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People Powered Public Services: Monitoring Australian 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 few years 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 Australian 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

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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 are monitoring how ‘satisfied’ Australians are with the services they are using and analyse key findings through these short, quarterly reports.

Measuring satisfaction with public services is already a priority for the Federal Government (as well as many state legislatures) as exemplified by their annual *Citizen Experience Survey*¹ – which is referenced in this paper. However, we hope this project – which is independent of any government – will deliver new, regular insights by tracking sentiments using different methods, exploring alternate trends, and creating new comparisons and analytical viewpoints. 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 Australia’s public sentiment towards public services as the continuing impacts of Covid-19, lockdowns and the relatively slow start to its national vaccine roll-out are felt.

The same study is being carried out in tandem in the UK and we will also briefly seek to highlight points of difference between the two countries.

Methodology & Limitations

This study was conducted in Australia by Kantar via an internet omnibus survey. A sample of 1042 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. Of course, delivery and policy are inevitably linked, both in practical terms and in the minds of the public who have been surveyed.

¹‘Citizen Experience Survey’ – Department of the Prime Minister and Cabinet.

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Overview – Satisfaction (not quite) guaranteed

The most striking aspect of the polling is the general contentment Australians have with public services, despite the survey being undertaken whilst the country was in the midst of the Covid storm. With **Public Services as a Whole**, Australians reported a net satisfaction score (i.e. an indication that they were 'quite' or 'very' satisfied) of 46% versus 17% net dissatisfaction (i.e. an indication that they were 'quite' or 'very' dissatisfied), with 34% 'neither satisfied nor dissatisfied'.

Top 3 services delivering satisfaction

(Net satisfaction / Net dissatisfaction)


1. GP & Community Healthcare Services (55% / 14%)
2. Hospital Services (52% / 18%)
3. Waste & Refuse Services (49% / 16%)

11 of the 17 service categories polled received a net satisfaction rating of over 40%, a particularly impressive figure given that respondents had the option of selecting 'neither satisfied nor dissatisfied'. This stat is further bolstered when we account for only eight public services receiving a net dissatisfaction rate of over 20%.

There are several results which stand out.

Despite the recent and well-publicised demonstrations, notably in Melbourne, against Covid-19 restrictions, 42% of all Australian respondents were net satisfied when asked about the **Management of Covid-19**, versus 27% net dissatisfied. However, and unsurprisingly, there is a notable divergence between different regions. In Victoria & Tasmania the net satisfaction of just 33% versus a whopping 63% in Western Australia and a significant 50% in Queensland. It is notable that Victoria and New South Wales faced longer and more severe lockdowns, whereas Western Australia and Queensland have (and continue) to face limited restrictions and very low case numbers, the price for this being closed borders as they continue to implement a Covid zero policy – the aim of the complete eradication of the disease in the population.

Health services (other than Mental Health Services) recorded the highest-scoring public services of all those polled. For **GP & Community Healthcare**, 55% of citizens were net satisfied versus only 14% net dissatisfied; **Hospital Services** scored 52% versus 18%. It is a boon for Australian public services in general that such critical, evocative, and widely used services are so well regarded by citizens.



The public services which citizens are more likely to experience on a regular basis received markedly high net satisfaction scores. For **Waste & Refuse Services**, 49%, versus 16%; **Public Transport** there was a 48% net satisfaction score, versus 18% net dissatisfaction; and **Schools**, 46% net satisfaction, versus 16% net dissatisfaction. **Post-18 Education (Universities & Colleges)** was not far behind with a 45% net satisfaction score, compared to 14% net dissatisfied.

These high scores might partially explain why Australians have a positive view of public services as a whole; those which they experience regularly are perceived positively.

3 services with the widest satisfaction margin (net dissatisfaction subtracted from satisfaction)

(Margin measured in percentage points)

1. GP & Community Healthcare Services (41 points)
2. Defence & the Armed Forces (36 points)
3. Hospital Services (34 points)

A high-satisfaction-scoring service which bucks the trend by not being a service which citizens ‘use’ often is **Defence & the Armed Forces**. Four times as many people said they were either ‘quite’ or ‘very’ satisfied with *Defence & the Armed Forces* as dissatisfied – receiving a 48% net satisfaction score compared to a 12% net dissatisfaction score.

Policing arguably straddles the line between an oft-used, visible public service and one with which most citizens do not regularly come into direct contact. It also received largely positive feedback – with 47% of respondents indicating a level of satisfaction, versus only 17% dissatisfaction.

Borders, International Travel & Customs – which, in light of the pandemic, can be partly considered a plank of Covid-19 management – recorded a relatively high net satisfaction rating of 41% versus a net dissatisfaction score of 23%. This could indicate lukewarm support for Australia’s strict international travel policies introduced due to the pandemic.

The services with the highest proportion of ‘neither satisfied nor dissatisfied’ responses

(Excluding Public Services as a Whole)

1. Prisons, Parole & Probation (39%)
2. Immigration & Asylum (35%)
3. Social/Aged Care (33%)
4. Post-18 Education (33%)
5. Defence & the Armed Forces (33%)
6. Housing (33%)

A more marginal, but nonetheless positive sentiment overall was revealed for **Social Security, Welfare & Job Support**, a set of services with which 38% of the Australian public said they were satisfied, as compared to 28% who said that they were not.

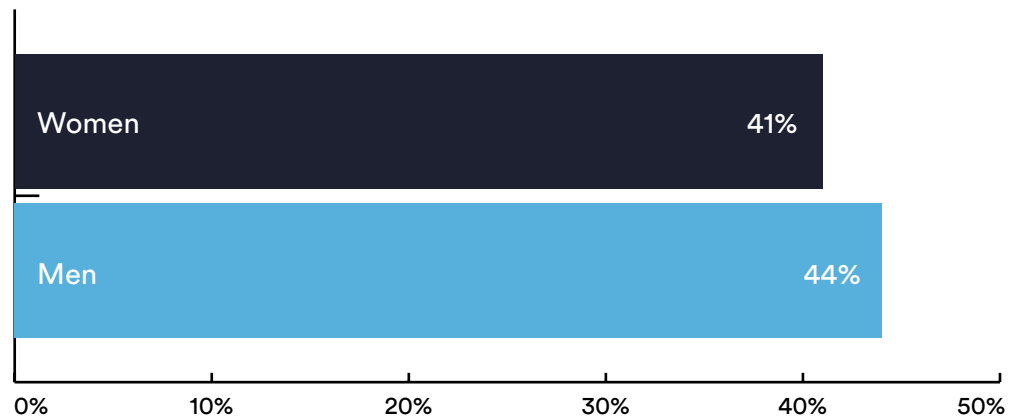
Social/Aged Care Services scored considerably lower than most other health-related services, with a net satisfaction rating of just 34%, versus 28% net dissatisfied. This area of social policy is a contentious issue in Australia, which has a particular shortage of care workers.

Of the 17 areas we polled, only two received a net dissatisfaction rating higher than net satisfaction. For **Housing**, respondents were 32% net dissatisfied versus 31% net satisfied; for **Immigration & Asylum**, 31% were net dissatisfied versus just 27% net satisfied. These results are of little surprise given both areas of policy have been the source of heated debate in recent years.

Key trends

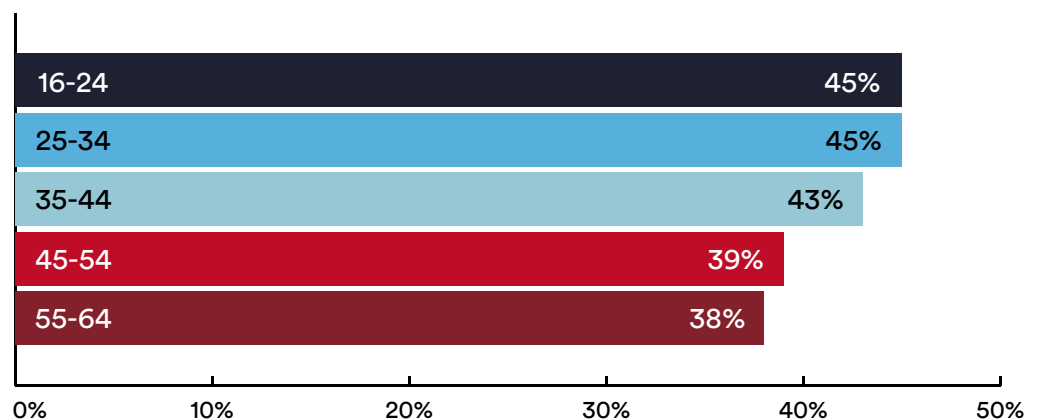
Alongside the results indicating people's sentiments towards individual services, we have identified some key trends across different demographics:

- In contrast to other countries, there is only limited divergence between the view of men and women on *Public Services as a Whole*. However, as was also the case in the UK, men reported greater levels of satisfaction (49%) than women (43%) in Australia.



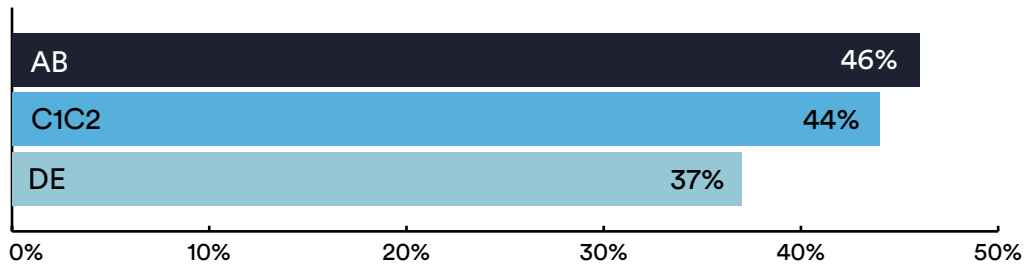
Gender: Average net satisfied responses across all 17 areas polled

- Age also seemed to be an indicator of satisfaction. A pattern – although with exceptions – emerged whereby the older a respondent is, the lower the level of satisfaction.



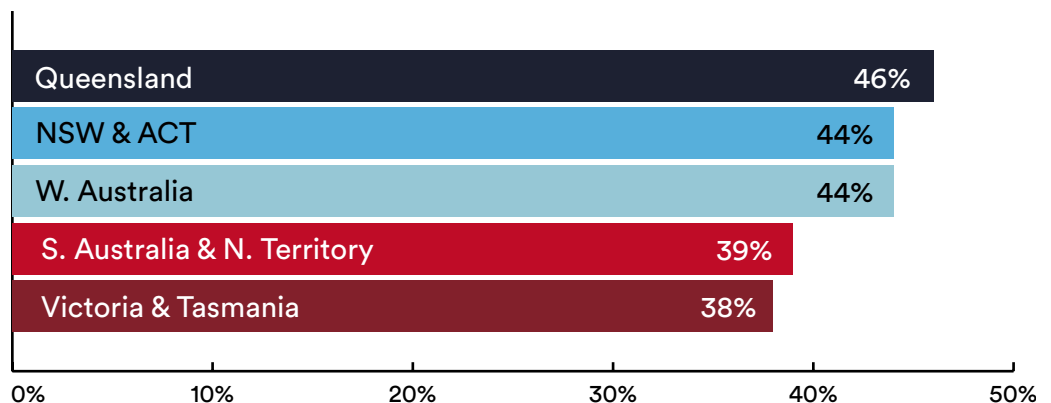
Age: Average net satisfied responses across all 17 areas polled

- A person's so-called 'social class'² seems to be an indicator of their sentiment towards public services. The higher the category, the more satisfied a person is with public services.




