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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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Outline – Tracking public opinion on public services

This is the second instalment of the Serco Institute's *People Powered Public Services* series, a longitudinal study in which the Institute tracks 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' Australians are with the services they are using and analyse key findings through these quarterly reports.

We hope that this will help policymakers 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, and whether perceptions change according to one-off news events or societal trends.

In this second report, we analyse the statistics taken from a new round of polling, conducted in January 2022, and compare them to our initial baseline data from August 2021, which we covered in our first report. Our objective to examine the Australian public's sentiment towards public services comes following a further wave of Covid-19, brought about by the Omicron variant of the virus. The same study in the UK is being carried out in parallel 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. 1,039 residents of Australia aged 16-64 were interviewed, with interviewing conducted by online self-completion between 20-24 January 2022. The sample has been weighted to be representative of the Australian population aged 16-64. Where unweighted base figures are less than 100, data has been treated cautiously, due to potential large margins of error. Not all figures and charts will sum 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 stance on the policies underpinning them. We also expect that respondents' views will be coloured by economic and socio-political changes in Australia and the implications these will have for individuals' personal circumstances. All these factors are impossible to disentangle from one another. The delivery and policy are inevitably linked, both in practical terms and in the minds of the people who have been surveyed.

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Introduction & Overview

Since we last polled Australian citizens' views in August 2021, much has changed. The country's states and territories remained under one of the most restrictive Covid-19 regimes in the world, albeit with significant variance between states and territories. The country's pandemic related restrictions have been significantly eased since then, although apparently not sufficiently for some, as demonstrated by the Ottawa truckers-inspired protests outside the Australian parliament in Canberra.

The easing of restrictions represents one of three significant changes since August 2021, the second being related; that is, the soaring of Omicron cases seen in Australia this year, with the country recording its highest number of Covid-19-related deaths in January 2022¹. The third major change is the country's increasingly febrile political landscape, a product of the 'Super Saturday' series of by-elections in New South Wales on 12th February, and, most importantly, the upcoming federal election in May. The cut and thrust of Australian politics remains as potent as ever.

Despite these significant shifts, citizens' views of public services remain largely unchanged, but with some striking outliers. In 10 of the 17 categories polled, citizens were more satisfied than they were in August 2021, albeit only very marginally in some cases. As in August, Australians showed a large degree of satisfaction with their public services. None of the 17 categories recorded a net dissatisfaction rating. The general similarity in the results compared to August 2021 is hardly surprising. Perceptions of public services are unlikely to change over the course of a few months, just as public services are unlikely to change in such a short period of time. An obvious example here could be the category *Social Security, Welfare & Job Support*. Nothing much has happened as regards Social Security in Australia between August 2021 and January 2022, presumably explaining why there was only a one-percentage-point change in satisfaction.


Whilst many of categories have not elicited strong changes in feeling since August 2021, there are some notable outliers. In August, 42% of respondents were net satisfied and 27% net dissatisfied with *Management of Covid-19*, a 15% net approval rating. By January, however, sentiment was much more negative, with 38% net satisfied and 34% net dissatisfied.



Since our last round of polling, Australia has experienced a major wave of Covid-19 due to the arrival of the Omicron variant. Immediately prior to Omicron, some parts of Australia had been loosening Covid restrictions, with Melbourne the last state capital to emerge from lockdown on 22 October 2021². Authorities made the loosening of restrictions contingent on fully vaccinating 80% of residents, with each of the country's states and territories reaching this milestone in late 2021 and consequently relaxing Covid regulations. With the arrival of Omicron, however, Australia went from seeing around 1,000 daily cases to over 100,000 in just over a month, with parts of the country previously relatively untouched by the pandemic seeing tens of thousands of new cases. The only state to have largely evaded the new variant is Western Australia, which maintained a hard internal border with the rest of the country throughout the Omicron wave³. Although a reopening of the state border was scheduled for 5th February, state premier Mark McGowan caused controversy by announcing on 20th January that the reopening of his state was to be delayed indefinitely⁴. Despite measures taken since then to relax restrictions, such as the halving of self-isolation periods for positive cases, the hard border remained largely in place in February⁵.

Whilst there is an obvious link to explain the decline in positive sentiment towards the *Management of Covid-19*, the increase in net satisfaction for *Defence & the Armed Forces* is harder to pin down. In August, this category recorded 48% net satisfied versus this poll which saw a 4-percentage point jump upwards.

During the federal election campaign so far, the governing Coalition Government of the Liberal and National parties has placed national defence at the heart of its election campaign. The Coalition has suggested only it can be relied upon to stave off the perceived threat of China, whilst simultaneously promoting a narrative claiming the Labor Party is susceptible to malign Chinese interests – recently, Prime Minister Scott Morrison referred to Labor's deputy leader as the “Manchurian candidate”⁶. Although this strategy may not translate into support for the Coalition – which is very marginally lagging Labor in the polls⁷ – placing national security at the heart of its campaign may bring the issue to the forefront of citizens' minds, thus increasing support for *Defence & Armed Forces* overall. In addition, there is a tenuous possibility that the jump in support could result from Australia's inclusion in the new defence alliance, AUKUS. However, it should be noted this was announced back in September 2021.



Looking ahead to our next poll, it is worth looking out for correlations between the parties' principal election issues and the related categories in our poll. For example, a decline in satisfaction for *GP & Community Healthcare, Services, Hospital Services, and Social/Aged Care Services*, may indicate that Labor is successfully instilling its key messages in the minds of voters.

¹'Australia suffers deadliest day of pandemic as Omicron drives up hospital cases' – Reuters.

²'Melbourne: Celebrations as city exits sixth lockdown' – BBC News.

³'Australia has decided to "let Covid rip." Is that a good idea?' – NBC News.

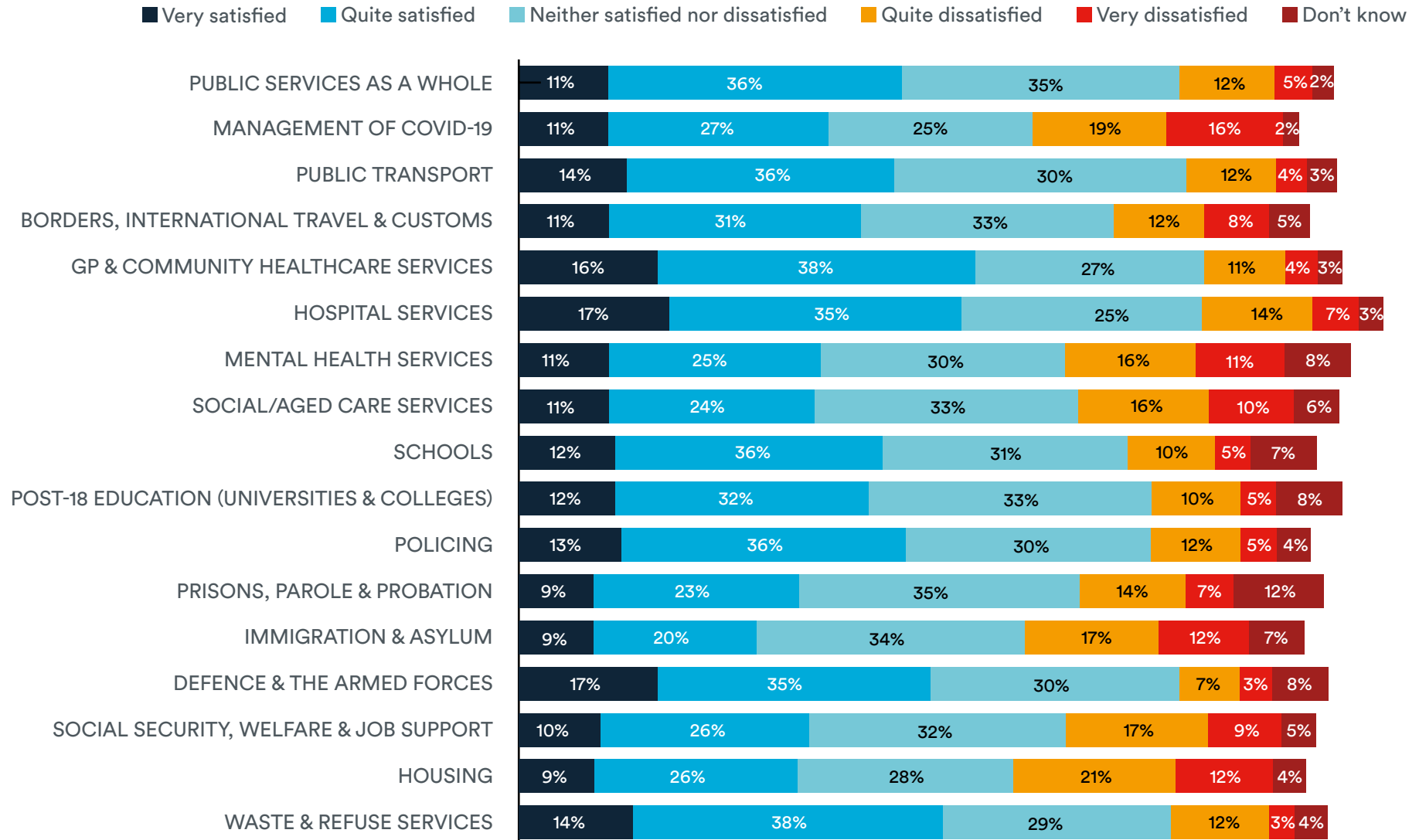
⁴'Western Australia suspends border reopening indefinitely amid Omicron spread' – The Guardian.

⁵'Western Australia changes quarantine and testing rules – but Mark McGowan refuses to say when borders will fully reopen.' – Daily Mail.

⁶'Ahead of Australian elections, fears of Chinese meddling fuel Liberal attacks on Labor' – The Washington Post.

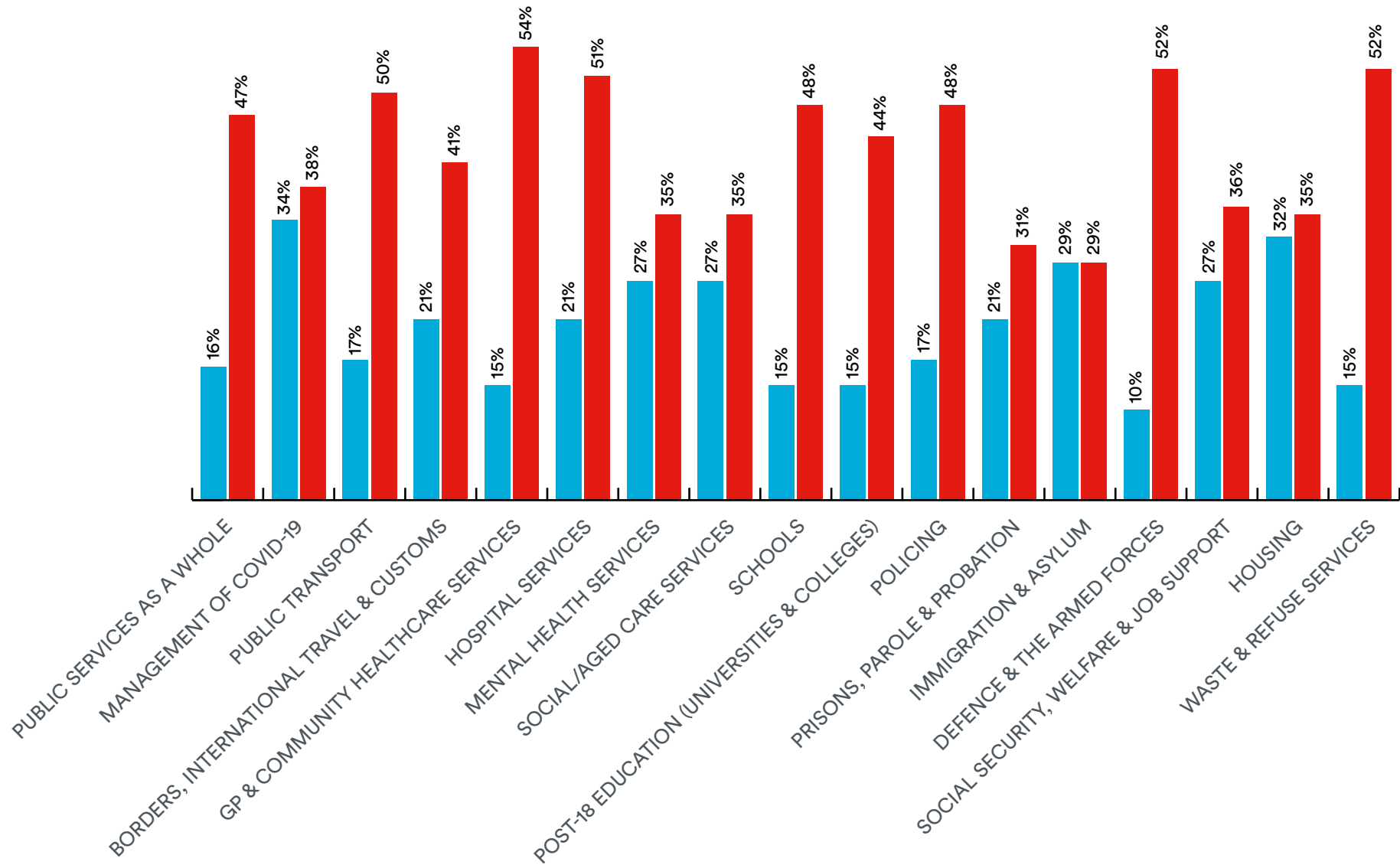
⁷'Bring it on': Scott Morrison goads Labor into election character contest after questions over leaked texts' – The Guardian.

