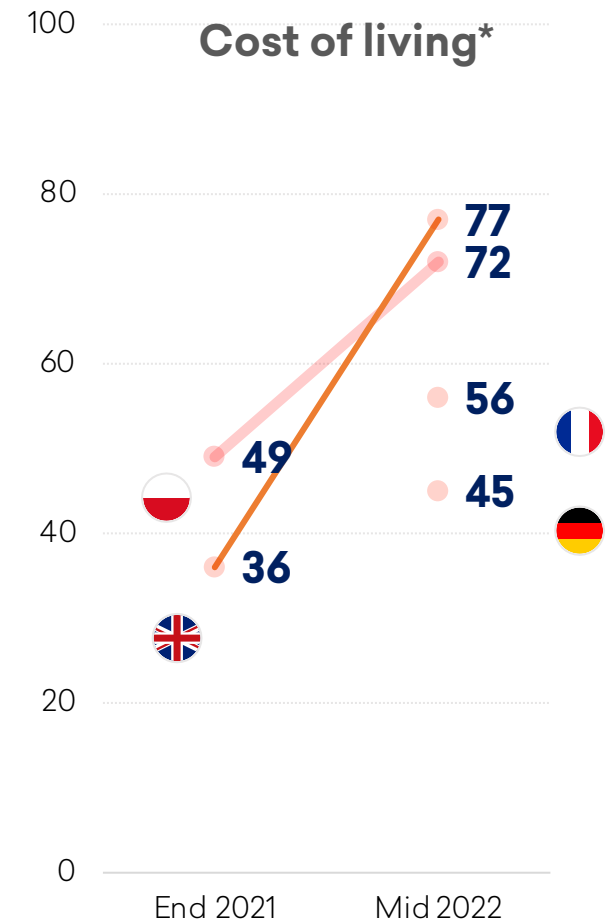
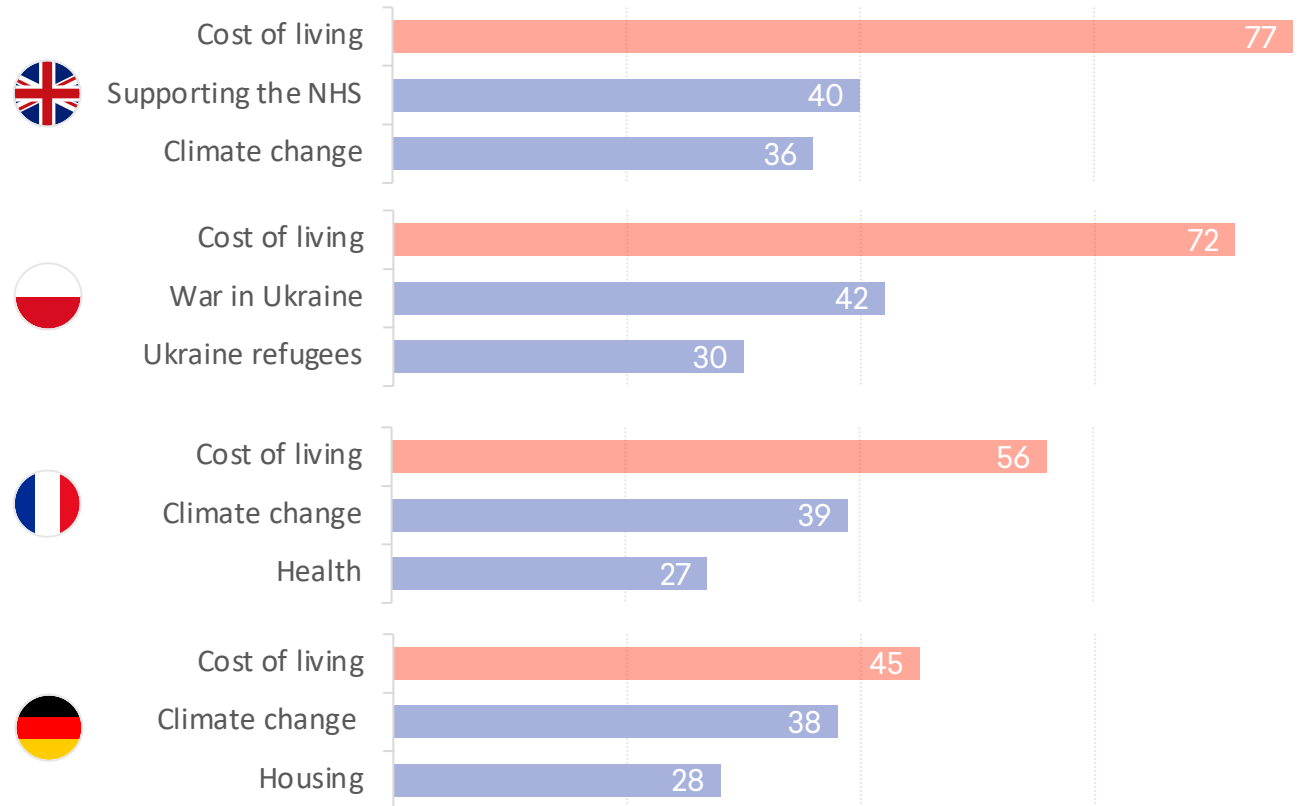
**Impact  
on people's  
lives and  
expectations  
for the future**



# Cost of living has shot up to No. 1 in people's priorities



In your opinion, which are the most IMPORTANT issues facing the country today? Select the top 3.

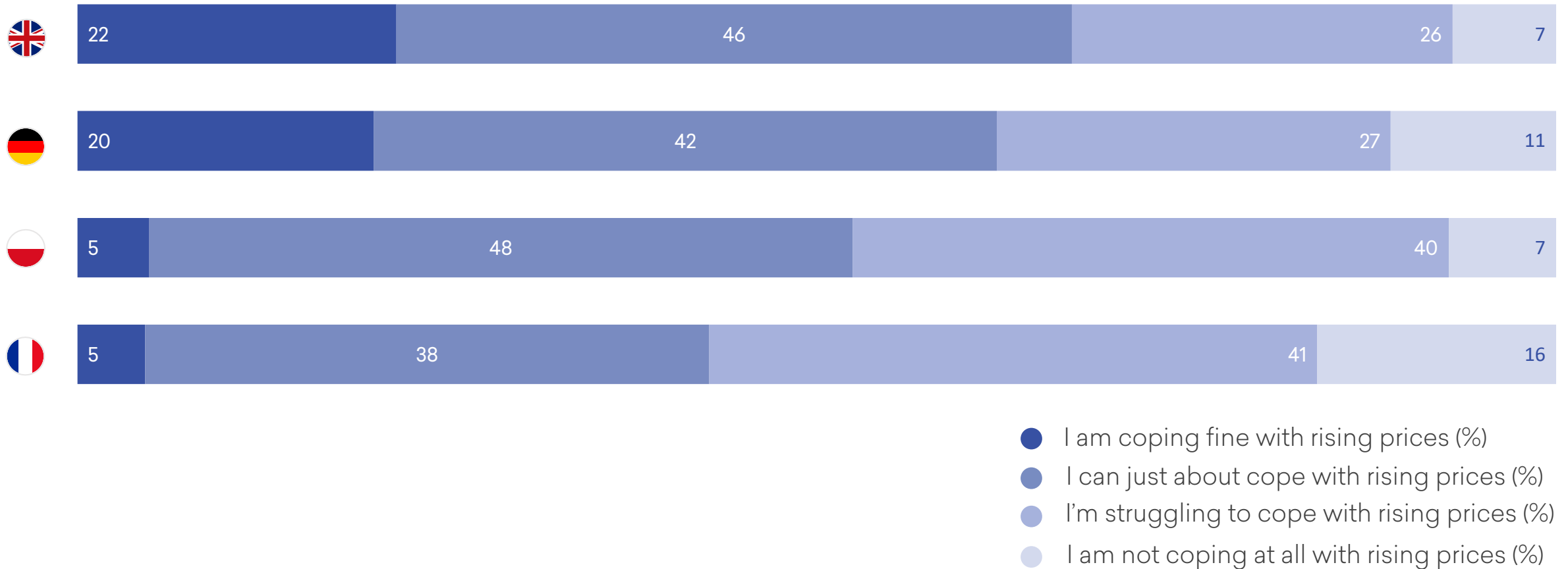


\* Cost of living not included as an option for France and Germany at the end of 2021

# Even before winter sets in, people are barely coping



Which of the following best describes the effects that rising prices for things like food and energy have had on your life over the last few weeks?

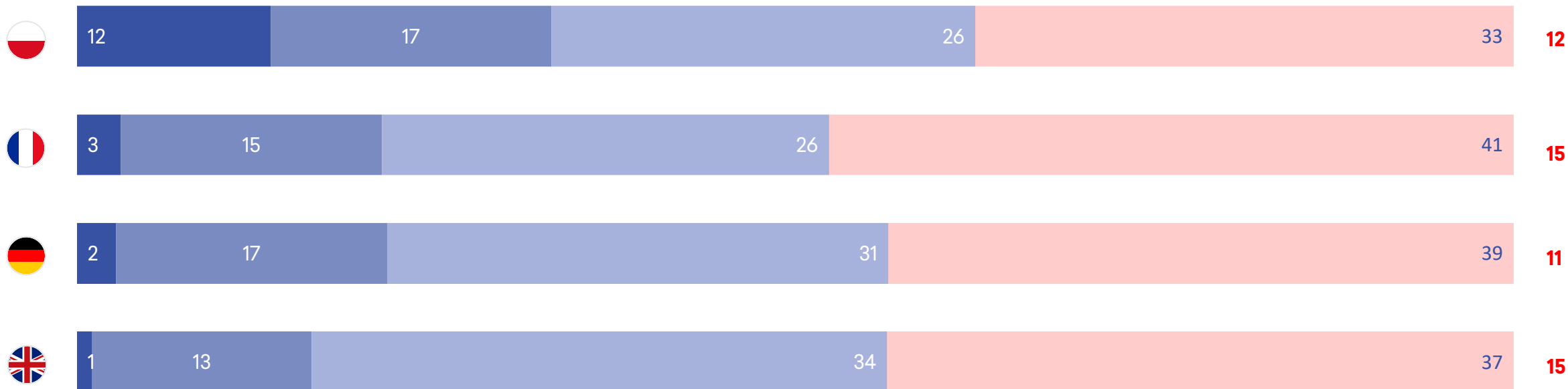


# No end in sight: few expect a short crisis. More than 1 in 3 are unsure it will ever end.



When do you expect the cost of living crisis to end?

Don't know  
(%)



- Later this year (%)
- Sometime next year (%)
- In the next few years (%)
- I'm not sure if it will ever end (%)

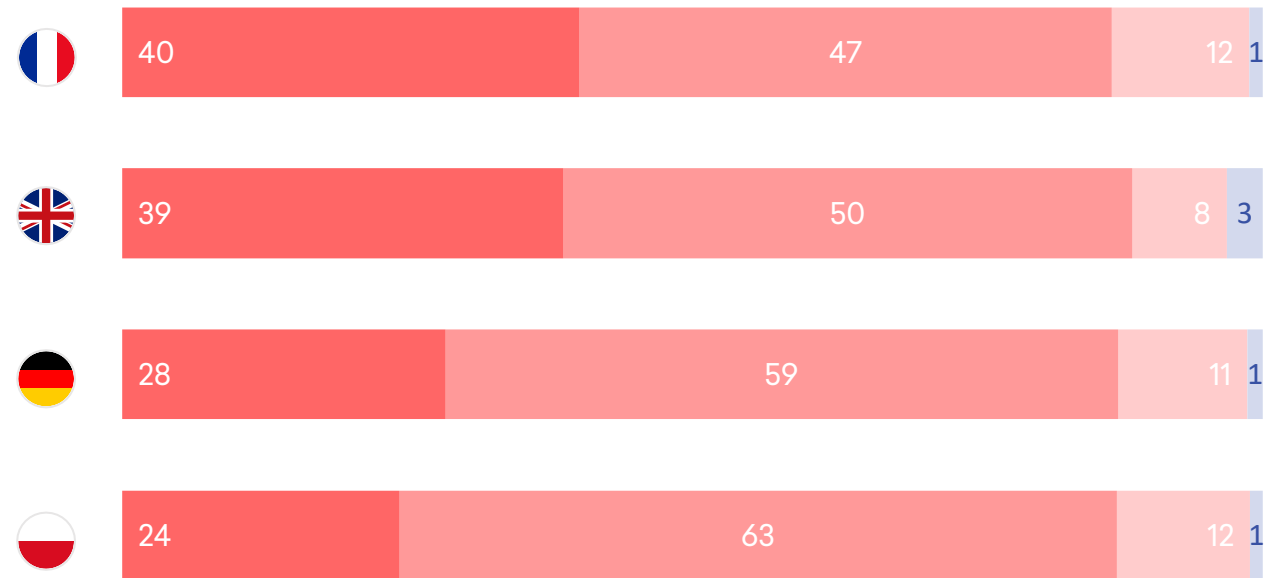


# People don't feel others are faring better than they are, for now



- At least 97% in all countries say they are feeling the effects of rising prices.
- For now, no segment feels they are doing worse than others in the crisis but that is unlikely to last into winter.

Which of the following best describes how you feel about rising prices?



- I am feeling the effects of rising prices, but I think most people in the country are **worse off than I am** (%)
- I am feeling the effects of rising prices and I think most people the country are feeling it to about the **same extent as I am** (%)
- I am feeling the effects of rising prices and I think most people the country are **doing better than I am** (%)
- I am **not feeling** the effects of rising prices (%)

# People are cutting down on expenses where they can

1 in 5 are drawing down from savings, 1 in ten are skipping meals.