NRS Social Grade: Average net satisfied responses across all 17 areas polled

- As a federal country, many public services are managed (or part-managed) by State Governments and associated authorities. It is therefore important to note some key patterns within and between different States and Territories. Perhaps unsurprising considering the current context, the most significant variances at a geographic level came in the responses regarding the *Management of Covid-19*. There was an overall trend that, in States where case numbers are high and/or restrictions severe, satisfaction levels are much lower; whereas in regions in which the circulation of the virus is minimal the opposite is true and satisfaction rates are comparatively high.



States & Territories: Average net satisfied responses across all 17 areas polled

The 'tangibility' of a public service seems likely to play a role in how citizens feel about it: while *Waste & Refuse Services* does not excite political passions in the same vein as *Immigration & Asylum*, the vast majority of Australians will encounter waste management services on an extremely regular basis. Waste disposal is also an uncontroversial issue which does not require a sophisticated grasp of public policy to be understood. In this instance, user experience is likely to inform citizens' judgment of public service performance.



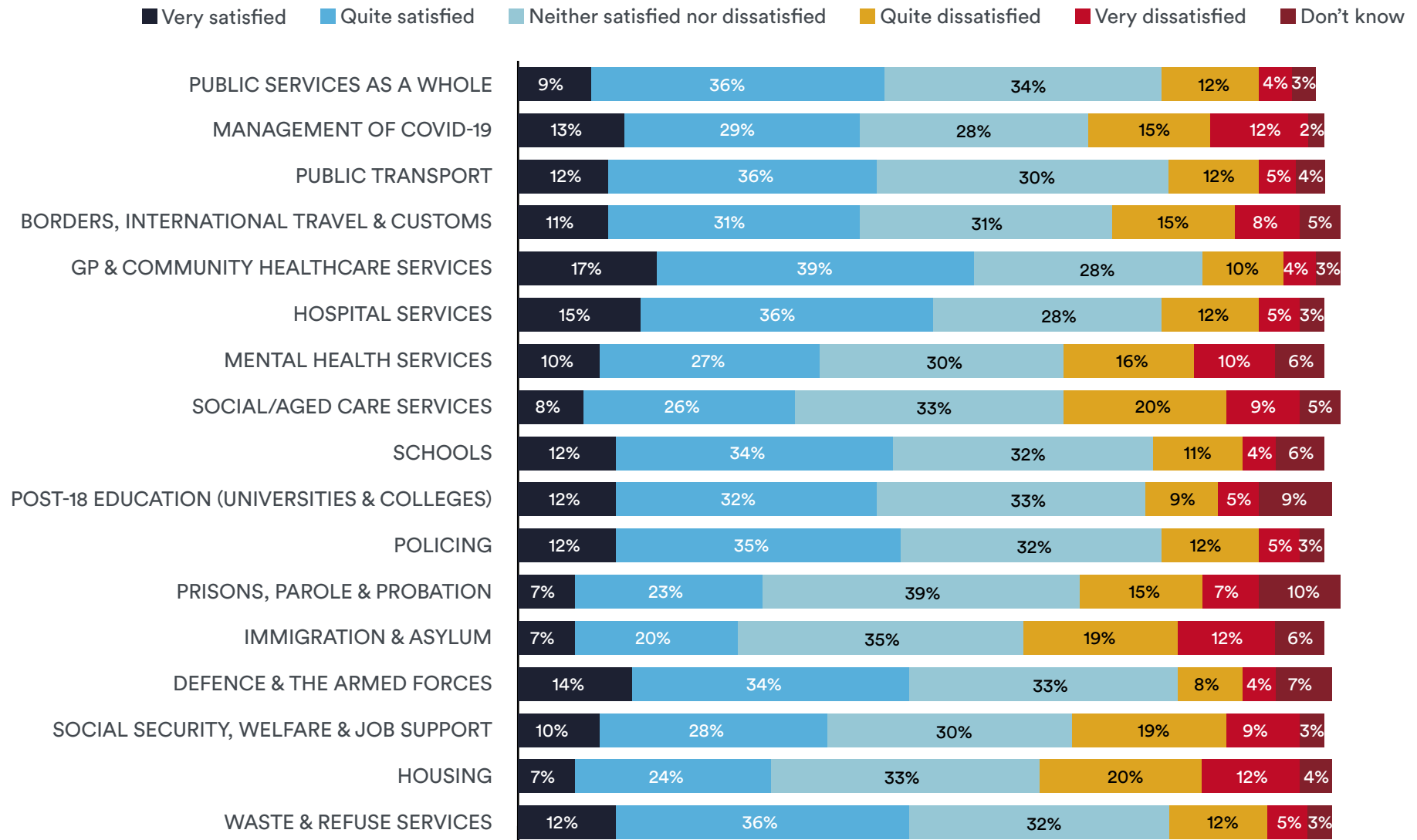
On the other hand, it also seems **Australians' view of public services are strongly influenced by said services' positions as contentious issues within Australian politics**. Given that it is unlikely that most respondents had prior experience of *Immigration & Asylum* – a controversial and divisive subject in Australian politics – before taking our survey, it may be inferred that the relatively high net dissatisfaction score, 31%, for this service is related to individual respondents' political views and disposition towards immigration policy and asylum, and it was on this basis that many respondents made their assessment.

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. It is clear through the frequency of returning higher satisfaction and lower dissatisfaction scores that **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 the British have different expectations of public services, or have a generally less positive outlook than their Australian counterparts.

This is just the first in a series of polls we plan to conduct examining sentiment towards public services in Australia. 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.

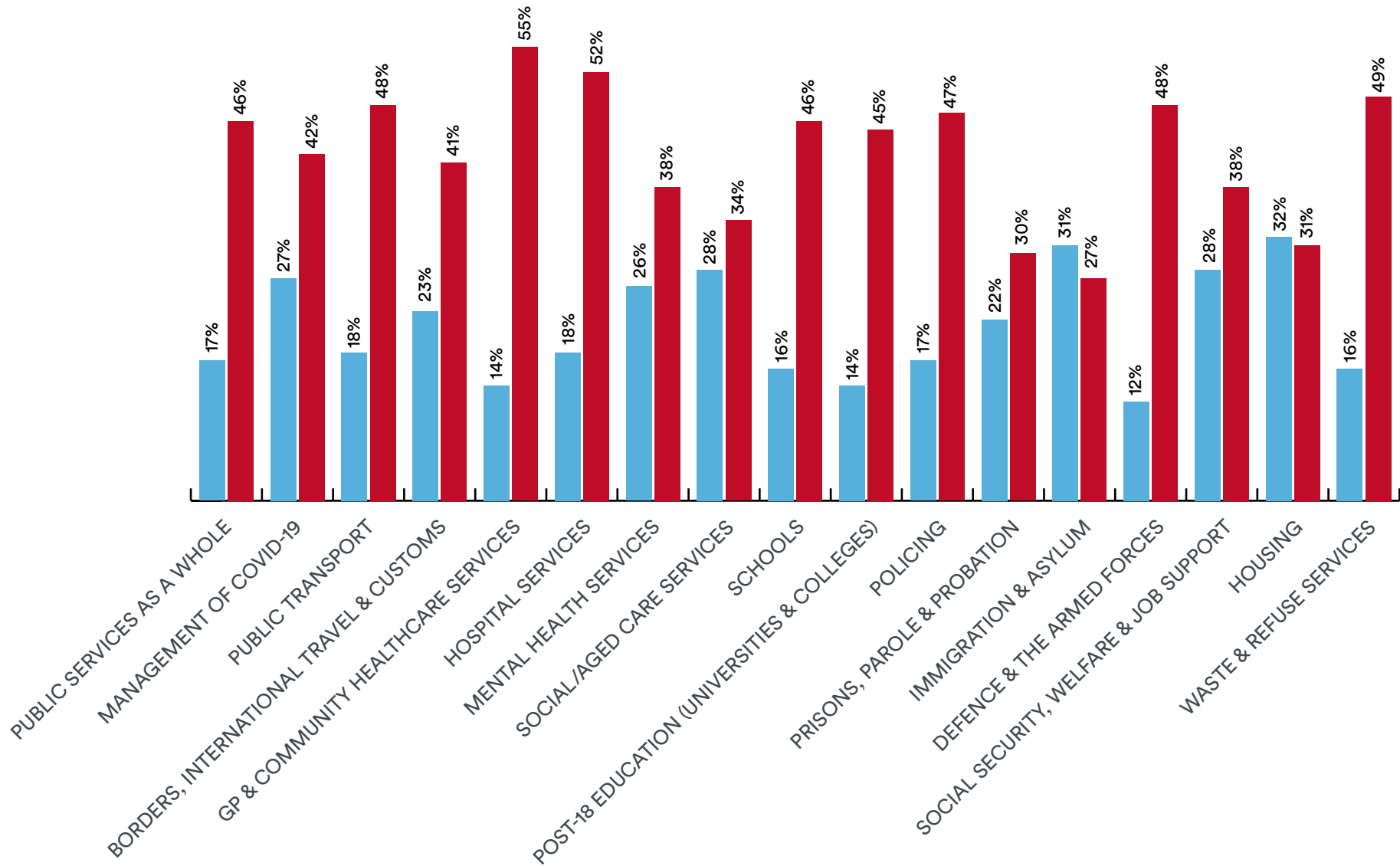
²Based on the NRS Social Grades system of classification: 'Social Grade' – National Readership Survey.

OVERVIEW



NET SATISFIED V NET DISSATISFIED

■ Net: Dissatisfied ■ Net: Satisfied






Introduction – What drives public opinion?

What is informing a citizen's views of public services is a complex and multi-faceted issue. Some responses will be primarily motivated by rational, first-hand user experience, whilst others will be more wrapped up in perceptions of the broader policy issue that relates to that public service. Equally a citizen's political views regarding their Federal and/or State governments may influence responses, as well as other economic, geographic and socio-political issues. In most cases, it is likely responses will be made up of an unquantifiable mix of all of these influences (and on some occasions other factors as well). The results of our poll are an interesting case study in this regard.

Let us take the issue of *Immigration & Asylum*, a policy area of keen debate within Australia. Of all the public services polled in our survey, it recorded the second highest level of net dissatisfaction at 31% and the lowest level of net satisfaction at just 27%. This was despite the service being successful if based purely on a reduction in illegal arrivals. *Immigration & Asylum* is an area of public service that is perhaps more likely to be influenced by an individual's views and political orientation. After all, only a tiny percentage of the Australian populace would have experienced this public service first-hand. How many people, for example, would have been through the asylum claim process or been resident in an offshore immigration detention centre? In this example, it is possible to conclude that responses in relation to *Immigration & Asylum* are not based on first-hand experience of the public service itself.

