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# People Powered Public Services: Monitoring UK Opinion

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We are a think tank working to help governments develop the next generation of public service solutions for citizens. We do this through developing research and insight on public services internationally and through trialling innovation in service design.

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# FOREWORD

## *Engaging citizens and communities in public service design and delivery is critical for future success*

As citizens, we spend a significant portion of our income on the taxes that fund public services. Perhaps more importantly, we rely on these critical services every day for the running of our lives – be it on the police to keep us safe, on public transport to get around, on the health system to keep us well, and so much more.

However, it is only once every five years or so (at least on any significant scale) that we are asked for our views and cast a vote to indicate our satisfaction - or lack thereof - with the services we receive. We on the whole pay more to governments than we do to any single private provider, yet we have less control over the output.

But this is changing. Citizens are now more powerful than ever, are more vocal than ever, and expect more. Governments in turn know they need to respond, and many have gone forward in leaps and bounds with transparency and other measures, but there is more to do. Long gone are the days of the paternalistic and distant state designing services at arm's length.

While government is not just about pleasing everyone, in the future, the most successful governments will need to stay closer to their citizens, building a better two-way dialogue focussed on how to improve services and overcome newly emerging challenges. Central to this is the idea of citizen-centred design of public services – creating services from the ground up, starting with the needs of the user, rather than what is convenient for the provider.

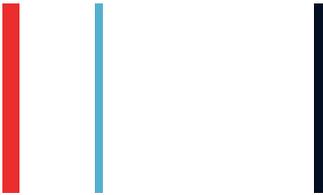
This new quarterly series from the Serco Institute – ‘People Powered Public Services – Monitoring UK Opinion’ aims to make a small contribution to this new emerging era of public service design and delivery.

The pandemic has helped remind governments of a key truth: there is not only political advantage in well-run public services, but a deep-seated requirement for them. Governments ignore the views of citizens at their peril.

**Kate Steadman**  
*Director, Serco Institute*

# CONTENTS

<b>Outline – Tracking public opinion on public services</b>	<b>5</b>
<b>Methodology &amp; Limitations</b>	<b>5</b>
<b>Overview</b>	
<b>Overview – Satisfaction (not quite) guaranteed</b>	<b>7</b>
<b>Introduction – What drives public opinion?</b>	<b>16</b>
<b>Key findings</b>	
<b>The Gender Gap</b>	<b>19</b>
<b>Age Is More Than Just a Number</b>	<b>24</b>
<b>What Is to Be Made of ‘Social Grade’?</b>	<b>29</b>
<b>Notions of the Nations</b>	<b>33</b>
<b>Conclusion</b>	
<b>UK v Australia – lessons to learn?</b>	<b>39</b>
<b>Conclusion – the beginning of the story</b>	<b>44</b>



## Outline – Tracking public opinion on public services

In this new, longitudinal study, the Serco Institute is tracking sentiment towards public services, through repeated, nationally representative surveys carried out by an independent, expert polling organisation. Across **15 types** of public services as well as the **Management of Covid-19** and **Public Services as a Whole**, we will track how ‘satisfied’ the UK is with the services they are using and analyse key findings through these short, quarterly reports.

We hope that this will help policymakers and shapers to design and deliver better public services, for the benefit of citizens. This research will also inform wider public understanding of how public services are perceived and used.

In this first report, we outline the statistics which will act as our initial baseline and examine the UK’s public sentiment towards public services as Covid-19 restrictions are significantly eased. The same study is being carried out in tandem in Australia and we will also briefly seek to highlight points of difference between the two countries.

### Methodology & Limitations

This study was conducted in the UK by *Kantar* via an internet omnibus survey. A sample of 1044 adults aged 16-64 were interviewed. Interviewing was conducted by online self-completion from 26 August - 30 August 2021. The sample has been weighted to represent the adult population aged 16-64. Where unweighted base figures are less than 100, data has been treated cautiously, as large margins of error are possible. Not all charts will equate to 100% due to rounding.

The quality of the data is reliant on the quality of responses. We anticipate that responses will be based on people’s experiences of public services as well as their view of the policies underpinning them, as well as other socio-political factors, which are impossible to disentangle from one and other. The delivery and policy are inevitably linked, both in practical terms and in the minds of the public who have been surveyed.

# CONTENTS

Outline – Tracking public opinion on public services	5
Methodology & Limitations	5
<b>Overview</b>	
<b>Overview – Satisfaction (not quite) guaranteed</b>	<b>7</b>
<b>Introduction – What drives public opinion?</b>	<b>16</b>
<b>Key findings</b>	
The Gender Gap	19
Age Is More Than Just a Number	24
What Is to Be Made of ‘Social Grade’?	29
Notions of the Nations	33
<b>Conclusion</b>	
UK v Australia – lessons to learn?	39
Conclusion – the beginning of the story	44

## Overview – Satisfaction (not quite) guaranteed

UK citizens' view of **Public Services as a Whole** can be considered as positive – with 45% of people indicating they were 'very' or 'quite' satisfied (from herein referred to as the 'net satisfaction' rating) versus 19% indicating they were 'very' or 'quite' dissatisfied (conversely called the 'net dissatisfaction' rating). Although the net satisfaction rating did not reach the 50% mark, 33% of respondents said they were 'neither satisfied nor dissatisfied'. The response of this cohort could be understood as broadly positive: perhaps these respondents feel that they are receiving the public services they expect in light of taxes paid – no better, no worse.

The public's assessment of **the way Covid-19 has been managed** is likely to be broadly welcomed by policymakers. There was a net satisfaction rating of 41% versus 29% net dissatisfaction rating. Possible explanations could be the goodwill generated from the vaccine rollout and that, at the time of the fieldwork for the poll, the furlough scheme was still in operation.

### Top 3 services delivering satisfaction

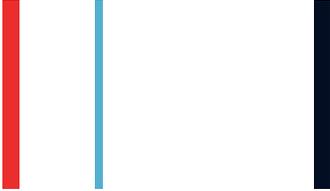
(Net satisfaction / Net dissatisfaction)

1. Hospital Services (49% / 24%)
2. Waste & Refuse Services (49% / 19%)
3. Schools (46% / 19%)

**Hospital Services** received the highest net satisfaction rating of any of the public services polled, with 49% net satisfied versus 24% net dissatisfied. This may be because of hospitals' association with the well-regarded NHS brand. Another theory is that negative press around the NHS accrues to whichever government is in power at the time, whereas the positives accrue to the service itself.

**Waste & Refuse Services** is a public service experienced on a regular basis by the majority of respondents – it is also one of the best thought-of. Achieving the joint highest net satisfaction score of 49% (the same as *Hospital Services*), and one of the lowest net dissatisfaction scores of 19%, *Waste & Refuse Services* might not be one of the most high-profile public services, but it is one of the most liked.

Respondents' views of **Schools** are noticeably more positive than negative with, 46% net satisfied and just 19% net dissatisfied. This is despite some fairly challenging headlines focused on how UK administrations handled schools throughout the pandemic. Perhaps the strong scores reflect students, parents, and grandparents' delight at this year's GCSE and A-Level results which have been markedly



higher than previous years, or perhaps these evaluations are based more on sentiment or general experiences and views of the education system.

**Defence & the Armed Forces** recorded a notably low net dissatisfaction rating of 16% compared to a net satisfaction rate of 44%. The underlying reasons for responses here are likely to be particularly complex. They might be informed by citizens' high regard for the Armed Forces, rather than a view on the technicalities of the UK Government's foreign and defence policy.

Respondents also reported a net satisfaction rating for **Public Transport** of 44%, but a slightly higher net dissatisfaction score of 22%. Although this was not one of the highest net satisfaction ratings in our survey, it is notably high given transport is often an evocative area of public service and used by many citizens on a truly regular basis.

Net satisfaction levels with **GP & Community Healthcare Services** were reported at 42% versus 30% net dissatisfied. Satisfaction levels are five percentage points lower than the corresponding figure for hospitals, possibly because *GP & Community Healthcare Services* do not get the 'brand dividend' of the NHS which is more closely associated with hospitals, or directly administer the often live-saving (and more emotive) treatment available at hospitals.

**Post-18 Education (Universities and Colleges)** received the next highest net satisfaction rating of 41% compared to 16% net dissatisfied, one of the lowest dissatisfaction figures in the survey. These responses appear somewhat surprisingly positive when one reflects on the supposed dissatisfaction of students with universities through the pandemic; in particular, the issue of students being encouraged back to universities only to be locked down in their accommodation.

Despite some high-profile controversies over the past twelve months, as well as having to play a difficult role during the pandemic, people were largely happy with **Policing** – 40% of respondents indicated they were net satisfied, and 28% net dissatisfied.

The difference between people who indicated they are satisfied as compared to dissatisfied becomes more marginal in the next set of services, starting with **Social Security, Welfare & Job Support**, which was subject to a 34% net satisfaction level versus 27% net dissatisfaction rating. The poll was conducted at a time when the UK's furlough scheme – the biggest job support programme in the country's history – was still in place, as well as a temporary pandemic-related uplift in Universal Credit, the main form of social security benefit.

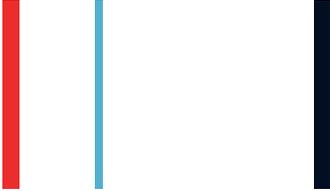
One of the most interesting stats is the unexpected, marginally positive net satisfaction rating for **Social/Aged Care Services** of 33% versus 30% net dissatisfied. This is despite the issue of a lack of social care reform, a regular feature of the public discourse for a number of years, most notably as a critical reason for the unexpected 2017 General Election result. It is important to note that fieldwork for the poll was conducted prior to the UK Government's announcement of a new 'Health & Social Care Levy' (confirmed on 7 September 2021) and so does not take account of this development. It will be interesting to view, in our next report, the ramifications of the new 'Levy' for public satisfaction with this service category.

Overall, citizens have a marginally positive view of **Borders, International Travel & Customs**, with 32% net satisfied and 29% net dissatisfied. The low gross level of satisfaction may be explained by the UK Government's international travel policy during the pandemic, which has faced some criticism as a result of the changing 'traffic light system'. Although a critical plank of the Government's Covid-19 policy, satisfaction with *Borders, International Travel & Customs* is notably lower than satisfaction of the Government's management of Covid-19 overall.

For **Prisons, Parole, & Probation**, 29% of people were net satisfied with 26% being net dissatisfied. Of all the public services, it recorded the highest level of citizens being 'neither satisfied nor dissatisfied' at 34%. Is this because of the inclusion of 'Parole' and 'Probation' in the category, a public service for which few citizens have first-hand experience? Had the category been confined to 'Prisons', a public service which evokes a strong reaction, the results may have been different.

Respondents were two percentage points more net dissatisfied with **Mental Health Services** than net satisfied. Indeed, it is one of three areas of public services where respondents giving a dissatisfied scoring outstripped the number giving a satisfied one. *Mental Health Services* is the second least well-regarded of all areas polled (behind *Immigration & Asylum*). This could be for any number of reasons, the most obvious being that its historically relatively low levels of funding have been brought into sharp relief through mental health issues being greatly exacerbated by the pandemic, and the challenges of effectively treating mental health issues given the nature of Covid-19 restrictions.

As one of the most polarising areas of public policy, **Immigration & Asylum** lived up to its reputation as an issue which generates strong feelings – returning the lowest levels of satisfaction, with some 20% of respondents being 'very dissatisfied', and 18% being 'quite dissatisfied'. Furthermore, only 9% of respondents indicated that they were 'very satisfied' and 17% 'quite satisfied' – giving it a net



satisfaction score of just 26%. Respondents' motivations as to why they were so unsatisfied is likely to range from a feeling that the immigration regime is too lenient, to too harsh. Nonetheless, it is an area of public services that continues to evoke a strong response from the British public.

### The 3 services where more people were dissatisfied than satisfied

(Net satisfaction / Net dissatisfaction)

1. Immigration & Asylum (26% / 38%)
2. Mental Health Services (31% / 33%)
3. Housing (31% / 33%)

**Housing** received one of the most negative sets of responses; only 31% were net satisfied and 33% were net dissatisfied. Perhaps this is no surprise, given it is a controversial policy area which attracts the ire of various groups. Many people, for example, have been unable to get on the housing ladder, in part due to limited housing supply. Others, such as those who oppose the UK Government's policy aimed at increasing housebuilding, may also respond to this category negatively.