Which of the following actions have you taken in recent months to deal with the rising cost of living, if any? Select all that apply.

I'm shopping around more for my groceries to find better deals

I'm cutting down on luxuries and non-essentials

I'm going out less

I'm driving less to save money on fuel

I've cancelled or changed holiday plans this year

I've cut down my electricity / heating usage

I'm drawing down from my savings

I'm investing in energy saving devices such as LED lightbulbs

I'm working more (e.g. taking on a second job)

I'm giving less money to charity

I'm postponing costly medical care

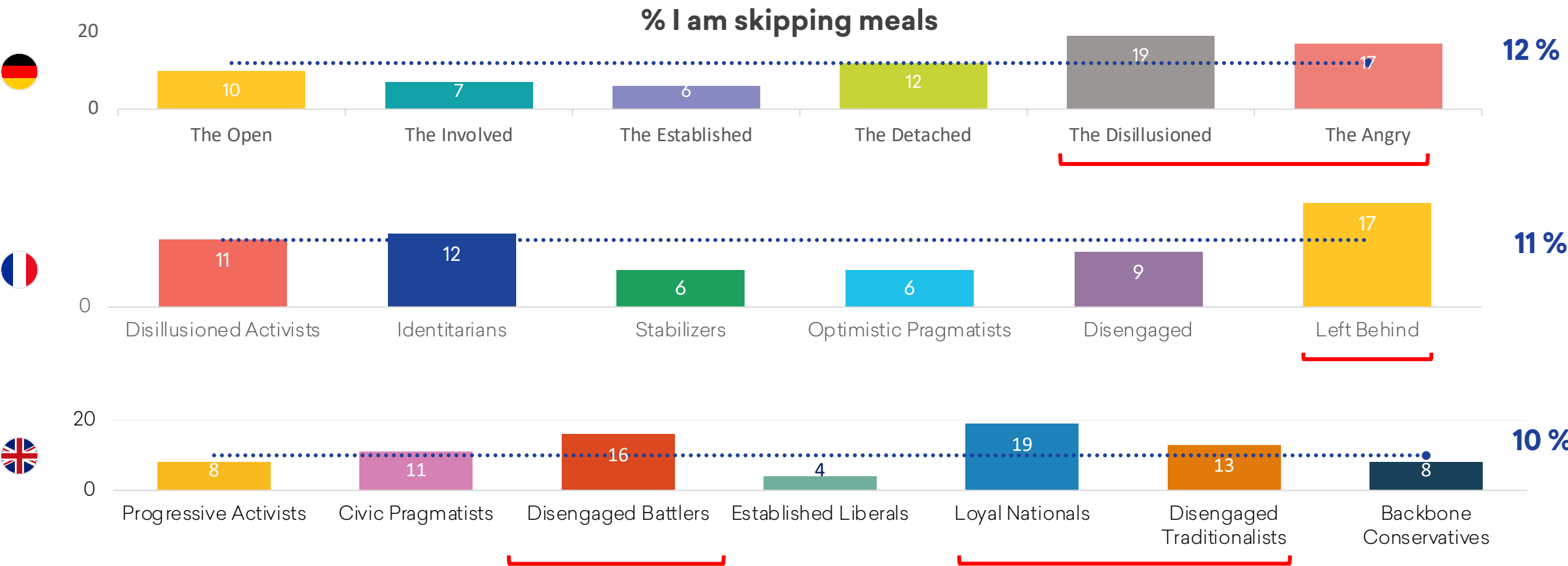
I'm skipping meals



60	57	49	41
49	36	56	56
42	38	48	44
29	32	36	37
26	19	20	14
26	38	37	45
22	11	24	22
20	14	14	10
14	6	9	8
14	10	13	20
12	8	13	5
9	12	11	10

# Low-trust groups are almost twice as likely to say they have been skipping meals

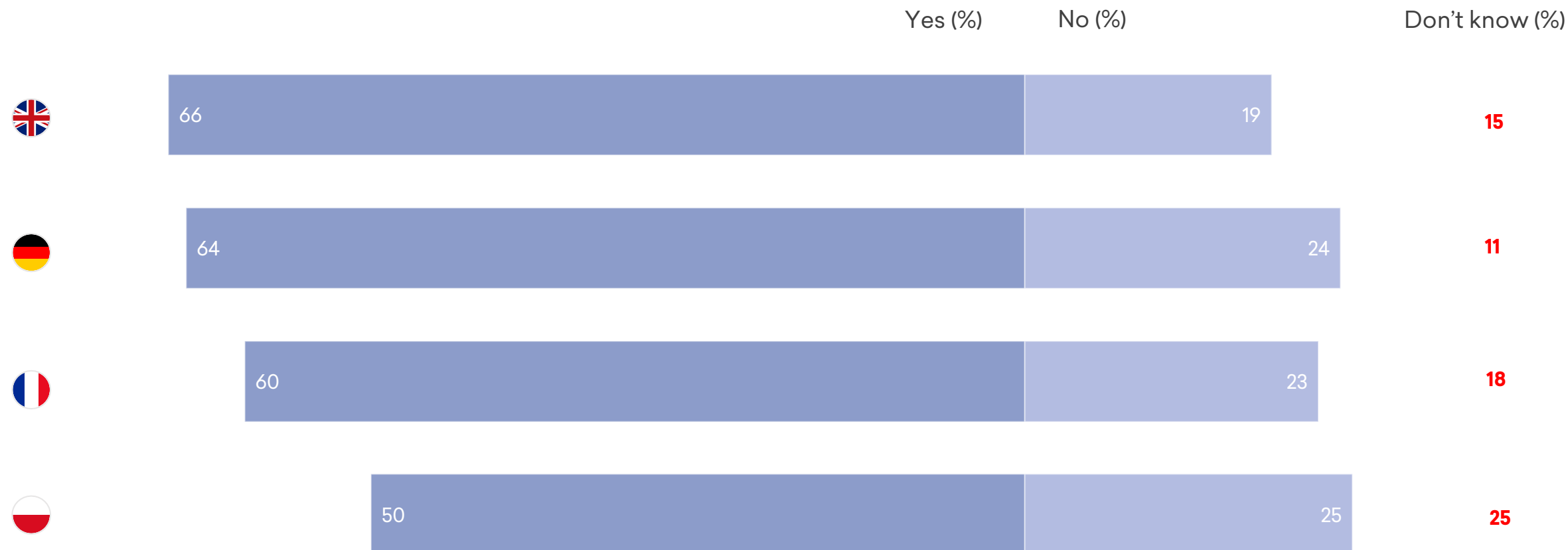
Which of the following actions have you taken in recent months to deal with the rising cost of living, if any?



# Majorities expect to cut down on heating this winter



Thinking about this coming winter, do you expect to have to cut down on your home heating because of high energy prices?

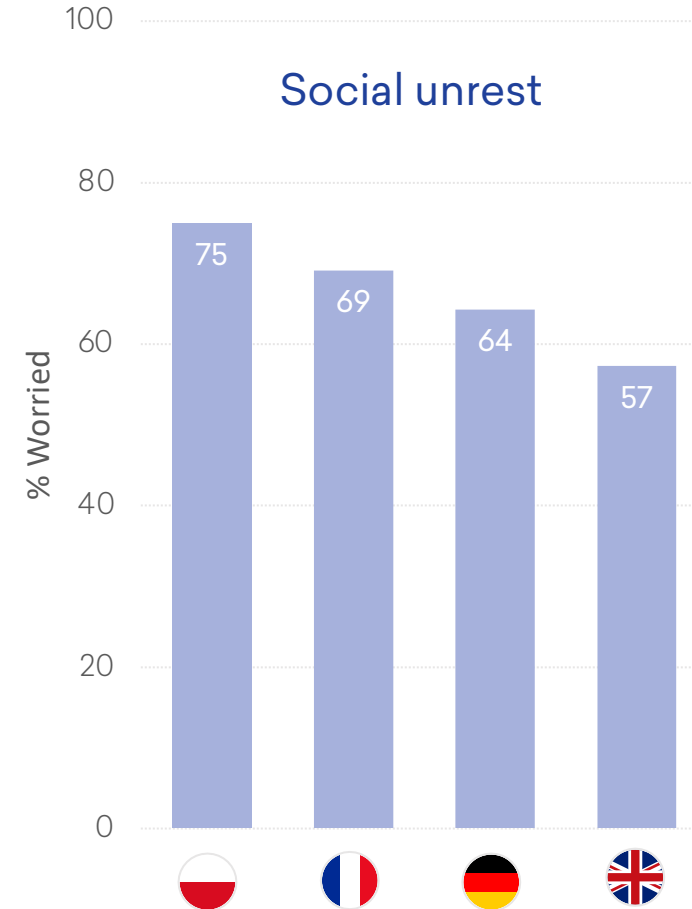
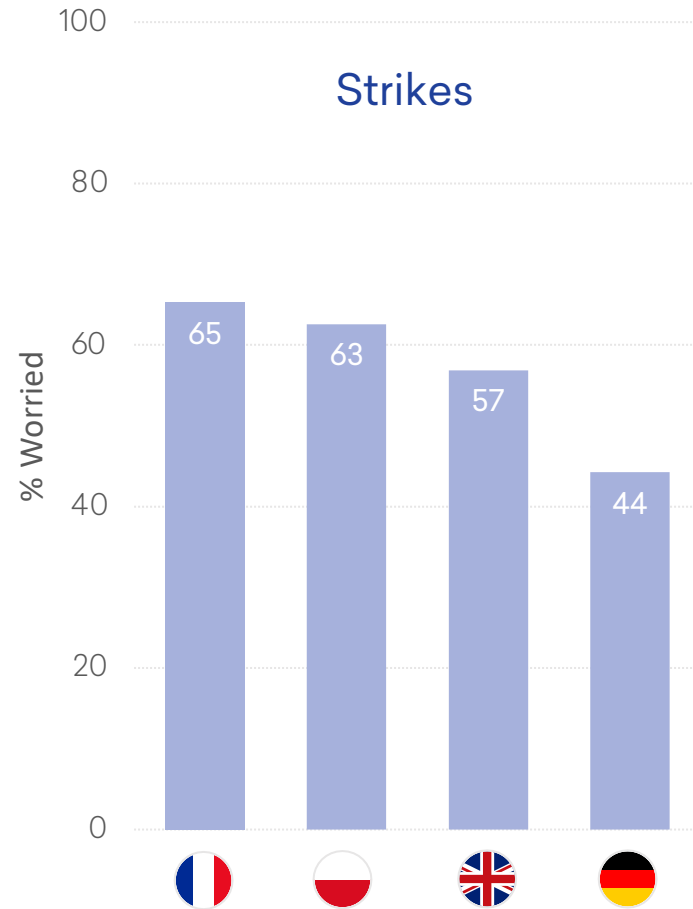




# And most people are worried about strikes and social unrest



Thinking about the next few months, how worried, if at all, are you about each of the following?



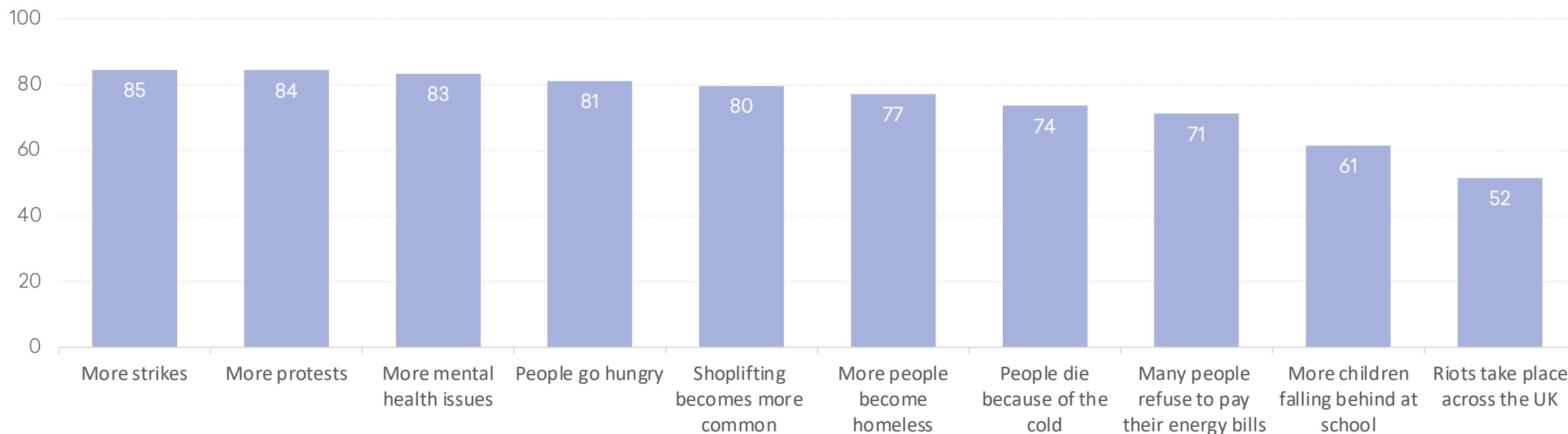
# In the UK and elsewhere, people expect a new winter of discontent



For each of the following, please indicate if it is something you expect or do not expect to happen this winter as a result of rising bills?