Some public services can also be heated topics of debate, experienced first-hand by citizens, but not used on a physical basis. These factors may also influence how a citizen responded to our poll. Take *Housing*, for example, which recorded a net dissatisfaction rating of 32%, the highest of any public service in our survey. There are well-publicised shortages of affordable housing in Australia³, at least partially as a result of decades' worth of government policy. One respondent, happily ensconced in their own home for decades, might respond negatively based purely on their view of government policies. Another, however, struggling to get onto the housing ladder with first-hand experience of the policy, but with no idea of what the policy is, also responds negatively. Both have arrived at the same response but for different reasons, again demonstrating the complexity of understanding why citizens respond as they do.

Could it be that the results for those public services which are tangibly understood by citizens and used more regularly can be explained more easily? For example, in contrast to *Immigration & Asylum*, *Waste & Refuse Services* 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 *Housing* or *Immigration & Asylum*. How often does *Waste & Refuse Services* make national headlines? The more apolitical nature of waste management could result in responses based more on user experience. The complexity of the service in question may also have a bearing on responses. Effective waste management services 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. Perhaps these factors explain its high net satisfaction rating of 49%?

These three examples highlight the uncertainty that abounds when trying to establish why the results are as they are. We can, though, be certain of one thing: at the time of polling, the Delta variant of Covid-19 was spreading apace through parts of Australia, where a significant proportion of the population had already been in lockdown for months. The impact of the pandemic cannot be underestimated. A comparative poll in June 2020 reported that 78% of Australian citizens were net satisfied with public services⁴, some 32 percentage points higher than in our poll, where just 46% of respondents were net satisfied. This illustrates the potential impact of Covid-19 on the Australian public's perception of public services at the current time.

³Australia's housing crisis: it's one of the most unaffordable in the world, so how is the Coalition going to fix it? – The Guardian.
⁴Citizen Experience Survey' – Department of the Prime Minister and Cabinet.

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The Gender Gap

Our data revealed a gap in the levels of Australian men and women's satisfaction with public services: across 13 of the 17 surveyed areas, men delivered higher satisfaction scores than women, and women had higher dissatisfaction scores than men in four service areas, though never by more than one percentage point. Men also delivered net satisfaction ratings above the general average in 12 areas, while only three saw women return a higher-than-average net satisfaction score, and never by more than one point. In 10 polled fields of public services, women's net satisfaction was below the average, while the same was true for men only in one service: *Post-18 Education (Universities and College)*. This trend has interesting implications for the design, delivery and accessibility of public services in Australia.

The polling data indicates that although women's satisfaction scores were generally lower than men's, both men and women remained broadly satisfied with public services. In 14 public services and in *Public Services as a Whole*, men and women alike registered higher net satisfaction scores than net dissatisfaction, although by differing margins: in relation to *Immigration & Asylum*, both men and women returned more dissatisfied than satisfied responses, and in relation to *Housing* women's rate of satisfaction equalled dissatisfaction; while men returned a dissatisfaction score only one percentage point higher than their satisfaction. Australian public service providers can therefore take heart from these findings, as the evidence suggests public services are well thought of by both men and women.


Closer analysis, however, reveals that although men and women were generally satisfied with the services they use, there remained discrepancies in the degree to which they were satisfied. In *Mental Health Services*, for instance, although both men and women's satisfaction scores (39% and 37% respectively) were within one point of one another, men's net dissatisfaction score was 16 percentage points beneath net satisfaction, while the corresponding figure for women was only eight points. The difference between men and women is brought into sharper relief when examining 'very satisfied' respondents: 13% of men reported they were 'very satisfied' with *Mental Health Services*, five points higher than the proportion of women who were 'very satisfied'. Mental health issues reportedly impact Australian women in greater numbers than men, with one in six women in Australia experiencing depression and one in three experiencing anxiety in their lifetime⁵. This compares to one in eight and one in five Australian men reportedly experiencing depression and anxiety respectively⁶. Men are also considerably less likely to access mental health services than women: a 2020 survey by the Australian Government's Institute of Family Studies found only a

quarter of men would be willing to seek help from a mental health professional if they needed it⁷. Could men's higher satisfaction score in *Mental Health Services* reflect a broader unwillingness on the part of men to openly discuss accessing mental health services, or could the data suggest an inequity in mental health service provision which means that, although men access services for mental health issues less frequently, their needs are being met at a higher rate than women?

A similar discrepancy in the degree of men and women's satisfaction is repeated in the responses to *Social/Aged Care Services*. 37% of men were satisfied with this service category, 10 points above their net dissatisfaction score. By contrast, satisfied women, at 31%, outnumbered dissatisfied women by only two points, one-fifth of the margin between satisfied and dissatisfied men. Given women's higher likelihood of having caregiving responsibilities – as of 2018, 71.8% of primary carers in Australia were women⁸ – it is possible to surmise that women consequently have higher standards for (and more experience of) social and aged care, which services are failing to meet.

In one of the more surprising findings of our survey, women's net satisfaction score in *Management of Covid-19* was higher than that of men, albeit by only one percentage point. Women's rate of satisfaction, at 43%, was 18 points higher than dissatisfaction, whereas only 12 points separated satisfaction (42%) from dissatisfaction (30%) amongst men. That women are net satisfied by a larger margin than men was unexpected, in light of evidence that the Covid-19 pandemic has had a larger impact on women than men. A Grattan Institute report has found that 8% of Australian women, double the figure for men, had lost their jobs at the peak of the Covid pandemic in April 2020, exacerbating pre-existing gender inequalities in the Australian workforce. The same report identified that economic recovery packages disproportionately favour men: two-thirds of spending under the Federal Government's flagship *JobMaker* programme supports male job creation rather than female, and economic sectors more likely to employ women, such as higher education, have been neglected by Government support⁹. This may go some way towards explaining the gender data for *Social Security, Welfare & Job Support*, where men's satisfaction, at 42%, was seven percentage points above that of women. Men's satisfaction for this public service category was additionally 15 points above dissatisfaction (27%), while women's satisfaction (35%) was only seven points above net dissatisfaction (28%).

Men and women in our survey generally indicated that they found public services in Australia satisfactory over dissatisfactory (or neither satisfactory nor dissatisfactory). However, although men's net satisfaction scores were in many cases only higher than women's by



a handful of percentage points, the fact that men reported higher satisfaction than women across the majority of public services, combined with the fact that men's satisfaction scores being higher than men's dissatisfaction by wider margins than the corresponding figures for women, would seem to suggest there is a level of inequity between genders when it comes to Australian public services. This raises a number of questions: do women experience greater barriers in accessing public services? Are the services simply not best designed for those who rely on them most, such as the case with *Social/Aged Care*? Or, are the associated policy positions of the current Government simply finding a chillier reception among women than men?

⁵⁴Women' – Beyond Blue.

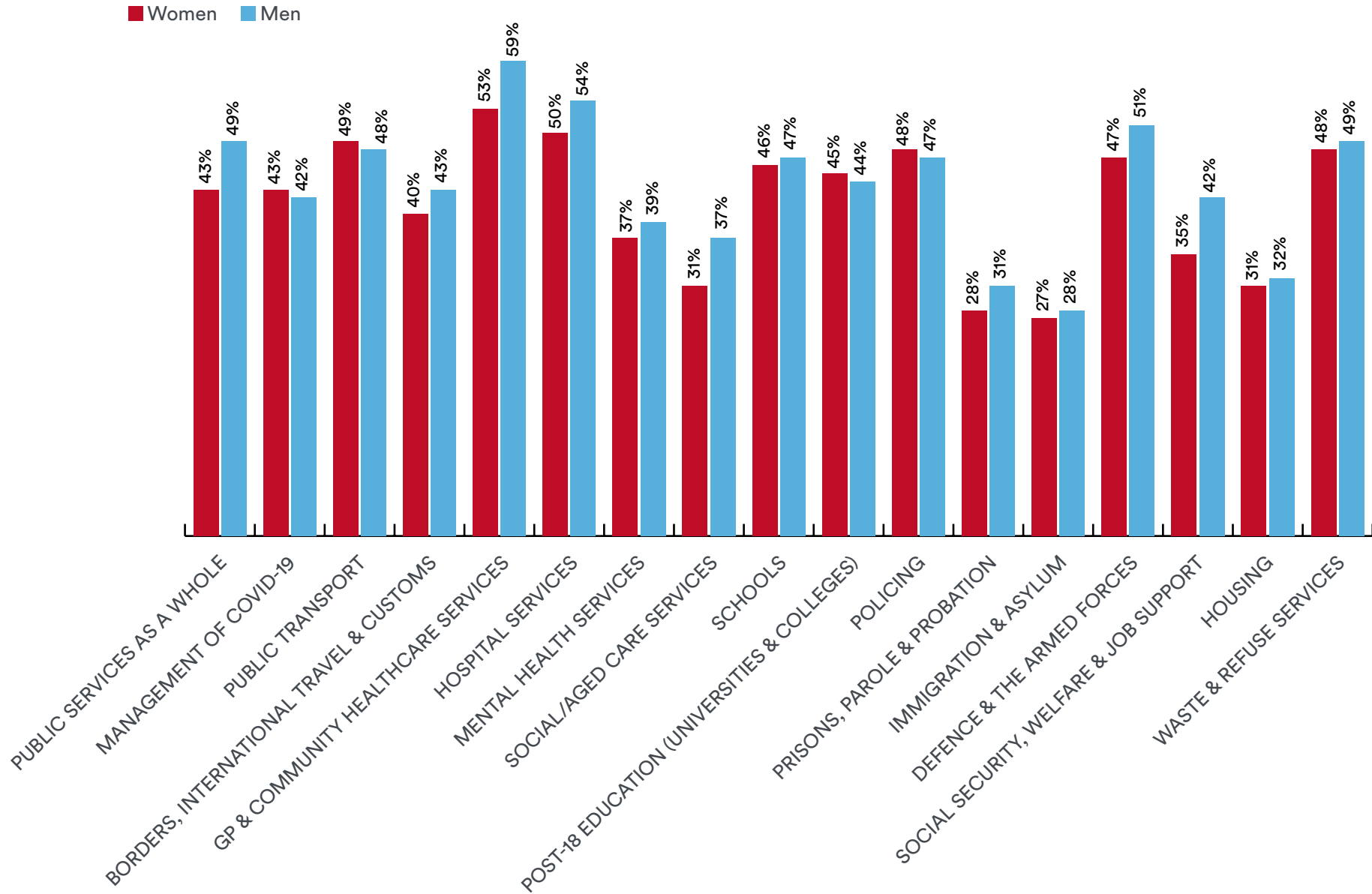
⁶⁴Statistics' – Beyond Blue.

⁷⁴Depression, suicidality and loneliness: mental health and Australian men' – Australian Institute of Family Studies.

⁸⁴Disability, Ageing and Carers, Australia: Summary of Findings, 2018' – Australian Bureau of Statistics.