### 3 services where satisfaction is only marginally higher than dissatisfaction

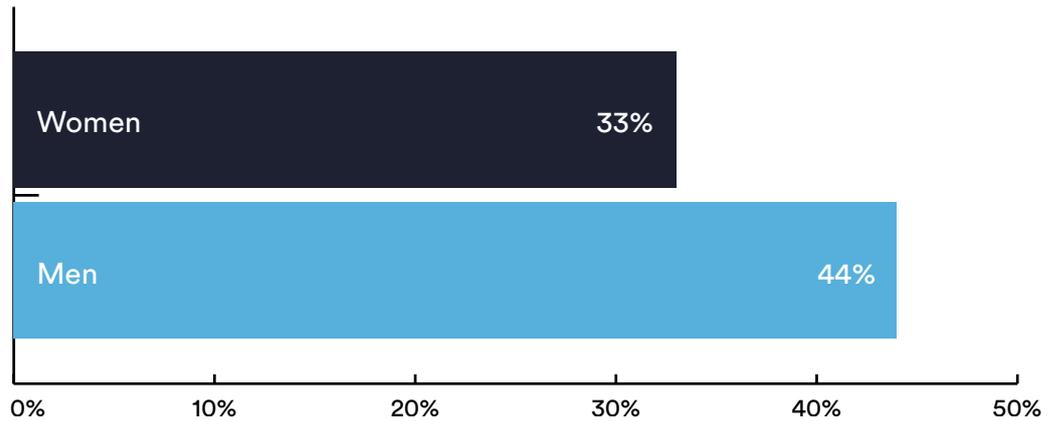
(Net satisfaction / Net dissatisfaction)

1. Borders, International Travel & Customs (32% / 29%)
2. Social/Aged Care Services (33% / 30%)
3. Prisons, Parole & Probation (29% / 26%)

## Key trends

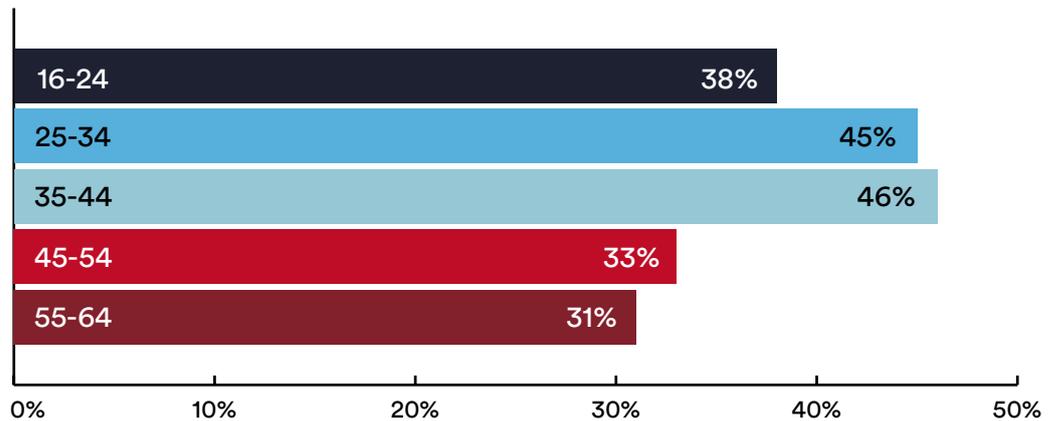
Alongside the results indicating people's sentiments towards individual services, we have identified some key trends across different cohorts. These include:

- Although reportedly greater users of services, **women consistently gave lower satisfaction scores when compared to men.**



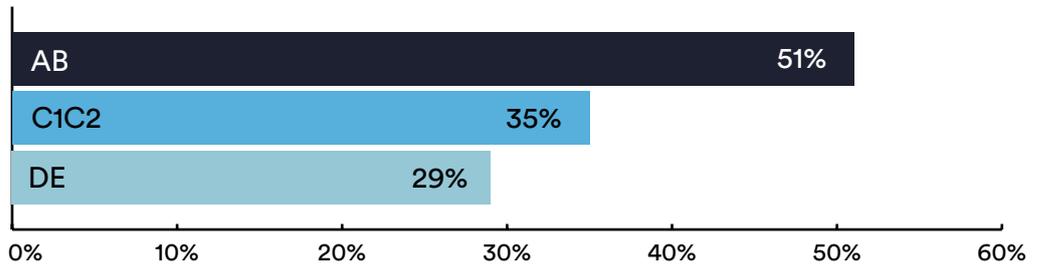
Average net satisfaction across all 17 areas polled

- Age also seemed to be an indicator of satisfaction. **The oldest age group in particular showed consistently high levels of dissatisfaction (and lower levels of satisfaction).**



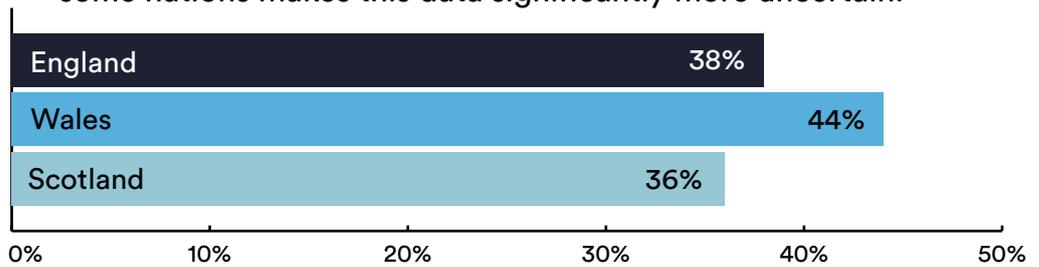
Average net satisfaction across all 17 areas polled

- A person's so-called 'social class' <sup>1</sup> seems to be an indicator of their sentiment towards public services. **The higher the category, the more satisfied a person is with public services.**



Average net satisfaction across all 17 areas polled

- With many services being managed (or part-managed) by devolved authorities it is important to note some key patterns within and between different UK nations. Broadly, **Wales was the most satisfied of the nations**, whereas Scottish respondents registered satisfaction scores lower than the UK average across 10 of the 17 areas polled. However, the limited number of respondents in some nations makes this data significantly more uncertain.



Northern Ireland is not included as the number of respondents was too low.

Average net satisfaction across all 17 areas polled

One candidate theory to explain the trends in the data is that **those who rely on public services more often are more likely to be dissatisfied with them.** Groups more likely to use or rely on public services, such as women, older people and those not in work, were less likely to be satisfied, and more likely to be dissatisfied, with the state of public services. Significantly, groups dependent on a particular service were shown to be less likely to be satisfied with its delivery: for instance, those not in work were significantly less satisfied and more dissatisfied than those in work with *Social Security, Welfare & Job Support*, while respondents aged 55-64 were considerably more likely to be dissatisfied than all other age groups with *Social/Aged Care Services*. Those cohorts less reliant on public services often have the ability to choose only to use them when they are more convenient than an alternative option provided by the private sector. Therefore, it would seem that access to a choice of potential providers increases positive sentiment towards public services. This also raises the question as to whether where a choice of providers cannot be offered directly to a public service user, that the government creating a market of providers from which they can choose will increase positive sentiments in a similar fashion.

Although not immediately obvious, if the responses for *Public Services as a Whole* are considered in isolation – for which there was only a small divergence between the countries – this polling also identifies a difference between how citizens in Australia and the UK regard their country’s public services. Taking each service on a case by case basis there is a clear indication that Australians are more satisfied with public services than their British counterparts. Both in terms of frequency of returning higher satisfaction and lower dissatisfaction scores, as well as corresponding averages, **the Australian public seems to be consistently more pleased with the services they receive.** This is not to say that services are necessarily better. It could, for example, simply mean that Australians have different expectations of their public services or are more accommodating and content in their overall outlook on life.

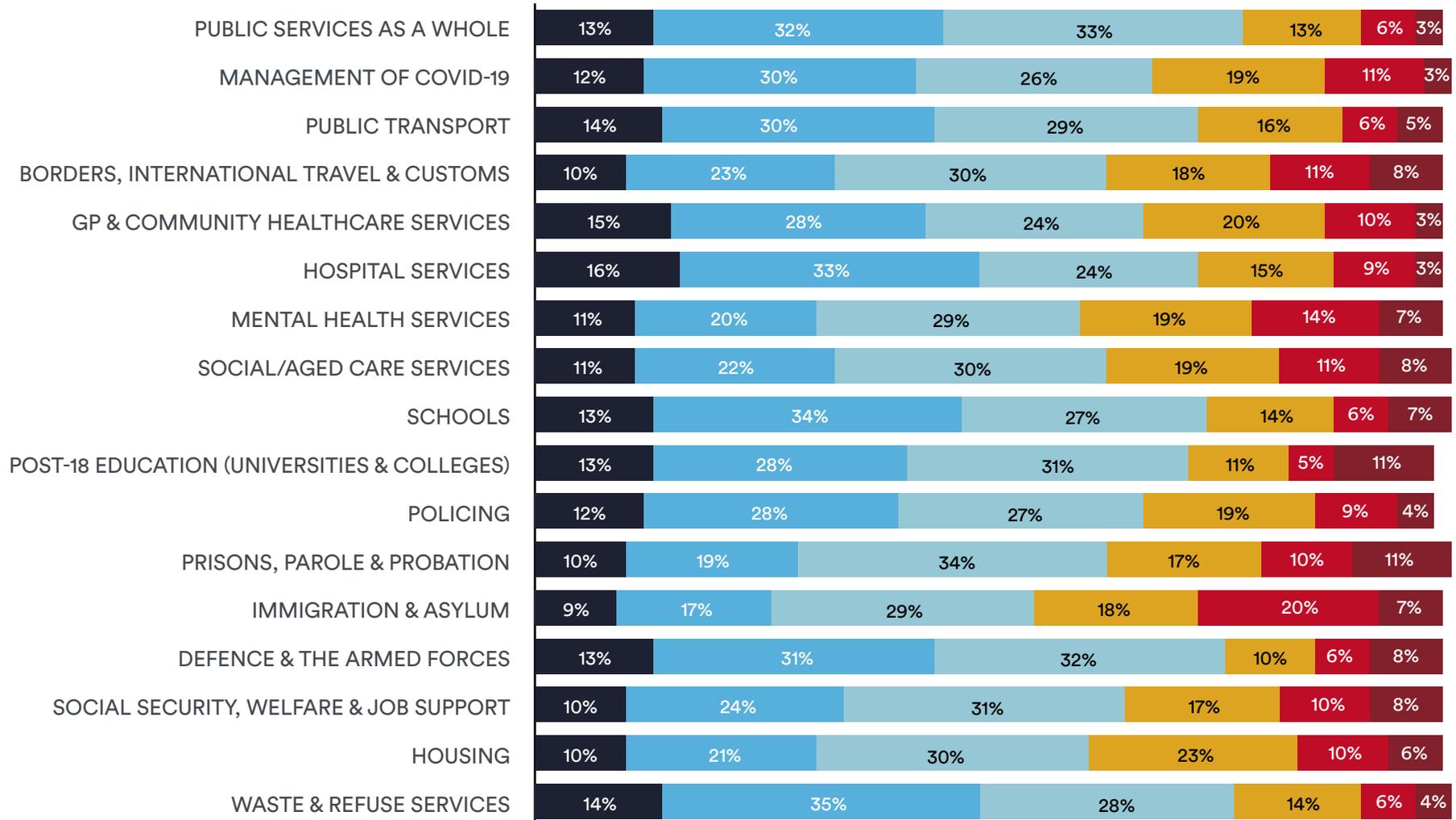
This is just the first in a series of polls we plan to conduct examining sentiment towards public services in the UK. Through repeated waves of polling we hope to track how sentiment towards public services is changing and whether some of the key trends we have identified in this first report evolve and why.

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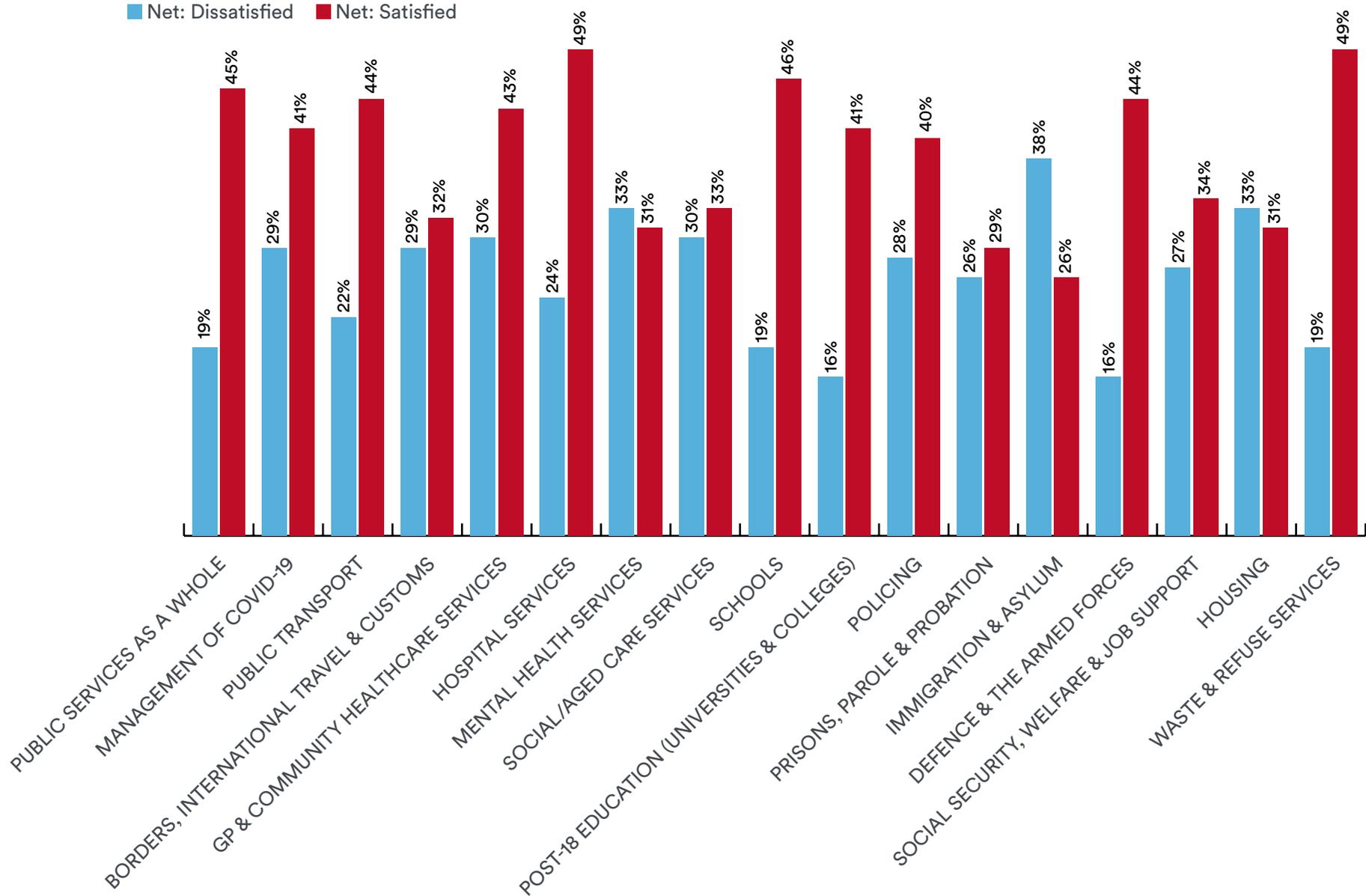
<sup>1</sup>Based on the NRS Social Grades system of classification: ‘Social Grade’ – National Readership Survey.

