

The citizen and the state survey

Understanding public attitudes has always been important to government and the public sector. Political leaders strive to respond to the electorate's priorities and public service managers want to deliver on citizen expectations. But a clear view on what matters to the public is more important than ever in an age of spending restraint – it allows the public sector to make more informed choices about allocating resources and reforming services in ways that deliver the most citizen impact.

For this year's *State of the State*, Deloitte and Reform commissioned Ipsos MORI to undertake an exclusive survey into public attitudes and expectations on the state. The polling took place this summer with face-to-face interviews with more than 1,000 members of the public from across the UK. This chapter sets out seven headline findings:

- 1.** Dealing with Brexit is a high priority, but not nearly as high as the NHS.
- 2.** More people expect public services to get worse because of Brexit.
- 3.** Satisfaction with most public services remains high.
- 4.** Austerity's impact has been felt most within certain groups – and has risen in the past year.
- 5.** Support for tax rises to fund public spending has risen since austerity began.
- 6.** Citizens want the public sector to listen more and collaborate better.
- 7.** The public sector needs to bridge the digital divide.

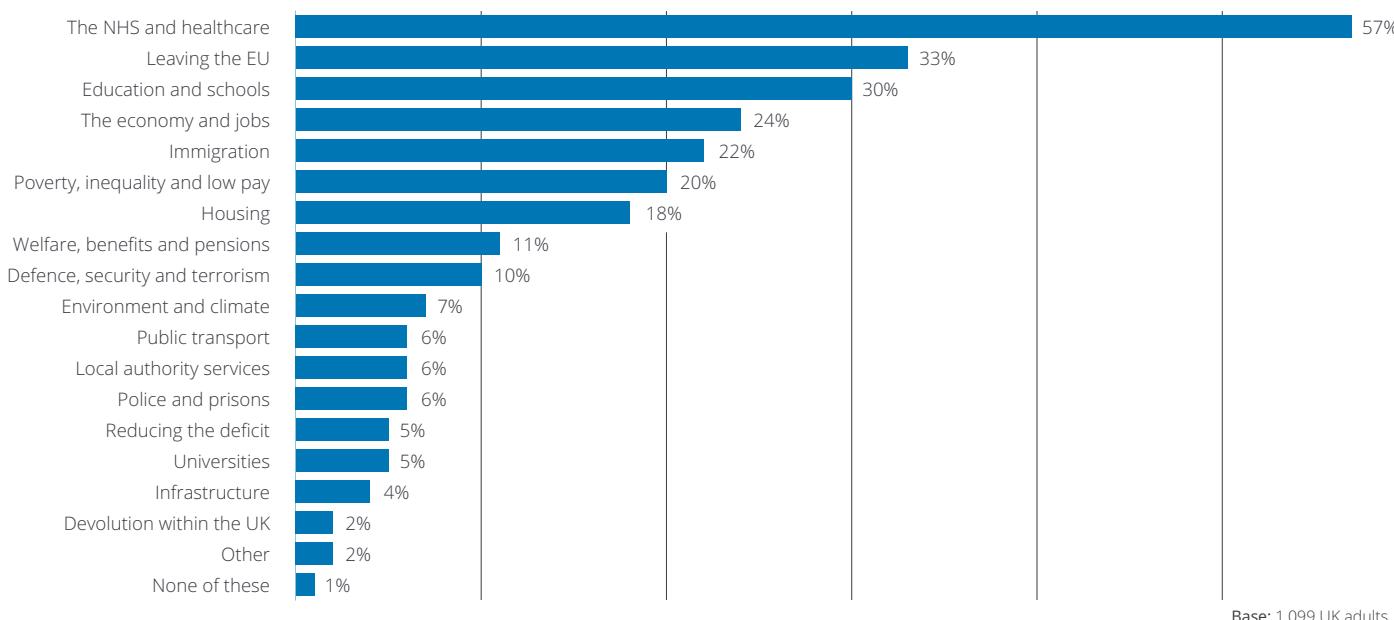
1. Dealing with Brexit is a high priority – but not nearly as high as the NHS