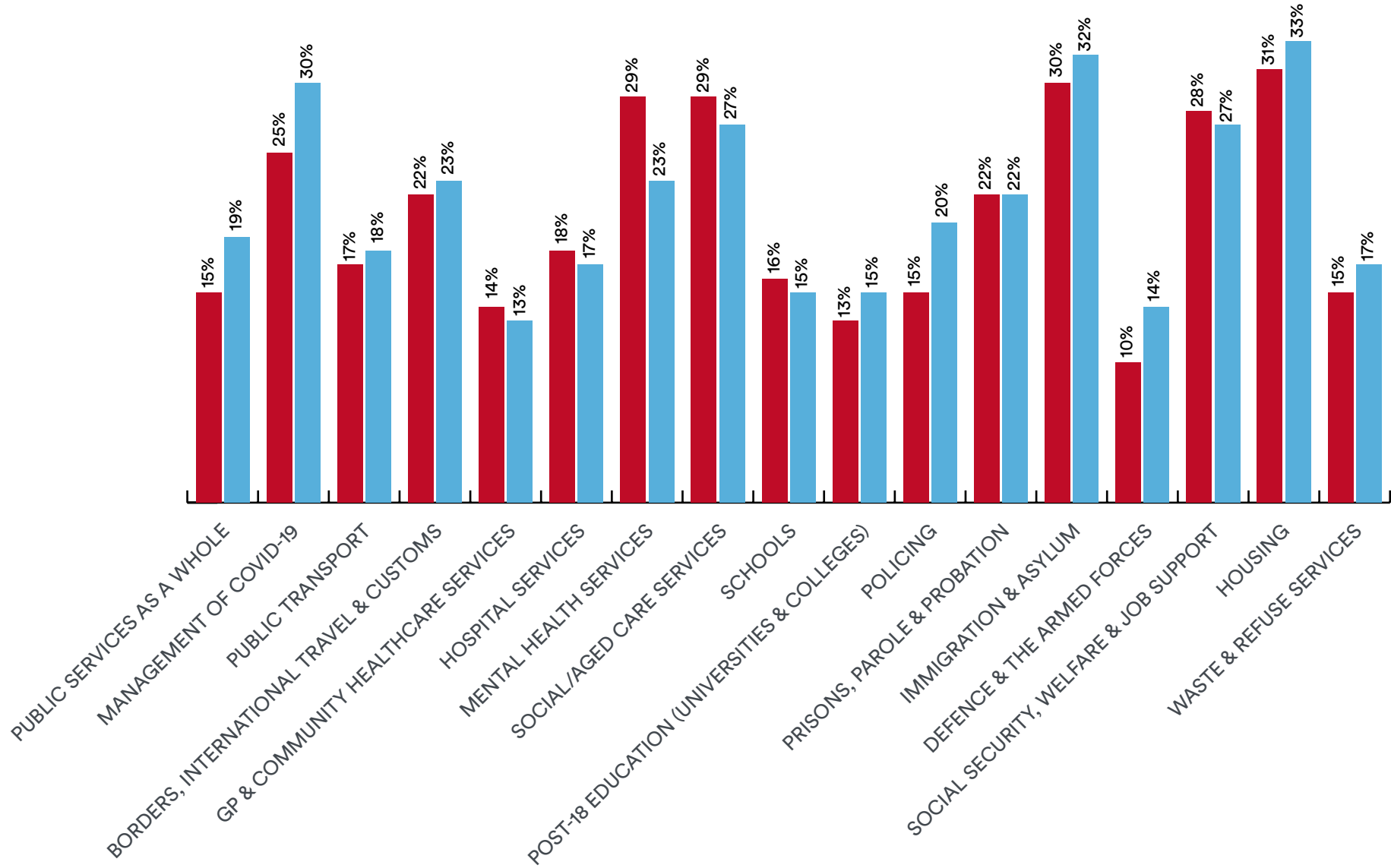
⁹⁴Women's work: the impact of the COVID crisis on Australian women' – Grattan Institute.

NET SATISFIED: WOMEN V MEN



NET DISSATISFIED: WOMEN V MEN

■ Women ■ Men



What Can We Gauge From Age?

The age group that responded most positively to the question ‘How satisfied are you with *Public Services as a Whole*?’ was the 25-34-year-old cohort, returning a net satisfaction score of 51%, closely followed by the 35-44-year-old cohort who confirmed a net satisfaction score of 49%. The two older age cohorts – 45-54 and 55-64 – gave the lowest scores when asked about *Public Services as a Whole* of 40% and 41% respectively. Interestingly, the youngest grouping, 16-24, gave a net satisfaction score to *Public Services as a Whole* in the middle of the range, at 46%, despite returning the highest net satisfaction scores when asked about the 16 other individual services eight times – more often than any other cohort. Conversely, the cohort that most often gave the lowest satisfaction scores was the oldest age group (55-64), who did so seven out of 16 times.

Net Satisfaction %					
	16-24	25-34	35-44	45-54	55-64
Public services as a whole	46	51	49	40	41
Management of Covid-19	36	41	46	44	44
Public transport	53	52	49	48	39
Borders, international travel & customs	42	44	45	38	38
GP & community healthcare services	57	59	50	55	56
Hospital services	53	54	50	48	54
Mental health services	42	41	41	34	28
Social/aged care services	43	39	34	25	27
Schools	52	53	45	39	42
Post-18 education (universities and colleges)	53	50	42	38	39
Policing	41	51	48	46	48
Prisons, parole & probation	39	34	31	26	20
Immigration & asylum	32	34	28	24	16
Defence & the armed forces	50	48	47	48	49
Social security, welfare & job support	43	40	38	36	35
Housing	42	33	30	28	24
Waste & refuse services	45	49	50	48	51
Frequency of the highest score	8	6	2	0	2
Frequency of the lowest score	3	0	2	6	7

KEY

Highest score


Lowest score

Although marginal – and with a number of exceptions – there is a general pattern amongst respondents that the higher up the age band a respondent is, the lower their rates of satisfaction. One way

this can be illustrated is by looking at the mean average rate of net satisfaction scores given by each age cohort across all 17 areas polled. The two youngest groupings – 16-24 and 25-34 – both returned an average net satisfaction score of 45%. This average incrementally decreases as you move up the age ranges – 35-44-year-olds averaging a net satisfaction score of 43%, followed by the 45-54-year-olds at 39% and finally the oldest banding, 55-64, with the lowest average of 38%. Although these small variances between adjacent age cohorts sit within the statistical margin for sampling error, there is nonetheless a clear downwards pattern. Furthermore, comparing average net satisfaction scores between the oldest and youngest age cohorts returns a statistically significant result – showing a pronounced lower satisfaction amongst 55-64-year-olds as compared to 16-24-year-olds. This goes some way in evidencing the theory that with age comes lower levels of satisfaction.

Only in relation to *Waste & Refuse Services* did 55-64-year-olds return a higher level of net satisfaction than all other cohorts; the youngest age group recorded the lowest level of net satisfaction of all cohorts when asked about this service.

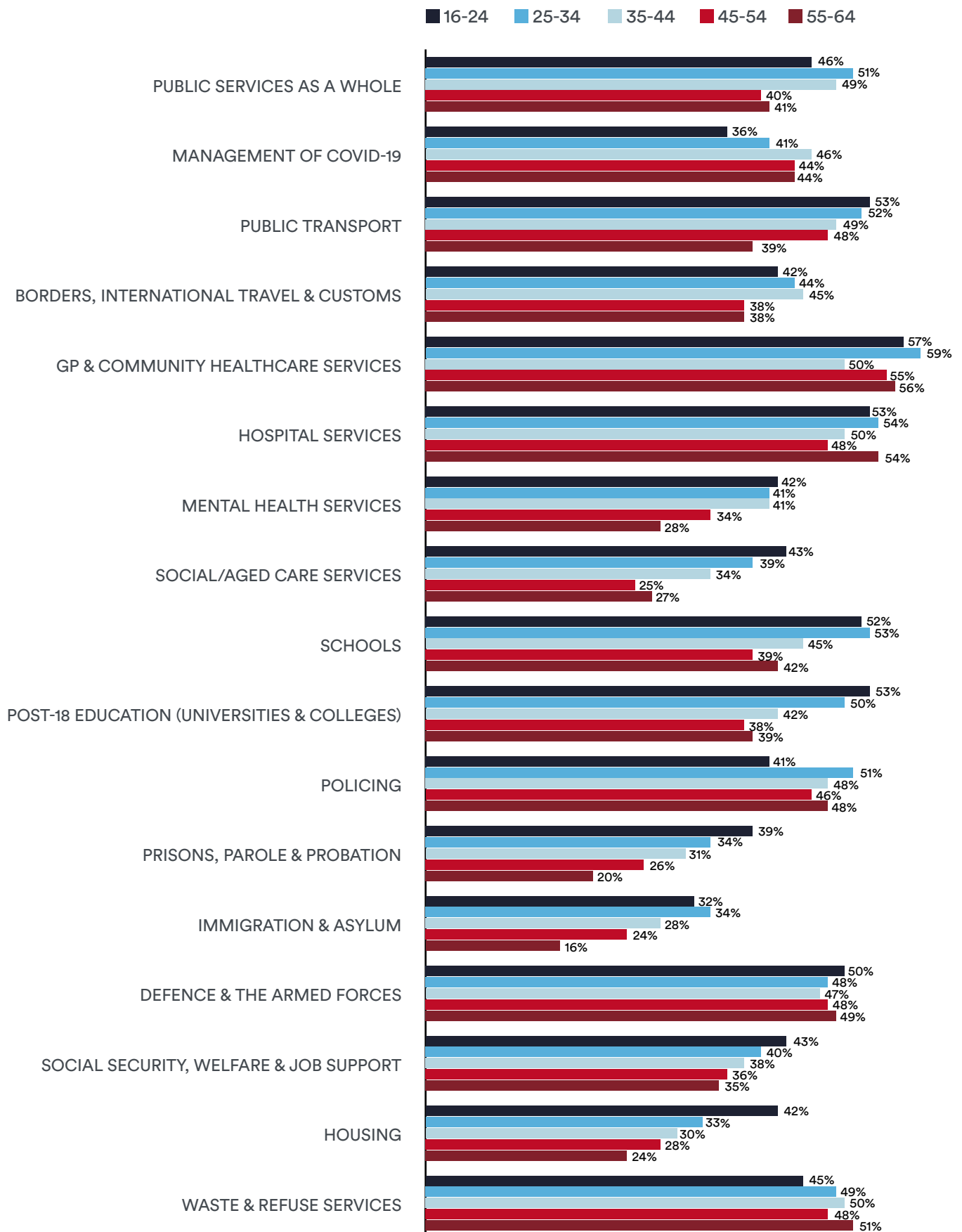
Across all 17 areas that we polled, the number of 16-24-year-olds who indicated that they were ‘very’ or ‘quite’ dissatisfied with a public service was always lower than the number indicating that they were satisfied. All other age cohorts had at least one area where net dissatisfaction outstripped net satisfaction: excluding the 16-24-year-old banding, every other cohort returned more dissatisfied than satisfied responses when asked about *Housing*. The two oldest groups – 45-54 and 55-64 – also indicated higher rates of dissatisfaction than satisfaction towards *Social/Aged Care Services* and *Immigration & Asylum*. In relation to the latter, the oldest age group responded particularly negatively – with 40% responding as either ‘quite’ or ‘very’ dissatisfied, and only 16% the opposite. The reasons that *Immigration & Asylum* services are perceived negatively by this oldest age group is likely to be tied up with dissatisfaction regarding factors (explored further in the introduction of this paper) not directly related to the delivery of the services themselves. Greater levels of dissatisfaction within this older age group towards *Housing* is perhaps more surprising, as older age groups are less likely to rely on public housing services and more likely to be homeowners¹⁰. Furthermore, house prices are continuing to rise in the majority of Australia, meaning these generally older homeowners are seeing the value of their assets increase, whilst younger (less dissatisfied) cohorts are increasingly ‘locked out’ of the market¹¹.