# OVERVIEW

Very satisfied
  Quite satisfied
  Neither satisfied nor dissatisfied
  Quite dissatisfied
  Very dissatisfied
  Don't know



# NET SATISFIED V NET DISSATISFIED



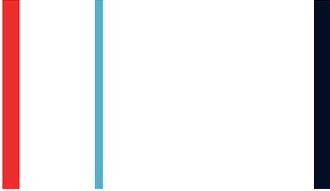


## Introduction – What drives public opinion?

When analysing why the UK public is more satisfied with some services than others, it is worth considering not only the services themselves but also the economic, geographic and socio-political context that could influence citizens' responses – polling responses are not formulated in a vacuum, but are the product of a particular point in time. With regard to public services, it is reasonable to suggest that responses are not solely informed by a citizen's experience of the service, but also by their view of the issue more generally and personal political persuasion. This unquantifiable mix of underlying reasons for responses is evident when we assess some of the responses to this survey – we will look at two particularly striking examples below.

*Immigration & Asylum* is a longstanding, controversial and polarising area of public policy. In our survey of the UK public, it registered the lowest levels of satisfaction, with some 20% of respondents being 'very dissatisfied', and 18% being 'quite dissatisfied'. At the other end of the scale, only 9% were 'very satisfied' and 17% 'quite satisfied', a net satisfaction rating of just 26%. *Immigration & Asylum* is an area of public service that is perhaps more likely to be influenced by an individual's views and political context: after all, only a small percentage of the UK populace would have experienced this public service first-hand. Even if we could guarantee the poll to be completely representative, it would still mean that only 0.6% of respondents had sought asylum in the UK and subsequently would have direct experience of the system<sup>2</sup>. It would therefore appear that the public's view of *Immigration & Asylum* is partially based on 'events' and perceptions of immigration more generally.

For example, within the context in which this poll was carried out, the number of immigrants arriving illegally by boat has been the subject of high-profile, regular media reports, often documented with evocative imagery. By late July 2021, the number of people who arrived in the UK through small boat crossings had reached 8,452, the same number as for the entirety of 2020<sup>3</sup>. However, asylum and immigration have not changed significantly as a public service, given that the Government's new, stricter immigration policy - as outlined in the Home Office's *New Plan for Immigration* white paper<sup>4</sup> - has not been implemented on the frontline. It may be that the high levels of dissatisfaction are partially explained by the raft of negative news stories rather than the public service itself or the planned future policy; indeed, 31% of the general public regard immigration as their number one concern, a figure that rises to 53% of those who voted Conservative in the 2019 General Election<sup>5</sup>. Further intensifying the levels of dissatisfaction could be those who simply oppose the Government's new immigration and asylum policy, well publicised for being more stringent than the current system. If this is the case,



those who favour a stricter immigration system may be dissatisfied due to the illegal arrivals, whilst those who oppose the new policy's restrictiveness may also be dissatisfied. Immigration and asylum, therefore, could be pleasing no one and in neither case are the majority of respondents basing their response on user experience of the public service. With changes incoming to immigration policy and a continually changing political context, it will be of interest to see if and how public sentiment changes towards *Immigration & Asylum* in our future polls.

Might the opposite be true of *Waste & Refuse Services*, which recorded the second highest level of satisfaction, where 35% of respondents were 'quite satisfied' and 14% 'very satisfied'?

In contrast to immigration, waste management is a public service which the vast majority of respondents are likely to experience first-hand on a regular, possibly weekly basis. Waste management, though undoubtedly a key public service, does not evoke the same level of high-profile attention as, for example, immigration. How often does waste management make national headlines? The more apolitical nature of waste management could result in responses that are based more on user experience. The complexity of the service in question may also have a bearing on responses. Effective waste management service is a complex undertaking; however, the delivery structure – focussed on repeatability and the servicing of a particular number of units – allows for a more forecastable service that is not as beholden to events as other public services. This may also partially explain the positive satisfaction scores: it is a simpler public service to deliver effectively relative to others.

These two examples highlight the myriad of potential factors that inform citizens' satisfaction levels with public services. Comprehensively explaining why citizens responded as they did is beyond the scope of this paper. However, we can provoke thoughts and questions as to why the results are as they are. Whatever the underlying reasons that underpin the responses, this polling paints a picture of UK citizens' satisfaction with public services in their country as it emerges from the worst of the pandemic.

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<sup>2</sup>Asylum and refugee resettlement in the UK' – The Migration Observatory.

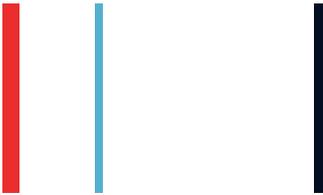
<sup>3</sup>Number of English Channel crossings surpasses 2020 record five months quicker' – ITV News.

<sup>4</sup>'New Plan for Immigration' - Home Office.

<sup>5</sup>Despite the pandemic, immigration is Conservative voters' number one concern' – YouGov.

# CONTENTS

Outline – Tracking public opinion on public services	5
Methodology & Limitations	5
<b>Overview</b>	
Overview – Satisfaction (not quite) guaranteed	7
Introduction – What drives public opinion?	16
<b>Key findings</b>	
<b>The Gender Gap</b>	<b>19</b>
<b>Age Is More Than Just a Number</b>	<b>24</b>
<b>What Is to Be Made of ‘Social Grade’?</b>	<b>29</b>
<b>Notions of the Nations</b>	<b>33</b>
<b>Conclusion</b>	
UK v Australia – lessons to learn?	39
Conclusion – the beginning of the story	44



## The Gender Gap

Perhaps one of the trends most evident in our data is a notable gap in the perceptions of men and women towards public services.

Male respondents delivered higher net satisfaction scores across all surveyed public services than their female counterparts, while women registered higher net dissatisfaction scores than men across 10 of the 17 areas polled. This is noteworthy for what it implies about the UK's public services, as, according to the campaign organisation the Women's Budget Group, women use public services more often than men<sup>6</sup>. Do women experience greater barriers in accessing public services? Are the services simply not best designed for those who use them most? Or, in the case of some public services, are the associated policy positions of the current Government simply finding a chillier reception among women than men?

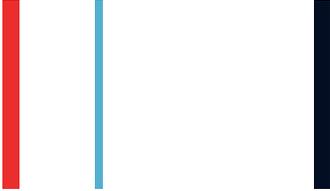
A further breakdown of the data reinforces this gender gap: men's net satisfaction scores were higher than net dissatisfaction scores for all services but *Immigration & Asylum*, where these scores were equal. By contrast, more women were dissatisfied than satisfied across eight services, although in two of these only by one percentage point. Across all 17 areas polled, satisfied men outnumbered dissatisfied men by an average of 20.5 percentage points, while women's satisfaction scores were higher than dissatisfaction scores by an average of only six percentage points. Women were therefore consistently more likely than men to find an area of public service dissatisfactory, and where they were satisfied with a service it was not by as much. This effect was especially pronounced when examining the gender breakdown of 'very satisfied' respondents, as men were often several times more likely to report they were 'very satisfied' with a service.

### Immigration & the EU Referendum – Policy v Delivery

In the year before the EU referendum, between June 2015 and 2016, immigration was consistently named as the most salient issue facing the country, peaking at 56% in September 2015. Rightly or wrongly, much of the commentary following the vote to leave argued it was as much a vote for a stricter immigration system as it was opposition to the EU itself. After the referendum, however, the salience of immigration to the UK public declined immediately and significantly, from 48% feeling it the most important facing the UK in June 2016 – the month of the EU referendum – to just 13% in November 2019<sup>7</sup>. It was almost as if a large proportion of the public felt the issue done and dusted through the vote to leave, even though *Immigration & Asylum* as a public service did not meaningfully change between June 2016 and November 2019. Indeed, there were not significant changes in net migration in the same period either<sup>8</sup>. In this prominent example, it seems that views of immigration are not necessarily based purely on the public service itself but wrapped up with the related events of the day.

An examination of the services with the highest discrepancy between men and women's satisfaction indicates there may be more at play than unequal access to public services. On *Immigration & Asylum*, the service where the gender gap was most visible, men were twice as likely to be net satisfied (34%), and five times as likely to be 'very satisfied' (15%), as women, and dissatisfied women, at 43%, outnumbered satisfied women by 26 percentage points. This is seemingly corroborated by the related service *Borders, International Travel & Customs*, where women's net dissatisfaction was, at 31%, once again higher than satisfaction, though only by seven percentage points, while men were almost five times as likely to be 'very satisfied' (15%) with this service as women. It is impossible, of course, to infer from the data why this may be, as the survey only indicates levels of satisfaction and not rationale. We may speculate that this is driven by a dislike for current Government policy as this may be intertwined with service delivery in the eyes of the public, but ultimately this cannot be definitively proven by this study.

Other areas where women and men diverge in their assessment of public services reflect broader trends in our society. On *Mental Health Services*, women's dissatisfaction, at 38%, was 14 points higher than satisfaction, and men, at 38%, were 14 points more likely to be satisfied than women. This is likely to reflect the fact that more women report suffering from mental health issues than men: as of 2014, one in five women in England suffered from mental health problems, compared to one in eight men<sup>9</sup>. Gendered taboos around



mental health reporting and the discussion of mental health may play a role here, as men are less likely to seek help or access mental health services than women, with only 36% of referrals for NHS talking therapies made for men<sup>10</sup>.

Other care-related services similarly indicated differing experiences of public services in these areas for men and women. 51% of men reported they were satisfied with *GP & Community Healthcare Services*, compared to 35% of women; while satisfied men outnumbered dissatisfied men by 28 percentage points, the proportion of dissatisfied women, at 36%, was one point higher than satisfied women. Could this indicate that women's health needs are not adequately met by GPs and community healthcare providers? Female respondents also indicated their dissatisfaction with *Social/ Aged Care Services*: while 38% of men stated they were satisfied with social and aged care, only 28% of women said the same, five percentage points below the proportion of women who said they were dissatisfied. This perhaps reflects the greater presence of care and caregiving in the lives of many women today. Women comprise 58% of unpaid carers in the UK and predictions are that one in two British women will have caregiving responsibilities by their late fifties<sup>11</sup>.

Although the disparity in satisfaction between men and women fluctuated between relatively negligible and very large, the fact remains that women taking part in our survey were consistently – and without exception – less satisfied than men across all areas of public services. Women were also more dissatisfied than men across a majority of polled areas, although it is notable that men's dissatisfaction was marginally higher than women's dissatisfaction with *Public Services as a Whole*. This suggests a gender-based inequity in UK public services, and efforts should be made to improve service quality and delivery for women.

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<sup>6</sup>Public Services' – Women's Budget Group.