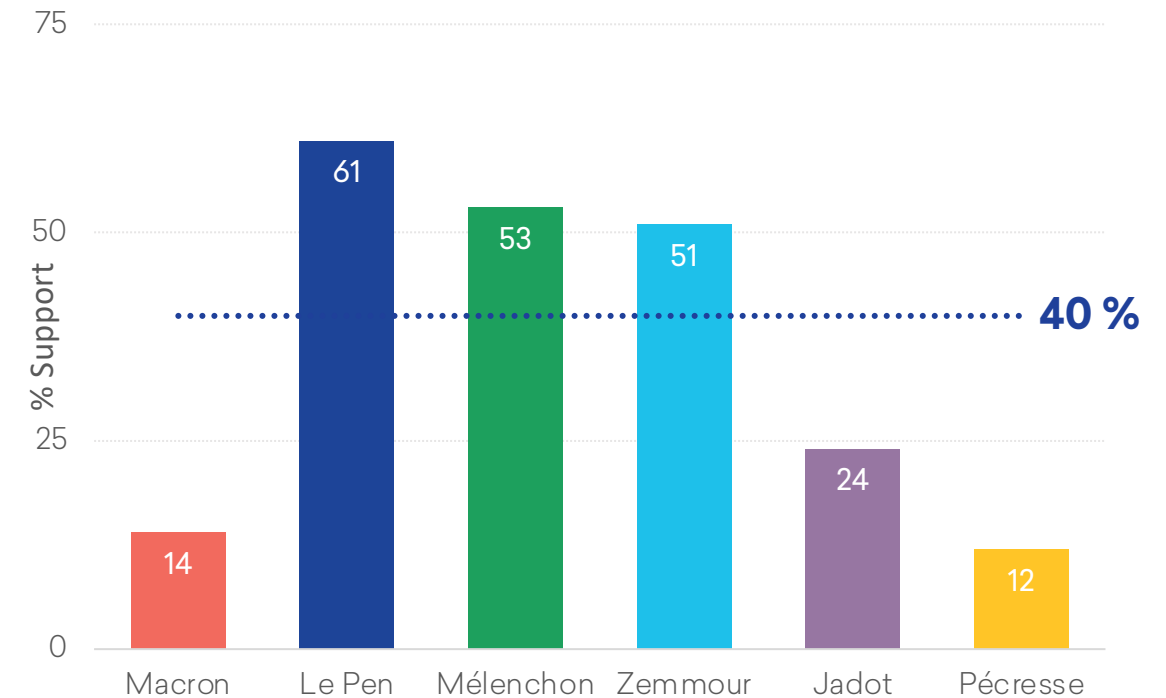
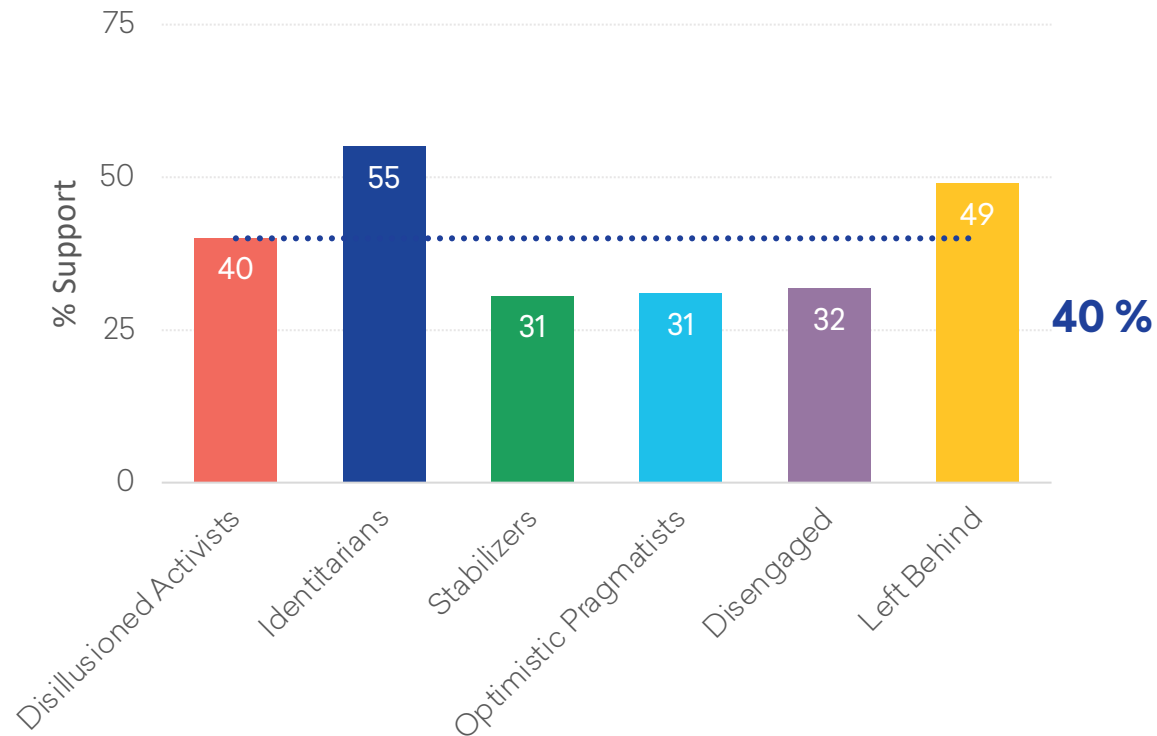
As a result of rising bills, I expect... (%)



# In France, 4 in 10 want to see a return of the Yellow Vests



 To what extent would you support a return of the Yellow Vests movement?



# A further erosion of trust



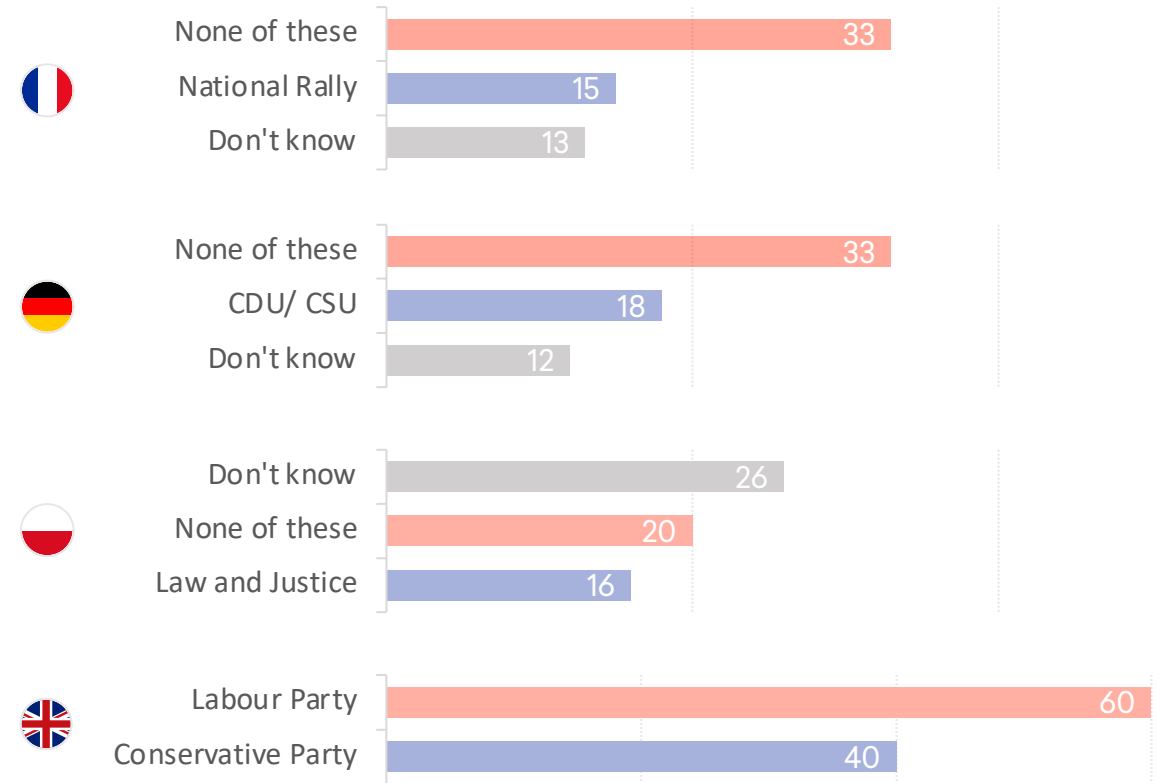


# The crisis is a potential boon for opposition parties, including populists and authoritarians like Marine Le Pen



- The cost-of-living crisis exacerbates the deep crisis of trust left by the handling of the COVID pandemic.
- People don't trust any party to deal with rising prices, but opposition parties are poised to make gains from the crisis.
- In France, people trust the National Rally the most to deal with the crisis.
- In the UK, trust in Labour is 20 points higher than in the Conservatives.
- In Poland, the crisis threatens PiS' support in the run up to next year's elections.

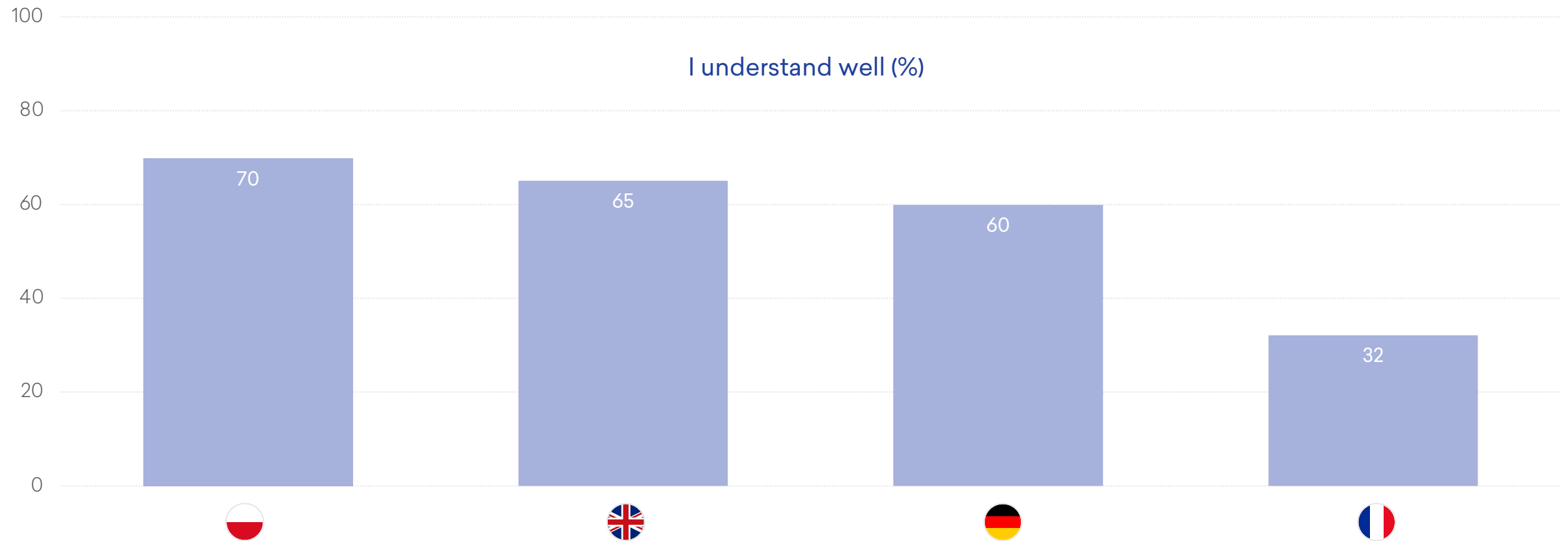
Which of the following do you trust most to tackle the rising cost of living?



# People's understanding of the reasons for the crisis is strikingly low in France



Do you understand why cost of living is rising?







Showing sum of very + fairly well

# Russia is seen as most responsible, but people think several other factors are driving rising prices



Who or what do you believe is responsible for rising prices?  
(Select up to 4.\*)

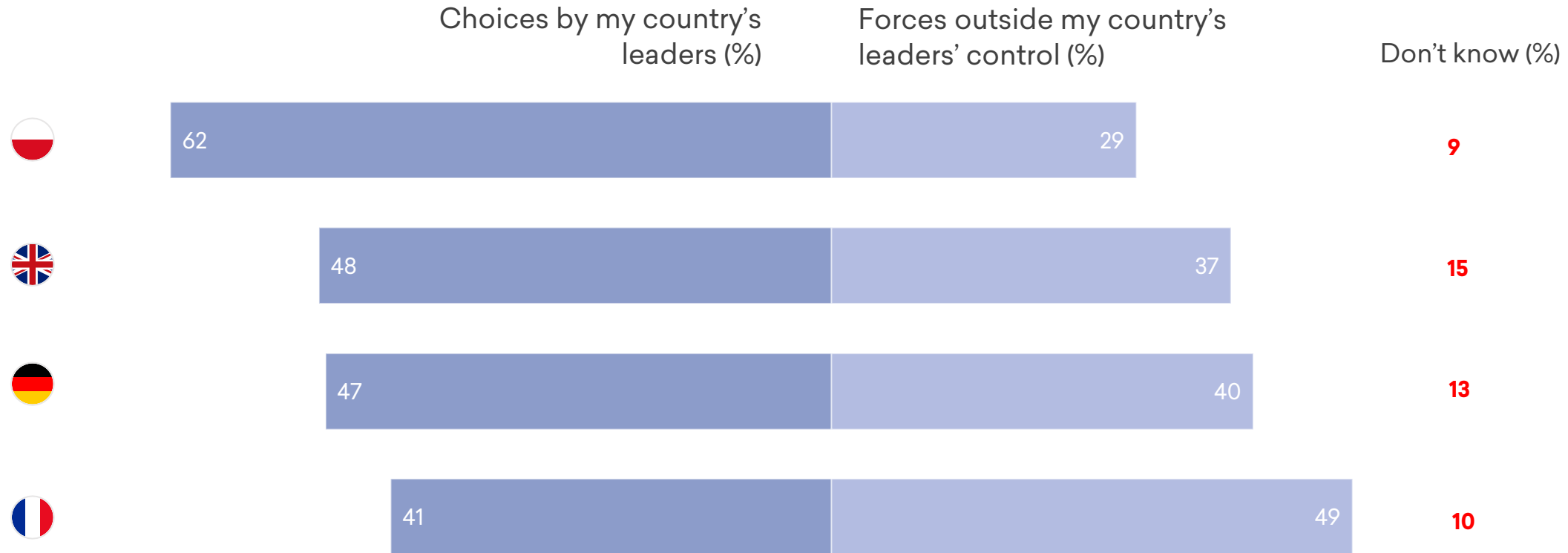
				
Russia	38	48	45	51
Energy and oil companies	32	39	27	55
The impact of COVID-19	25	26	30	42
Policies by the government	33	36	54	36
Ukraine	25	22	14	30
Our dependence on fossil fuels in general	29	41	39	28
Big business	24	18	27	15
Banks and the financial sector	25	10	18	10
Costly pro-climate policies	9	15	14	9

\* Not showing "Brexit" in the UK – 40%

# Only in Poland do people decisively blame their leaders for the current crisis



The current cost of living crisis is mostly the result of...