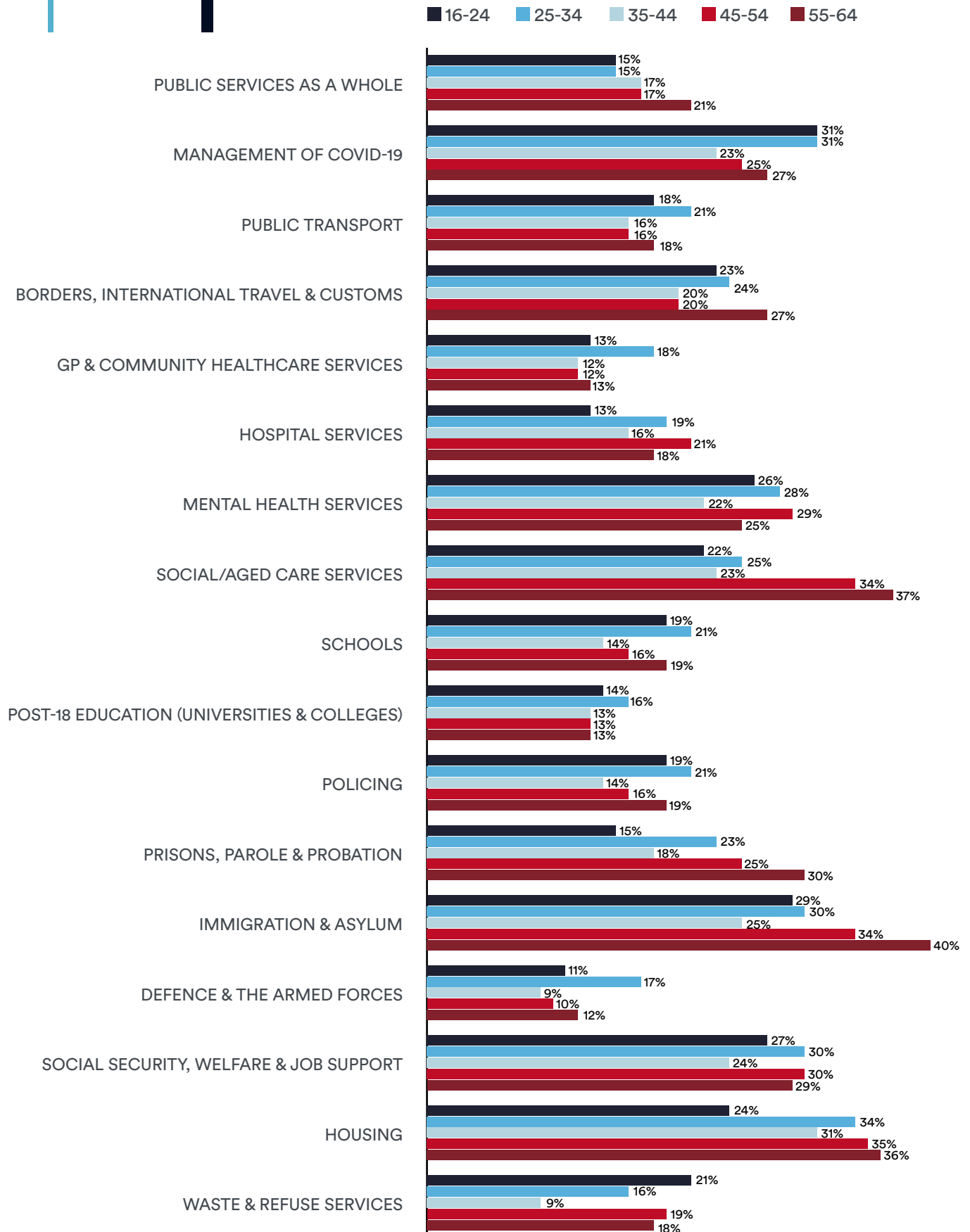
Overall, there is a pattern – although not always statistically significant and with a number of exceptions – that as age increases rates of satisfaction decrease. There are a number of candidate theories for this trend: could it be that older respondents' likely greater experience of or reliance on public services makes them more jaded? Is it that accessing and using services is easier for younger people? Or is it perhaps that there is simply a tendency for people to become shrewder and more critical with age?

¹⁰Average age of Aussie first-home buyers closer to 40 than 20, research reveals' – realestate.com.au.
¹¹'Where house prices have fallen across Australia over the past year' – Domain.

AGE GROUPS: SATISFIED



AGE GROUPS: DISSATISFIED



Learning Lessons Examining Social Class


For over 50 years, market researchers and pollsters have used the *NRS Social Grades* system of demographic classification. Although particularly prominent in the UK, the system maps onto any population and can act as an effective guide to identifying what is commonly referred to as 'social class'. Originally developed by newspaper and magazine audience researchers for the National Readership Survey (hence 'NRS') in the UK, individuals are grouped based on the occupation of the primary earner. As a result of the methodology employed during the data collection, we have grouped the standard six classes of Social Grades into three pairs:

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.

There is a relatively consistent pattern in the data that the higher a person's 'Social Grade', the more satisfied they are with public services. Of the 17 areas polled (including *Public Services as a Whole*) the net satisfaction score of the *AB* group exceeded that of the *C1C2* group 12 times and *DE* group in 17 of 17. However, the difference between the net satisfaction scores of the *AB* and *C1C2* groups were generally small (on average a three percentage-point difference), and the middle grouping gave a marginally higher net satisfaction score for *Public Services as a Whole*, by one percentage point (*AB*: 50%; *C1C2*: 51%). It is noteworthy, however, that the *DE* group returned a significantly lower net satisfaction score for *Public Services as a Whole* (37%).

Rates of dissatisfaction were again, remarkably similar across all groups. Only in relation to *Social Security, Welfare & Job Support* was there a significant difference between any two groups – the *AB* social group (which is least likely to rely on such support) were significantly less dissatisfied (23%) as compared to the *DE* group (31%), which are the group most likely to rely on such support. This is reinforced by the data showing that those in work are significantly more likely to be satisfied (42%) with *Social Security, Welfare & Job Support* compared to those not in work (33%).

In only one area – *Immigration & Asylum* – did the *AB* group return more dissatisfied (33%) responses than satisfied (31%) responses, however this again was only marginal. The *C1C2* and *DE* groups also gave a higher net dissatisfaction (*C1C2*: 31%; *DE*: 30%) than



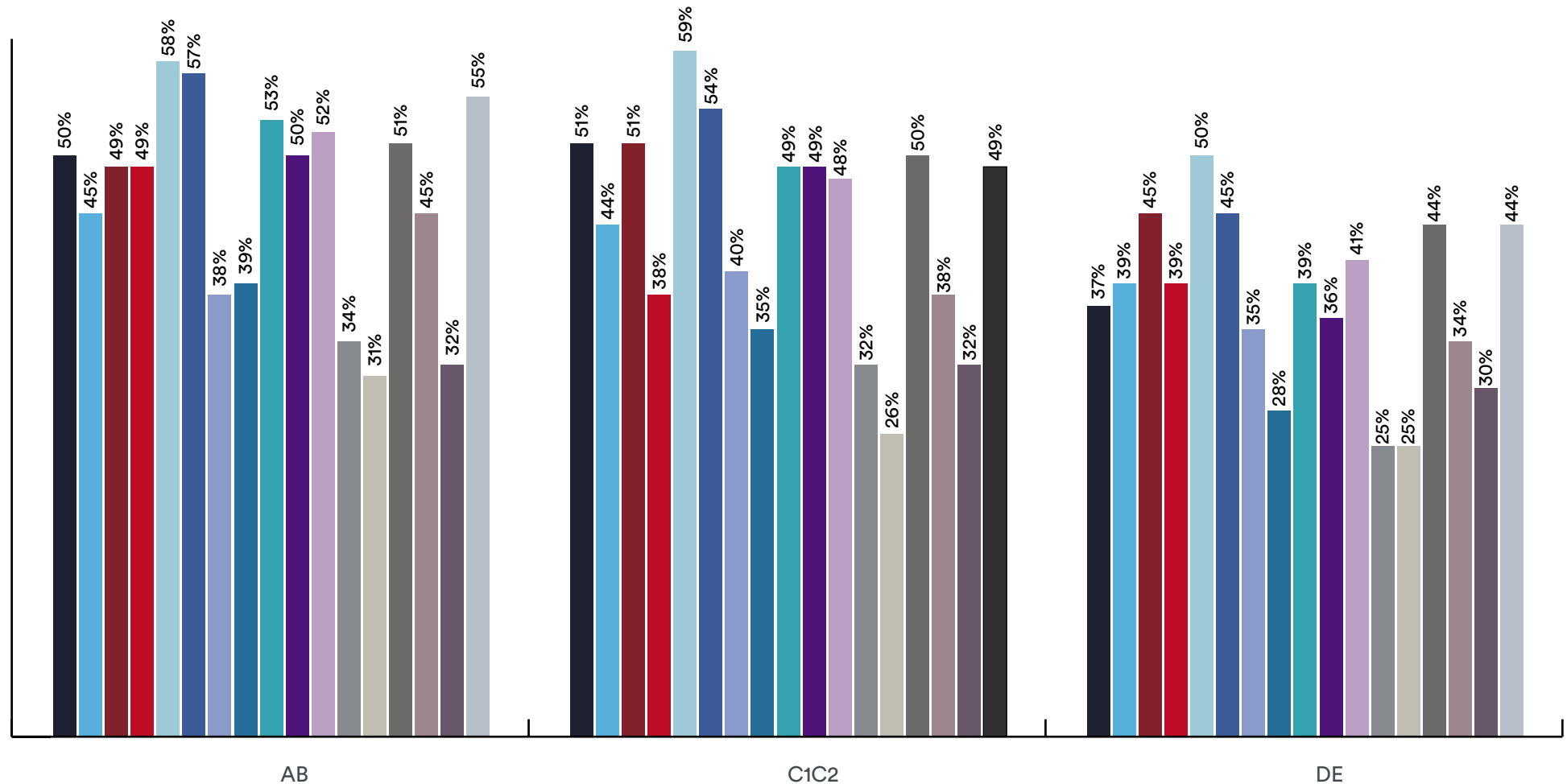
satisfaction score (*C1C2*: 26%; *DE*: 25%) for *Immigration & Asylum*. The *DE* group also indicated a higher level of dissatisfaction than satisfaction with *Housing*. The *AB* and *C1C2* groups showed similar levels of dissatisfaction with *Housing* (*AB*: 31%; *C1C2*: 32%), however the former a net satisfaction score one percentage point higher (32%) than their net dissatisfaction score and the latter returned the exact same net satisfaction score as dissatisfaction (32%).

Across all groups, the service which achieved the greatest level of satisfaction was *GP & Community Healthcare Services* – *AB* respondents returning an overall net satisfaction score of 58%, *C1C2* respondents 59%, and *DE* 50%.