<sup>7</sup>UK Public Opinion toward Immigration: Overall Attitudes and Level of Concern' - The Migration Observatory

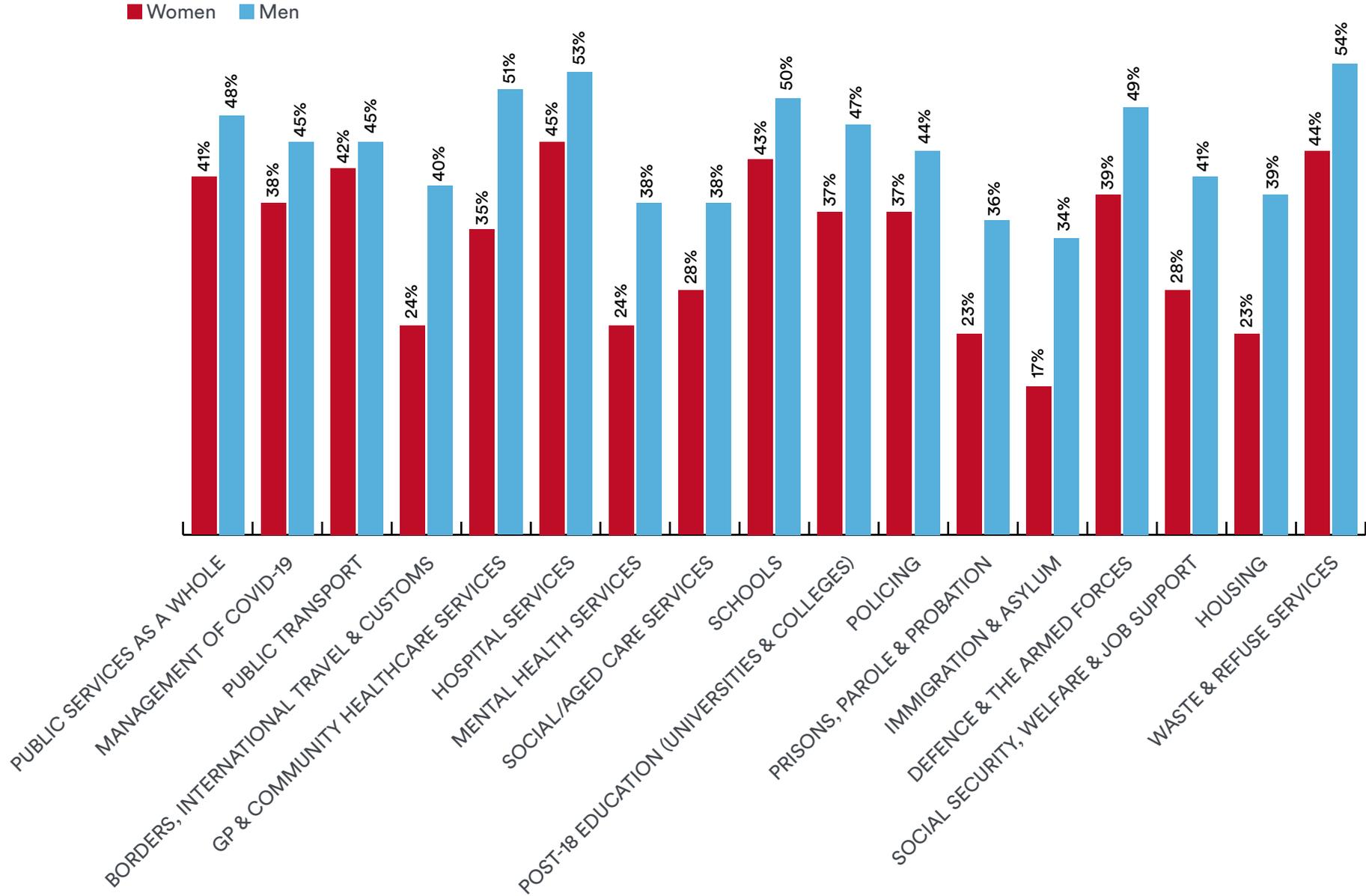
<sup>8</sup>Net migration to the UK - Migration Observatory' - The Migration Observatory.

<sup>9</sup>Mental health statistics: men and women' – Mental Health Foundation.

<sup>10</sup>Men and mental health' – Mental Health Foundation.

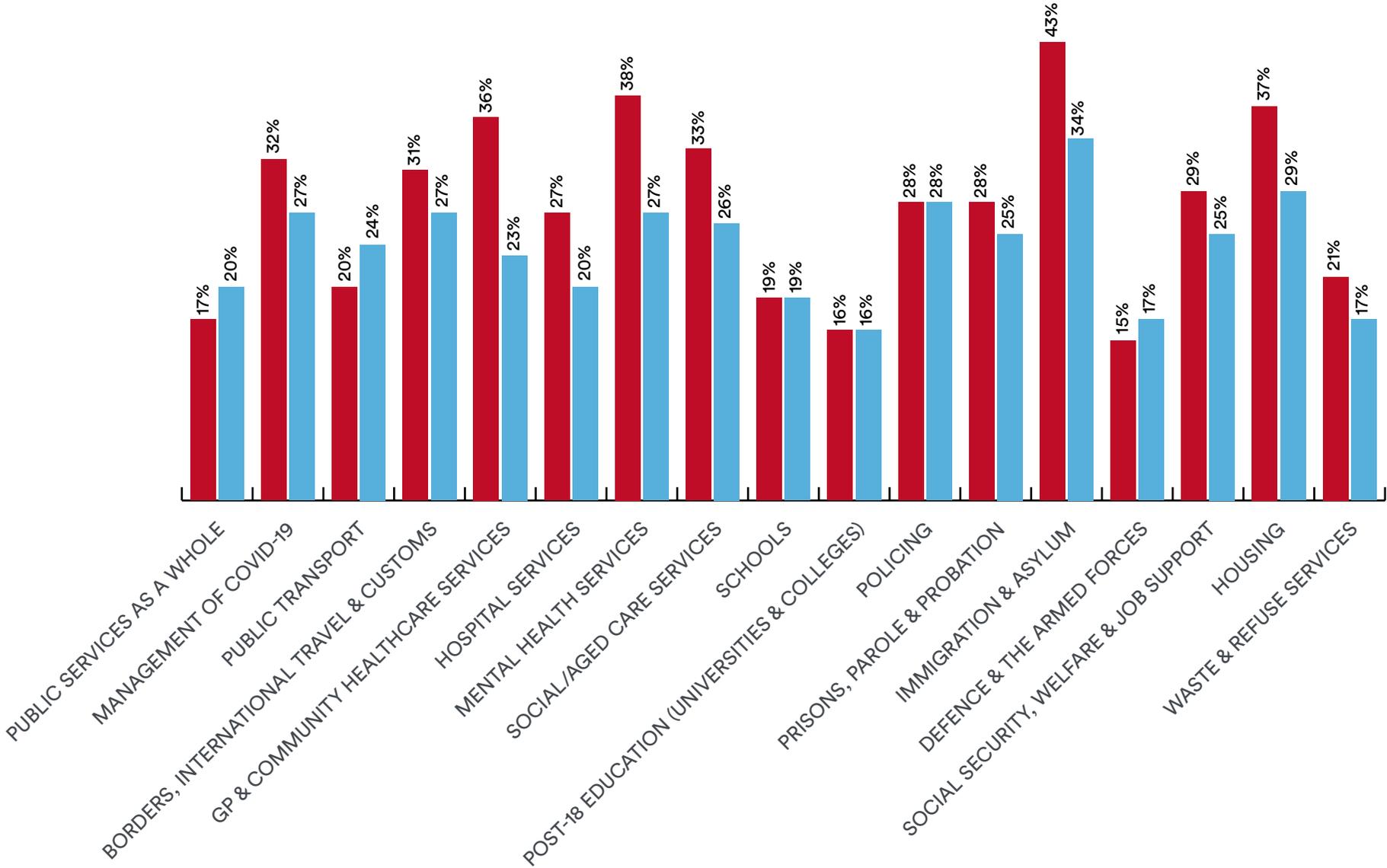
<sup>11</sup>10 facts about women and caring in the UK on International Women's Day' – Carers UK.

# NET SATISFIED: WOMEN V MEN



# NET DISSATISFIED: WOMEN V MEN

■ Women ■ Men



## Age Is More Than Just a Number

One of the other most striking trends across almost all polled areas of public services is that the oldest age group were consistently less satisfied with public services than their younger compatriots. The only service that the 55-64-year-old cohort indicated a greater net level of satisfaction with than the other age groups – excluding 35-44-year-olds, who indicated an equal level of satisfaction – is *Waste & Refuse Services*, where 52% of this oldest age range indicated they were ‘quite’ or ‘very satisfied’. In most other areas, this oldest age band confirmed lower levels of satisfaction than other cohorts.

### Don't know responses

Unsurprisingly, a number of respondents indicated that they ‘didn't know’ whether or not they were satisfied with various public services. The highest overall rate of ‘don't know’ responses, 11%, was received in relation to *Prison, Parole & Probation*, an area of public services that the majority of people are less likely to engage with on a day-to-day basis.

Within the different age cohorts, the rate of ‘don't know’ responses varied significantly. On 14 occasions the 16-24-year-old cohort returned the highest number of ‘don't know’ responses. The greatest number of ‘don't know’ responses by 16-24-year-olds was received in relation to *Prisons, Parole & Probation* (15%), in line with the overall trend. However, they also recorded the highest number of ‘don't know’ responses in relation to: *Social/ Aged Care* (11%), *Defence & the Armed Forces* (11%), and *Waste & Refuse Services* (11%) among others. These are all areas of public services of less direct relevance to this age cohort, or often register as being of less interest to them.

Conversely, the older age group recorded a greater number of don't know response in relation to *Schools* (14%) and *Universities* (17%). Once again, these are areas unlikely to be of direct relevance to the majority of people in this cohort.

There were a few exceptions to this trend; for example, the older age groups indicated greater satisfaction with *Defence & the Armed Forces* as compared to some of the younger cohorts. This oldest age grouping also showed greater satisfaction with *Management of Covid-19* (42% net satisfaction) as compared to the youngest age group (16-24-year-olds), who showed the least satisfaction (34%) with this area of public services. This is perhaps unsurprising, considering the younger age band was often the ‘hardest hit’ by Covid-19 restrictions – such as lockdown's disproportionate impact on sectors of the economy such as hospitality, where younger people

tend to work, and on university life and schools – despite being far less at risk of severe illness and death from the virus. The greatest level of net satisfaction with the *Management of Covid-19* was found in the 35-44 age band, who gave it a net satisfaction score of 49%.

The oldest age banding also gave the lowest overall satisfaction score for any single public service across all age ranges, indicating a net satisfaction score of just 10% for *Immigration & Asylum*.

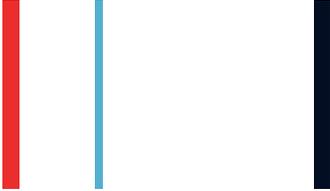
There is a very broad trend that net satisfaction scores were highest amongst those in the age range of 25-34 and 35-44. Although not true for every public service asked about, the younger and older age ranges generally indicated lower levels of satisfaction than the two age bandings towards the middle of the scale.

Of the 17 surveyed areas of public services, the oldest age band – 55-64 – registered a higher net dissatisfaction score than net satisfaction in nine different areas. In other words, there were more people aged 55-64 dissatisfied than satisfied with the majority of public services. That said, when polled in relation to their satisfaction with *Public Services as a Whole*, 39% of people in this oldest age range said they were ‘quite’ or ‘very satisfied’, whereas only 25% said they were ‘quite’ or ‘very dissatisfied’. Therefore, as with all the other age groups, there were more people who were satisfied than dissatisfied with *Public Services as a Whole* in this oldest cohort. This is still the joint lowest (with the 45-54 age band) net satisfaction score and the highest level of net dissatisfaction for *Public Services as a Whole*.

### Mental Health Services

One set of responses that stands out when analysing the data through the lens of age cohorts is *Mental Health Services*. The youngest (16-24) and two older age cohorts (45-54 & 55-64) recorded more dissatisfied responses than satisfied. In fact, two-thirds more 45-54-year-olds and over double the number of 55-64 said they were dissatisfied as compared to those who said they were satisfied.