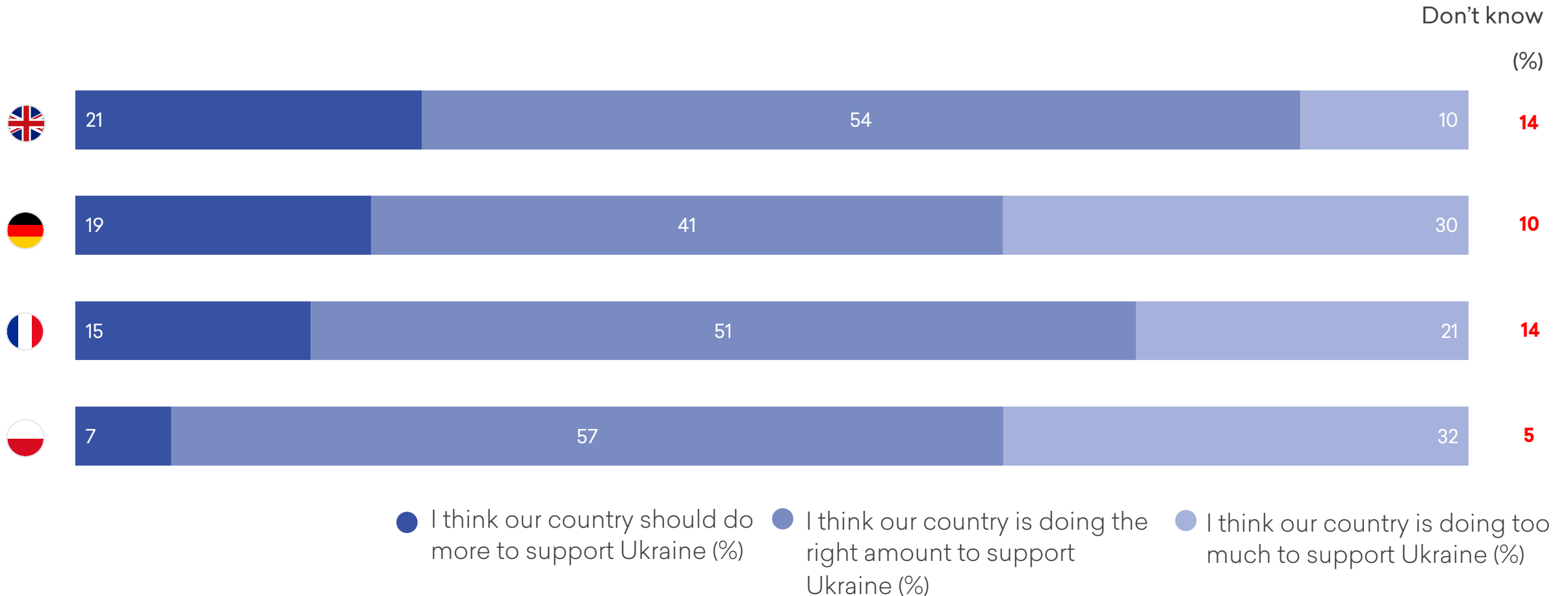


Which of the following best describes your view?

# Support for the war in Ukraine remains fairly strong



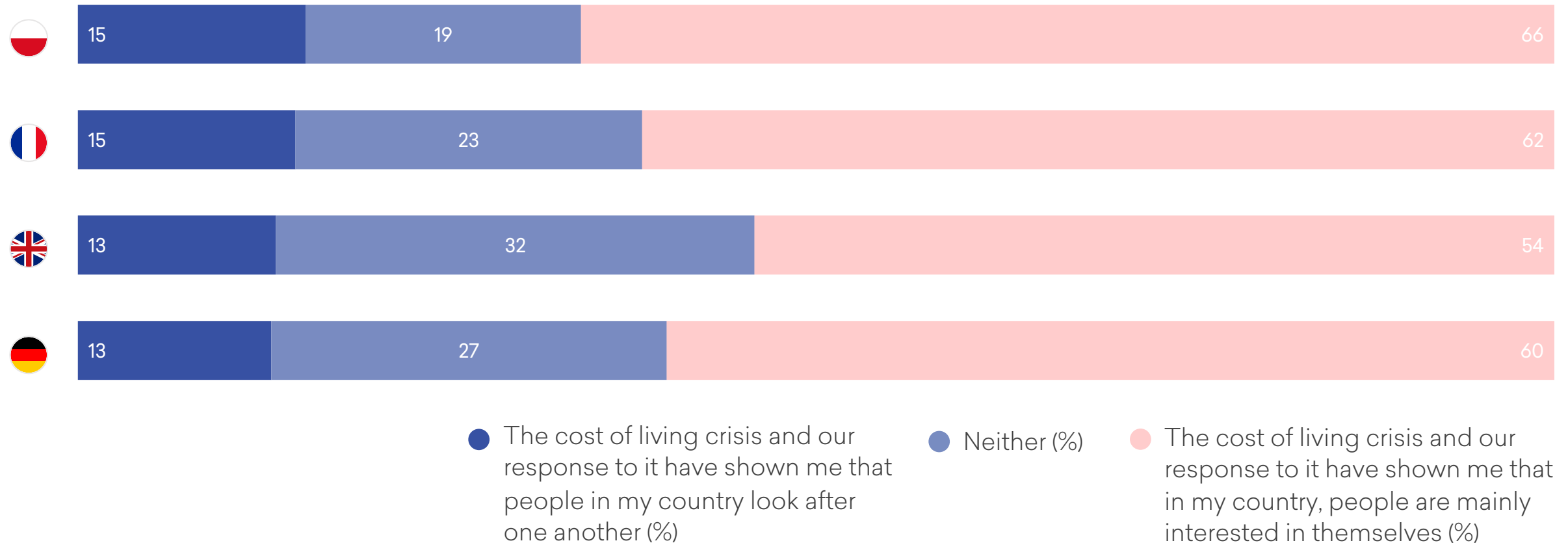
Thinking about the war in Ukraine, which statement best reflects your view?



# A weak sense of solidarity among people could play into the hands of disruptive forces seeking to divide



Which of the following statements best reflects your views?









# Policies to prepare for winter



# Most popular policy solutions to the crisis



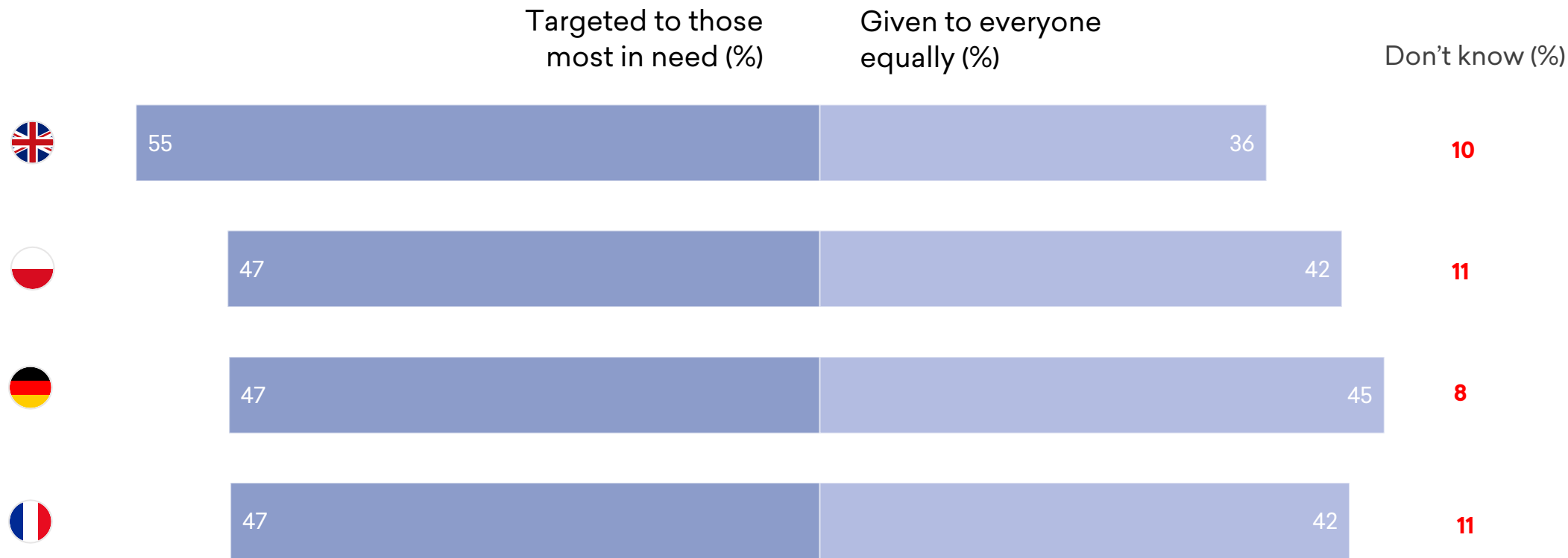
				
Reduce VAT on energy and food	87	85	83	80
Lower the energy price cap for all bill payers	86	83	74	82
Increase tax on profits made by energy companies	85	72	61	73
Make public transport cheaper	85	79	72	76
<b>Accelerate investment in renewable energy</b>	<b>79</b>	<b>74</b>	<b>73</b>	<b>72</b>
Increase wages and salaries	76	76	75	85
Give grants to help people buy energy saving devices e.g. smart meters	74	62	66	74
Increase taxes for those on higher incomes	71	68	48	67
Vouchers for spending on food and groceries	69	56	66	67
Lower income taxes	65	74	75	69
Increase welfare to most needy	59	61	45	54
Give everyone a one-off cash payment	50	58	46	42
Cut environmental levies	42	72	75	57
Impose limits on people's energy use through energy rationing	<b>21</b>	<b>33</b>	<b>30</b>	<b>41</b>

To what extent would you support, or oppose, the following measures to help address the rising cost of living?  
Showing common policies. Terminology varies by country.

# Public opinion is evenly split on universal vs targeted relief support



In dealing with the rising cost of living, should the government's support be...



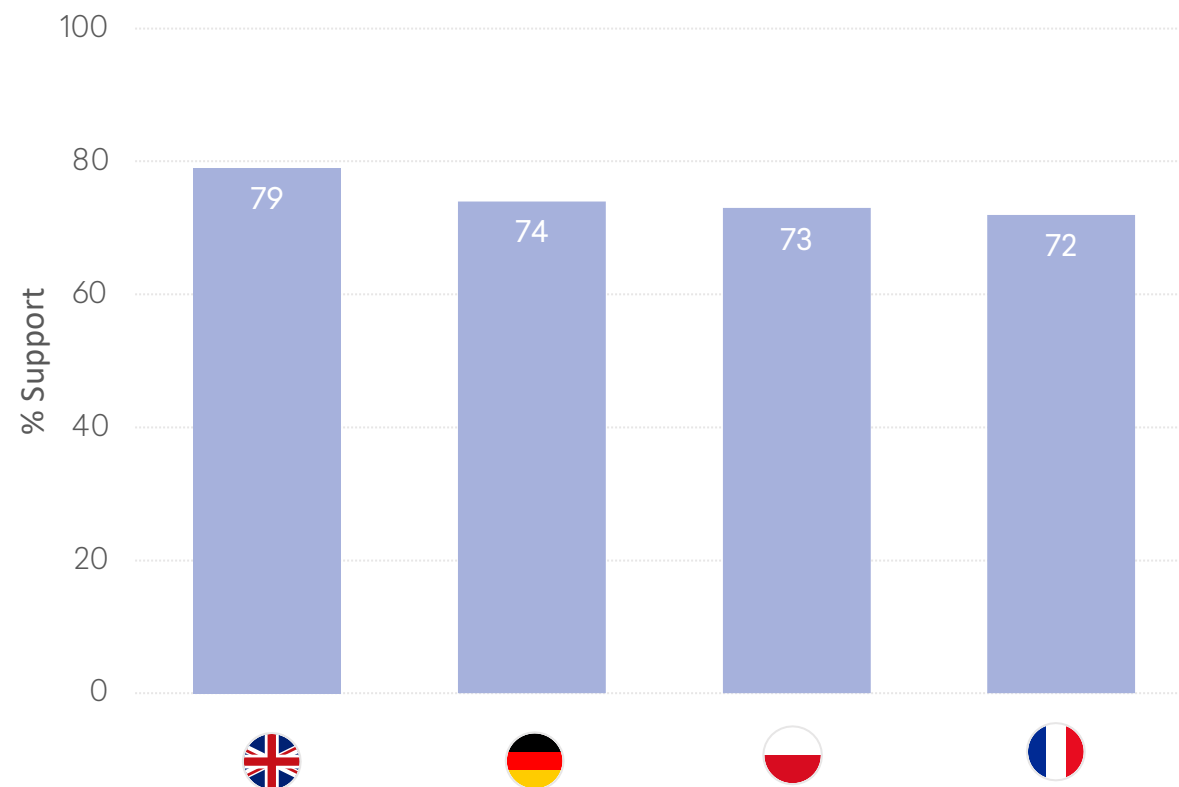
# Broad majorities see a faster transition to renewables as an answer to the cost of living crisis



Support for accelerating the transition to renewables includes...