OVERVIEW



NET SATISFIED V NET DISSATISFIED

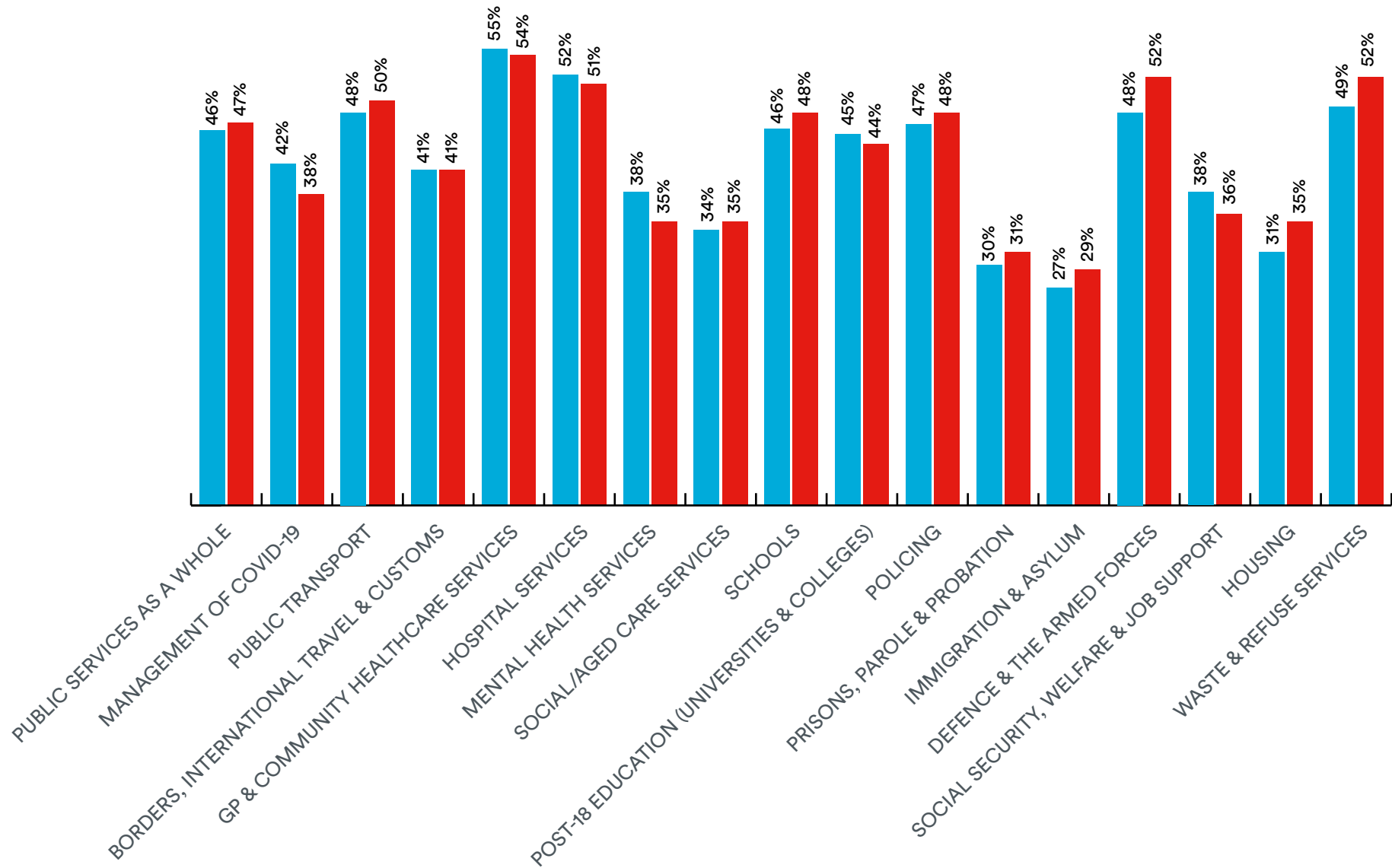
■ Net: Dissatisfied ■ Net: Satisfied



CHANGE IN SATISFACTION: AUGUST 2021 - JANUARY 2022

■ Aug - 21

■ Jan - 22



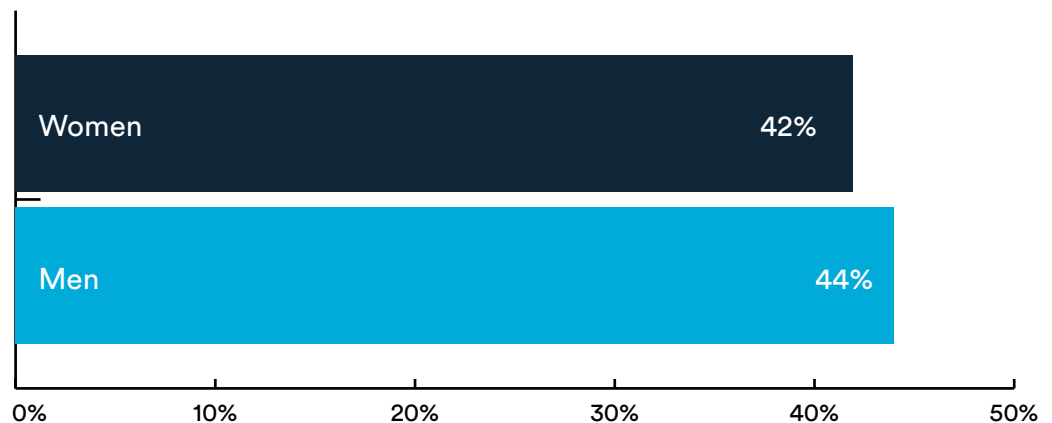
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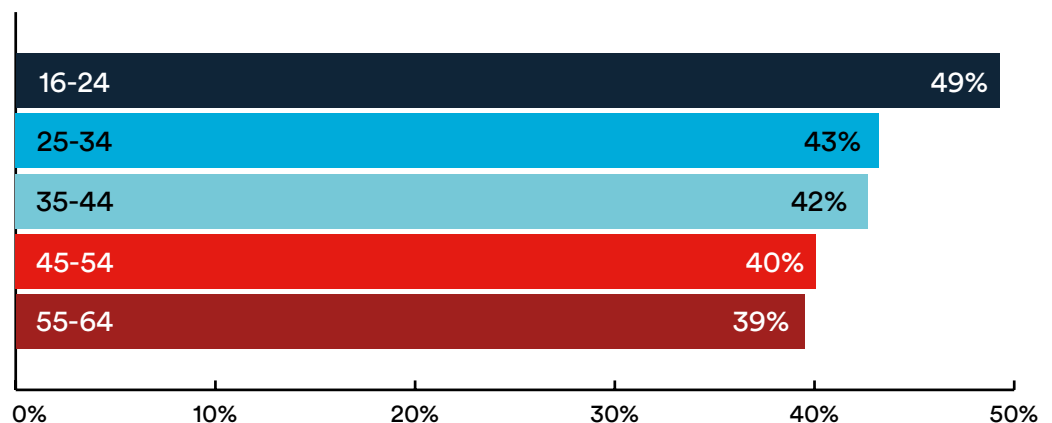
Key trends

We found that many of the key trends identified in our previous report continued to hold true with this new round of polling, although certain groups of respondents were more likely to report increased levels of satisfaction than others.

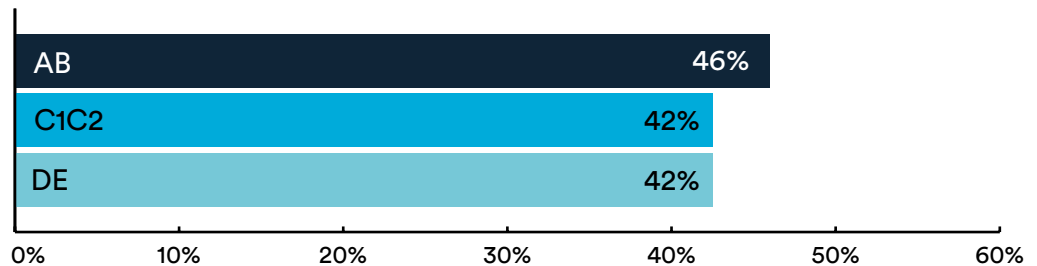
- As was the case in our survey data from August, **Australian women consistently returned lower satisfaction scores than men.**



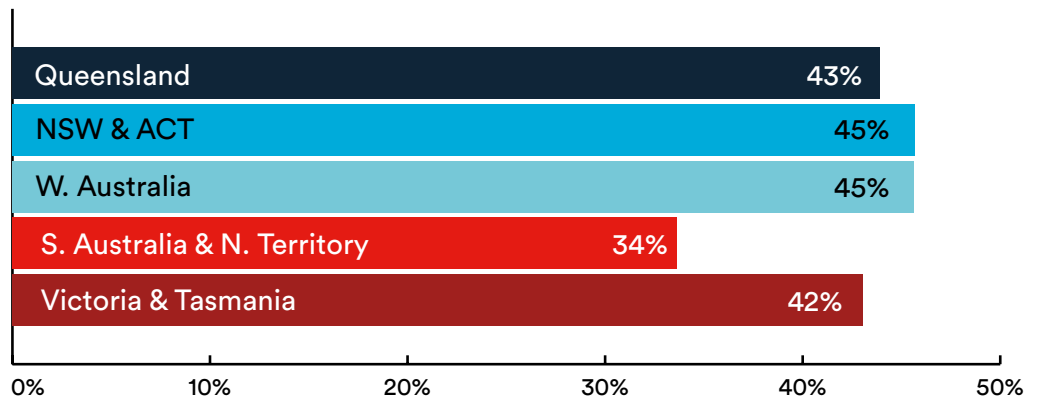
- In a further continuation of trends we previously identified, the **oldest age cohort (55-64-year-olds) was consistently the least satisfied, and the most dissatisfied of the age groups.** However, 16-24-year-olds registered a four-percentage-point improvement in their (mean) average satisfaction score across the 17 polled areas, meaning average satisfaction scores dropped with each older age category.



- It remained broadly true that an individual's so-called 'social class'⁸ was an indicator of their sentiment towards public services, with people belonging to '**higher**' **Social Grades more likely to be satisfied with public services**. However, the gap between the DE social grade and the AB and C1C2 social grades had narrowed since our last round of polling in August.



- Whereas Victoria & Tasmania had been **Australia's least satisfied polling region** in August, by January this position was occupied by **South Australia & the Northern Territory**, which returned the lowest (by some margin) average net satisfaction score across all 17 polled areas. Meanwhile, **Western Australia tied with New South Wales & the Australian Capital Territory for the highest average satisfaction score** (both 45%) across the 17 polled areas.



Other findings

In January this year, 47% of respondents were net satisfied with **‘Public Services as a Whole’** versus 16% net dissatisfied. In August, respondents had been one percentage point less satisfied overall, an almost negligible swing. Most surveyed categories of public services saw similarly small swings in opinion, with no change in satisfaction larger than four percentage points. The biggest increase in satisfaction was for **Defence & the Armed Forces**, which saw satisfaction levels increase from 48% to 52%. It is possible that this is a show of support for the Australian Defence Force in the wake of the AUKUS partnership between Australia, the United States and the UK, announced in September 2021.


3 services delivering satisfaction

(Net satisfaction / Net dissatisfaction)

1. GP & Community Healthcare Services (54% / 15%)
2. Defence & the Armed Forces (52% / 10%)
3. Waste & Refuse Service (52% / 15%)

The largest decline in satisfaction was in relation to **Management of Covid-19**, where net satisfaction fell from 42% to 38% between August and January. Presumably, this is due to public concern with the handling of the Omicron variant which swept Australia, along with many other countries, in late 2021 and early 2022, particularly just as many parts of the country had been emerging from lockdown and other stringent measures immediately prior. The optimism and relief felt as the overwhelming majority of Australians received second jabs may have easily turned to weariness as the country was faced with yet another wave of the virus.

Unlike in our previous survey, there were no public service areas where more Australians were more dissatisfied than satisfied. The only service where Australians did not return a satisfaction score higher than dissatisfaction was *Immigration & Asylum*: respondents were split here, with 29% satisfied and 29% dissatisfied with the service. This is not altogether unsurprising, in view of evidence that a majority of Australians remain cautious about immigration: a November 2021 study found that nearly six in 10 (58%) of Australians wanted for post-Covid immigration levels to their country to be below what they had been before the pandemic⁹.