Mental health is often seen as a policy area of particular interest to young people. However, this data shows that older people have strong views on the issue. Another interesting data point in relation to *Mental Health Services* is that over four times as many 16-24-year-olds (despite giving an overall higher net dissatisfaction score) and 25-34-year-olds said they were ‘very satisfied’ with *Mental Health Services* as compared to 45-54 and

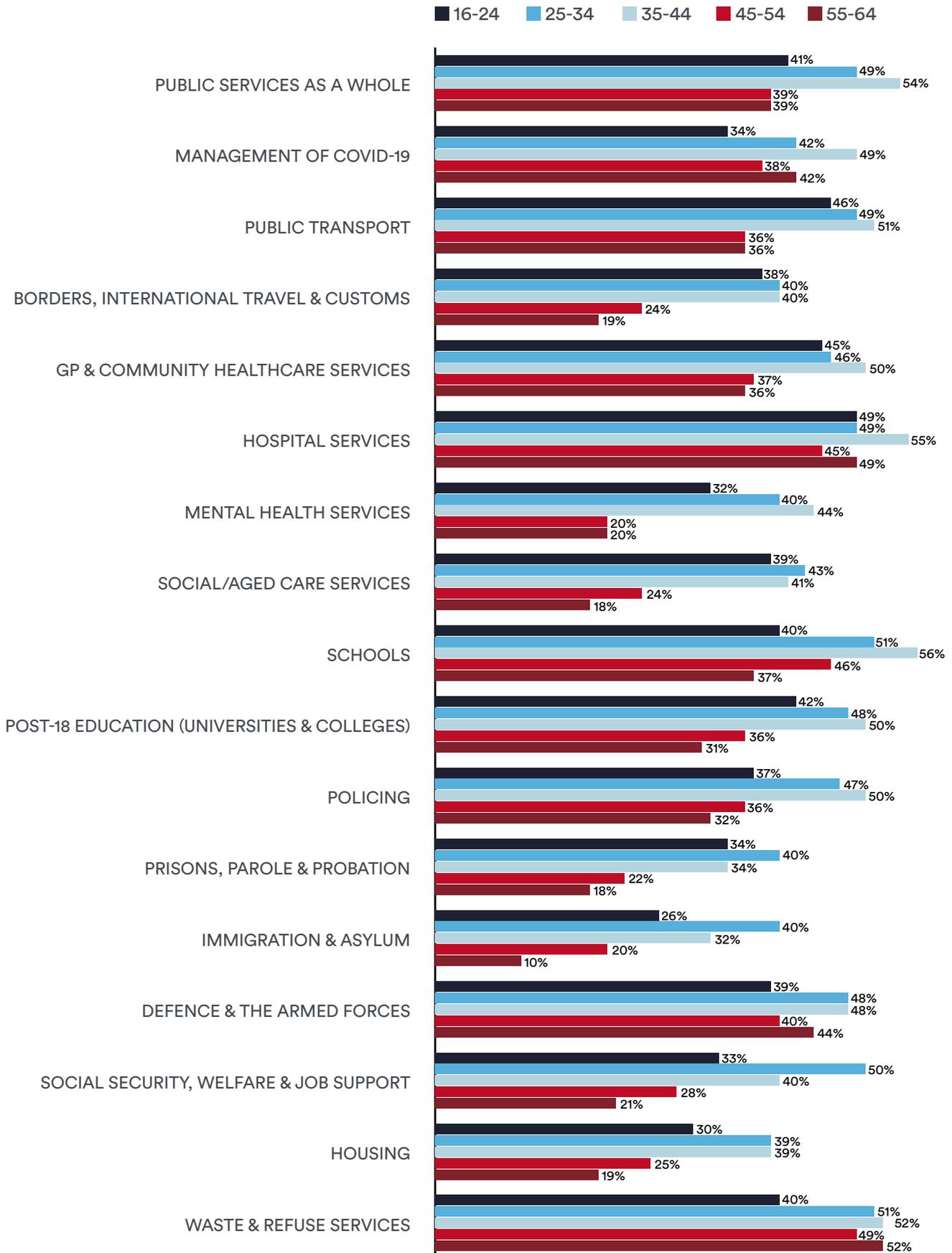


55-64-year-olds. Could this be an indication that where young people do access support, they are happy with the service that they receive, whereas a much greater proportion of older people feel services are not meeting their needs?

There are a number of candidate theories for this trend: could it be that older respondents' likely greater experience of public services makes them more jaded? Is it that there is simply a tendency for people to become shrewder and more critical with age? What motivates the young's similarly reproving view of many public services? Or is it again the issue of reliance as mentioned earlier – with increasing age comes increasing need, decreasing control and greater reliance on many public services?

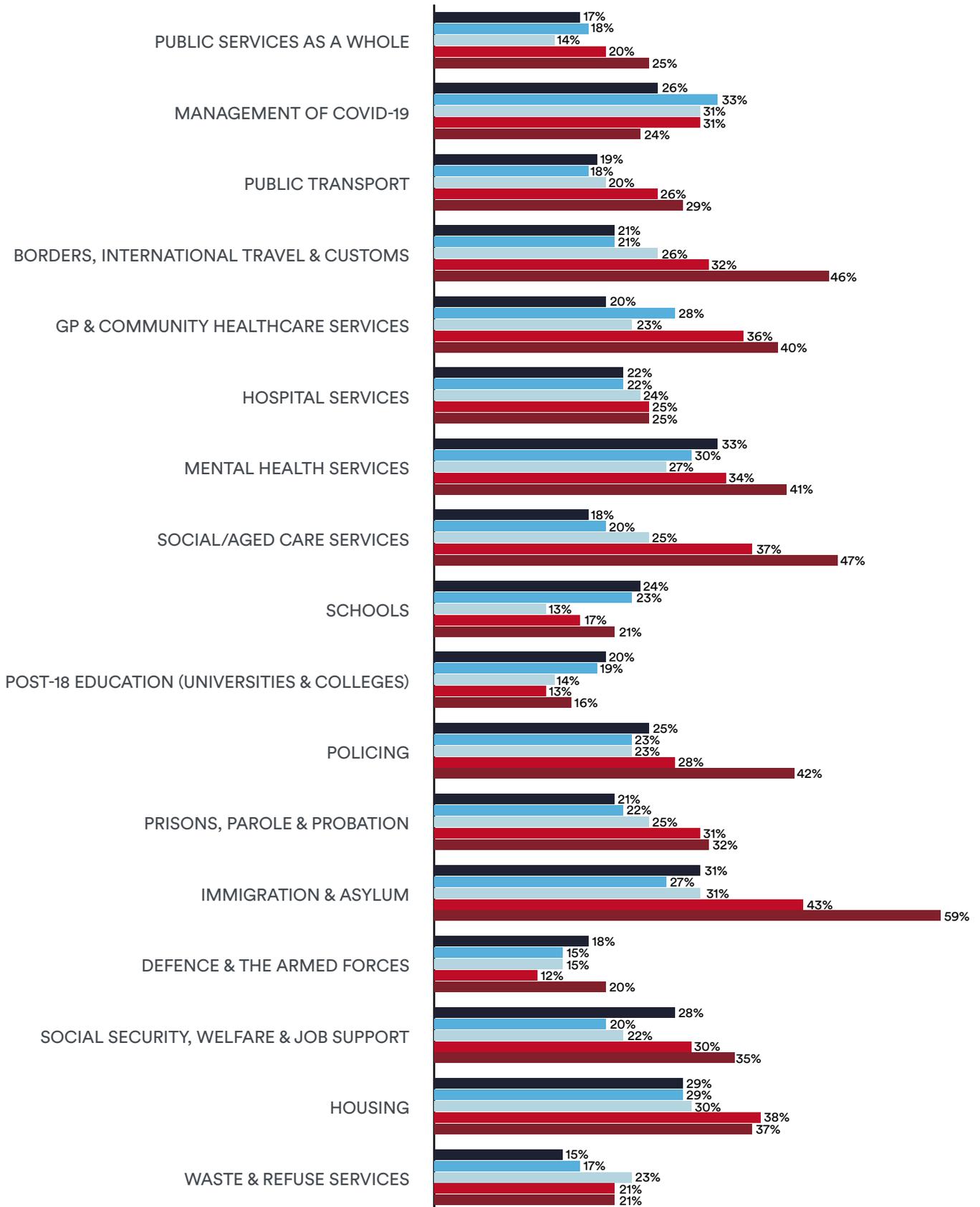
Regardless of these questions, the data indicates that people seem to become increasingly satisfied with public services as they head towards middle age, before heading back down the slope towards dissatisfaction as they move into their older years.

# AGE GROUPS: SATISFIED



# AGE GROUPS: DISSATISFIED

16-24 25-34 35-44 45-54 55-64



## What Is To Be Made of ‘Social Grade’?

For over 50 years market researchers and pollsters have used the *NRS Social Grades* system of demographic classification. Originally developed by newspaper and magazine audience researchers for the National Readership Survey (hence ‘NRS’), individuals are grouped based on the occupation of the primary earner’s occupation. It is often equated to ‘social class’. As a result of the methodology employed during the data collection, we have grouped the standard six classes of Social Grades into three couples:

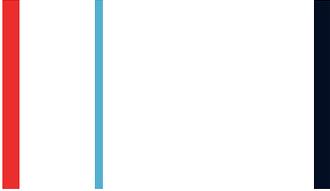
1. **AB** – Senior and intermediate managerial, administrative and professional workers
2. **C1C2** – Supervisory or clerical and junior managerial roles, and skilled manual workers
3. **DE** – Semi-skilled and unskilled manual workers, and casual workers and the unemployed

This research finds that the further up the NRS Social Grading system an individual is, the more likely they are to be satisfied with public services. Across every single area of public services we polled, those in the top two Grades (AB) indicated a higher level of satisfaction than the other two groups of Social Grades (C1C2 and DE). The same is true for the net satisfaction scores awarded by those in the C1C2 grouping as compared to those in DE.

### Public Transport – those that use it least are the most satisfied?

One candidate theory is that the more people rely on a public service, the less satisfied they are with it. For example, if we look at ratings for public transport, the ‘highest’ AB Social Grade group’s net satisfaction scores are 50% higher than the DE group. This is despite those on lower incomes (i.e. those in the DE group) being more likely to use public transport – particularly buses – and those on higher incomes (i.e. those in the AB group) being more likely to use cars.

The same is broadly true, bar a small number of exceptions, when it comes to levels of dissatisfaction. Interestingly, one of these exceptions is that when asked about *Public Services as a Whole*, the DE grouping indicated a lower level of dissatisfaction (16%) than those in the C1C2 (20%) and AB (19%) groupings. This is despite generally indicating higher levels of dissatisfaction (and lower levels of satisfaction) when asked about individual services. However, the margins of difference between the different groups are relatively small (3-4%), and therefore may be down to sampling.



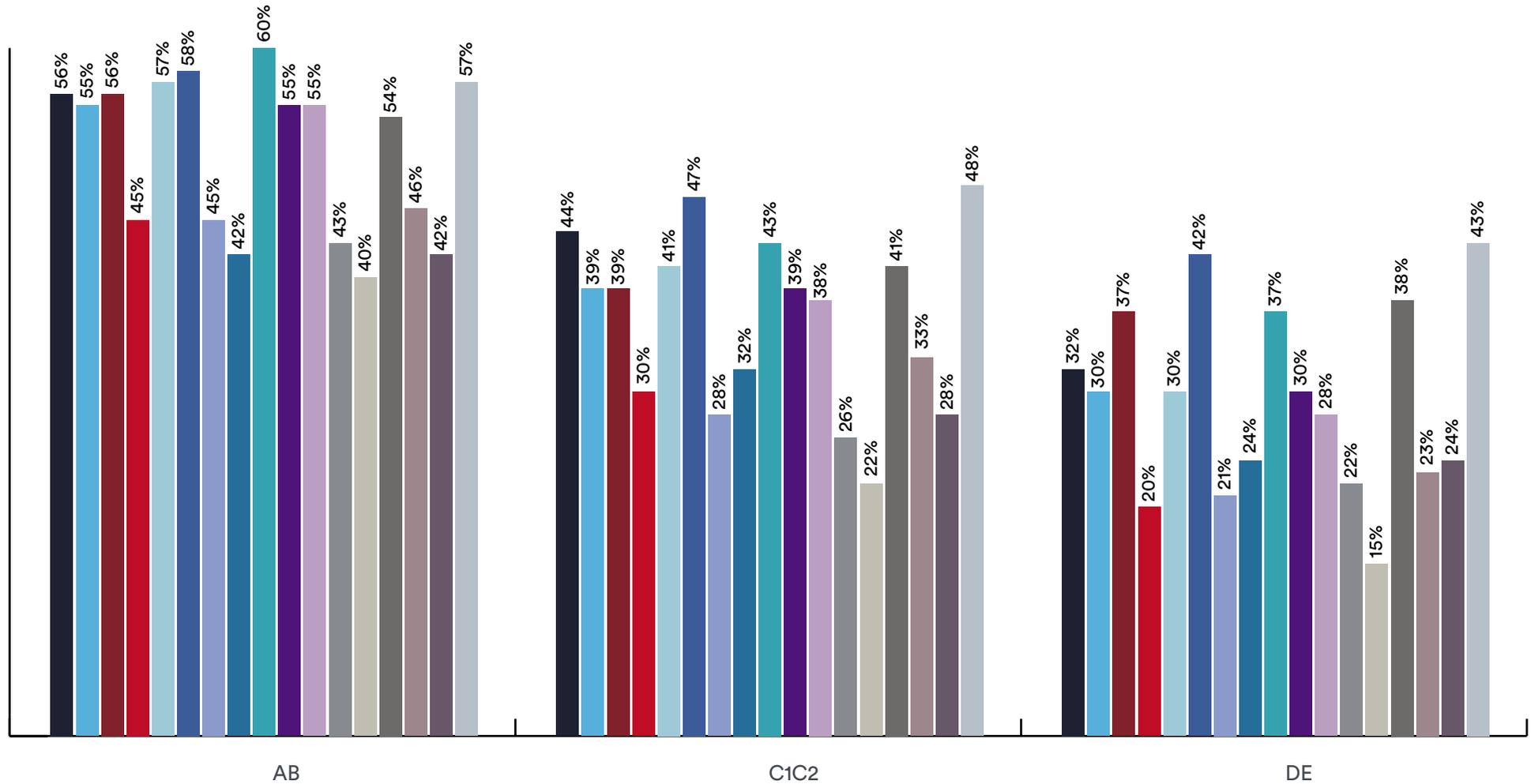
Including *Public Services as a Whole*, the poll asked people to rate their levels of satisfaction in 17 different areas. Nine out of 17 times the DE grouping recorded higher net dissatisfaction scores than net satisfaction scores. For the C1C2 grouping this occurred six times. AB respondents gave higher net satisfaction than net dissatisfaction across all 17 areas of public services.