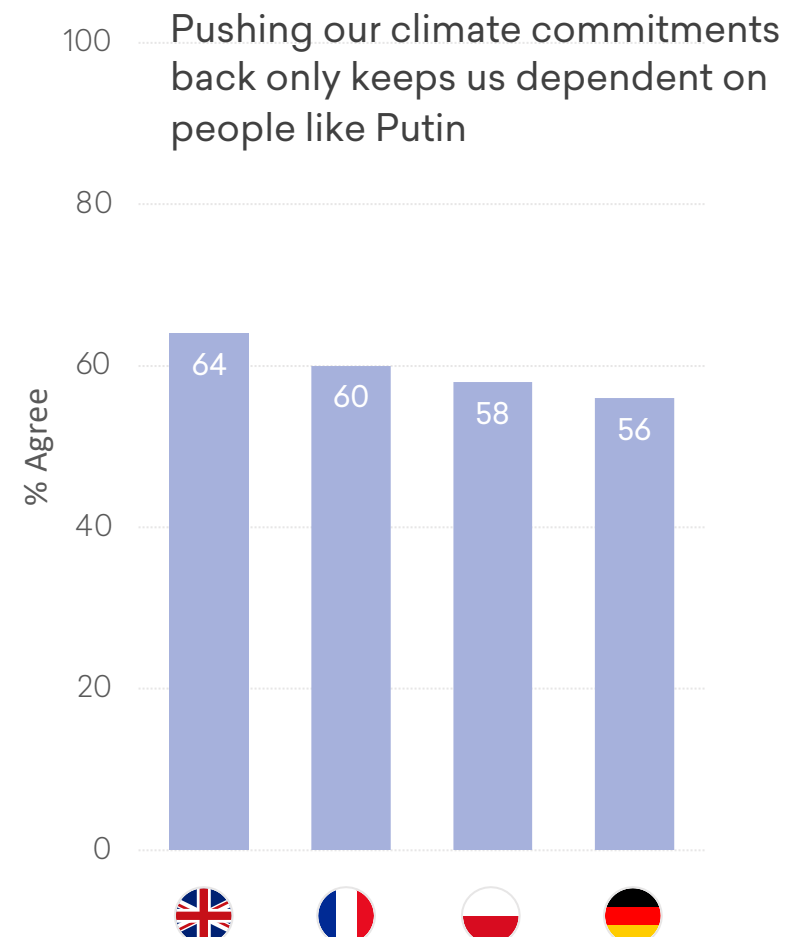
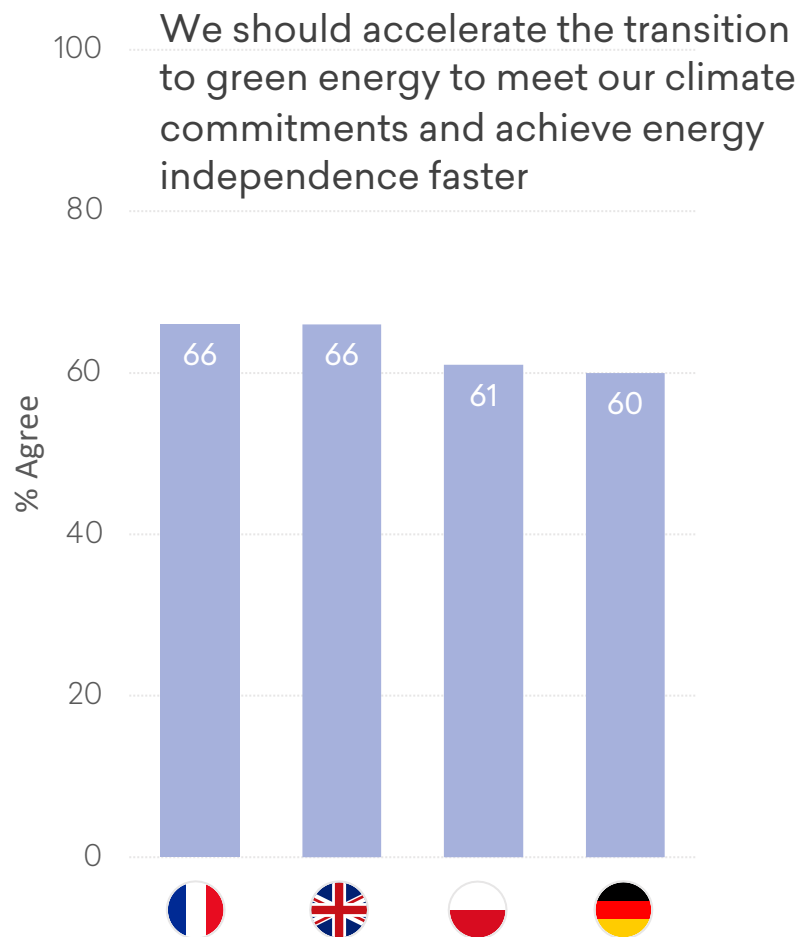
- In France, 80% of Stabilizers, 73% of Left Behind, and 67% of Identitarians
- In Germany, 83% of the Angry and 82% of the Disillusioned
- In the UK, 80% of Loyal Nationals, 78% of Disengaged Battlers, and 76% of Backbone Conservatives

Accelerate the transition to renewable energy in the country



To what extent would you support, or oppose, the following measures to help address the rising cost of living?

# Majorities see renewables as a chance to achieve energy independence

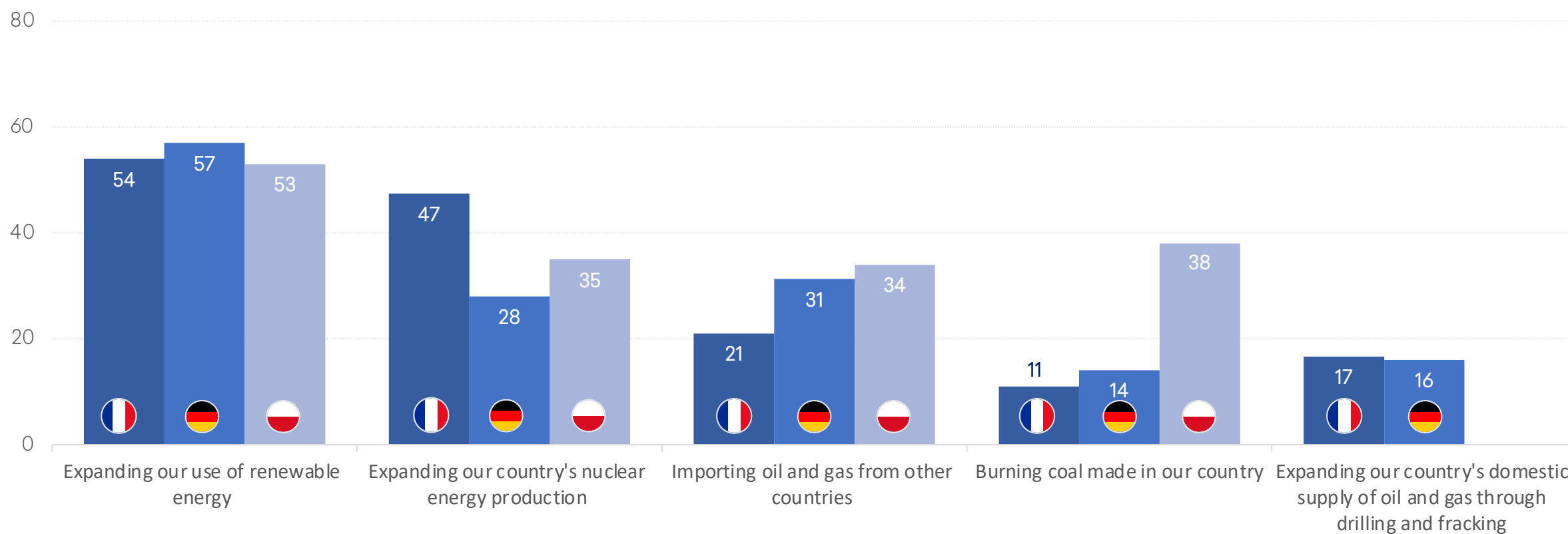


Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10) Showing sum of 6-10.

# Investing in renewables is seen as the best way - by far - to achieve energy independence from Russia



Which of the following options do you think is the best way of eliminating our dependence on Russian oil and gas?



Question not asked in the UK. Drilling and fracking option not asked in Poland.

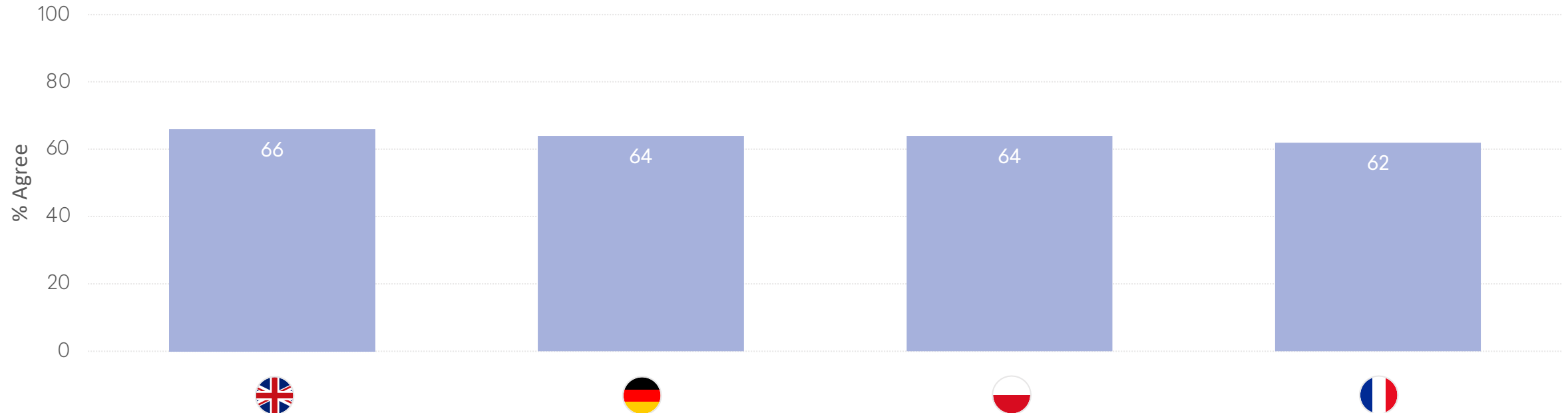
\*Not shown: "Don't know" and "Other" responses



# Too little too late: People blame the government's sluggishness on renewables as one of the reasons prices are currently rising



The government has been too slow to invest in renewable energy.  
That is one of the reasons for the recent increase in energy prices

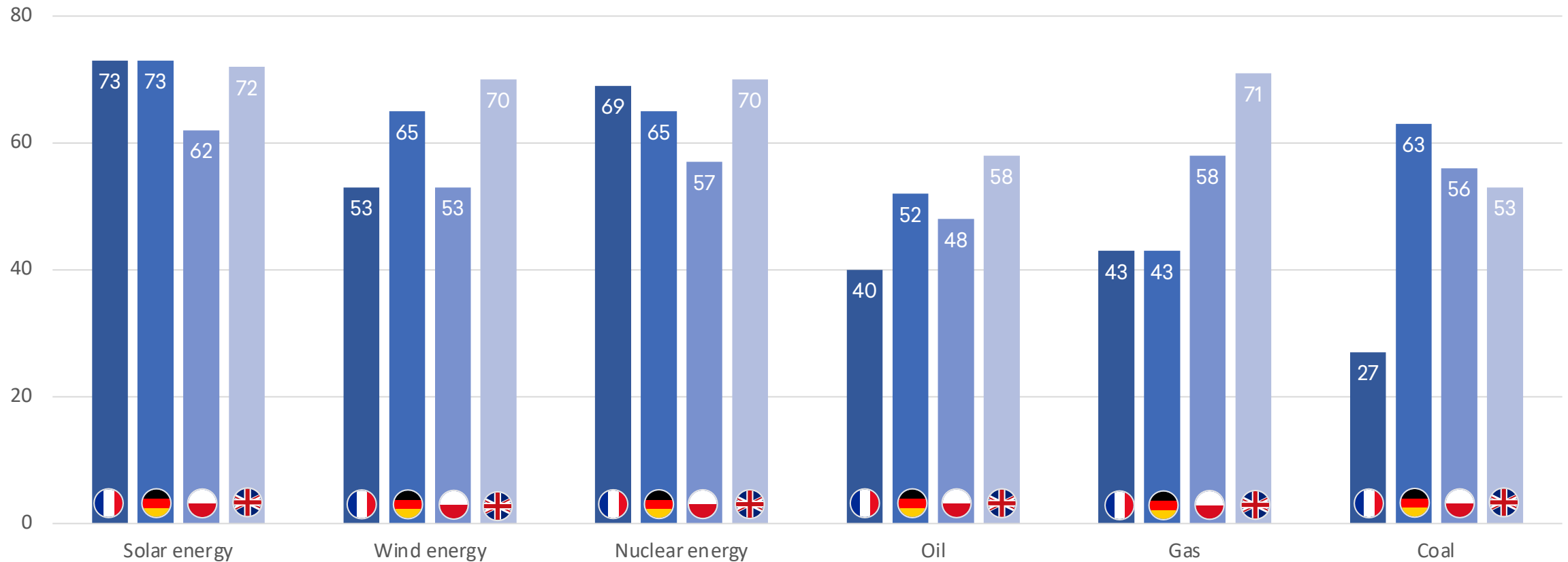


Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10)  
Showing sum of 6-10.