Furthermore, an additional point of interest in our new survey data is where there was no change in opinion: the satisfaction score among Australians for **Borders, International Travel & Customs** remained 41%, as it was in August. This may be seen as an unchanged endorsement of the Government's policy regarding the external Australian border which remained sealed, as of the time of polling in January 2022, to the outside world. Alternatively, perhaps this signals popular support for the gradual easing of border restrictions. The Commonwealth Government relaxed controls on entering Australia in December 2021, with fully vaccinated international students and skilled migrants admitted into the country for the first time in nearly two years¹⁰: that this resulted in no change in public satisfaction with this policy area suggests that the Australian public support the gradual move to shed border restrictions into their country.

⁸Based on the NRS Social Grades system of classification: 'Social Grade' – National Readership Survey.

⁹'Voters reveal population concerns ahead of border reopening' – The Sydney Morning Herald.

¹⁰'Australia reopens to students, migrants after nearly two-year ban' – Al Jazeera.




The Gender Gap

Our previous report highlighted the gap between Australian men and women in relation to their satisfaction towards public services. In the previous poll conducted, male respondents delivered higher satisfaction scores than female respondents and in our newest polling data, this same broad trend remains. Men recorded higher net satisfaction scores than women across 11 of 15 specific public service areas (i.e. excluding *Public Services as a Whole* and *Management of Covid-19*), whilst women recorded higher net dissatisfaction scores across 6 of 15 public service areas, compared to 4 previously.

The newest polling data, however, shows one crucial shift. Men recorded a decrease in net satisfaction from 49% to 46% when asked about *Public Services as a Whole*, whilst women's net satisfaction increased from 43 to 47%. This is a significant shift and asserts that women were more satisfied than men with public services when looking at services in totality, albeit only by one percentage point. This is a noteworthy swing given men outscored women by 6 percentage points on this question previously. Furthermore, in relation to *Public Services as a Whole*, men recorded a higher net dissatisfaction score than women.

The previous report also noted that both men and women remain broadly satisfied with the services that they use. This trend holds true and is revealed by the fact that the net satisfaction scores for men and women increased across 9 and 8 of the public service areas respectively. Public service providers can, therefore, continue to take heart by the evidence suggesting that there is general approval of the services available from both genders.

Government action in relation to the Covid-19 pandemic continues to be a topical and crucial issue for the public. Interestingly, both men and women showed a decrease in satisfaction and an increase in dissatisfaction in response to *Management of Covid-19*. As noted above, this could be a result of general fatigue around Covid-19 policy or a concern regarding the continuing tight restrictions that have been pursued in Australia throughout the pandemic. The previous report noted that women recording a higher net satisfaction on *Management of Covid-19*. This is no longer the case. Women recorded a decrease of 6 percentage points from 43% to 37% in net satisfaction whilst men only decreased by 2 percentage points to 40%. Remarkably, women have also recorded a 10-percentage point increase in net dissatisfaction alongside men recording a 5-percentage point increase in net dissatisfaction. Previously, we outlined that economic recovery packages in Australia were more likely to favour men, and a higher percentage of women lost their jobs at the peak of Covid. This could help to explain this large

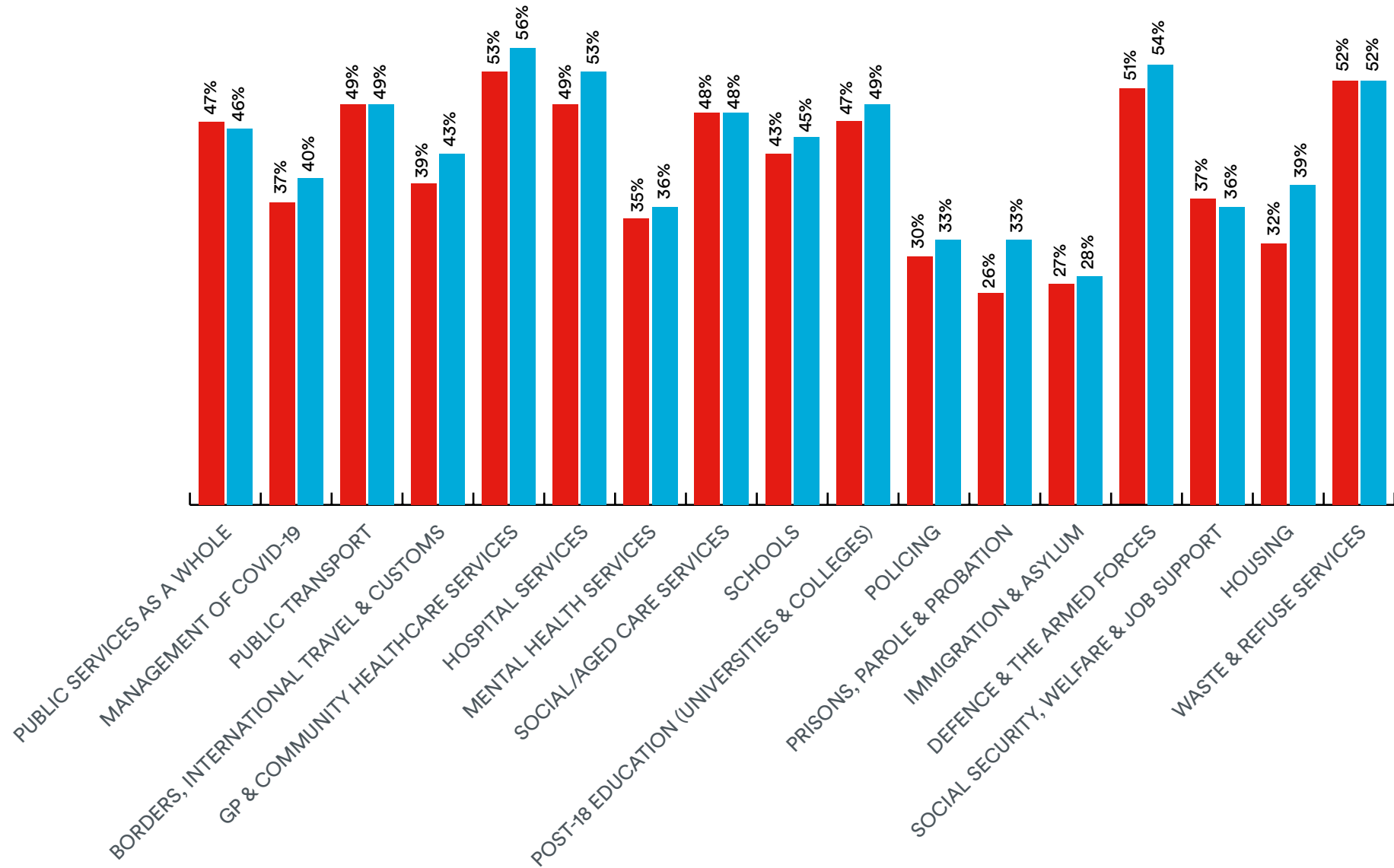


satisfaction, alongside the fact that women tend to be more cautious about restrictions, meaning the easing of some Covid measures are less likely to be supported by them.

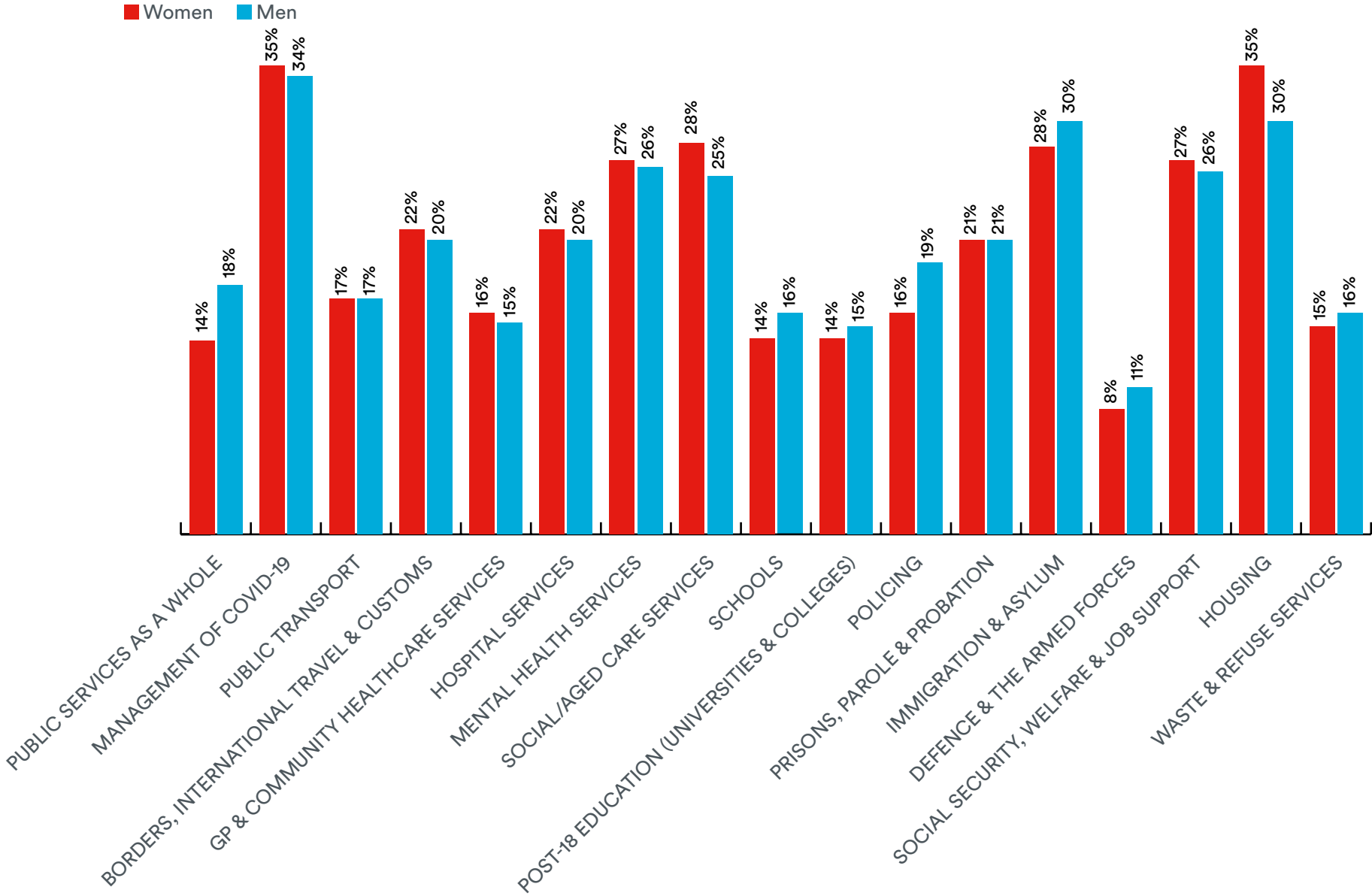
In conclusion, the newest set of polling data continues to support the assertion that men are more satisfied with public service provision than women in Australia. However, notably, there was a surprise in that, when asked specifically about *Public Services as a Whole*, women had a higher net satisfaction than men, albeit by one percentage point. Most importantly for governments in Australia, Australian men and women remain broadly satisfied with the services available to them.