When respondents are divided into those in work and those not in work, a similar trend appears. Non-working respondents gave higher net dissatisfaction than satisfaction scores nine out of 17 times.

It is clear that the higher up the *NRS Social Grades* system a person is, the more satisfied they are with public services. One potential explanation is that people less reliant on public services are more likely to be satisfied with them. For example, those not in work are significantly less satisfied (and more dissatisfied) with *Social Security, Welfare & Job Support* than those in work. Those cohorts less reliant on public services often have the ability to choose to use them only when more convenient than an option provided by the private sector.

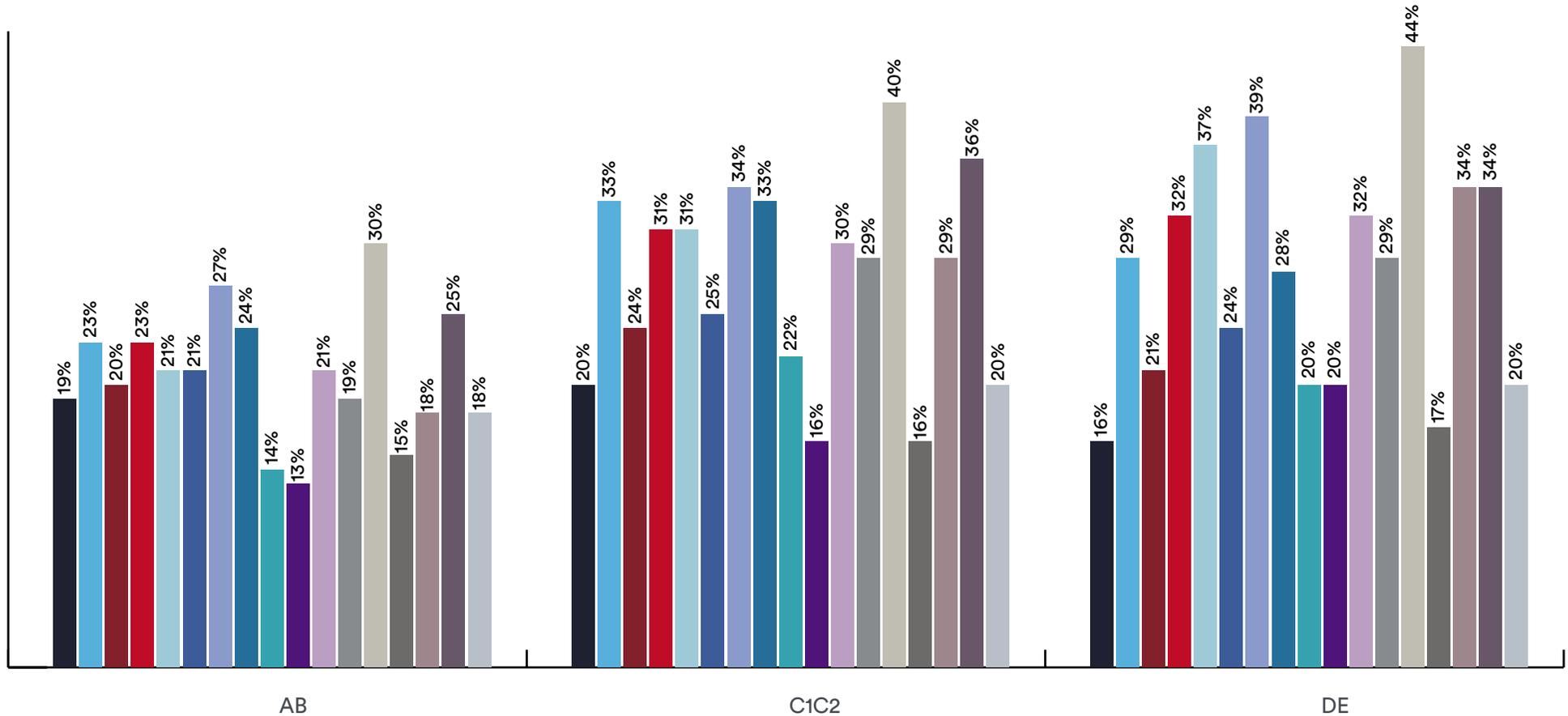
# NRS SOCIAL CLASS: SATISFIED

- PUBLIC SERVICES AS A WHOLE   ■ MANAGEMENT OF COVID-19   ■ PUBLIC TRANSPORT   ■ BORDERS, INTERNATIONAL TRAVEL & CUSTOMS
- GP & COMMUNITY HEALTHCARE SERVICES   ■ HOSPITAL SERVICES   ■ MENTAL HEALTH SERVICES   ■ SOCIAL/AGED CARE SERVICES
- SCHOOLS   ■ POST-18 EDUCATION (UNIVERSITIES & COLLEGES)   ■ POLICING   ■ PRISONS, PAROLE & PROBATION   ■ IMMIGRATION & ASYLUM
- DEFENCE & THE ARMED FORCES   ■ SOCIAL SECURITY, WELFARE & JOB SUPPORT   ■ HOUSING   ■ WASTE & REFUSE SERVICES



# NRS SOCIAL CLASS: DISSATISFIED

- PUBLIC SERVICES AS A WHOLE   ■ MANAGEMENT OF COVID-19   ■ PUBLIC TRANSPORT   ■ BORDERS, INTERNATIONAL TRAVEL & CUSTOMS
- GP & COMMUNITY HEALTHCARE SERVICES   ■ HOSPITAL SERVICES   ■ MENTAL HEALTH SERVICES   ■ SOCIAL/AGED CARE SERVICES
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- DEFENCE & THE ARMED FORCES   ■ SOCIAL SECURITY, WELFARE & JOB SUPPORT   ■ HOUSING   ■ WASTE & REFUSE SERVICES





## Notions of the Nations

The fourth major theme emerging from the survey is an output of the fact that it also offers an opportunity to examine the diversity of public opinion across the UK's different nations. Sentiment diverges considerably between the nations across a range of public services. What makes this especially interesting is that, as many of the surveyed services are devolved in Scotland, Wales and Northern Ireland, the data could be said to offer insight into the perceived performance delivery of public services by the devolved governments of the UK. However, a significant limitation to the reliability of our findings here is sample size: data on Scotland and Wales is drawn from a small base of under 100 people in each nation (i.e. fewer than 100 people's responses were recorded in Scotland and Wales respectively even prior to modelling the data to make the poll nationally representative). The inferences we are able to draw from the survey data should therefore not be regarded as authoritative, but rather as a suggestive glimpse into how public service delivery is assessed in each nation. The sample size of Northern Irish respondents is just 23, below the minimum base of 30: given this, we feel it would be inappropriate to draw conclusions on the state of opinion in Northern Ireland based on this data.

Despite these limitations, our data suggests that broadly, Wales was the most satisfied of the nations: its net satisfaction score was generally above the UK average by a mean of six points, and Wales registered higher-than-average satisfaction scores across 13 of the 17 surveyed areas of public service. By contrast, Scotland's net satisfaction scores were generally below the UK average by a mean of two points, and Scottish respondents registered lower than average satisfaction scores across 10 of the 17 surveyed areas. England's net satisfaction scores for all 17 services either equalled or were within one percentage point from the UK-wide average: this is likely because England supplied 907 of the 1044 survey participants and consequently dominated the mean.

One of the most prominent examples of divergence in policy and public service delivery during the pandemic is *Management of Covid-19*, an area in which the SNP-led Scottish Government and the Labour-led Welsh Government have adopted different, often more cautious approaches to lifting restrictions than the Conservative administration in England. 52% of Welsh survey takers reported they were satisfied with *Management of Covid-19*, 11 points above the UK-wide average, and the net satisfaction score for both England and Scotland, of 41%. Although this suggests that satisfaction in Wales with the handling of Covid-19 is higher than in England and Scotland, this satisfaction score diverges from data gathered by the Welsh Government: as of late August 2021, 73% of respondents agreed that

the Cardiff Bay administration had done a good job in containing the spread of Covid-19<sup>11</sup>. It is worth noting that, although devolved policy has differed (sometimes significantly) from that of the central UK Government over the course of the pandemic – with Scotland and Wales introducing restrictions or entering lockdowns at different times from England – it is unclear whether survey takers, in answering the survey question, distinguished between the policies of their government and those of the UK. However, evidence that the publics in the devolved nations make such a distinction is supported by previous polling conducted by King’s College London and the University of Bristol, which found that while 55% of Scottish and 43% of Welsh respondents trusted the UK Government less as a consequence of Westminster’s handling of the pandemic, two-thirds of those polled in Scotland trusted the first minister Nicola Sturgeon on coronavirus-related issues<sup>12</sup>.

On other issues, the nations delivered a mixed bag of judgments. On all four surveyed public services which are mostly reserved to Westminster – *Borders, International Travel & Customs; Immigration & Asylum; Social Security, Welfare & Job Support; and Defence & the Armed Forces* – Scotland delivered net satisfaction scores below the UK average and net dissatisfaction higher than the UK average. Furthermore, net dissatisfaction was higher than net satisfaction across two of these four service areas in Scotland. In Wales, where a further two services – *Policing; and Prisons, Parole & Probation* – are not devolved, respondents reported higher levels of satisfaction rather than dissatisfaction across four services out of the six not under the Senedd’s remit and above-average satisfaction scores across five.

Coupled with the above, it is noteworthy that Scottish respondents tended to show higher levels of dissatisfaction with services delivered by the UK Government. For example, on *Defence & the Armed Forces*, Scotland recorded the lowest satisfaction (35%) and highest dissatisfaction (26%) scores of the nations. Equally, on *Immigration & Asylum*, dissatisfied respondents (40%) outnumbered satisfied respondents (24%) by 16 percentage points in Scotland. While we cannot pinpoint whether this higher level of dissatisfaction is due to support for or opposition to current UK immigration levels or policy, this may reflect Scotland’s large Remain vote in the 2016 referendum, and broad continuing support in Scotland for EU membership and attendant free movement rights<sup>13</sup>. We cannot verify, based on this data, whether pro-independence sentiment is driving this dissatisfaction with public services under the UK Government’s purview, but it is interesting, given Scotland’s high level of support for independence, that a pattern seems to exist between UK Government control and Scottish dissatisfaction in public services.



As stated above, we cannot draw definitive conclusions from this data about the state of satisfaction and dissatisfaction with public services in the nations. Nevertheless, trends are evident in the responses of those polled in Scotland and Wales, which may offer comment on those nations' satisfaction with the services delivered both by their respective devolved governments and the central UK Government.

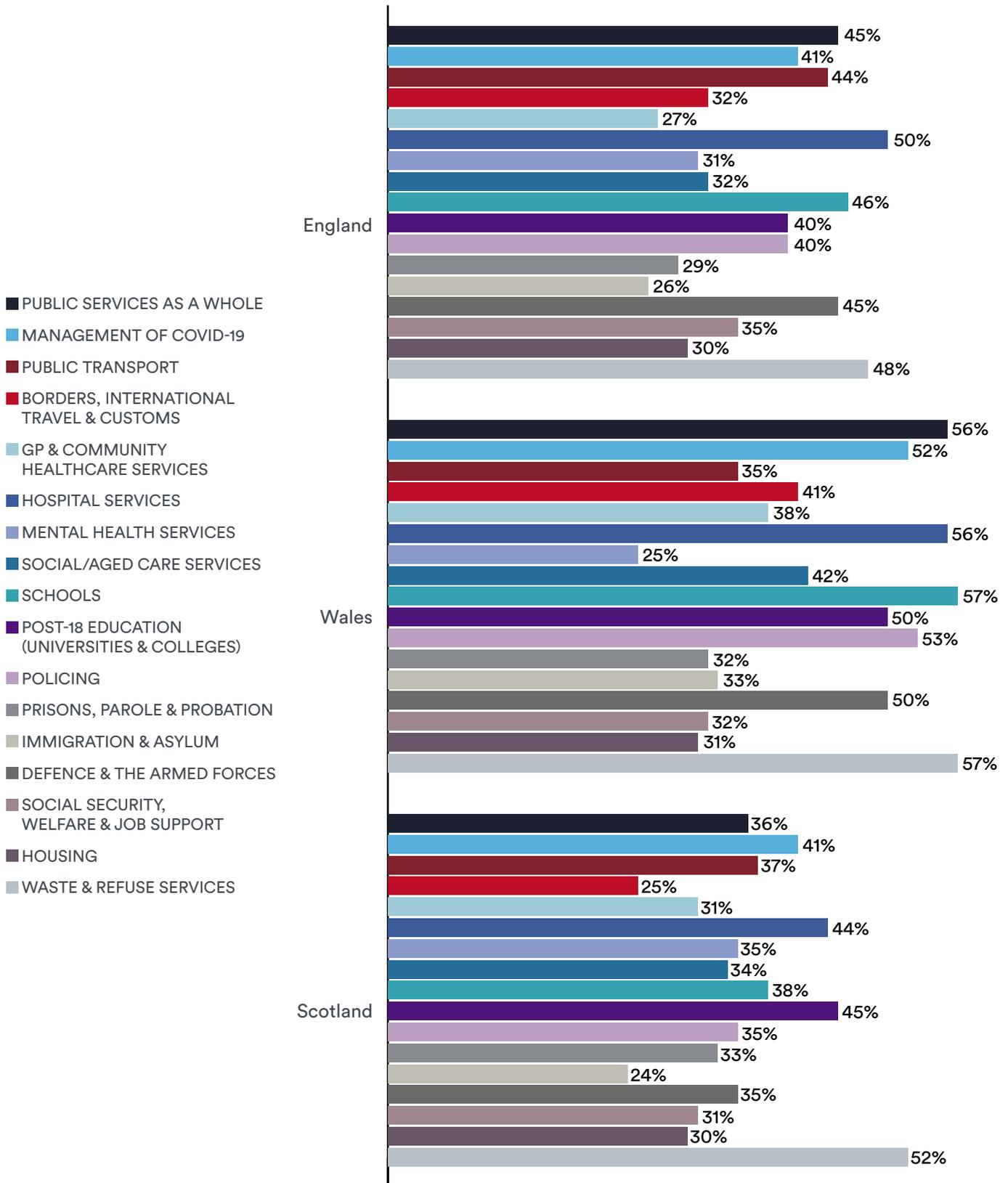
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<sup>11</sup>Survey of public views on the coronavirus (COVID-19): 27 to 30 August 2021' – Welsh Government.