# Renewable energy sources are considered more reliable than non-renewable energy sources



How reliable, if at all, are the following energy sources?



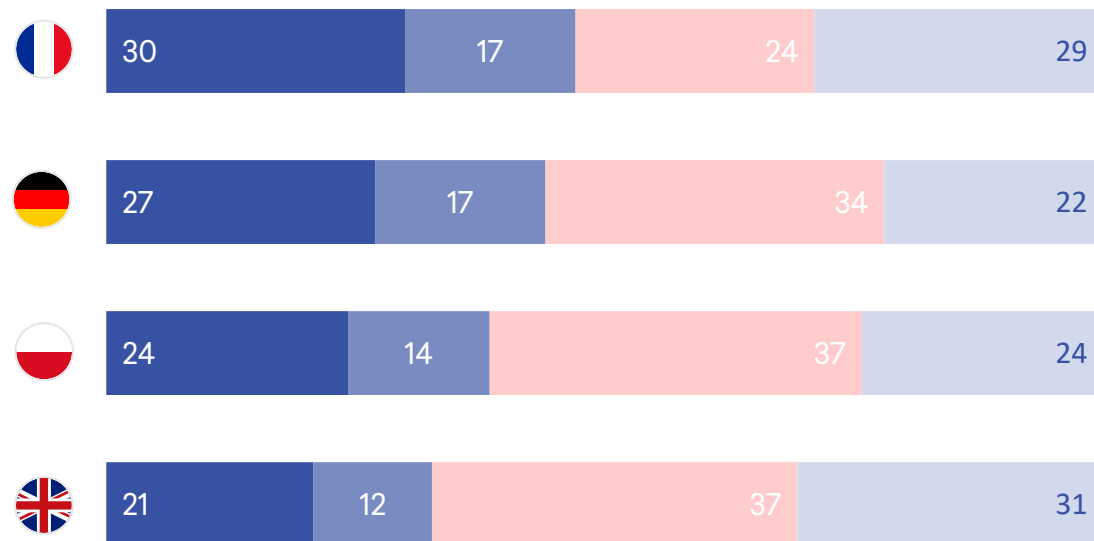
Showing sum of very reliable + somewhat reliable.

# People are starting to believe renewables are cheaper than other forms of energy, although many remain unsure

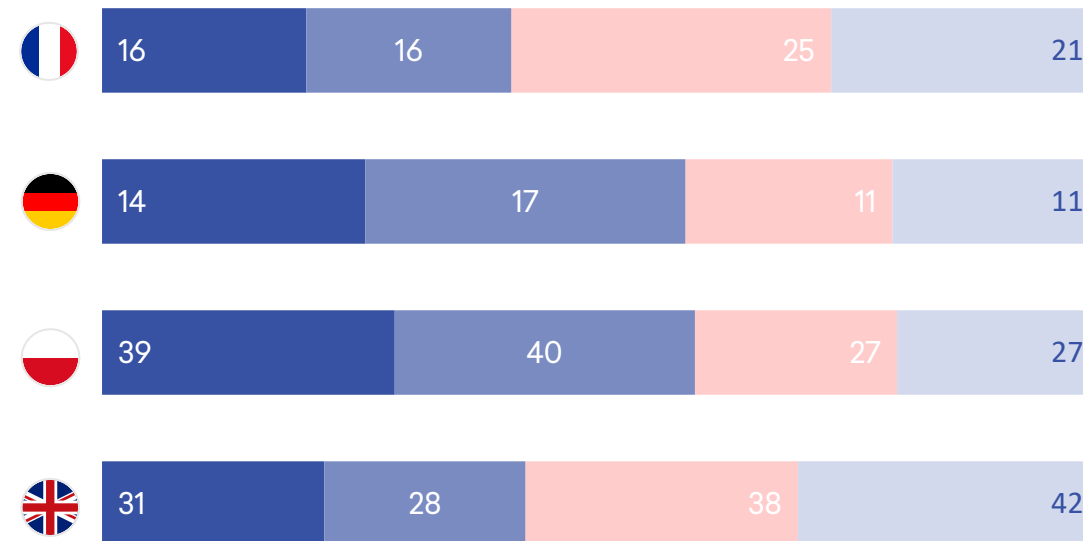


Do you think each of the following types of energy are more expensive or cheaper than oil and gas, or is it about the same?

## Renewable energy like wind or solar

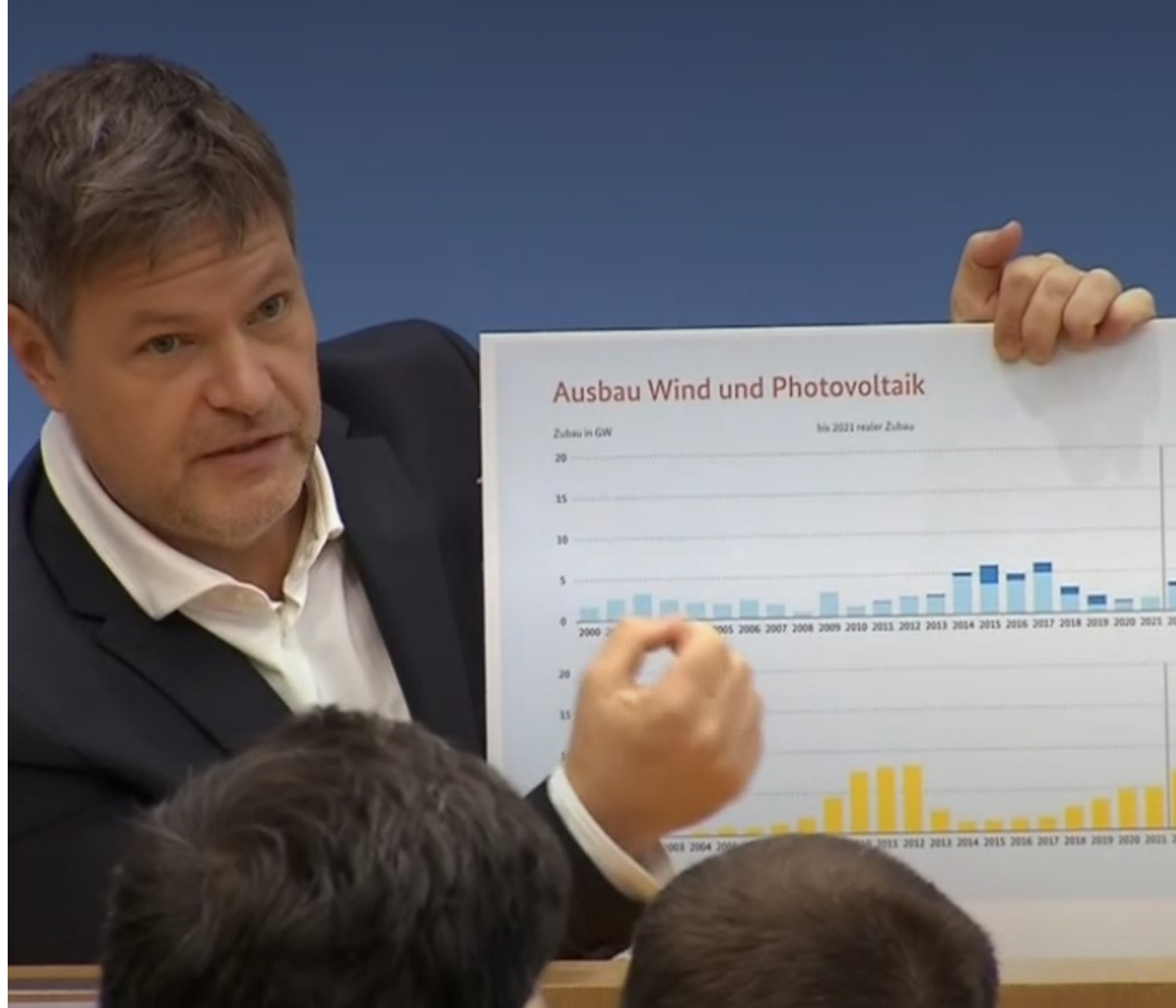


## Nuclear energy







● More expensive than oil and gas (%)    ● About the same as oil and gas (%)    ● Cheaper than oil and gas (%)    ● Don't know (%)

# Communicating about the crisis (message testing)



# Messages suggesting delays in climate targets don't do well



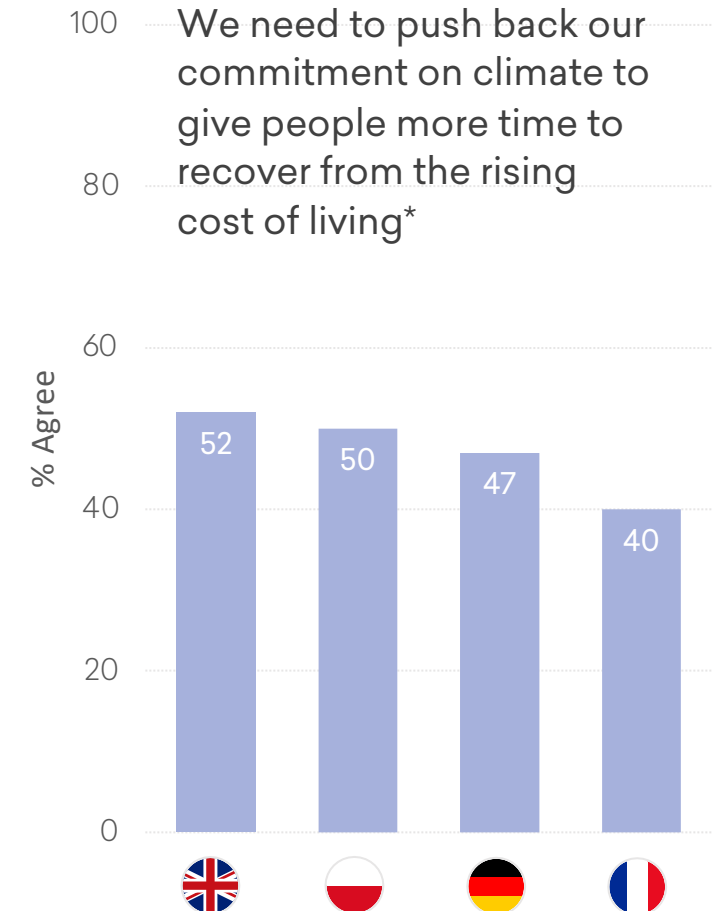
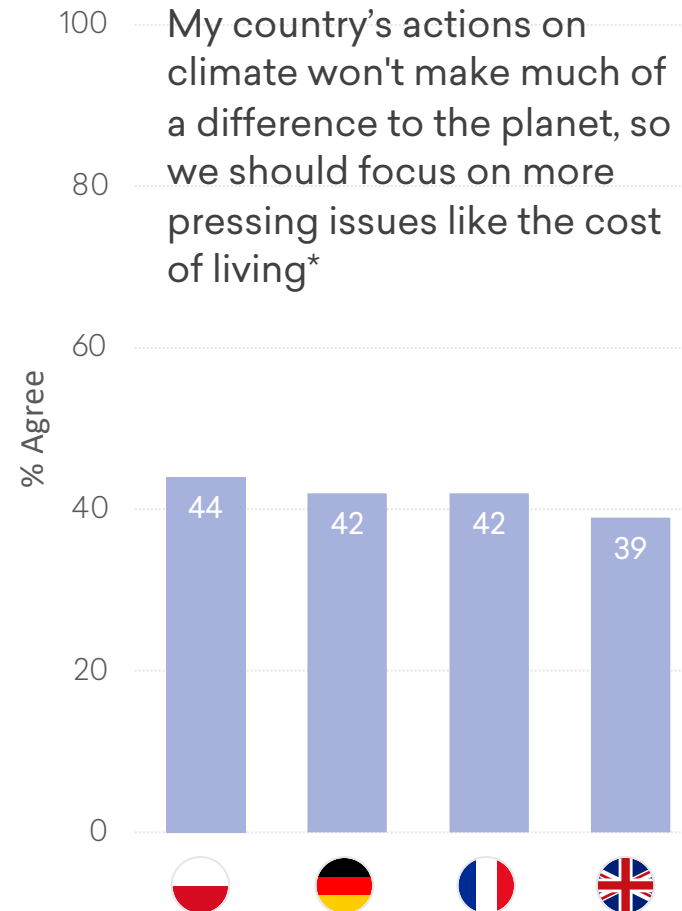
				
If we push back deadlines on climate, big businesses won't do anything and will just avoid the problem*	67	61	58	62
We should accelerate the transition to green energy to meet our climate commitments and achieve energy independence faster	66	60	61	66
The government has been too slow to invest in renewable energy. That is one of the reasons for the recent increase in energy prices	62	64	64	66
Delaying our climate commitments will only push our energy bills up in the medium and long-term	60	52	57	59
Pushing our climate commitments back only keeps us dependent on people like Vladimir Putin	60	56	58	64
I think climate activists have too much power and are dictating what we should do, to the detriment of ordinary people	47	49	46	42
Pushing up the price of oil and gas is part of a government plan to force us to switch to renewable energy	46	43	43	36
Our country's actions on climate won't make much of a difference to the planet, so we should focus on more pressing issues like the cost of living*	42	42	44	39
We need to push back our climate commitments to give people time to recover from the rising cost of living*	40	47	50	52

Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10); Showing sum of 6-10. \*UK data from April 2022 where some terminology varies.