NET SATISFIED: WOMEN V MEN

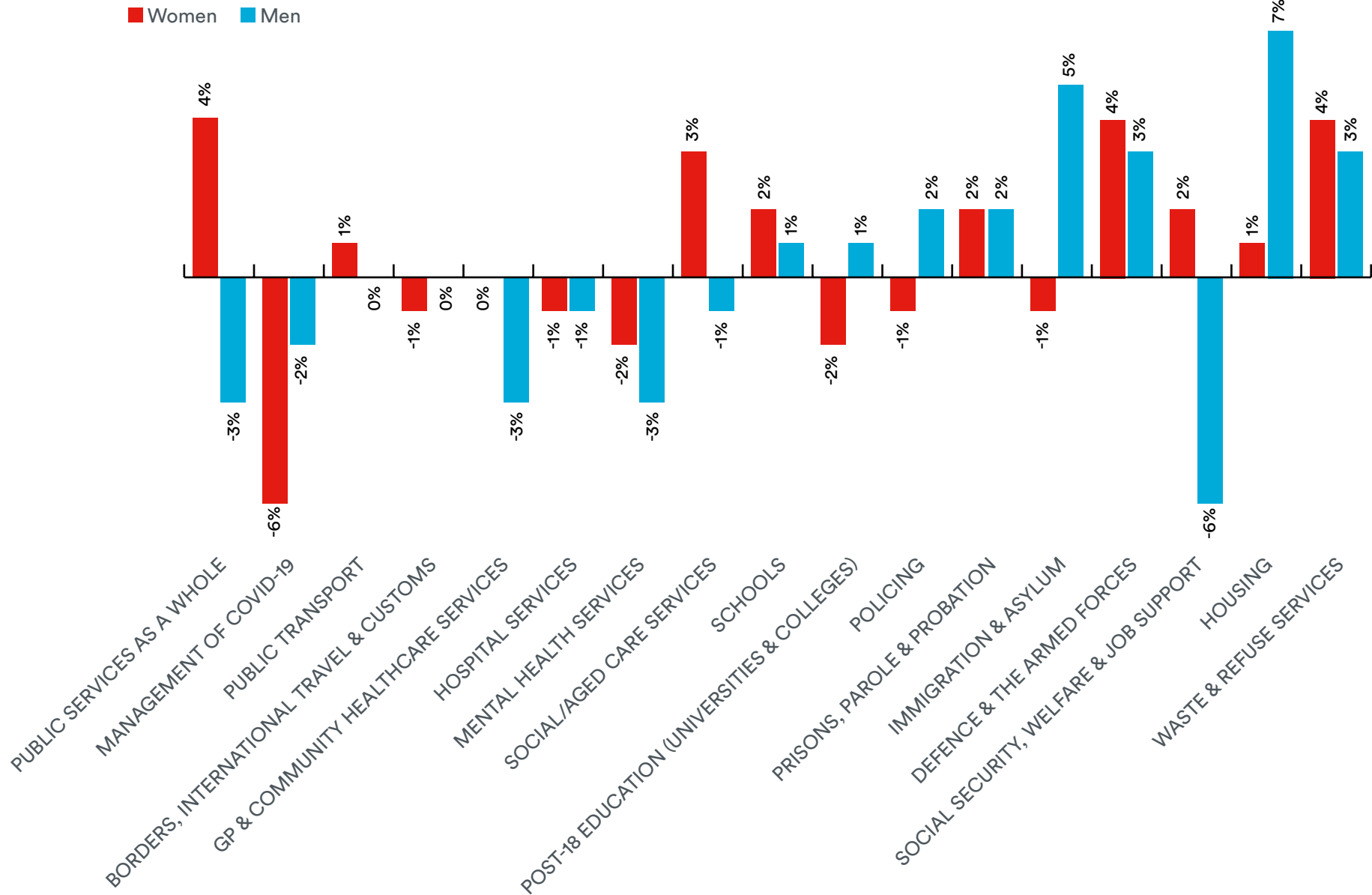
■ Women ■ Men



NET DISSATISFIED: WOMEN V MEN



CHANGE IN SATISFACTION: WOMEN V MEN





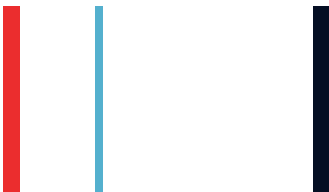
What Can We Gauge From Age?

Broadly speaking, it remained the case that the older a respondent was, the less likely they were to be satisfied with any given category of public services. However, it was clear that certain age groups were more satisfied with public services in January than in August, while other age groups were less satisfied.

In our previous report, the two youngest age groups, 16-24-year-olds and 25-34-year-olds, each returned a (mean) average satisfaction score across all 17 polled areas of 45%, cementing these two bandings' position as the most satisfied of the age groups. By January, however, 16-24-year-olds had drawn ahead, recording an average satisfaction score four percentage points higher than in August (49%). This was the most significant change in overall satisfaction recorded. The two oldest age groups, the 45-54 and 55-64 age cohorts, recorded slightly higher average satisfaction scores of 40% and 39% respectively, representing a one-point improvement for each age group. Meanwhile, the two middle age groups, 25-34-year-olds and 35-44-year-olds, indicated slightly lower average satisfaction scores of 43% and 42% respectively, marking a two-point decline for the 25-34 age group and a one-point decline for the 35-44 age group.

A more granular examination of the service categories confirms this trend of increased satisfaction for the youngest age group. Australians aged 16-24 returned the highest, or joint highest, satisfaction scores for 13 of the 17 polled categories, up from eight in August. This included *Public Services as a Whole*, with which 53% of 16-24-year-olds were satisfied, 14 points higher than their 55-64-year-old counterparts and seven points up from August. 16-24-year-old respondents furthermore registered improvements in satisfaction scores in all but one of the polled areas, the exception being *Prisons*, which registered a one-point dip in satisfaction among 16-24-year-olds to 38%. By contrast, 25-34-year-olds reported the same or higher satisfaction levels across six polled areas, with 11 categories seeing declines in satisfaction among respondents belonging to this age group.

In some cases, 16-24-year-olds constituted the only age group to register an improvement in satisfaction with a specific category of public services. For example, the youngest age group's satisfaction with *Management of Covid-19* rose four points between August and January, but declined in all other age groups. This may be explained by the simple fact that these young respondents are less at risk of severe illness and death from Covid, leading them to view their Government's decision to loosen pandemic mitigation policies in a more positive light than their older compatriots. Additionally, satisfaction among 16-24-year-olds with *Social Security, Welfare*




& *Job Support* also rose four points while falling among the other four age cohorts. This comes despite a pre-Christmas boost to Centrelink welfare payments, suggesting that respondents in most age groups indicated that social support in Australia was struggling to meet their needs¹¹.

Among 55-64-year-olds, satisfaction ratings improved across eight of the 17 surveyed categories. In some instances, the rise in satisfaction was particularly sharp: most notably, for *Defence & the Armed Forces*, satisfaction among 55-64-year-old Australians rose 11 points to 60%. This may be interpreted as high support among older respondents for recent developments involving the Australian Defence Force: this theory is reinforced by evidence showing that the AUKUS deal, under which Australia will purchase nuclear-powered submarines from the United States, is strongly supported by older Australians but opposed by a small minority (53%) of 18-24-year-olds¹².

Three more service areas – *Public Transport; Borders, International Travel & Customs*; and *Immigration & Asylum* – each saw nine-point increases in satisfaction among 55-64-year-olds. The second and third of these are linked, and, given that these are more likely to be due to associated government policies rather than the delivery of the services themselves, this suggests that the Commonwealth Government's border and immigration policies have met with approval among respondents in the oldest age banding. In view of the fact that the only significant change to Australia's international border to have occurred between August 2021 and January 2022 was the easing of border restrictions for fully vaccinated holders of certain visas¹³, we may infer that the continued enforcement of Australia's strict entry policies was met warmly by older age groups. This may be due to a combination of fears of importing Covid cases, among those respondents most at risk from severe illness and death from the virus, and immigration scepticism: surveys show that nearly six in 10 (58%) Australians support restarting immigration at a lower level than before the pandemic¹⁴.

As was the case in our previous report, all age groups save the 16-24 cohort indicated higher dissatisfaction than satisfaction in at least one service category. Generally, however, where dissatisfaction outstripped satisfaction, it was only by a handful of percentage points. One notable exception was in relation to 55-64-year-olds' sentiments towards *Social/Aged Care Services*: here, dissatisfied respondents in this age group outnumbered satisfied ones by 18 points, a gap eight points wider than what it had been in August.



Given this age group's higher likelihood of needing social or aged care, this is perhaps unsurprising, as the Omicron wave placed the Australian aged care sector under serious strain in early 2022, to the point where major aged care providers called upon the Australian Government to deploy soldiers to help fill Covid-induced staff shortages¹⁵.

The only surveyed category in which all age groups saw an increase in satisfaction levels between August and January was *Housing*. However, while satisfaction among 16-24-year-olds only increased by one point, among 55-64-year-olds the corresponding rise was eight points. This, again, is to be expected: with evidence that Australian housing prices rose a record 22% in 2021, buoyed by low interest rates¹⁶, it is clear that first-home buyers, on average aged 36 in Australia, will have been disadvantaged by this, while older people have seen their assets increase in value¹⁷.

In spite of differing patterns in satisfaction different age groups emerging from our January poll, the overarching theme remained that older respondents were less likely to be satisfied than younger ones with public services. In fact, the average satisfaction score across all 17 polled areas decreased linearly by age group, from 49% among 16-24-year-olds to 39% among 55-64-year-olds. Do older Australians simply find public services less accessible, or could it be that they simply grow more critical of services as they age?

¹⁵Centrelink payment increase 2021: Jobseeker, pension cash boost hitting Australian bank accounts' – 7News.

¹⁶Most Australians approve of nuclear subs deal' – Australian Finance Review.

¹⁷Sydney, Melbourne to reap benefits from return of international students, skilled workers' – The Sydney Morning Herald.

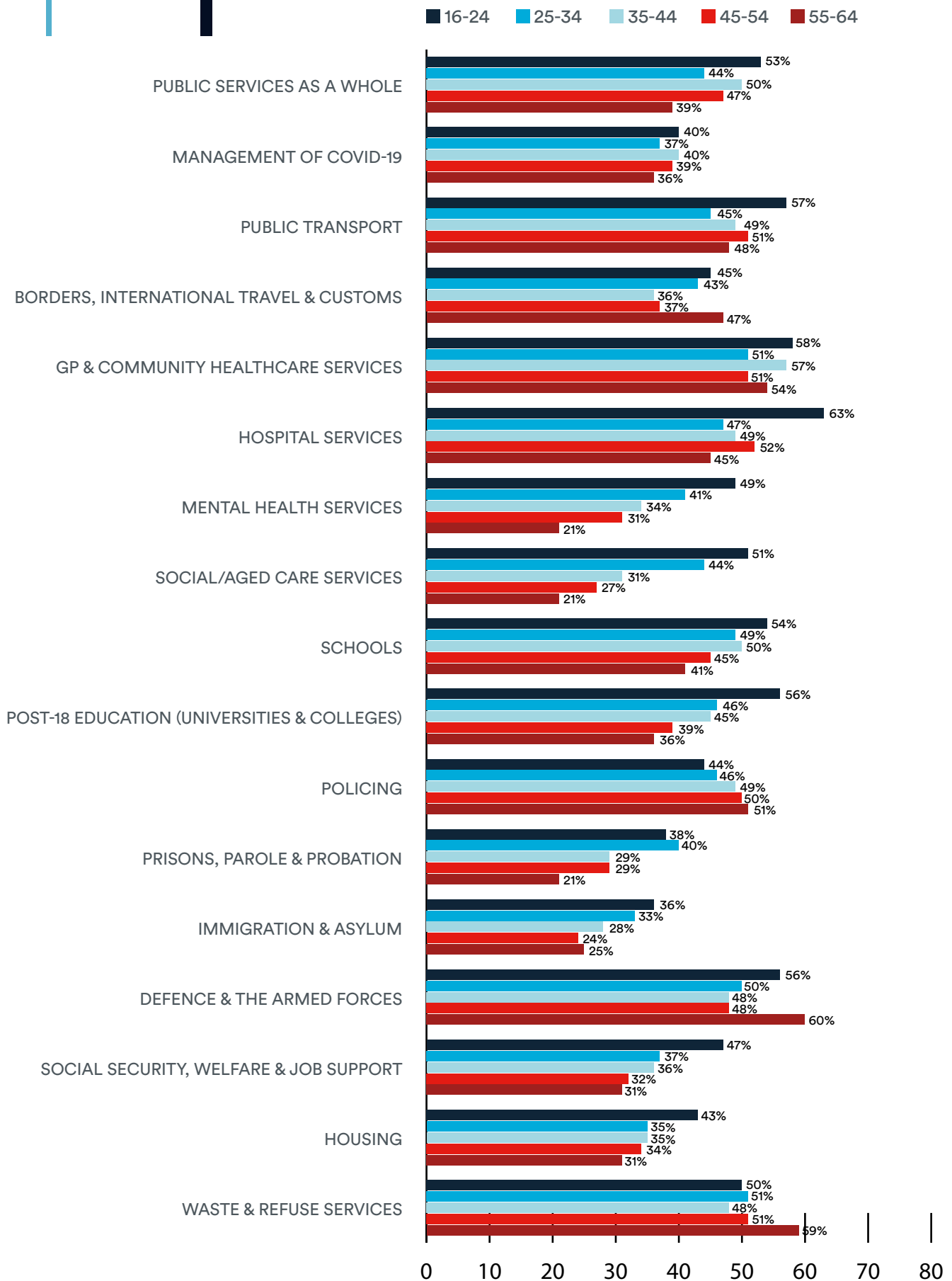
¹⁸When Rules Aren't Just Rules' – The New York Times.

¹⁹Aged care providers beg Scott Morrison to send in military – "We'd welcome any help" – The Guardian.