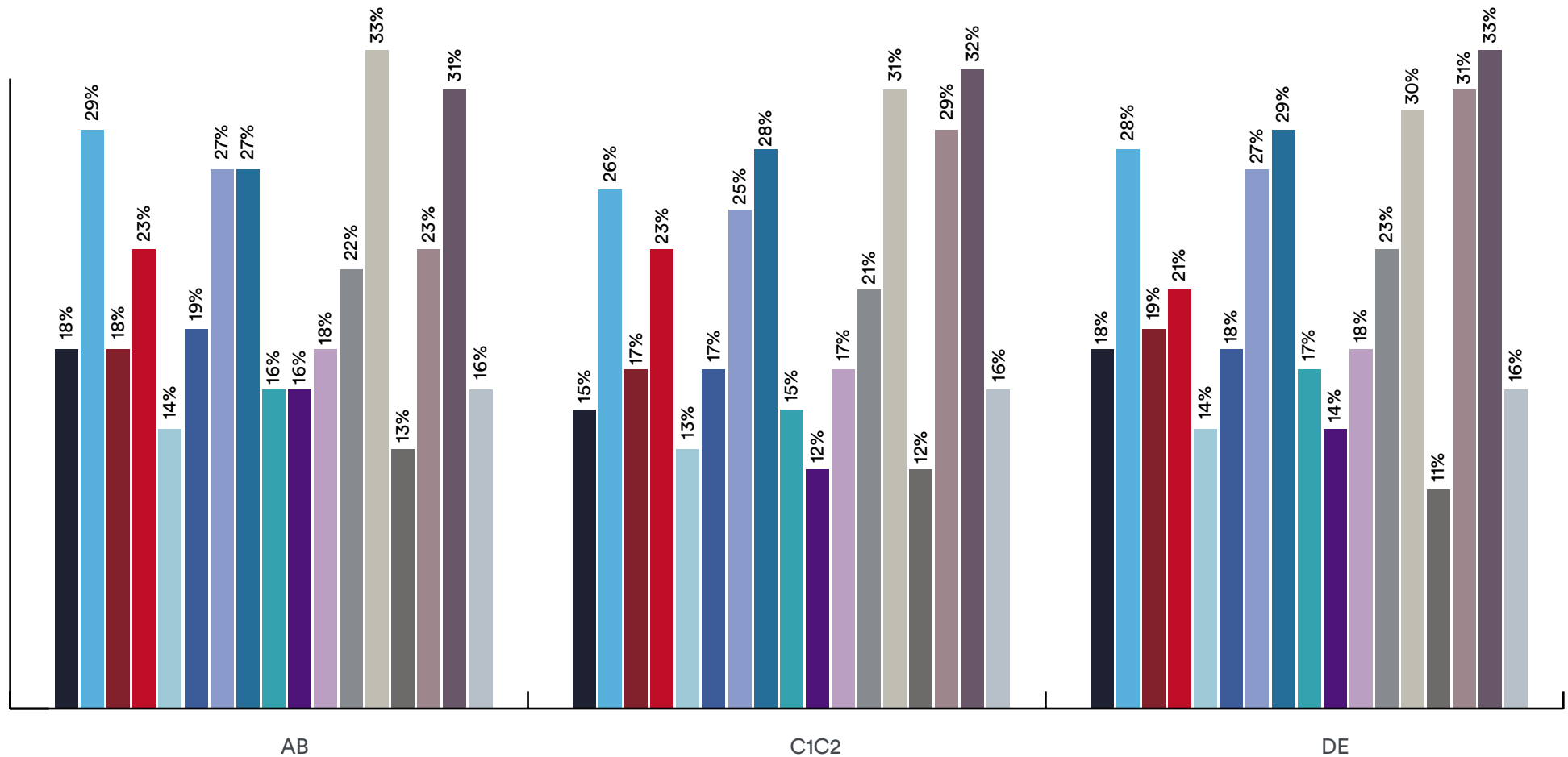
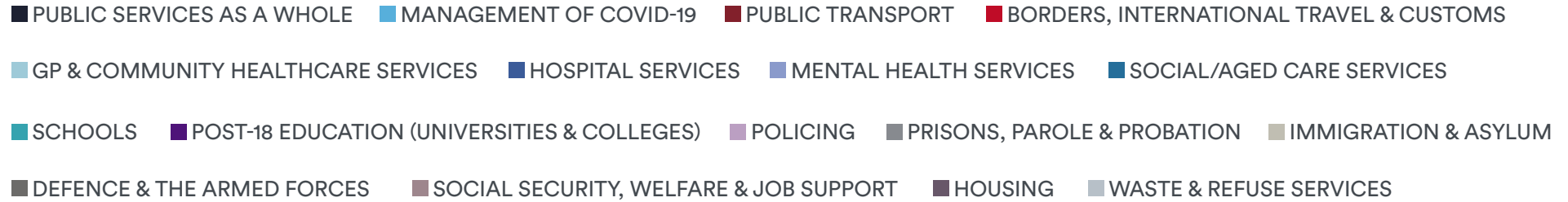
Fundamentally, across all Social Grades, Australians indicated relatively similar levels of satisfaction and dissatisfaction. That said, the highest social group (*AB*) seemed to be more satisfied than their compatriots in the lowest (*DE*) group, even if this difference was generally not dramatic. The difference in satisfaction levels between the *AB* and *C1C2* groupings is even more marginal and on four occasions the latter cohort indicated slightly higher levels of satisfaction compared to the former (again, only marginally). One exception was the clear difference between sentiments towards *Public Services as a Whole*, where *DE* respondents returned a net satisfaction score (37%) 13 percentage points lower than the *AB* group (50%) and 14 points lower than the *C1C2* group (51%). Overall, however, positive perceptions regarding the quality of services is seemingly relatively well spread across the board when one looks at the data through the lens of social class on a service-by-service basis.

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





Sentiments of the States

One of the few areas in which significant disparities in satisfaction and dissatisfaction with public services are to be noted is in differences between the regions. This is made more interesting by the substantial autonomy of Australia's States and Territories – which in many cases are responsible for public service delivery – as well as their differing experiences throughout Australia of the Covid-19 pandemic.

Due to data collection methods, three of the five polling regions used in our dataset – New South Wales & the Australian Capital Territory; Victoria & Tasmania; and South Australia & the Northern Territory – each encompass more than one Australian State or Territory. The two other polling regions the data was broken down into are Queensland and Western Australia, which are both States. As such, the data collected for the regions does not allow us to make conclusive inferences regarding Australians' opinion on public services delivered by a particular State or Territorial government, given that six of the eight States and Territories where residents were polled are grouped together in pairs. Furthermore, data for Western Australia and South Australia & the Northern Territory is calculated using a small sample size of under 100 each, and as such conclusions drawn for these regions should be treated with some caution as margins of error are significantly increased. Nonetheless, there exist interesting patterns and differences between the satisfaction levels across the regions which merit closer examination.

Victoria & Tasmania was the least satisfied of the five regions: across all 17 surveyed areas of public services, its net satisfaction scores were beneath the corresponding Australia-wide figures, by an average of around five percentage points. South Australia & the Northern Territory was also less satisfied than Australia as a whole, as its net satisfaction scores were generally below the Australian average by a mean of three points, and it registered below-average satisfaction scores across 10 of the 17 surveyed areas. The most satisfied region was Queensland, which registered above-average satisfaction scores in 15 polled areas and whose net satisfaction scores were above the Australia-wide average by a mean of four percentage points. However, notably, no region registered higher dissatisfaction than satisfaction overall – excluding *Public Services as a Whole*, all five regions proved net satisfied with the range of public services polled. This suggests that Australians throughout the country are by and large happy with public services.

Nevertheless, some geographical differences are evident which reflect varying conditions in the different regions of Australia.


Most notably, satisfaction with *Management of Covid-19* diverges significantly from region to region. At the higher end of the spectrum, 63% of Western Australians reported they were satisfied with the *Management of Covid-19*. This is a full 30 points above the least satisfied region, Victoria & Tasmania, at 33%, and 13 points higher than the next most satisfied region, Queensland, at 50%. This is likely to be a result of vastly differing experiences of the pandemic between different parts of Australia. As of 30 August 2021 (the last day of polling fieldwork for this study) Western Australia was not in lockdown¹² and had recorded 1,086 total infections since its first case¹³: by the same date, the State of Victoria, which had entered its sixth lockdown on 5 August 2021¹⁴, had recorded 21,996 cases since the beginning of the pandemic¹⁵. The transmissibility of the Delta variant has led to the abandonment by the State governments of New South Wales and Victoria, as well as the Federal Government, of the hitherto successfully implemented ‘Covid zero’ strategy, under which authorities sought to maintain a virus-free society and keep all Covid cases out of Australia through enforced hotel quarantine and travel restrictions¹⁶. However, given the retention of ‘Covid zero’ as government policy in Queensland and Western Australia, there is significant space for further divergence in satisfaction levels between different parts of Australia, and it will be interesting to continue monitoring public satisfaction with management of the pandemic¹⁷.

Covid-19 in Australia

Once touted as a Covid success story, Australia’s strict regional lockdowns, closed borders and mandatory hotel quarantine meant the country had returned almost to normal life by May 2021. The arrival of the Delta variant upended all this, forcing State and local governments into lockdown, and as of 8 September one in two Australians lived under strict Covid restrictions¹⁸.

The latest wave, Australia’s worst yet, has led the Federal Government and the State governments of Victoria and New South Wales to accept that Covid zero, once the reality in Australia, is no longer possible. However, Western Australia and Queensland, which remain almost entirely Covid-free, are resisting calls to open their borders to the rest of the country, and the world. While, as of 10 September, Victoria had endured 220 days of lockdown, Western Australia had seen just 12¹⁹.

Federal and State leaders are now pinning their hopes on Australia’s once-sluggish vaccination programme, now kicking into high gear. Even here, however, there are tensions brewing,



with Western Australia Premier Mark McGowan accusing New South Wales of receiving more than its fair share of vaccine doses²⁰. As Covid management and vaccination policies diverge ever more drastically within Australia, what effect will this have on public satisfaction?

Australia's federal nature means most public services fall under the jurisdiction of State and Territorial governments, but the public service with which most regions were net dissatisfied was reserved to the Federal Government: *Immigration & Asylum*. Only Western Australia returned a net satisfaction score (30%) higher than net dissatisfaction (25%), by only five percentage points. All other regions, as well as Australia as a whole, returned higher net dissatisfaction scores relative to net satisfaction when it came to *Immigration & Asylum*, with Victoria & Tasmania showing the least support for the current approach, with a net dissatisfaction rating (37%) 14 percentage points higher than its net satisfaction. The proportion of Victoria & Tasmania residents declaring themselves 'very dissatisfied' with *Immigration & Asylum* (15%) was also nearly twice the corresponding figure for Western Australia (8%), underlining the difference in opinion between these two regions. On the related service of *Borders, International Travel & Customs*, Western Australia also recorded an above-average satisfaction score, with 18% of Western Australian respondents declaring themselves 'very satisfied', seven points higher than the nationwide average and six times higher than South Australia & the Northern Territory. Examination of the overseas-born population of Australia's States and Territories reveals that Western Australia also has the highest proportion of foreign-born residents, at 35% (the national average as of 2016, the year for which the latest data is available, is 29.8%). By contrast, although Victoria also has an above-average foreign-born share of its population (31%), Tasmania – which forms the other constituent part of the polling group Victoria & Tasmania, the region most dissatisfied with *Immigration & Asylum* – has the lowest overseas-born population share of Australia's states and territories, at 13%²¹. Perhaps a relatively low immigrant population has led to opposition to immigration among Tasmania residents. We cannot confirm this based on this survey's data, which does not allow us to analyse the internal breakdown of satisfaction and dissatisfaction within the polling region Victoria & Tasmania. Additionally, as the poll only indicates level of satisfaction or dissatisfaction, we cannot infer why Australians are unhappy with immigration to their country, and whether their dissatisfaction stems from support for or opposition to current immigration levels or policy.