# But support could weaken by winter...



- Arguments to prioritise the cost of living over climate change are less persuasive
- Citizens do believe their countries can have impact on climate change – there is no incentive to wait on others to push ahead with climate action
- But for about half the population, the immediate crisis takes precedence over climate commitments



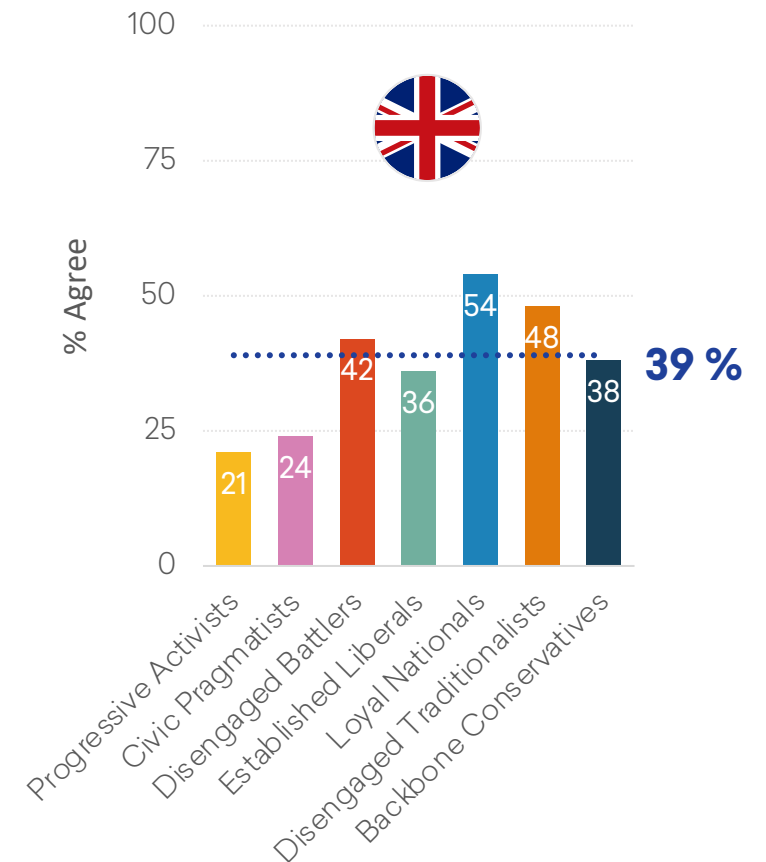
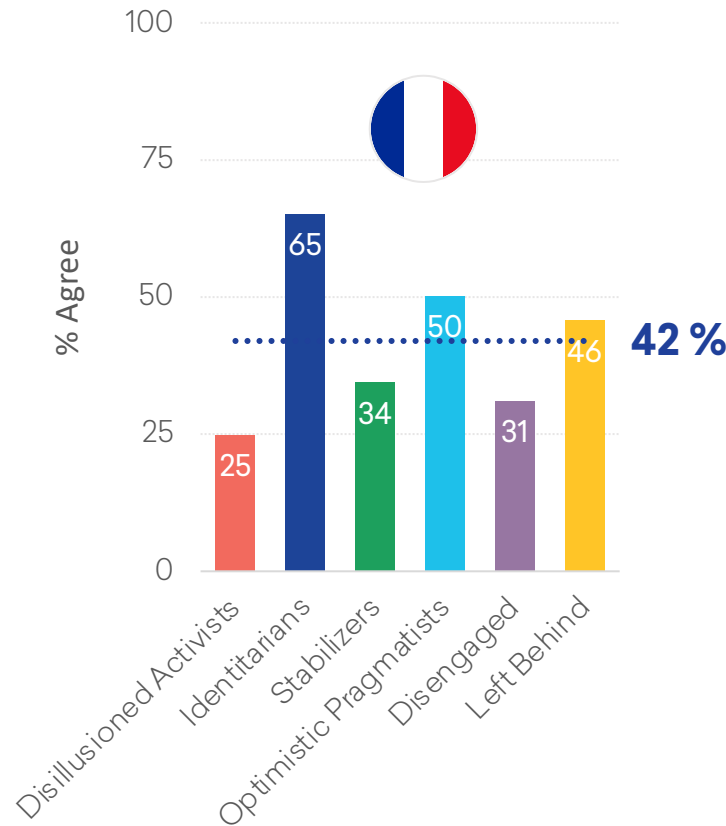
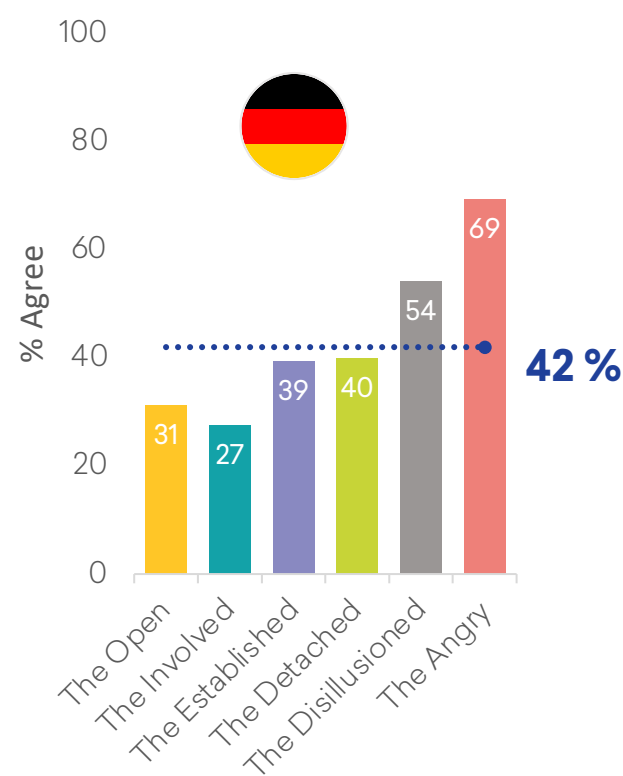
Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10)  
Showing sum of 6-10. \*UK data from April 2022.





# ...Particularly among low-trust groups, who are often suffering the most from rising prices

Our country's actions on climate won't make much of a difference to the planet, so we should focus on more pressing issues like the cost of living\*

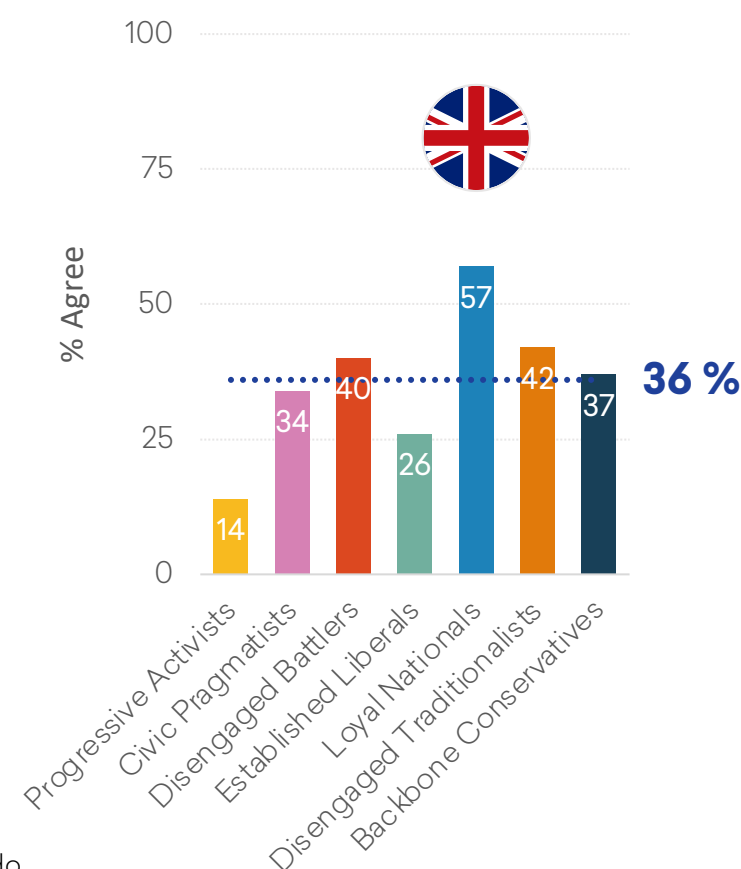
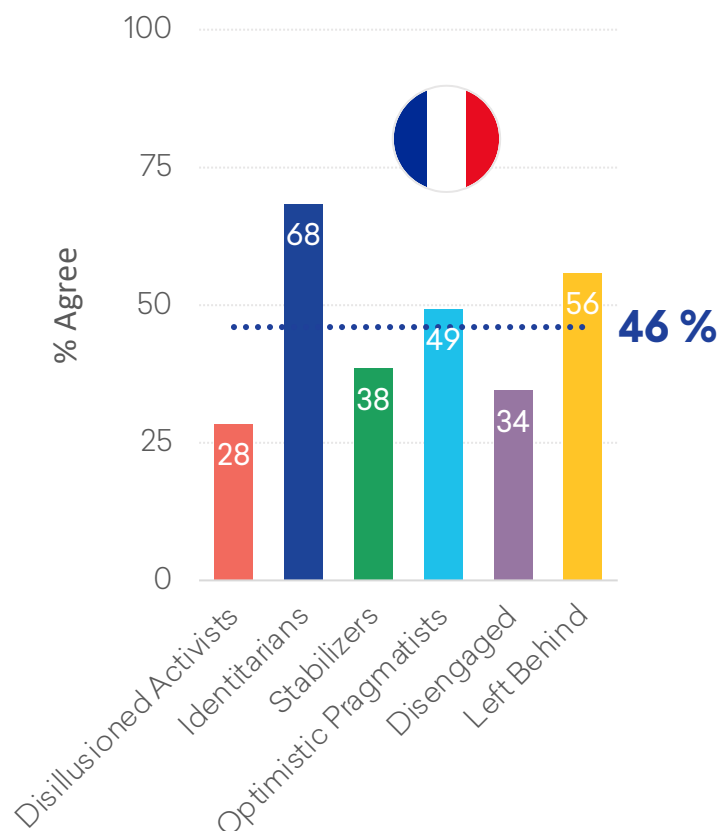
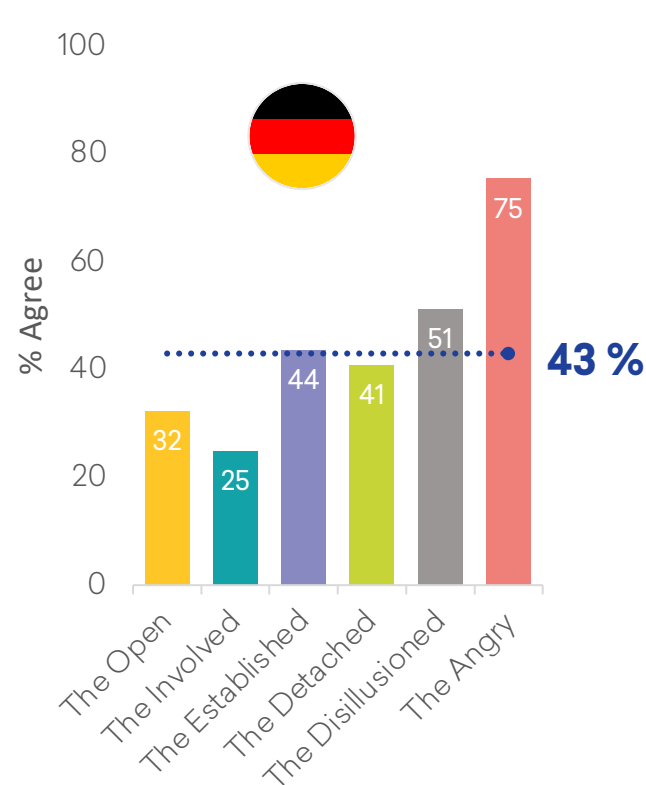


Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10) Showing sum of 6-10. \*UK data from April 2022.

# As the crisis deepens, a lack of trust and a conspiracy mindset may drive these segments to reject solutions



Pushing up the price of oil and gas is part of a government plan to force us to switch to renewable energy

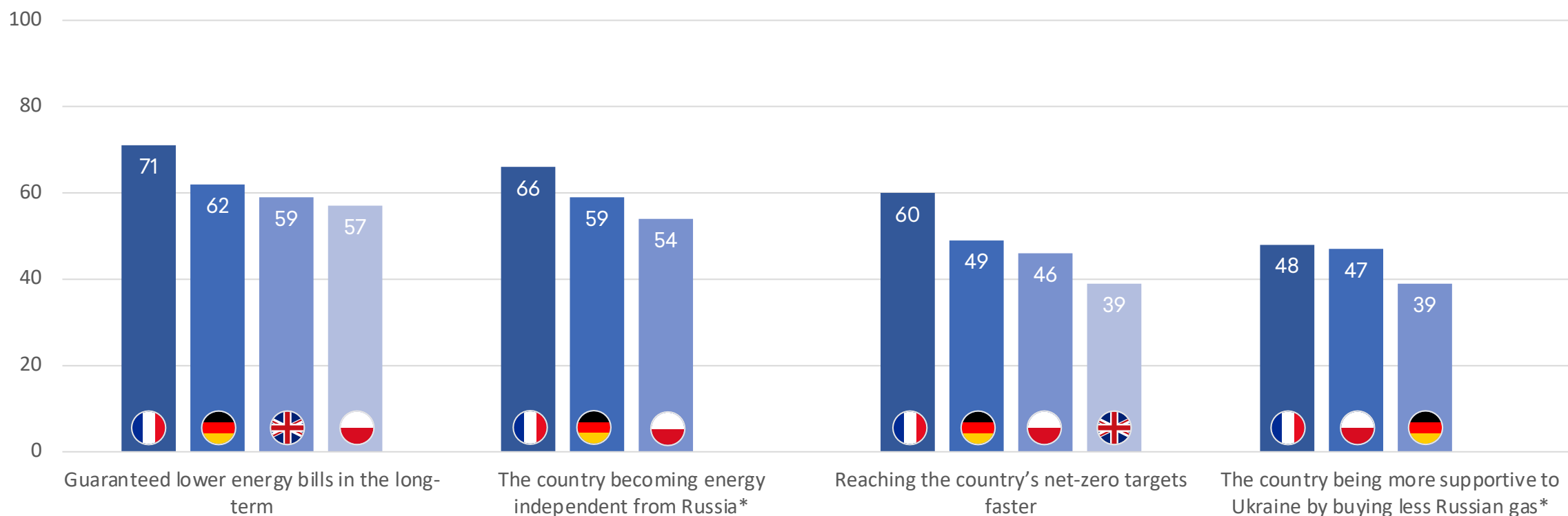


Governments around the world are setting targets to reach net zero goals and tackle climate change. To what extent do you agree with the following statements? (Agreement scale 0-10)  
Showing sum of 6-10.