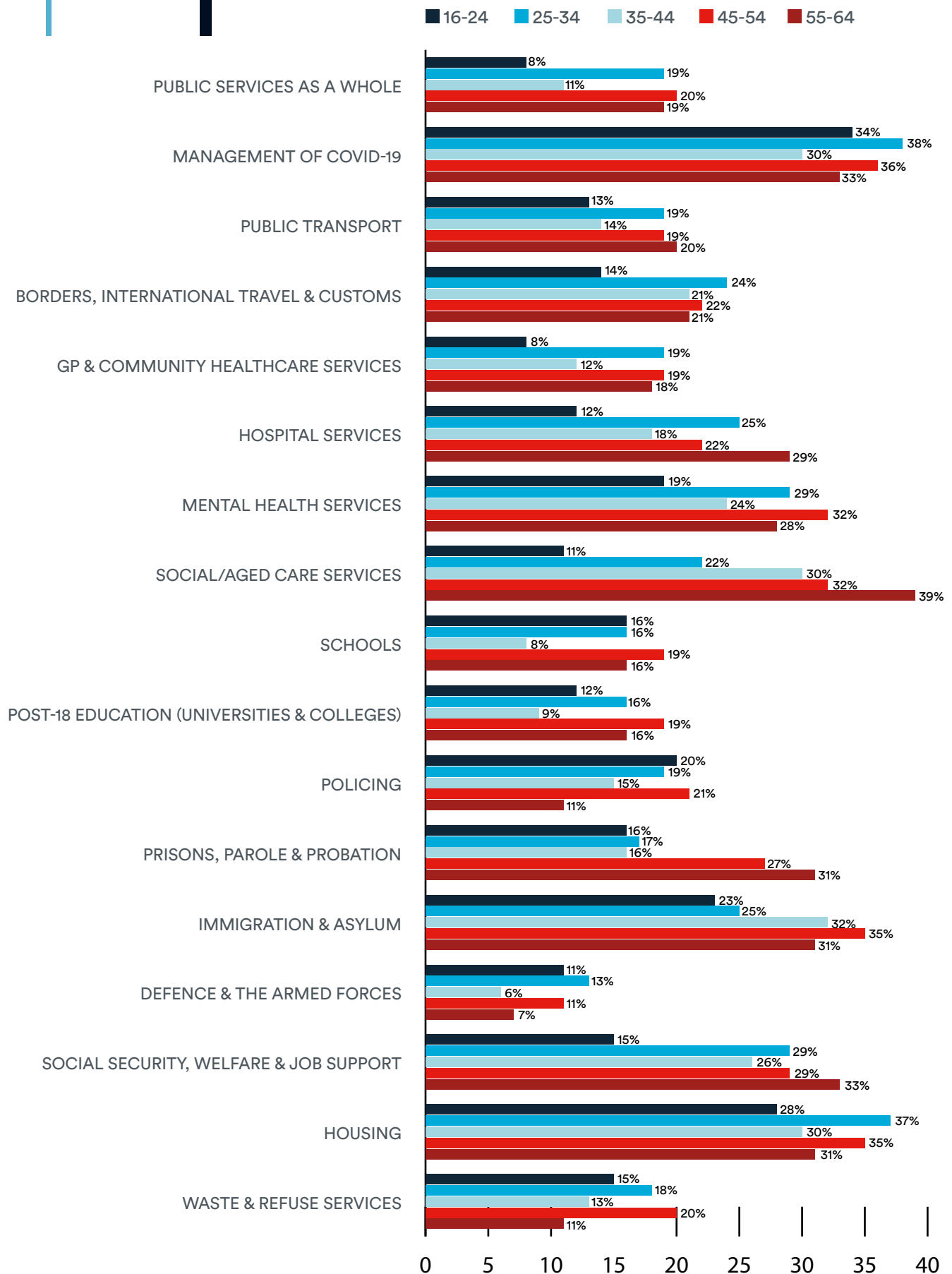
²⁰Australian property prices surged 22pc last year, its biggest jump since the 1980s' – ABC News.

²¹Average age of Aussie first-home buyers closer to 40 than 20, research reveals' – Realestate.com.au.

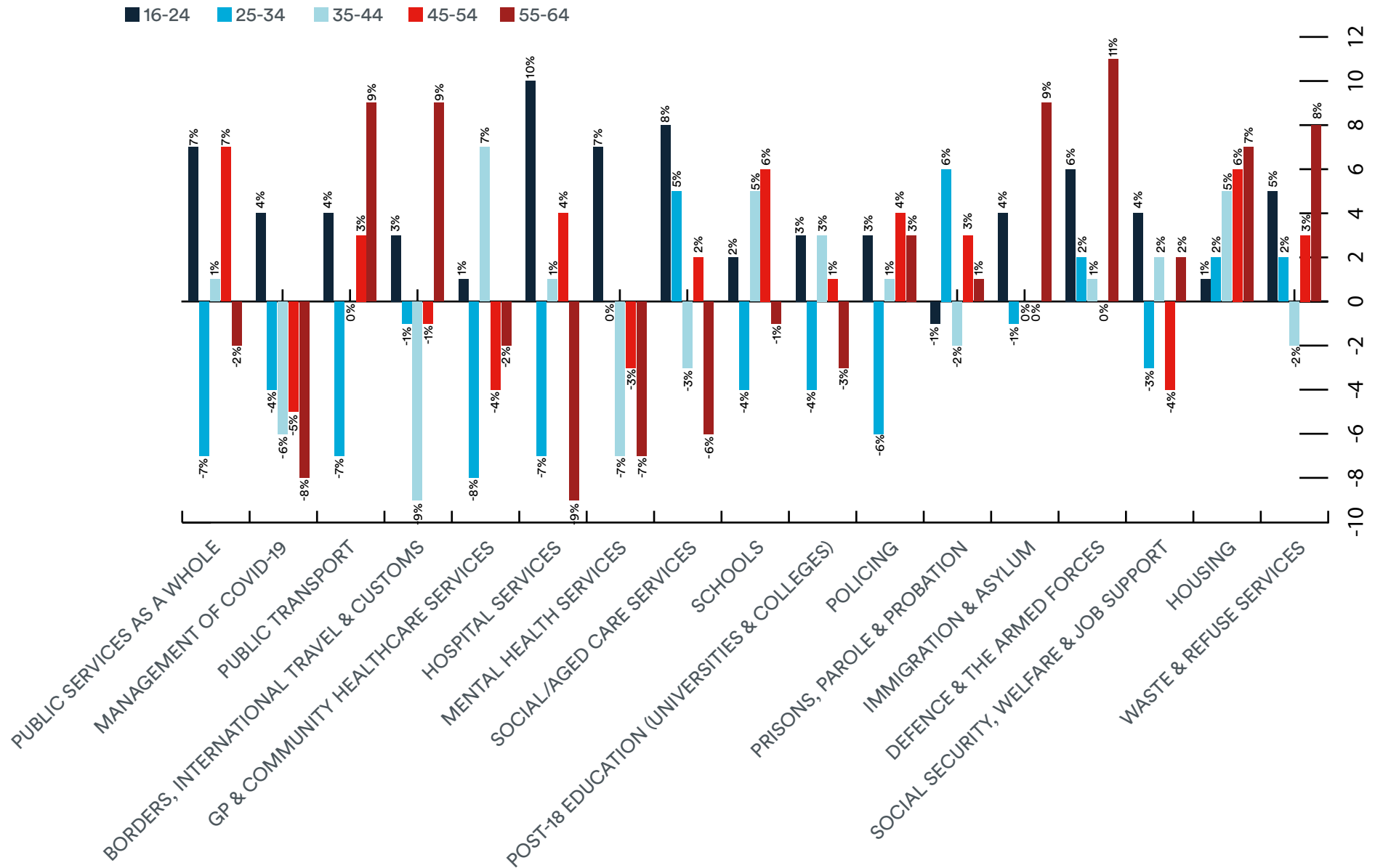
AGE GROUPS: SATISFIED



AGE GROUPS: DISSATISFIED



CHANGE IN SATISFICATION: AGE





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.


As identified in our October publication, 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 (or matched) that of the C1C2 and DE groups in 12 of 17 categories.

Net Satisfaction %			
	AB	C1C2	DE
Public services as a whole	53	46	32
Management of Covid-19	41	37	37
Public transport	54	48	48
Borders, international travel & customs	47	43	36
GP & community healthcare services	53	54	56
Hospital services	55	49	50
Mental health services	35	35	36
Social/aged care services	34	33	38
Schools	51	49	44
Post-18 education (universities and colleges)	51	44	40
Policing	53	47	46
Prisons, parole & probation	32	30	32
Immigration & asylum	33	28	28
Defence & the armed forces	52	53	51
Social security, welfare & job support	38	34	38
Housing	36	34	37
Waste & refuse services	57	49	51
KEY			
Highest			
Lowest score			

In a change to our poll published in October the highest banding (AB) and lowest (DE) showed greater levels of satisfaction with *Public Services as a Whole* – indicating a three-point and six-point increase in net satisfaction respectively. The middle group (C1C2), on the other hand, indicated a relatively significant decrease in satisfaction of six points. This means where the AB and C1C2 groups indicated similar levels of net satisfaction with *Public Services as a Whole* (50% and 51% respectively) in August, this gap has grown to a seven-percentage-point difference.

Averaging levels of net satisfaction across all 17 areas reveals the C1C2 and DE both returned a mean score of 42%, whereas the AB group's satisfaction levels were four points higher at 46%. Average dissatisfaction levels were similar across all three groupings, all hovering around the 20% mark.

Housing was the only area where any cohort – the C1C2 group – registered more dissatisfied than satisfied responses (34% satisfied / 36% dissatisfied). The other area which in August saw a similar result – *Immigration & Asylum* – saw improvements in its satisfaction or drops in dissatisfaction across the different categories, meaning that the C1C2 and DE groups now indicated the same levels of satisfaction as dissatisfaction (C1C2 31%; DE 25%).



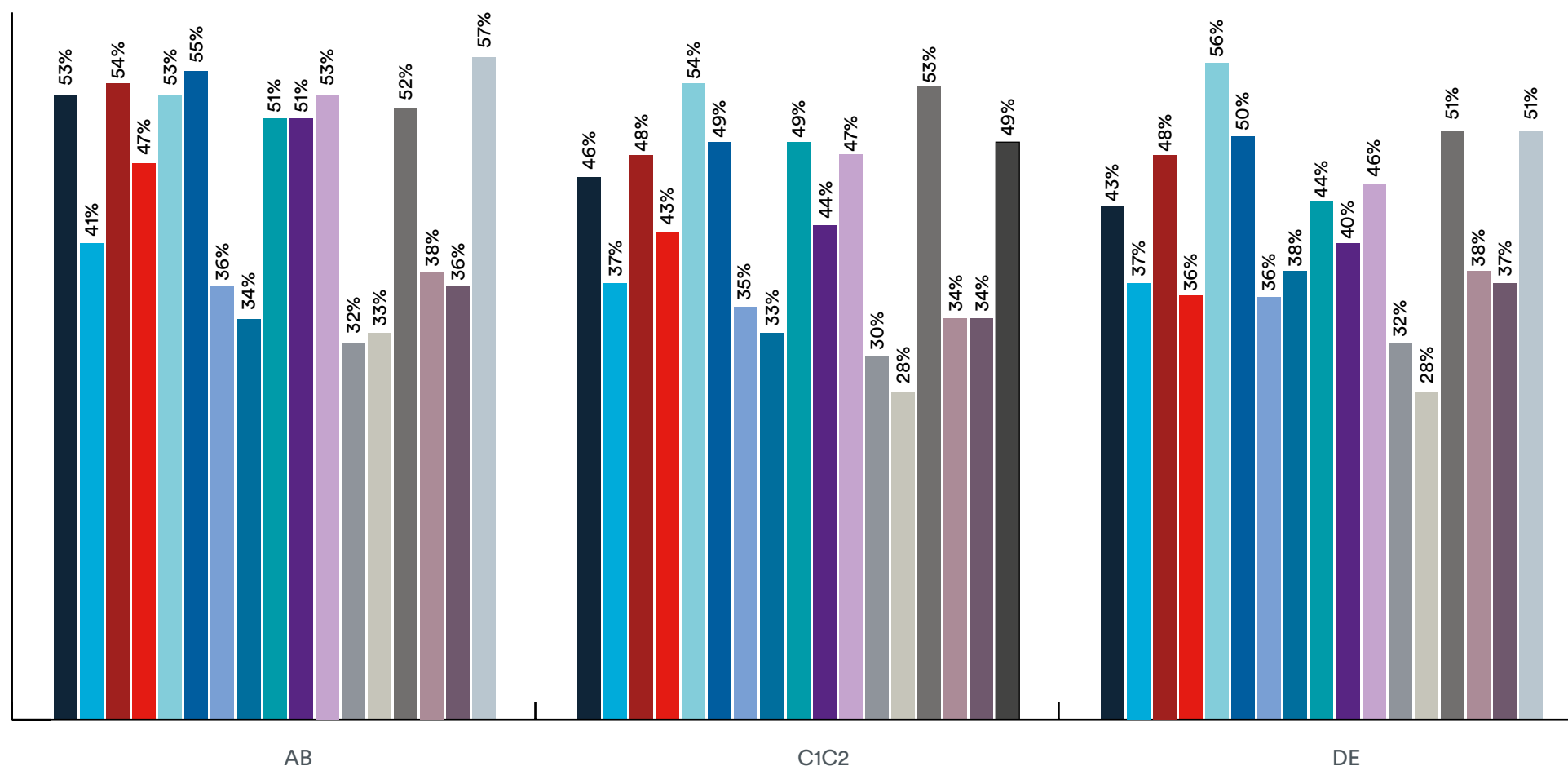
The only area where all three social grades indicated decreased levels of satisfaction compared to the data published in October was in relation to the *Management of Covid-19* (AB -4%; C1C2 -7%; DE -2%). This is the only area in which the DE cohort indicated a decline in their satisfaction levels. This, as discussed in previous chapters, could be the result of the Omicron wave and the uncertainty it created towards the end of 2021 and beginning of 2022, when many states and territories were beginning to ‘unlock’.

The AB and C1C2 indicated drops in satisfaction in 9 and 11 of the 17 areas we asked about respectively. Overall, this meant that average satisfaction levels across all 17 areas were stable (at 46%) for the AB group, dropped by two points to 42% for the C1C2 cohort and increased by five points to 42% for the DE group.