Interestingly, health and care-related public services (other than *Mental Health Services*) delivered a mixed set of results. Despite significant efforts by the Federal and State and Territory

governments over the past few years, *Social/Aged Care Services* proved a somewhat polarising service area: while the net satisfaction score of New South Wales & the Australian Capital Territory was – at 38% – 16 points higher than its net dissatisfaction rating, net satisfaction in South Australia & the Northern Territory was – at 27% – 12 points beneath net dissatisfaction (39%). This stood in contrast to *GP & Community Healthcare Services*, where all regions saw net satisfaction scores above net dissatisfaction by margins of at least 36 points. *Hospital Services* received similarly positive feedback – even in the least satisfied region, South Australia & the Northern Territory, satisfied respondents still outnumbered their dissatisfied equivalents by 19 percentage points. Regional polarisation with regard to *Social/Aged Care Services* should be understood in the context of varying degrees of use: as of June 2020, South Australia had, among the States and Territories of Australia, the highest proportion of the target population using permanent residential aged care (4.7%) and using home support (25%)²².

By and large, however, Australians throughout the country proved net satisfied with public service delivery across the areas polled. This is reinforced by the fact that all six regions' net satisfaction scores for *Public Services as a Whole* were higher than net dissatisfaction, by margins ranging from 35 percentage points in Western Australia to 23 points in both South Australia & the Northern Territory and Victoria & Tasmania.

¹²'Lockdowns and outbreaks in Western Australia' – Healthdirect Australia.

¹³'Coronavirus COVID-19 in Western Australia' – Government of Western Australia.

¹⁴'Victoria enters sixth lockdown in response to new mystery COVID-19 cases' – ABC News.

¹⁵'Coronavirus update for Victoria' – Department of Health and Human Services Victoria.

¹⁶'Australia's Covid Zero Strategy Hits a Wall' – Bloomberg.

¹⁷'With no more COVID zero, we've hit a new stage. But the states are more fractured than ever' – ABC News.

¹⁸'Covid Zero Is No Longer Working for Australia' – New York Times.

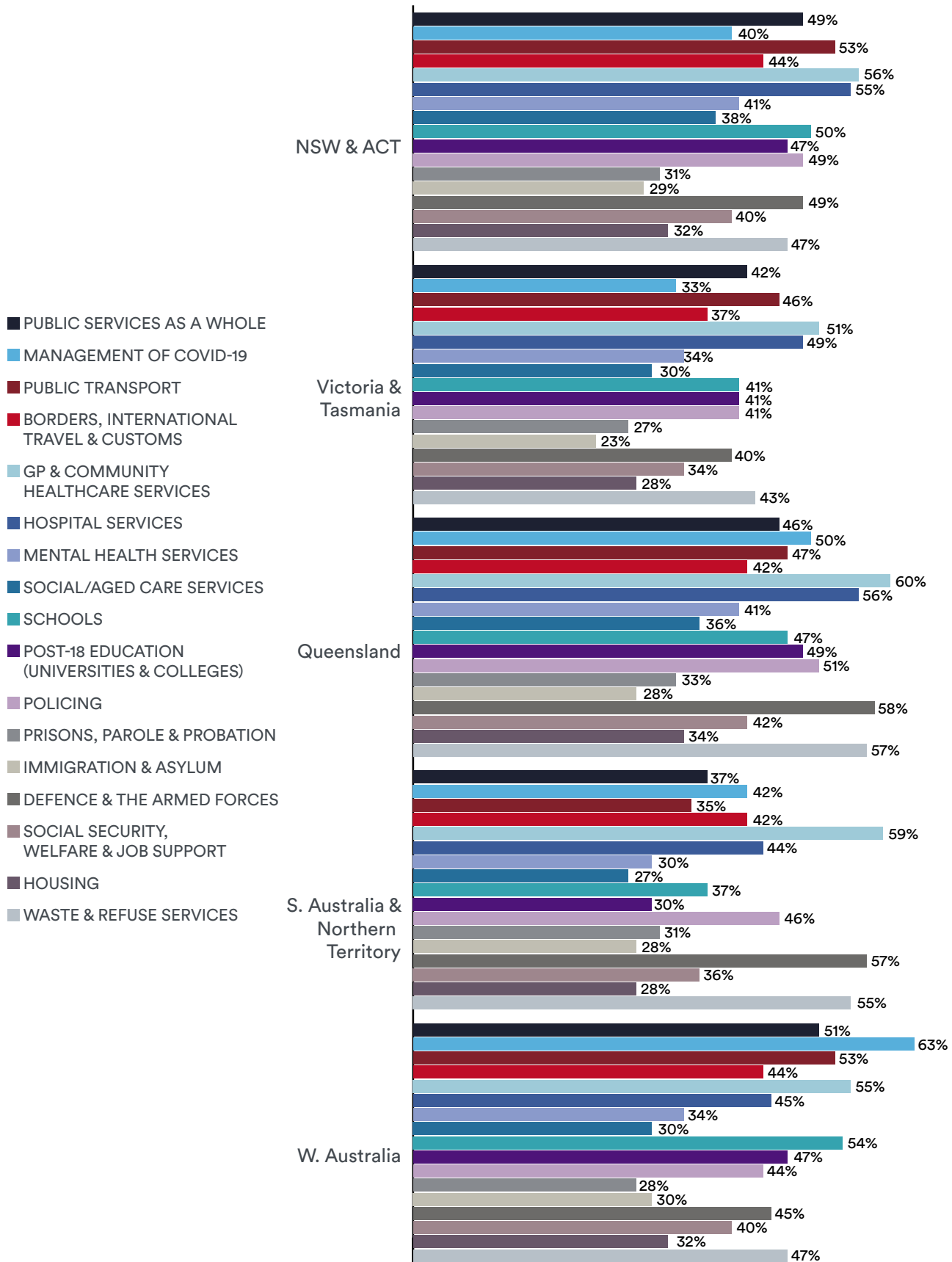
¹⁹'Paradise': Australian states free of COVID resist opening' – ABC News.

²⁰'WA Covid vaccination supplies must be shored up amid extra NSW jabs, Mark McGowan says' – ABC News.

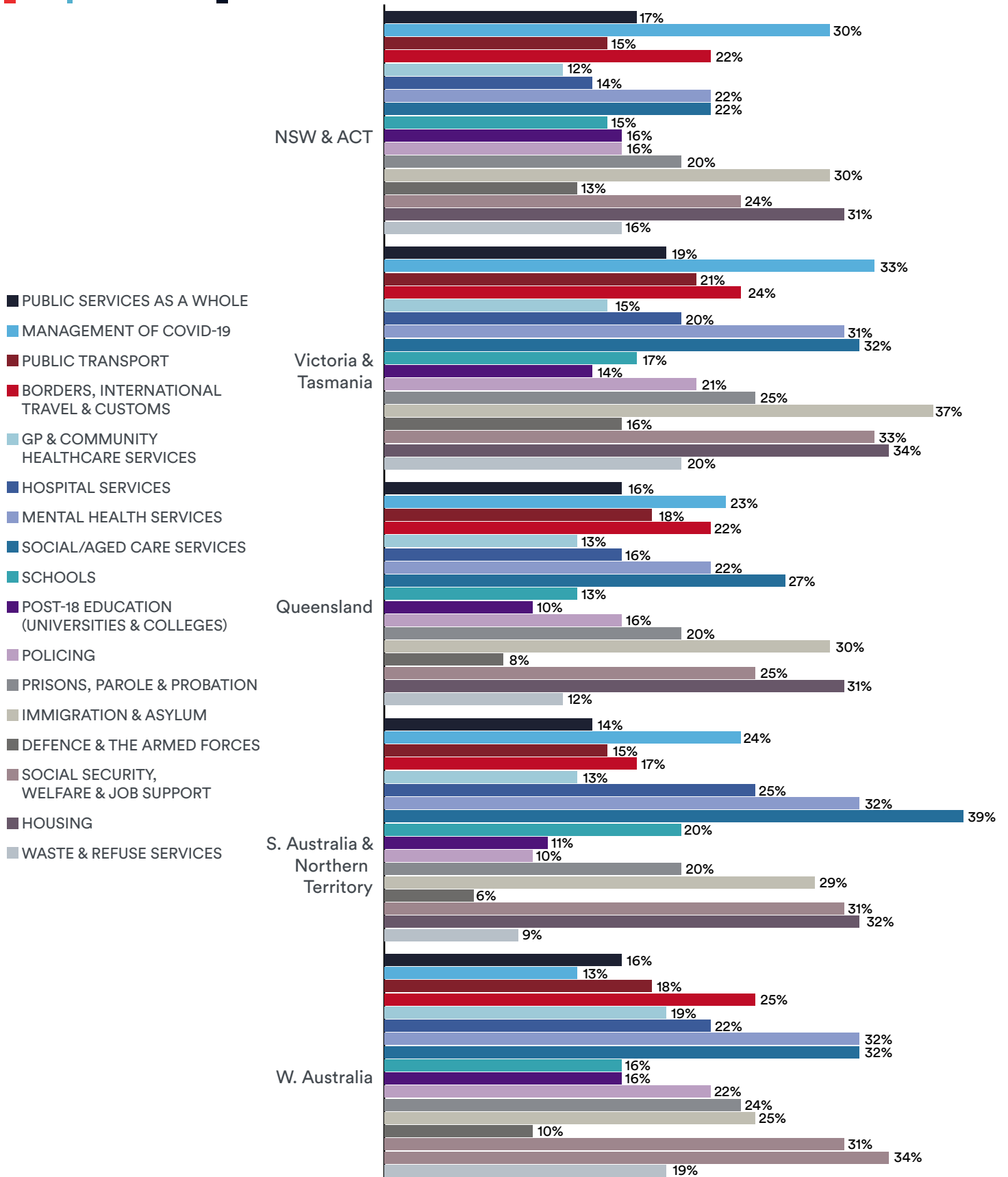
²¹'Migration, Australia, 2019-20 financial year' – Australian Bureau of Statistics.

²²'People using aged care' – Australian Institute of Health and Welfare.

AUS STATES & TERRITORIES: NET SATISFIED



AUS STATES & TERRITORIES: NET DISSATISFIED



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Australia vs UK – Lessons to learn?

As can be seen in our sister report *People Powered Public Services: Monitoring UK 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, more respondents in Australia were satisfied with 14 areas of public services than their UK equivalents; 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 often 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 9 percentage points, and *Mental Health Services* and *Policing* each at seven percentage points. Across all 17 areas we polled, the (mean) average rate at which the UK public returned 'very' or 'quite' satisfied response was 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 equivalent mean rate of dissatisfaction responses, 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 the UK population has different expectations of their public services or a generally more pessimistic overall outlook.