# Majorities are prepared to make short-term sacrifices if they understand the long-term benefits



To what extent would you be willing, if at all, to accept a further rise in energy prices for the next year if it meant...

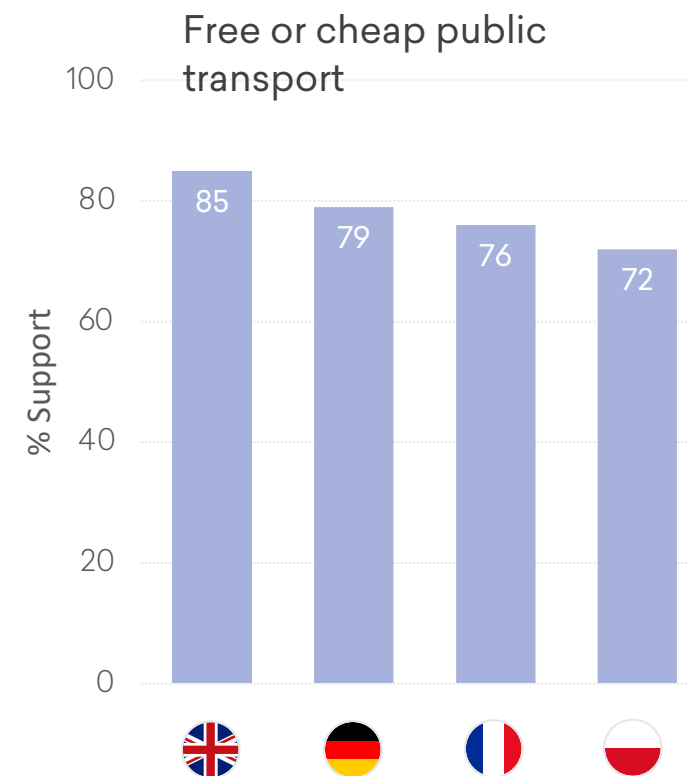
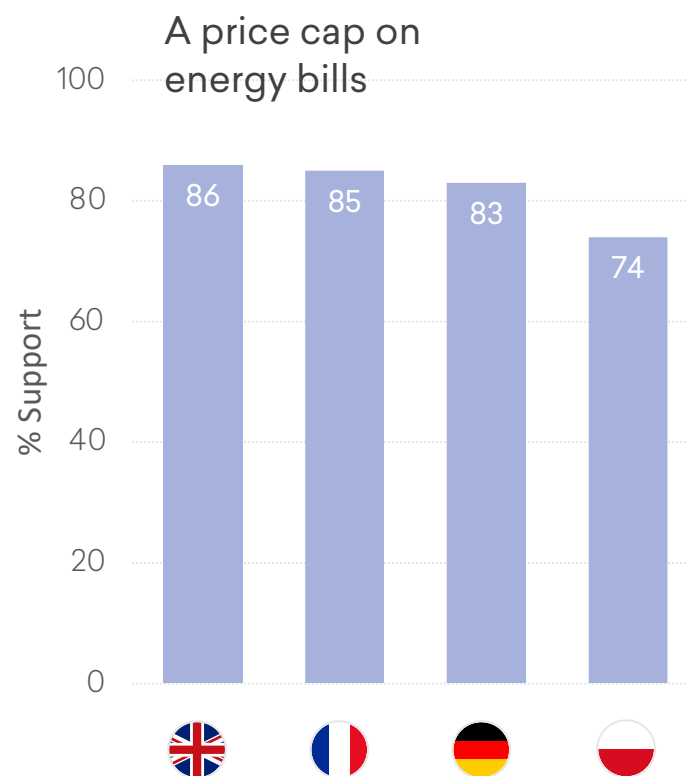
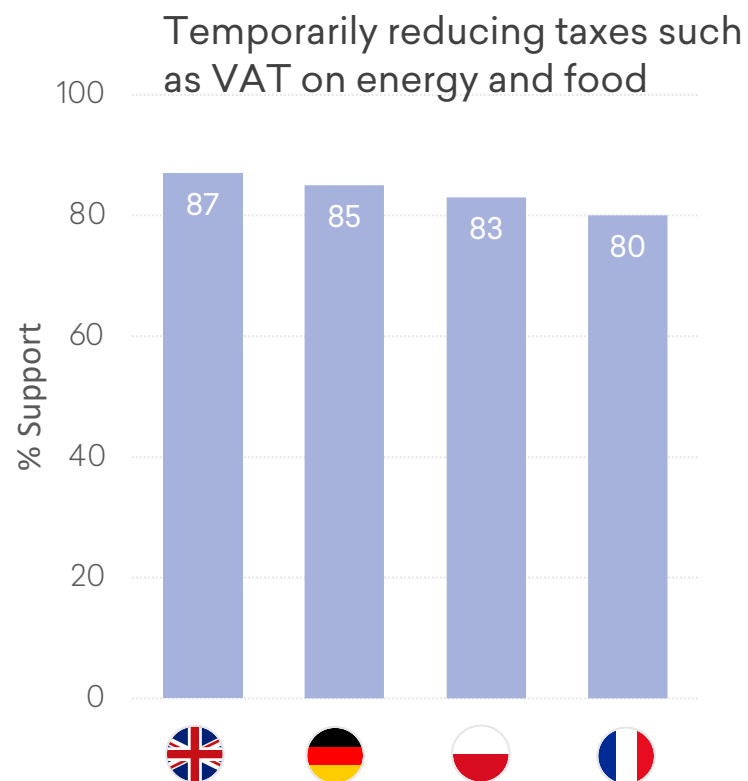


\*Not asked in the UK

# Action on renewables should come with short-term relief to avoid a contest of priorities



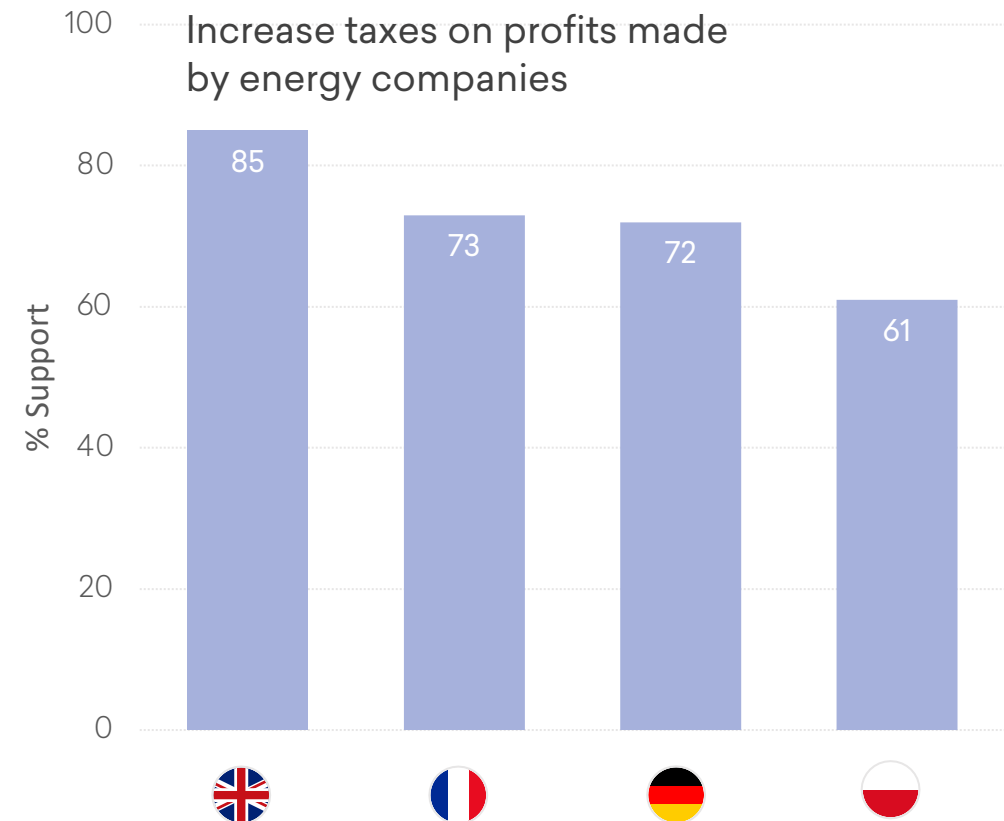
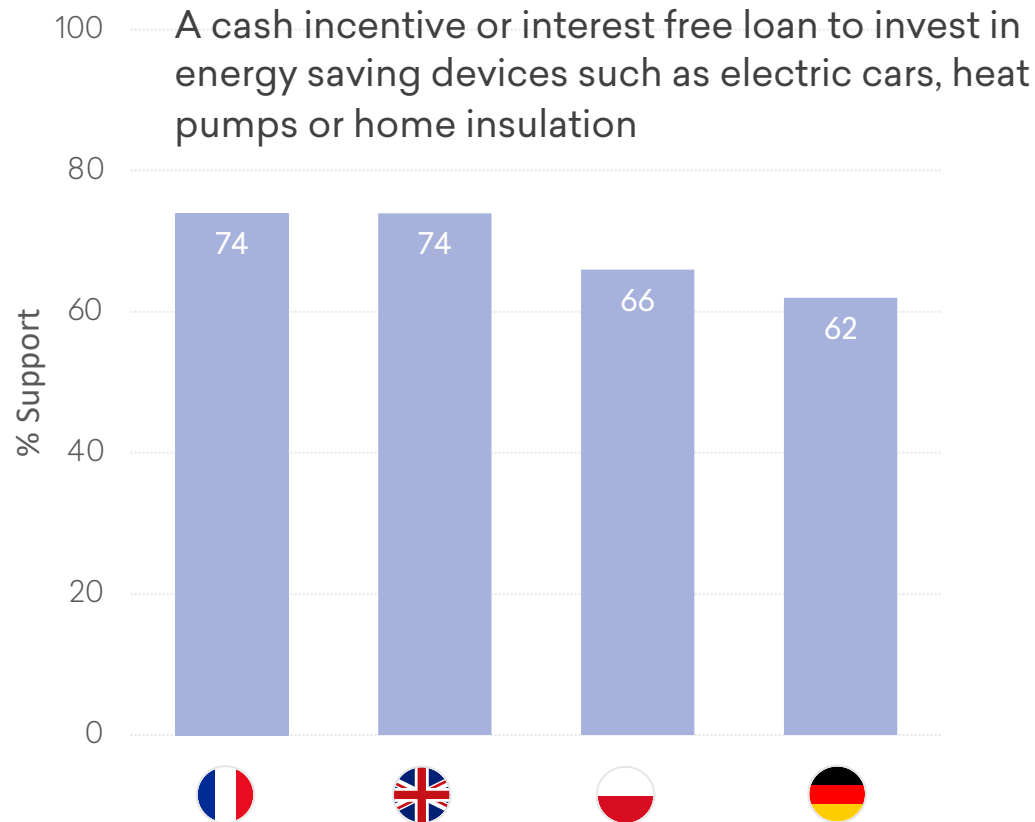
To what extent would you support, or oppose, the following measures to help address the rising cost of living?





# Public strongly backs windfall profit taxes and cash incentives for EVs and heat pumps

To what extent would you support, or oppose, the following measures to help address the rising cost of living?





# Thank you.

For more information on this survey, including country specific reports and data, please contact **Arisa Kimaram** ([arisa@moreincommon.com](mailto:arisa@moreincommon.com)).

For all **media enquiries**, please contact [media@moreincommon.com](mailto:media@moreincommon.com).





# Appendix: Previous Survey Waves

The Cost of Living study is part of More in Common's *Navigating Uncertainty* project (2021-2022). Where relevant, we reference tracking data from two previous waves of survey work. Full details are available on our website.

Wave 1 -  
referred to as  
"End 2021"

Wave 1	Fieldwork Dates	N-size	Research Partner	Margin of Error
France	7-15 December 2021	2,000	YouGov	2%
Germany	7-17 December 2021	2,000		2%
Poland	6-17 December 2021	2,000		2%
UK	19 Nov - 1 Dec 2021	2,000		2%

Wave 2 -  
referred to as  
"Mid 2022"

Wave 2	Fieldwork Dates	N-size	Research Partner	Margin of Error
France	14-25 March 2022	4,000	Kantar	2%
Germany	6-12 May 2022	2,000	YouGov	2%
Poland Phase 2a	4-7 May 2022	1,000	Ipsos	3%
Poland Phase 2b	1-6 June 2022	1,000		3%
UK Phase 2a	13-21 April 2022	3,000	Public First	2%
UK Phase 2b	27 May – 1 June 2022	2,000		
UK Phase 2c	21 - 26 July 2022	2,686		