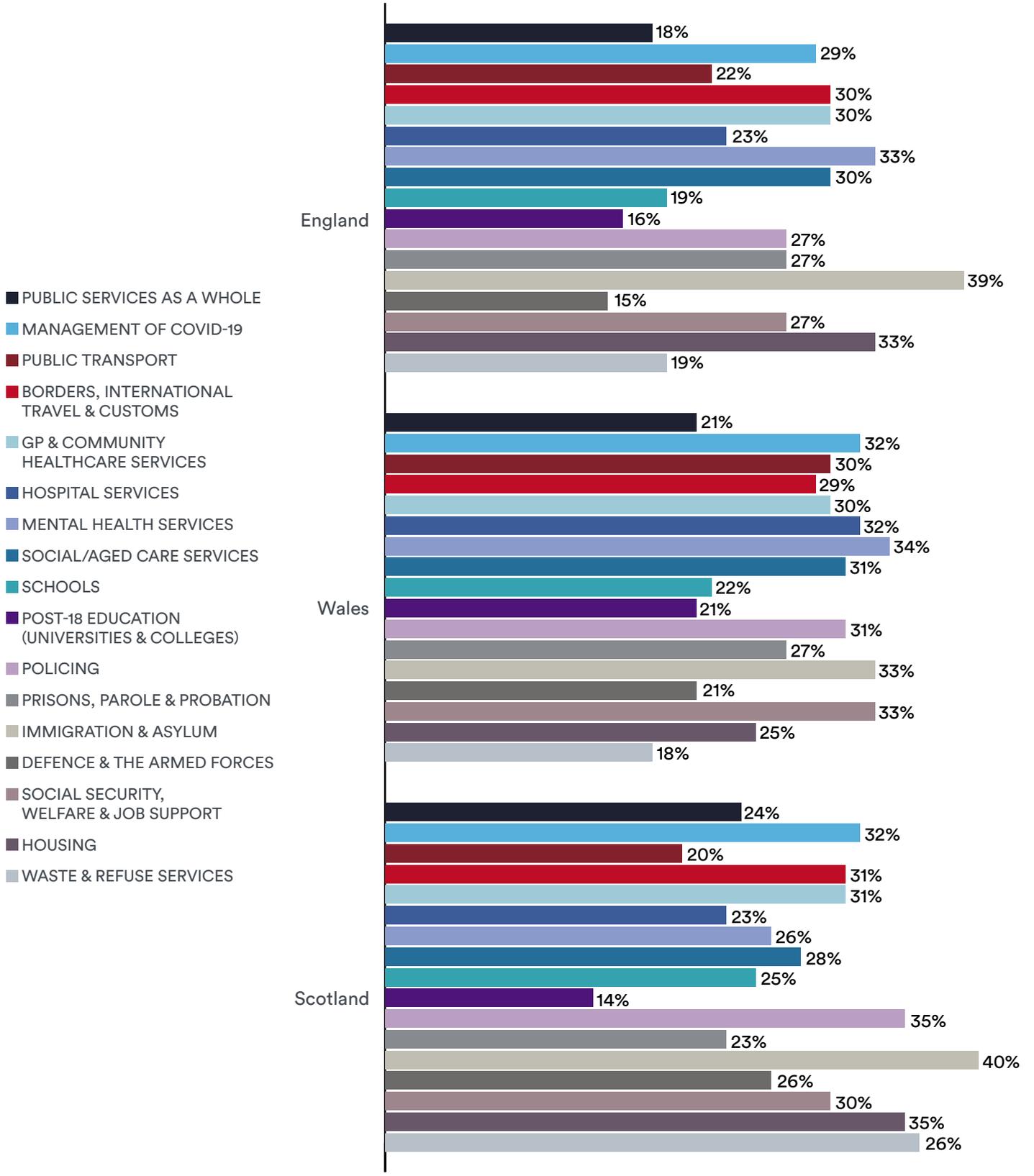
<sup>12</sup>Covid and trust: how the nations of the UK rate their governments' – King's College London & University of Bristol.

<sup>13</sup>EU: 63% of Scots want to rejoin, Panelbase poll finds' – The National.

# UK NATIONS: SATISFIED



# UK NATIONS: DISSATISFIED



# CONTENTS

Outline – Tracking public opinion on public services	5
Methodology & Limitations	5
<b>Overview</b>	
Overview – Satisfaction (not quite) guaranteed	7
Introduction – What drives public opinion?	16
<b>Key findings</b>	
The Gender Gap	19
Age Is More Than Just a Number	24
What Is to Be Made of ‘Social Grade’?	29
Notions of the Nations	33
<b>Conclusion</b>	
<b>UK v Australia – lessons to learn?</b>	<b>39</b>
<b>Conclusion – the beginning of the story</b>	<b>44</b>

## UK v Australia – lessons to learn?

As can be seen in our sister report *People Powered Public Services: Monitoring Australian Opinion* on satisfaction with Australian public services, this polling identifies a clear difference between how citizens in Australia and the UK regard their country's public services. This is not immediately obvious based on the responses for *Public Services as a Whole*, for which there was only a small divergence, with 46% of Australian respondents being net satisfied and 17% dissatisfied, versus 45% and 19% in the UK.

If we take each service on a case by case basis, however, there is a clear-cut conclusion: Australians are seemingly more satisfied with public services than their British counterparts.

### Top 3 areas with the biggest net satisfaction margins

(UK / Australia)

1. GP & Community Healthcare Services (43% / 55%)
2. Borders, International Travel & Customs (32% / 41%)
3. Mental Health Services (31% / 38%)
- =3. Policing (40% / 47%)

Of the 17 categories polled, respondents in Australia were more satisfied with 14 areas of public services; the other three services – *Waste & Refuse Management*, *Housing*, and *Schools* – recorded the same net satisfaction ratings in both countries. On the other side of the coin, Australians were more net dissatisfied in just one public service, *Social Security, Welfare & Job Support* – and even in this instance, the differential was just a single percentage point. The most significant divergences for net satisfaction occur in *GP & Community Healthcare Services* at 12 percentage points, *Borders, International Travel & Customs* at nine percentage points, and *Mental Health Services* and *Policing* each at seven percentage points.

Across all 17 areas we polled, the UK public gave an (mean) average net satisfaction score of 39%, whereas the Australians returned an average figure three points higher at 42%. This slightly higher level of average satisfaction is somewhat affirmed by the mean dissatisfaction scores, where the UK's scoring was five points higher at 26% as compared to the Australian figure of 21%. This is not to say that services are necessarily better. It could, for example, simply mean that Australians have different expectations of their public services or are more accommodating and content in their overall outlook on life.

### Top 3 areas with the biggest net dissatisfaction margins (UK / Australia)

1. Change to GP & Community Healthcare Services (30% / 14%)
2. Policing (28% / 17%)
3. Immigration & Asylum (38% / 31%)

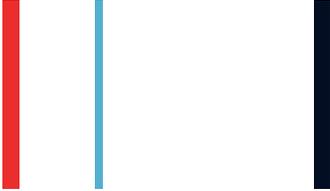
One significant area of meaningful congruence is in regard to gender, where men in both countries appear more satisfied with public services than women. In Australia, men reported a net satisfaction score of 49% versus 43% for women; in the UK the comparative figures were 48% versus 41%. In the UK, men returned more satisfied responses in all 17 categories polled, in contrast to Australia, where women were more net satisfied than men with four public services.

### 3 areas where the UK and Australia agree – equal net satisfaction scores (net satisfaction score in both countries)

1. Waste & Refuse Services (49%)
2. Schools (46%)
3. Housing (31%)

Again in contrast to the UK, the relationship between ‘social class’ and satisfaction with public services seemed weaker. Unlike British respondents, levels of satisfaction and dissatisfaction with public services is generally similar across all social classes. That said, the broad trend of the higher your social class the more satisfied you were was seemingly true – this is borne out by the fact that the ‘lowest’ grouping (DE) in both countries returned a significantly lower score when they were asked about *Public Services as a Whole* as compared to other groupings of Social Grades (Australia: AB 50%; C1C2 51%; DE 37% | UK: AB 56%; C1C2 44%; DE 32%).

From an age perspective, the two eldest age groups polled in both countries – 45-54 and 55-64 – recorded the lowest net satisfaction rates with public services. The two groups most satisfied when asked about *Public Services as a Whole* in both countries were the 25-34 and 35-44 cohorts. Across both countries 35-44-year-olds in the UK were actually the most satisfied with *Public Services as a Whole*, returning a score of 54%. However, in Australia, there was a more general pattern that across the 17 areas we polled, the younger your age the more likely you were to be satisfied with public services. Multiple stats illustrate this point, including the fact that the youngest Australian grouping (16-24) gave the highest net satisfaction score more times than any other cohort in the country.

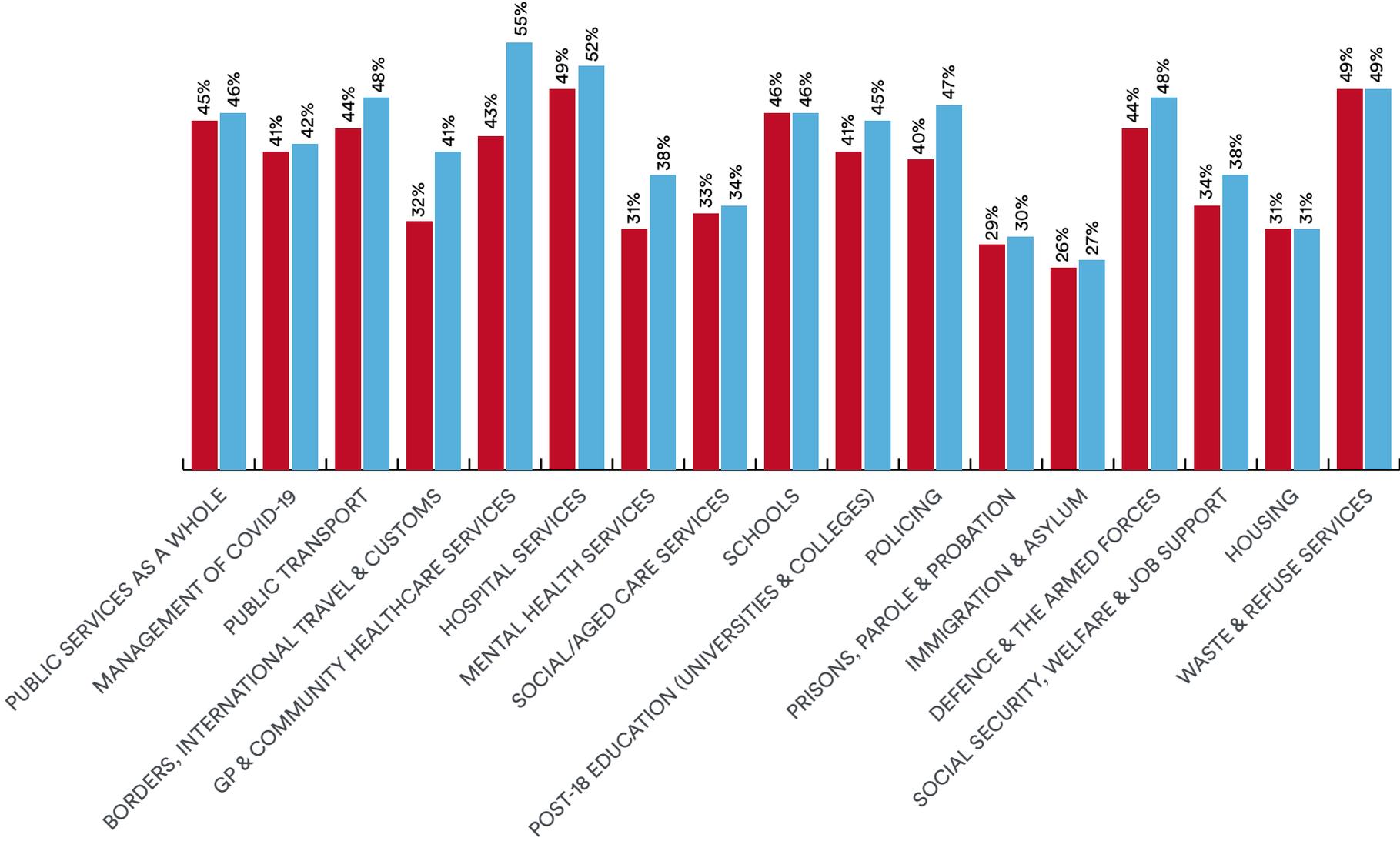


They also gave services an average net satisfaction score of 45%, joint highest with the 25-34-year-olds in the Australian poll.