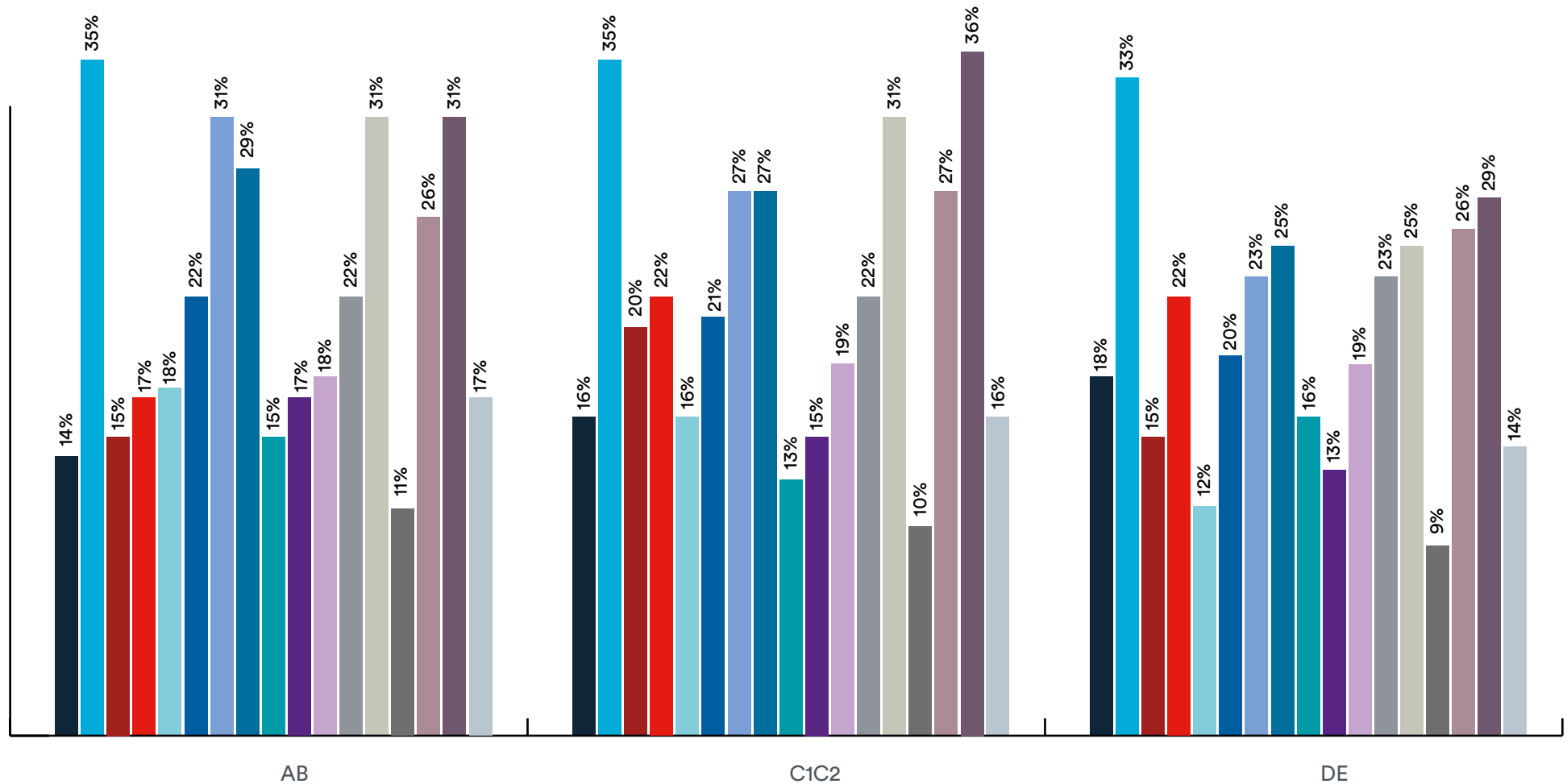
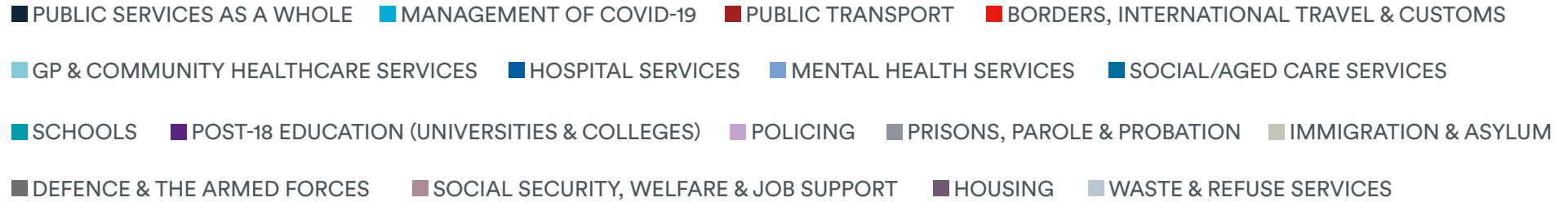
Across all social grades, satisfaction levels remain high in Australia and dissatisfaction levels remain relatively low across all 17 areas of public services we explored. Improvements in the sentiments of the DE social grade since our last publication have narrowed the gap between them and the other social grades. However, it still remains broadly true that the higher the social grade the more likely a person is to be satisfied with a public service. As discussed elsewhere, we believe this is likely down to the fact that the higher one’s social grade – and therefore income – the more options and choice one has in terms of using public services or opting for private sector or other alternatives.

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

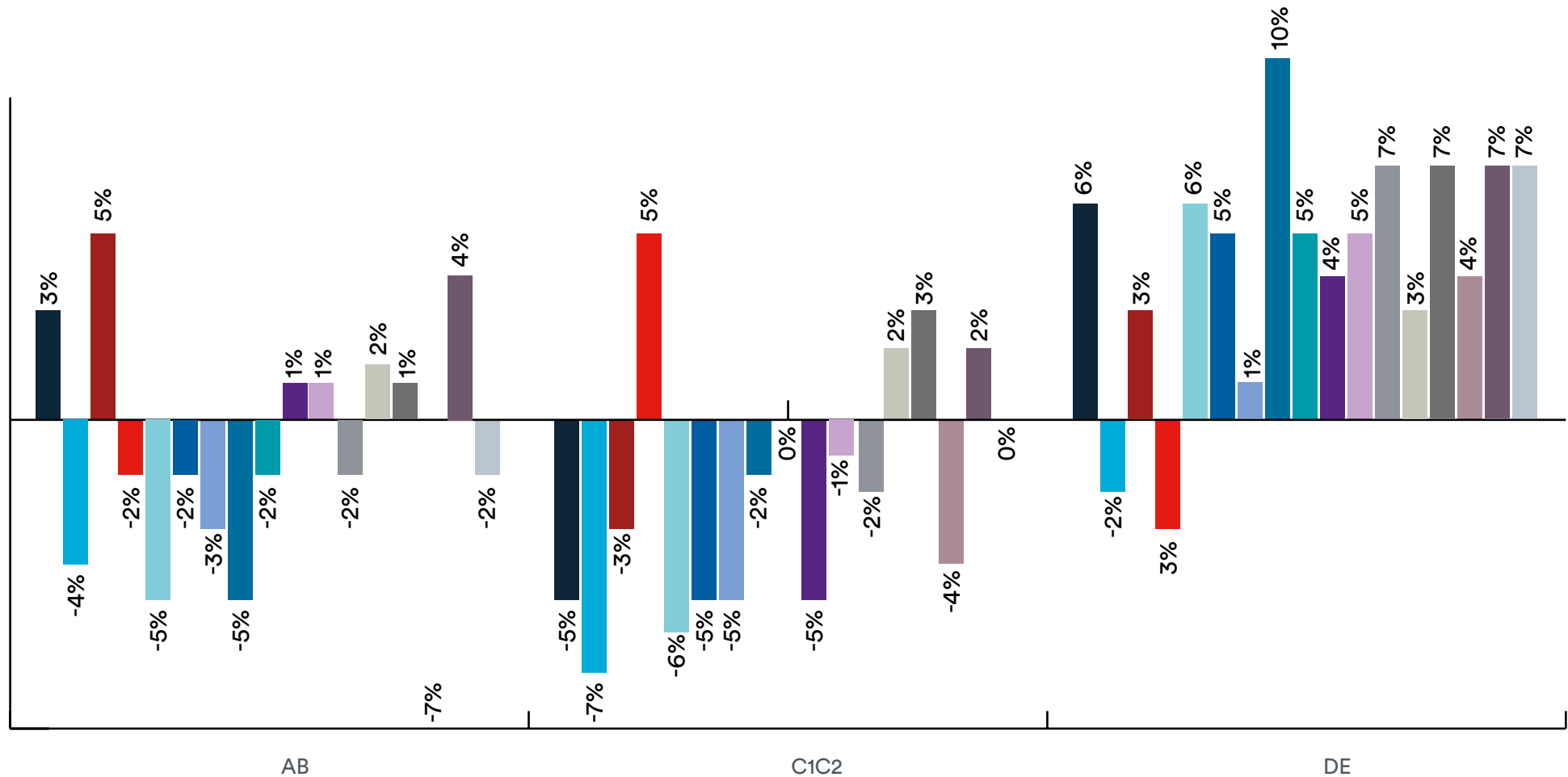


NRS SOCIAL CLASS: DISSATISFIED



CHANGE IN SATISFICATION: NRS SOCIAL CLASS

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






Sentiments of the States

Once again, there existed significant divergence in sentiments towards public services among Australia's states and territories. The autonomy of Australian subnational governments, under whose jurisdiction delivery of many public services falls, means that examining polling results here may offer interesting insights into how residents of these regions judge the quality and performance of the services provided to them by the government of their state or territory.

For the purposes of regional analysis, our survey respondents were divided into five polling regions: New South Wales & the Australian Capital Territory; Victoria & Tasmania; South Australia & the Northern Territory; Queensland; and Western Australia. Of these five regions, only Queensland and Western Australia are states, while each of the other three encompasses more than one Australian state or territory. Given this, we cannot draw definitive conclusions on public services delivered by the government of a particular state or territory, as six of the eight states and territories where residents were polled are grouped together in pairs for the purposes of our survey. Furthermore, data for Western Australia and for South Australia & the Northern Territory should be regarded with caution, as polling for each of these two regions was conducted using a small sample size of under 100 respondents, thus increasing the margins of error. With this said, our survey nevertheless revealed interesting trends in the five regions we polled, many of them a continuation from patterns observed in our earlier survey.

We previously identified Victoria & Tasmania as the least satisfied of the five regions. By January, this region's satisfaction levels appeared to have increased significantly, and its (mean) average net satisfaction score across the 17 areas of public services polled increased from 38% to 42%. Whereas in August Victoria & Tasmania's satisfaction scores had been below the Australia-wide average across all 17 polled areas, by January its satisfaction levels were only below-average in seven categories – Victoria & Tasmania also indicated higher satisfaction levels relative to August in all surveyed categories. By contrast, South Australia & the Northern Territory's average satisfaction score across the 17 areas we asked about fell five points from 39% to 34% between August and January – the lowest average score of the five regions – and its satisfaction levels were below the national average in all categories but *Waste & Refuse Service*. In fact, South Australia & the Northern Territory recorded declines in satisfaction across 13 of the 17 polled service categories.




South Australia & the Northern Territory's status as Australia's least satisfied region was reinforced by its dissatisfaction results: this region's dissatisfaction levels were higher than satisfaction levels in seven polled areas, compared to just one polled area each for Victoria & Tasmania, Queensland and Western Australia. Residents here also returned the highest dissatisfaction scores of the regions across 10 of the 17 polled areas.

On the other side of the scale, Western Australia tied with New South Wales & the Australian Capital Territory for the highest average satisfaction score (both 45%) across the 17 polled areas. This was a one-point increase for both regions on August, when Queensland had had the highest average satisfaction score (46%; by January, this was 43%). Western Australia also was the most, or joint most, satisfied of the regions across nine of the 17 polled areas, but returned satisfaction scores below the Australian average for five polled categories. Meanwhile, satisfaction levels in New South Wales & the Australian Capital Territory were at or above the national average across all 17 surveyed areas, arguably making the polling region home to Sydney and Canberra the most consistently satisfied of the five regions used in our survey.

As before, one of the areas in which sentiments in Australia's regions differed most significantly from one another was in relation to *Management of Covid-19*, which is also an area in which public policy has diverged sharply among Australia's states. Of the five polling regions, only one, Victoria & Tasmania, recorded a rise in satisfaction relative to our previous survey – the other four reported fallen satisfaction levels, presumably due to the Omicron wave and subsequent restrictions Australia and its constituent states and territories has seen since August.

Western Australia recorded the highest satisfaction score of the five regions (49%) for *Management of Covid-19*. This may be seen as an endorsement by residents of the Western Australian Government's cautious approach towards managing Covid, which has earned the state the nickname 'Fortress WA'. At the time of polling, Western Australia remained largely Covid-free and sealed off by a hard border from the rest of the country: opinion polls have previously shown overwhelming popular support for the policy, with an October 2021 poll indicating that 82% of residents supported the hard border¹⁸.