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

1. GP & Community Healthcare Services (30% / 14%)
2. Policing (28% / 17%)
3. Immigration & Asylum (38% / 31%)
- =3. Mental Health Services (33% / 26%)

One significant area of congruence is in the data relating to gender, where men in both countries appear more satisfied with *Public Services as a Whole* 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 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 are is 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 UK 35-44 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

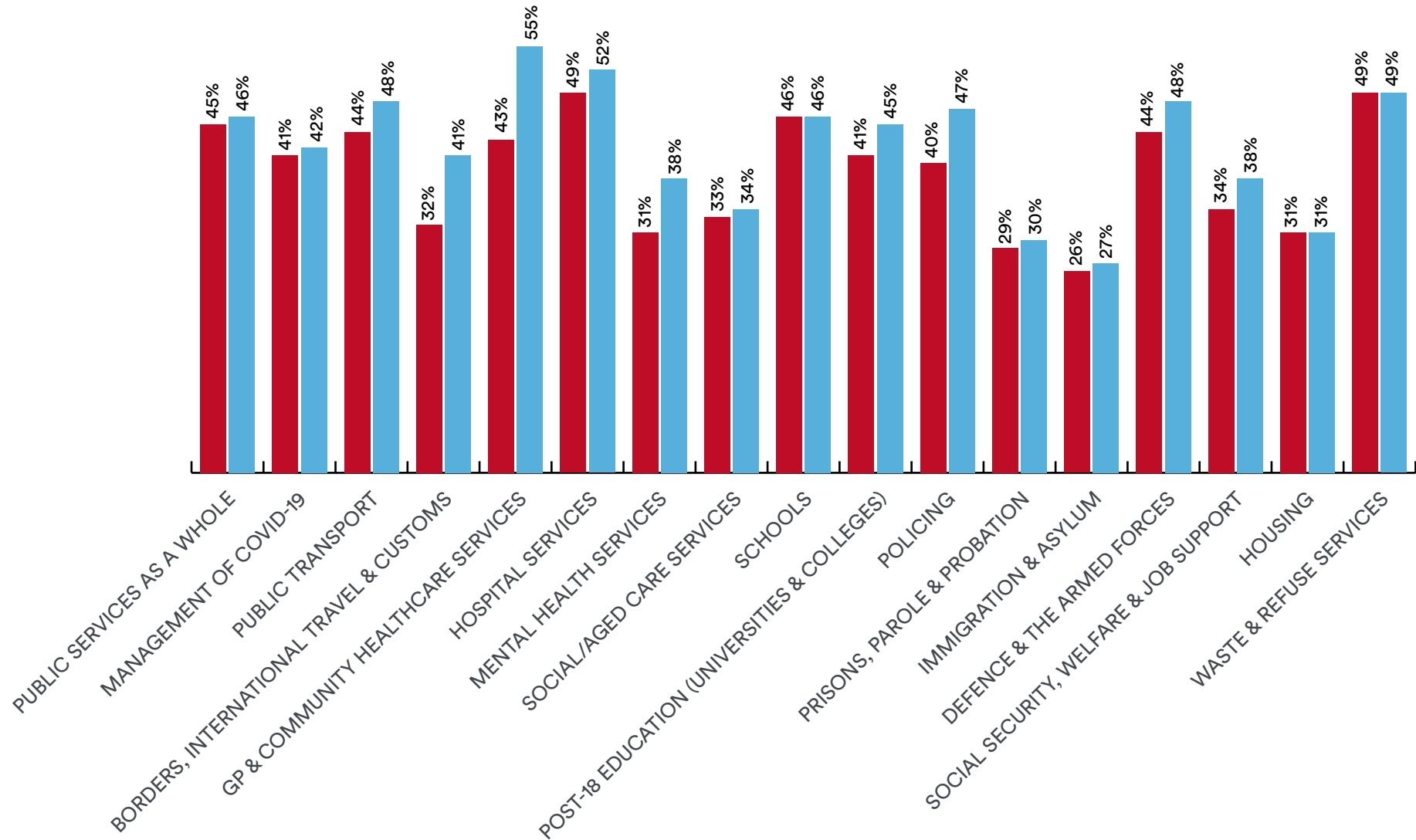


(16-24) returned the highest net satisfaction score more times than any other cohort in the country. Furthermore, their average rate of net satisfaction score was 45%, joint highest with the 25-34 year olds in the Australian poll.

It is beyond the scope of this paper to explore why Australian citizens hold their public services in notably higher regard than their British counterparts. Observers should be wary of drawing knee-jerk reactions from the results by concluding that Australian public services are ‘better’ than those in the UK. For example, it could be, as noted above, that Australians have different expectations of their public services. Even with these caveats in mind, however, it is fair to conclude that the UK has something to learn from Australian policy-makers, whether it is in the managing of expectations, the narrative through which public services are discussed in the public realm, or, simply, how best to design and deliver public services.

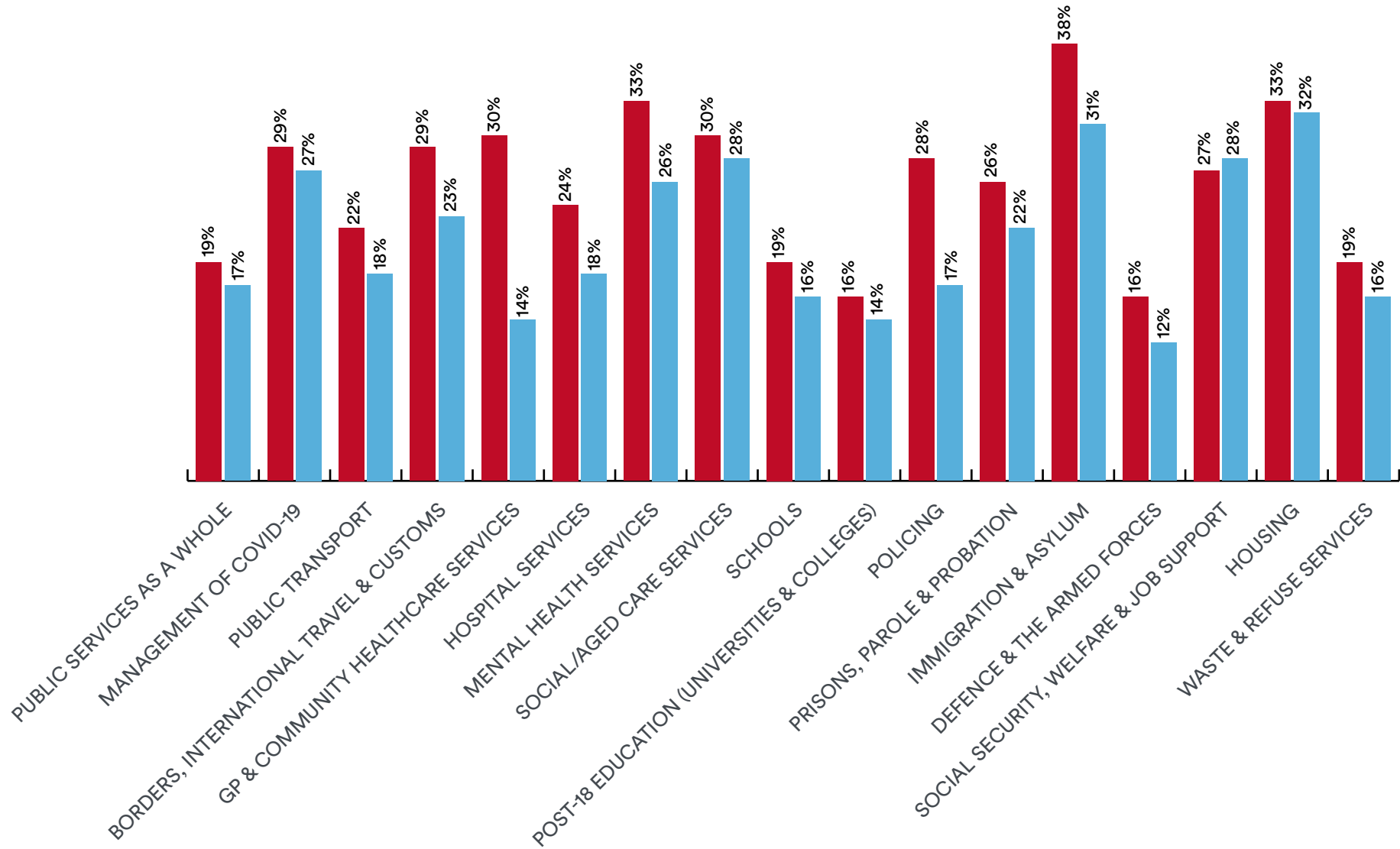
NET SATISFIED: UK V AUSTRALIA

■ 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 Australia over time, clear patterns have already been revealed by this initial dataset.

Unlike the UK, there is only limited divergence between the views of men and women on public services. That said the broad trend that men reported greater levels of satisfaction than women was true in Australia, as it was in the UK.

Age also seemed to be an indicator of satisfaction. A pattern – although with exceptions – emerged whereby the older a respondent is, the lower the level of satisfaction. This divergence was particularly stark by the time you compared the satisfaction rates of the oldest and youngest cohorts of respondents.

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 ‘lowest’ grouping (*DE*) did return a significantly lower score when they were asked about *Public Services as a Whole* (*AB* 50%; *C1C2* 51%; *DE* 37%).

Australia’s federal system of government means services are designed and delivered by a number of different governments, operating at the local, State and national level. It is perhaps unsurprising therefore that the data revealed some key regional differences in sentiment. Variances between satisfaction and dissatisfaction rates were evident across a number of areas, but contrast was most apparent in responses regarding the *Management of Covid-19*. The policies and experiences of different States and Territories throughout the pandemic has been starkly different. In states where case numbers are high and/or restrictions severe, satisfaction levels are much lower – for example, Victoria & Tasmania, at 33% – whereas in regions in which the circulation of the virus remains low the opposite is true – for example, Western Australia returned a net satisfaction score of 63%.

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 – UK residents could, for example, just have different expectations of their public services or have a more pessimistic outlook in general.

Overall, however, people remained largely more satisfied than not with public services in Australia. Only in two areas (*Immigration & Asylum* and *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 28% and 39% of people indicating as such, depending on the service. This arguably shows that – beyond those that are satisfied – between just over a quarter to almost two-fifths of people believe that services are meeting their expectations.

The ‘tangibility’ of a public service seems likely to play a role in how citizens feel about it: while *Waste & Refuse Services* does not excite political passions in the same vein as *Immigration & Asylum*, the vast majority of Australians will encounter waste management services on an extremely regular basis. Waste disposal is also an uncontroversial issue which does not require a sophisticated grasp of public policy to be understood. In this instance, user experience is likely to inform citizens’ judgment of public service performance.

On the other hand, it also seems Australians’ view of public services are strongly influenced by said services’ position as a contentious issue within Australian politics. Given that it is unlikely that most respondents had prior direct experience of *Immigration & Asylum* services – a controversial and divisive subject in Australian politics – before taking our survey, it may be inferred that the relatively high net dissatisfaction score, 31%, for this service is related to individual respondents’ political views and disposition towards immigration policy and asylum, and it was on this basis that many respondents made their assessment.

That said, 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 Australia means responsibility for different public services lies across a whole range of institutions – be it local, devolved or central government.



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.