It is beyond the scope of this paper to explore why citizens in the UK and Australia diverge so markedly in their view of public services. Such research would, however, be of undeniable interest. Traditionally, it is thought that ‘policy borrowing’ between the two countries is one-way traffic; that is, from the UK to Australia. Whether this is true or not, if net satisfaction is an indicator of the quality of public services in Australia, the underlying reasons why should be of undoubted interest to policymakers in the UK.

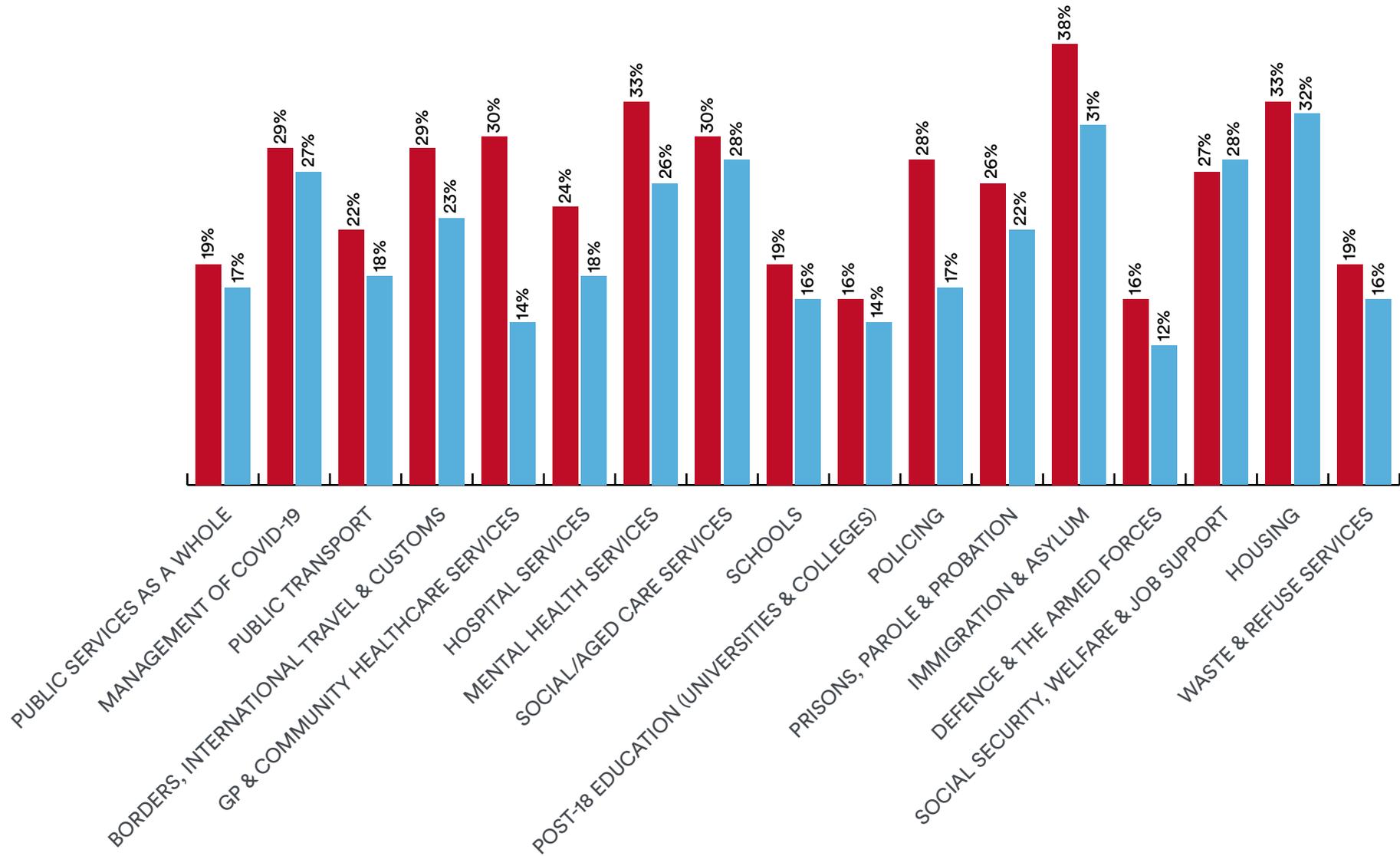
# NET SATISFIED: UK V AUSTRALIA

■ UK ■ Australia



# NET DISSATISFIED: UK V AUSTRALIA

■ UK ■ Australia





## Conclusion – the beginning of the story

Although this is just the first in a series of reports examining changes in sentiment towards public services in the UK over time, clear patterns have already been revealed.

Men and women consistently show differing attitudes towards public services. Although reportedly greater users of services, women consistently gave lower satisfaction scores when compared to men.

Age also seemed to be an indicator of satisfaction. The oldest age group particularly showing consistently high levels of dissatisfaction, although this is mirrored to a certain extent by the youngest age cohort.

One of the clearest relationships visible in this data is between a person's so-called 'social class' and their sentiment towards public services. The higher the category, the more satisfied a person is with public services.

Another pattern visible relates to the different UK nations. Respondents in Wales tended to show the greatest levels of satisfaction across the board, whereas those in Scotland tended to be less satisfied with services delivered by the UK Government as compared to those managed by the devolved administration. However, as is discussed at length in the above chapter, the limited number of respondents in some nations makes this data significantly more uncertain.

Although not immediately obvious based on the responses for *Public Services as a Whole*, for which there was only a small divergence between the countries this polling also identifies a clear difference between how citizens in Australia and the UK regard their country's public services. Taking each service on a case by case basis there is a clear-cut conclusion: Australians are more satisfied with public services than their British counterparts. Both in terms of frequency of returning higher satisfaction and lower dissatisfaction scores, as well as corresponding averages, the Australian public seems to be consistently more pleased with the services they receive. However, as noted, this is not to say that services are necessarily better – Australians could, for example, have different expectations of their public services.

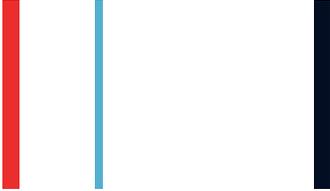
Overall, however, people remain largely more satisfied than not with public services in the UK. Only in three areas (*Immigration & Asylum; Mental Health Services; Housing*) were there more people indicating a feeling of dissatisfaction than those indicating a level of satisfaction. Furthermore, in the majority of areas we asked about,

the largest cohort after those indicating that they were in some way satisfied (either 'very' or 'quite') with public services was 'neither satisfied nor dissatisfied' – with between 24% and 33% of people indicating as such, depending on the service. This arguably shows that – beyond those that are satisfied – between a quarter to a third of people believe that services are meeting their expectations.

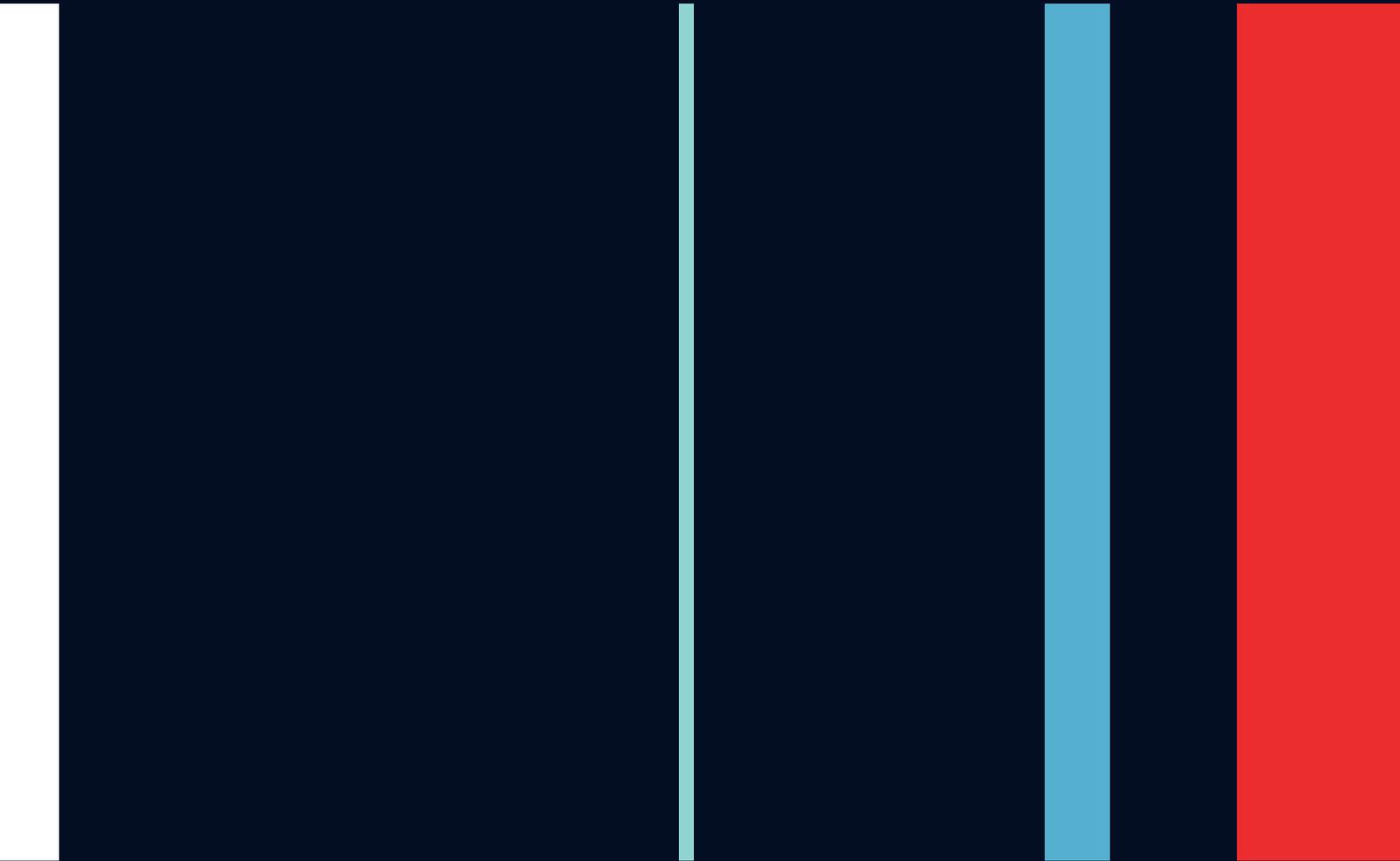
Further research is needed to explore why people are satisfied or dissatisfied with public services. This polling can only identify and track these sentiments, it cannot confirm people's reasoning. The complex nature of the design and delivery of public services means a whole range of factors could be driving satisfaction and dissatisfaction. Moreover, the multi-layered nature of government in the UK means responsibility for different public services lies across a whole range of institutions – be it local, devolved or central government.

That said, one of the more plausible candidate theories to explain the trends in the data is that those who rely on public services more often are more likely to be dissatisfied with them. Groups more likely to use or depend on public services, such as women, older people and those not in work, were less likely to be satisfied, and more likely to be dissatisfied, with the state of public services. Significantly, groups dependent on a particular service were shown to be less likely to be satisfied with its delivery: for instance, those not in work were significantly less satisfied and more dissatisfied than those in work with *Social Security, Welfare & Job Support*, while respondents aged 55-64 were considerably more likely to be dissatisfied than all other age groups with *Social/Aged Care Services*. Those cohorts less reliant on public services often have the ability to choose only to use them when they are more convenient than an alternative option provided by the private sector. Therefore, it would seem that access to a choice of potential providers increases positive sentiment towards public services. There is a question as to where a choice of providers cannot be offered directly to a public service user, that the government creating a market of providers from which they can choose will increase positive sentiments in a similar fashion.

Furthermore, responses will have been based on people's experiences of public services as well as their view of the policies underpinning them, as well as other socio-political factors, which are impossible to disentangle from one and other. For instance, *Immigration & Asylum*, a high-profile and controversial topic in British politics, had a net satisfaction score of just 26%, while net dissatisfaction stood 12 points above at 38%. Given that only a small minority of the UK population are likely to have experienced this public service first-hand, one may surmise that this is a service likely to be influenced by respondents' political positions, pre-existing attitudes towards immigration levels and policy.



As we undertake more waves of polling in the coming months, we hope to uncover further patterns which show how citizens feel about the services they use. We hope that these insights will help those designing and delivering services to meet the needs and wants of citizens.



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