Western Australia opened its borders to vaccinated visitors from other parts of the country and the world in early March 2022 for the first time in nearly two years. It will therefore be interesting to see, in future rounds of polling, whether the state government's Covid policy retains its popularity among Western Australians, particularly as the closed border is credited with having allowed the state's unfettered internal economy to thrive and having precipitated an unprecedented landslide in the 2021 state election¹⁹.

Overall, sentiments among Australia's states and territories towards public services remained positive: three of the five regions returned improved average satisfaction scores relative to August. As the country opens up to the outside world for the first time in two years and with the resulting boom in tourism, we may see still-higher satisfaction scores in future rounds of polling. With the Southern Hemisphere winter approaching, however, come fears that Australia may soon be faced with a second wave of Omicron cases accompanied by the return of the flu season²⁰. The impact that these prophesied waves of sickness, if they come to pass, will have on satisfaction with public services will be important to monitor in future months.

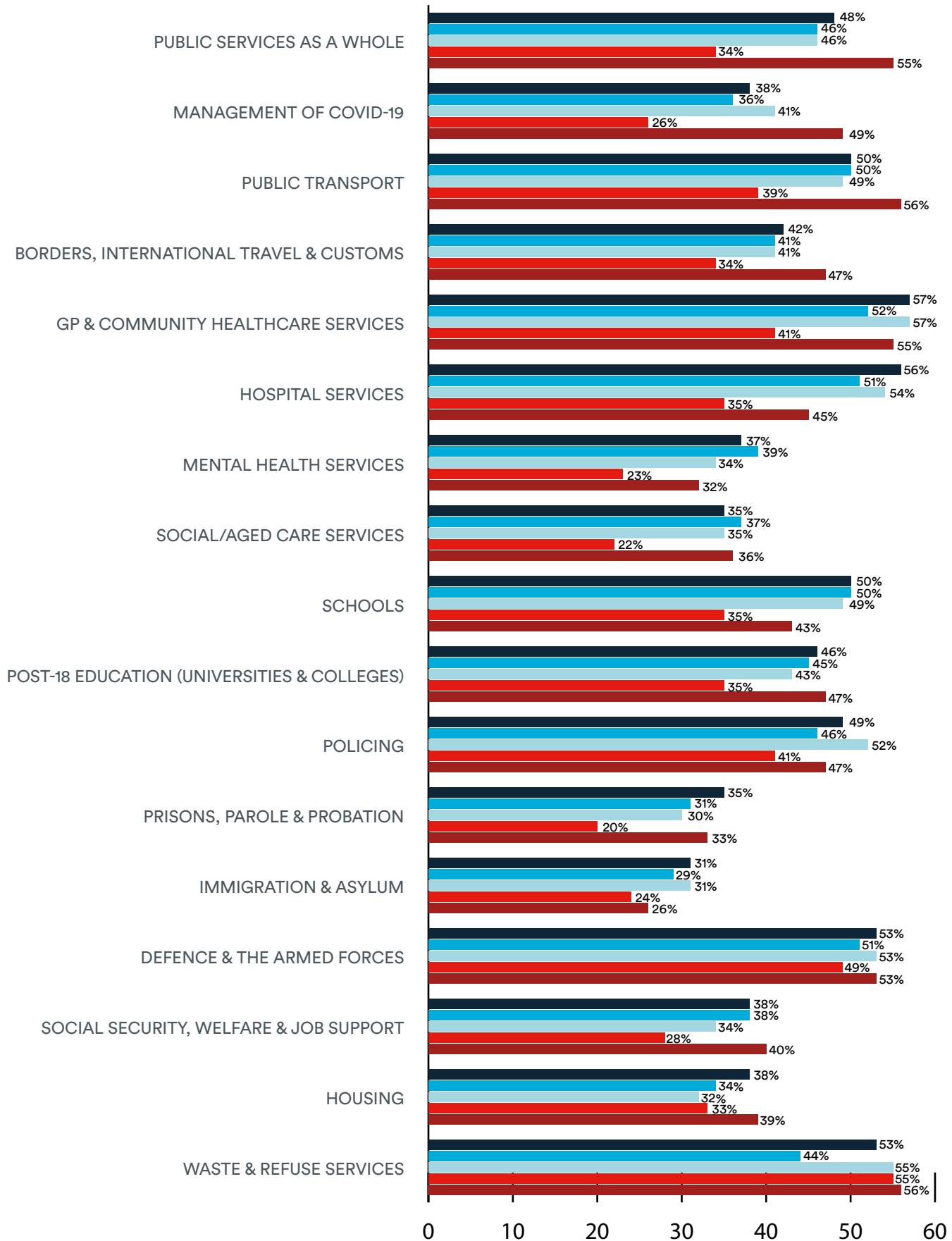
¹⁸'Covid Western Australia: Mark McGowan backed by WA's silent majority who WANT state to stay closed' – Daily Mail.

¹⁹'WA's hard border is finally down, but Omicron's emergence means it's far from back to normal' – ABC News.

²⁰'Australia faces double threat of flu spike and second Omicron wave' – News.com.au.

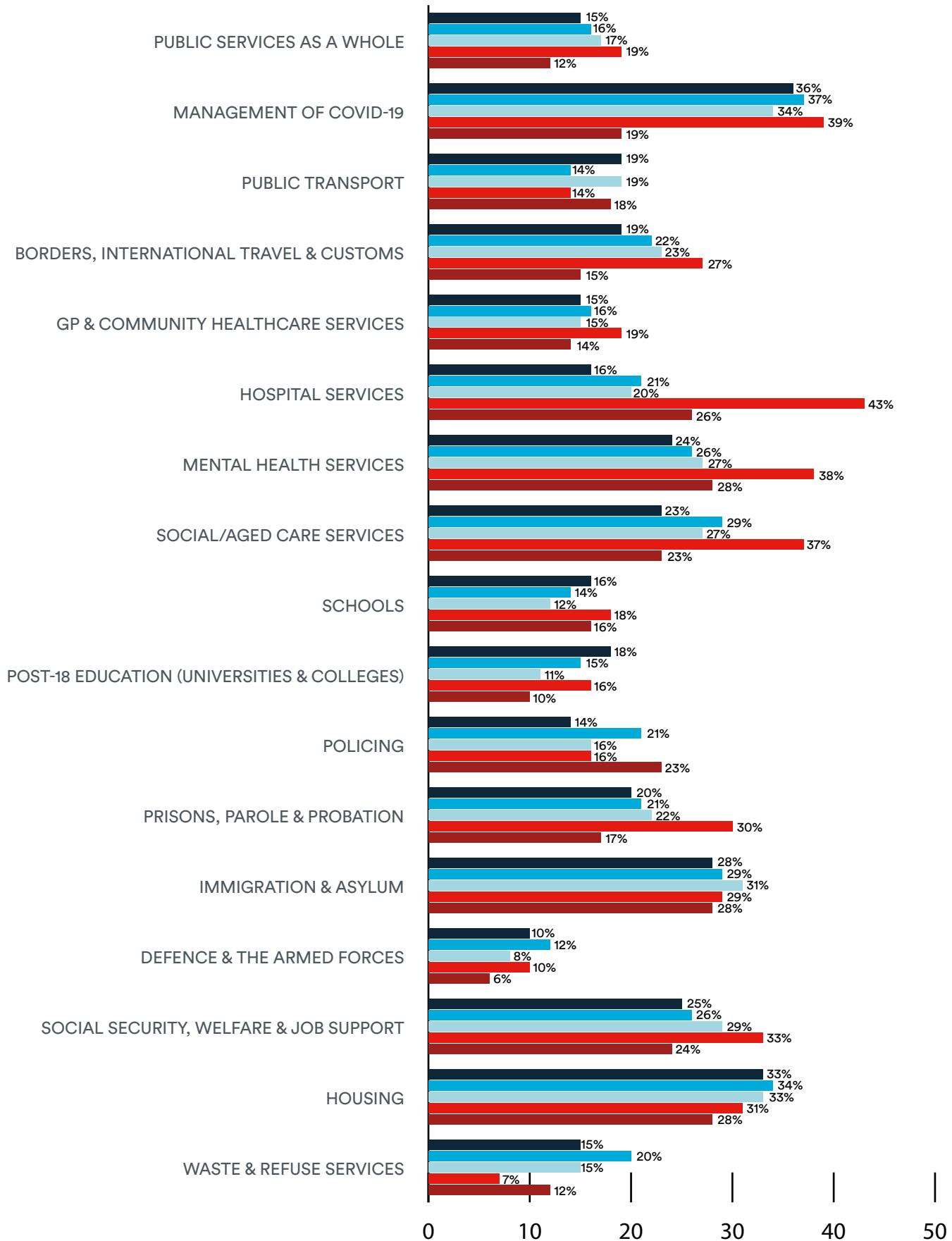
AUS STATES & TERRITORIES: NET SATISFIED

■ NSW & ACT ■ Victoria & Tasmania ■ Queensland ■ S. Australia & N. Territory ■ W. Australia

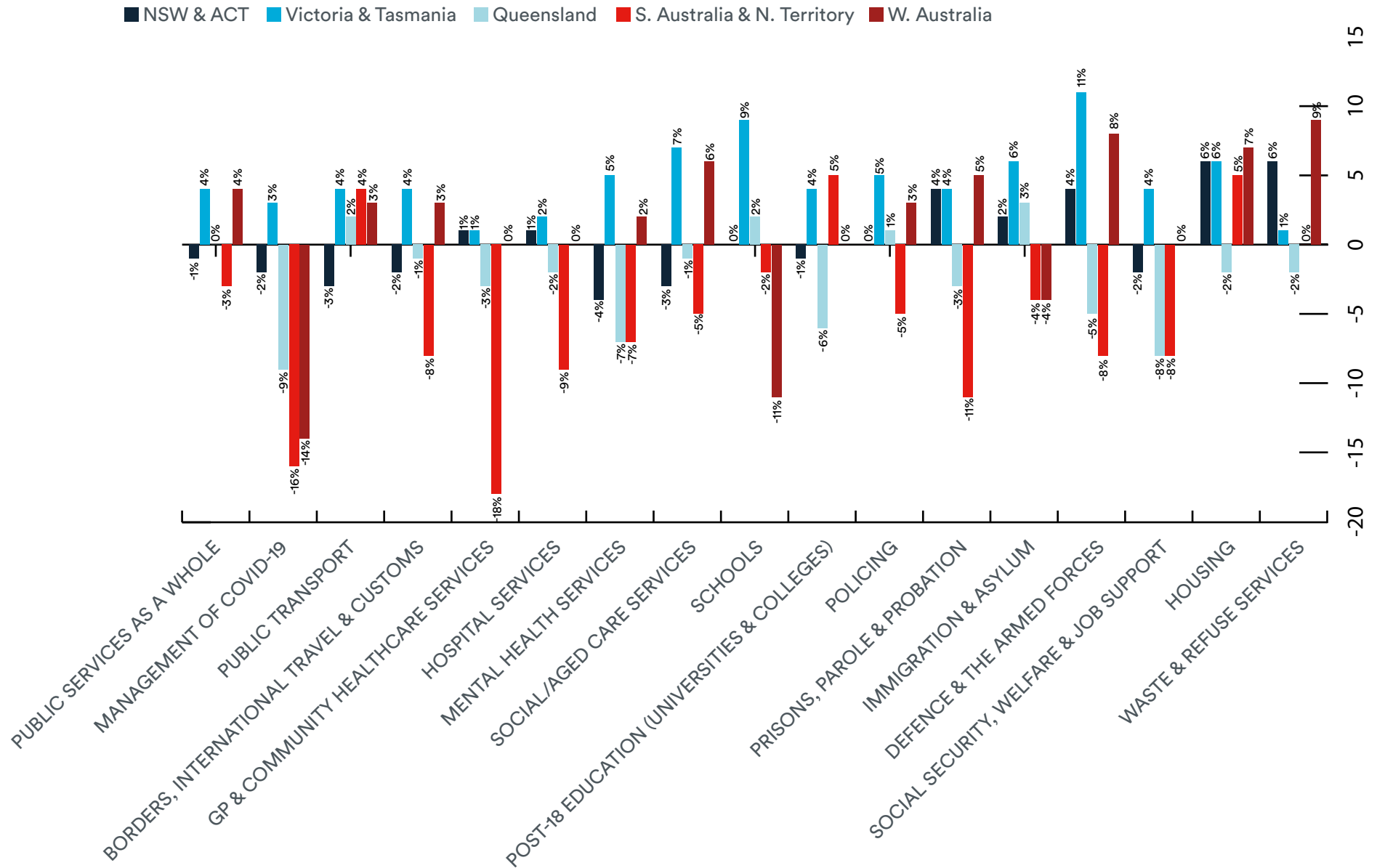


AUS STATES & TERRITORIES: NET DISSATISFIED

■ NSW & ACT ■ Victoria & Tasmania ■ Queensland ■ S. Australia & N. Territory ■ W. Australia



AUS STATES & TERRITORIES: CHANGE IN SATISFICATION



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Looking across to the UK

This report's sister, *People Powered Public Services: Monitoring UK Opinion*, identifies clear distinctions between the way residents of Australia and of the UK perceive public services in their respective countries. Most obviously, 43% of Britons were satisfied with *Public Services as a Whole*, four points below the corresponding proportion in Australia: in August, the net satisfaction scores for this category had been 46% in Australia and 45% in the UK. As such, the gap between satisfied Australians and Britons had demonstrably widened between August 2021 and January 2022. A further analysis of the UK data reveals, on comparing it with the Australian statistics, that Britons remained less satisfied with public services than Australian respondents, much as they had been in August.

Of the 17 polled areas of public services, Australia's net satisfaction scores were higher than Britain's on 15 occasions. The only exceptions were *Management of Covid-19* (41% satisfied in the UK; 38% in Australia) and *Waste & Refuse Service* (53% satisfied in the UK; 52% in Australia). Furthermore, the UK's (mean) average net satisfaction score across all surveyed service categories was, at 38%, five points below that of Australia (43%). Once again, this five-point margin was wider than what it had been in August, when the UK's average satisfaction score stood at 39% and Australia's stood at 42%.

The largest discrepancies between Australia and the UK with respect to satisfaction scores were to be found in *GP & Community Healthcare Services*, where Australia's satisfaction score stood 12 points higher than the UK's (54% v. 42%), and *Defence & the Armed Forces*, where once again a 12-point margin separated satisfied Australians (52%) from satisfied Britons (40%). Other service areas with a notable difference in satisfaction levels between the two countries included *Borders, International Travel & Customs* (41% satisfied in Australia; 33% satisfied in the UK) and *Policing* (48% satisfied in Australia; 40% satisfied in the UK).

With regard to dissatisfaction, British dissatisfaction scores were higher than Australian ones for 15 of the 17 polled areas. With one service, *Housing*, UK and Australian respondents were equally dissatisfied (both 32%) and it was only for *Management of Covid-19* that Australian respondents returned a higher dissatisfaction score (34%) than their British counterparts, and only by one percentage point. To reinforce this, the UK's average dissatisfaction score across the 17 categories was, at 26%, five points higher than the corresponding figure for Australia.

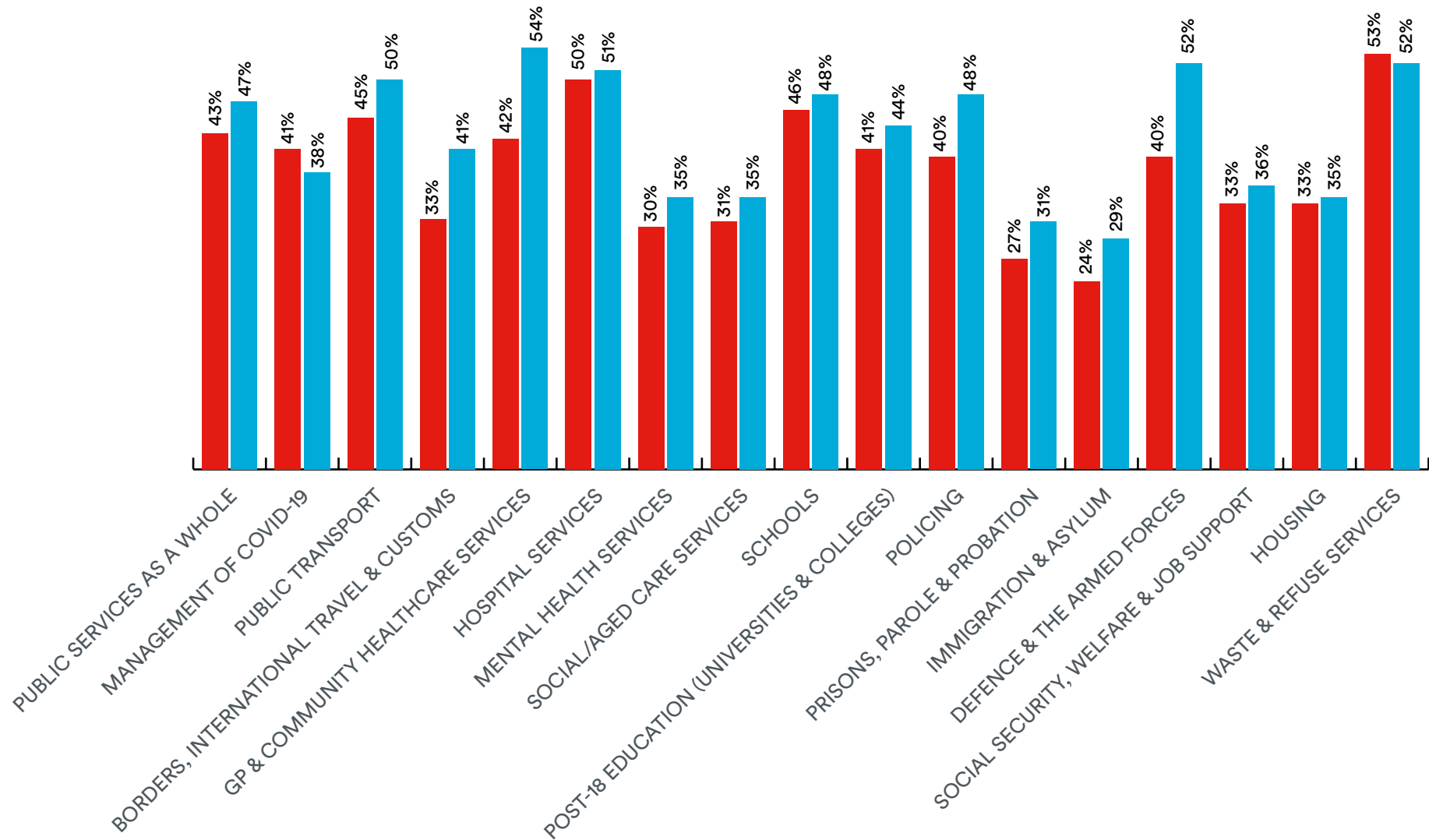


The widest gaps between the UK and Australia's dissatisfaction scores were in regard to *GP & Community Healthcare Services*, where a 17-point gap separated the UK's dissatisfaction score (32%) from Australia's (15%), and *Policing*, where dissatisfaction in the UK (27%) stood 10 points higher than in Australia (17%).

Britons' lower levels of satisfaction and higher levels of dissatisfaction do not necessarily mean that public services in the UK are of a lower quality than in Australia. Australians could, for instance, have different expectations of their government services, or are better-disposed towards them because of a more easy-going national psyche. However, the trend of a growing gap in the levels of satisfaction should encourage UK policymakers to explore in more detail why Australian citizens seemingly harbour more positive feelings towards the services their government(s) deliver than their UK counterparts.

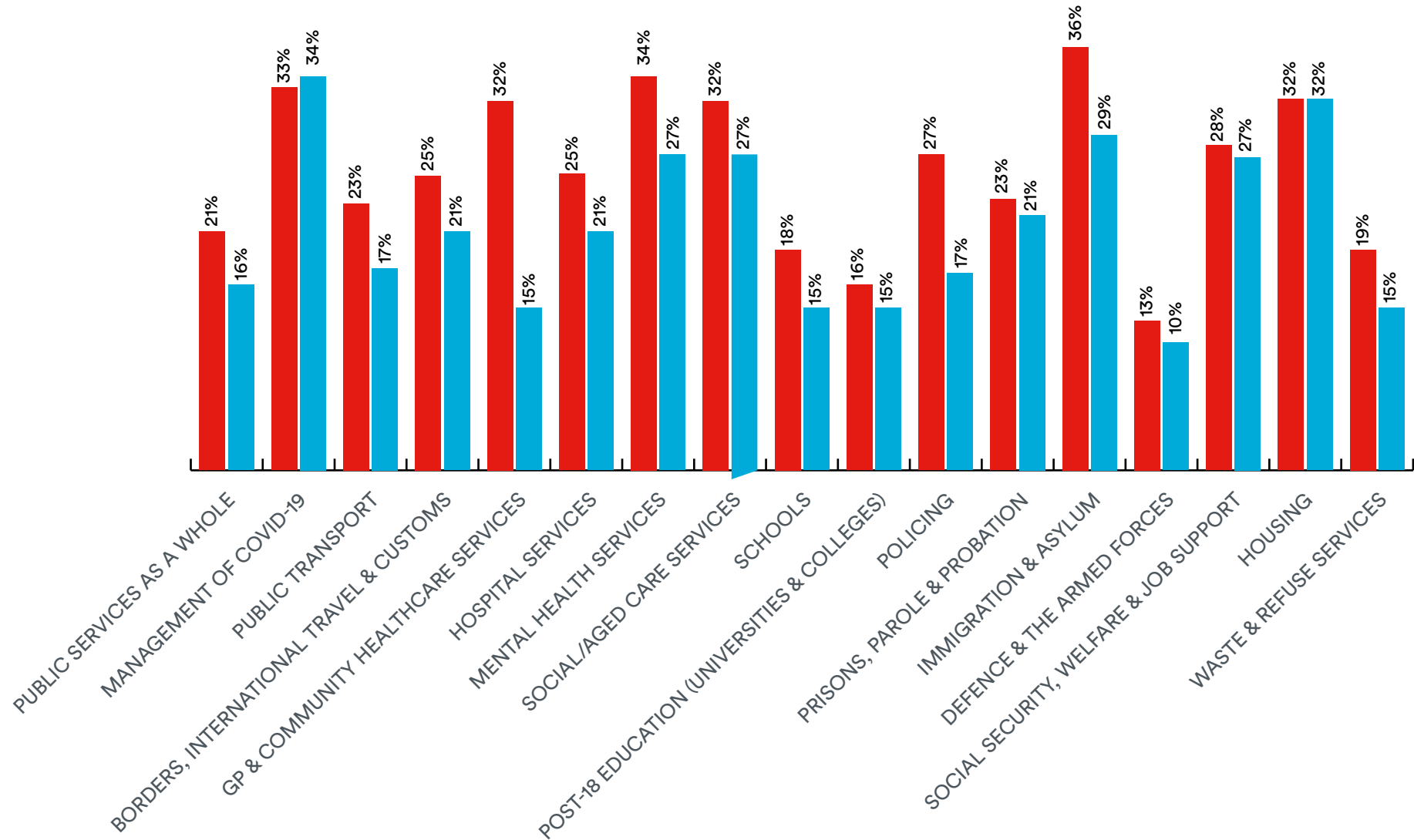
NET SATISFIED: UK V AUSTRALIA

■ UK ■ Australia



NET DISSATISFIED: UK V AUSTRALIA

■ UK ■ Australia






Conclusion – The story continued

The Australia public services landscape continues to evolve as they face the changing context of Covid restrictions, the Omicron variant, as well as local and upcoming federal elections. These have all impacted people's view of public services, overall, however, since August 2021, when the Serco Institute last polled Australian citizens many of the trends hold true. Including the fact that:

- Australian women generally returned lower satisfaction scores than men. That said, women now score *Public Services as a Whole* more highly than men and the gap has narrowed in many specific public service areas, including in relation to the *Management of Covid-19*.
- The oldest age cohort (55-64-year-olds) remains consistently the least satisfied, and the most dissatisfied of the age groups. However, 16-24-year-olds registered a four-percentage-point improvement in their (mean) average satisfaction score across the 17 polled areas, meaning average satisfaction scores dropped with each older age category.
- It remained broadly true that an individual's so-called 'social class'²¹ was an indicator of their sentiment towards public services, with people belonging to 'higher' social grades more likely to be satisfied with public services. However, the gap between the DE social grade and the AB and C1C2 social grades had narrowed since our last round of polling in August.
- Whereas Victoria & Tasmania had been Australia's least satisfied polling region in August, by January this position was occupied by South Australia & the Northern Territory, which returned the lowest (by some margin) average net satisfaction score across all 17 polled areas. Meanwhile, Western Australia tied with New South Wales & the Australian Capital Territory for the highest average satisfaction score (both 45%) across the 17 polled areas.

As already noted, the Omicron variant has had a huge impact both on public services and the restrictions around general life in Australia. It is likely that this is therefore the most significant factor impacting people's perception of public services. In August, 42% of respondents were net satisfied and 27% net dissatisfied with *Management of Covid-19*, a 15% net approval rating. By January, however, sentiment was much more negative, with 38% net satisfied and 34% net dissatisfied.



This is further evidenced by the fact that, although Australians remain generally more positive about public services than their British counterparts – of the 17 polled areas Australia's net satisfaction scores were higher than Britain's on 15 occasions – the *Management of Covid-19* was one of only two areas where Brits were more satisfied (41% satisfied in the UK; 38% in Australia).

That said, the Australian public remain largely positive about the quality of the public services they receive. In fact, in 11 of the 17 categories polled, citizens were more satisfied than they were in August 2021.

With upcoming federal elections public services are likely to face increasing scrutiny in the coming months. Monitoring public sentiment towards them will give an insight into how the key issues of the various actions, promises and campaigns of the candidates are landing with voters.

²¹ Based on the NRS Social Grades system of classification: 'Social Grade' – National Readership Survey.