Headlines

- Public services, the economy and immigration are key public priorities
- Dealing with Brexit is a new priority and second only to the NHS
- Public transport and investment are more important local issues

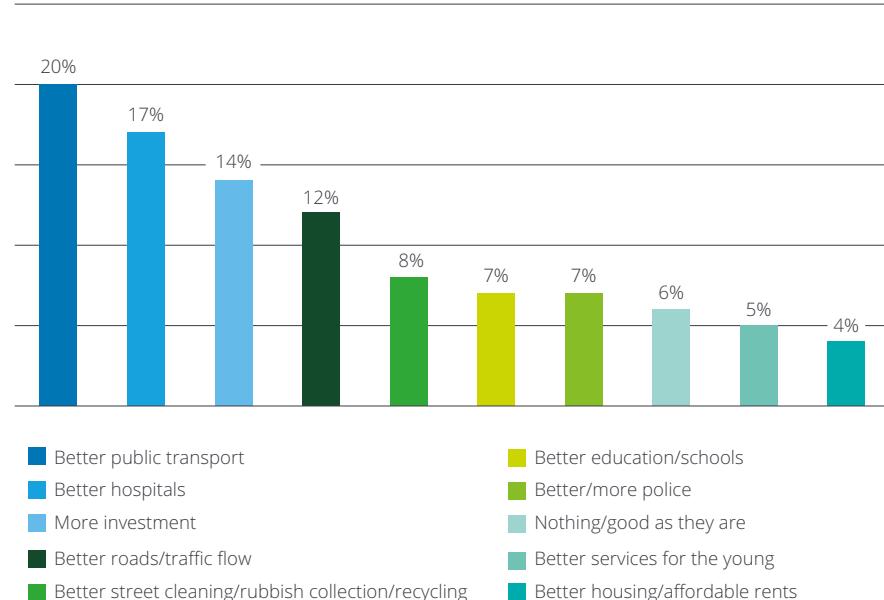
Our survey asked people what two or three issues the Government should prioritise for the year ahead. As shown in figure 9, some 57 per cent said that the NHS is a priority, making healthcare the most common concern. The second biggest issue named by the public was Brexit, with one-third describing it as a top priority.

"A clear view on what matters to the public is more important than ever in an age of spending restraint – it allows the public sector to make more informed choices about allocating resources and reforming services in ways that deliver the most citizen impact."

Figure 9.**Which two or three policy areas do you think should be the priority for the UK Government over the next 12 months?**

The issues different groups want government to prioritise reflect the things they most care about. Women are more likely to say the NHS should be prioritised, and those with children place greater importance on education. Younger people aged 18-24 want a greater focus on higher education than other age groups, while older people and those from working class backgrounds are more worried about immigration. People on lower incomes, and Londoners, tend to see housing as a high priority.

Our survey also asked the public to tell us about their local priorities for improving public services. As figure 10 shows, public transport was the most mentioned issue, followed by local health services. The next priority was a more general one: a call for more funding, money or investment. This suggests that some among the public would like to see greater spending on local public services generally.

Figure 10.**What things would you say would most improve public services in your area?****The ten most mentioned factors**

2. More people expect public services to get worse because of Brexit

Headlines

- Overall, 41 per cent believe Brexit will be worse for public services and 28 per cent believe it will be better
- People who voted to remain in the EU are most likely to have a strong, pessimistic view for the future of public services
- Three in five people think taxes will rise as a result of Brexit – but the public is split on whether leaving the EU will mean higher public spending

Our survey asked people if they think leaving the EU will be positive or negative for the UK's public services. Overall, 41 per cent think Brexit will make public services worse compared to 28 per cent who think it will make them better. Around a quarter believe Brexit will make no difference to public services, as shown in figure 11.

Figure 12. What difference will Brexit make to tax and spending?

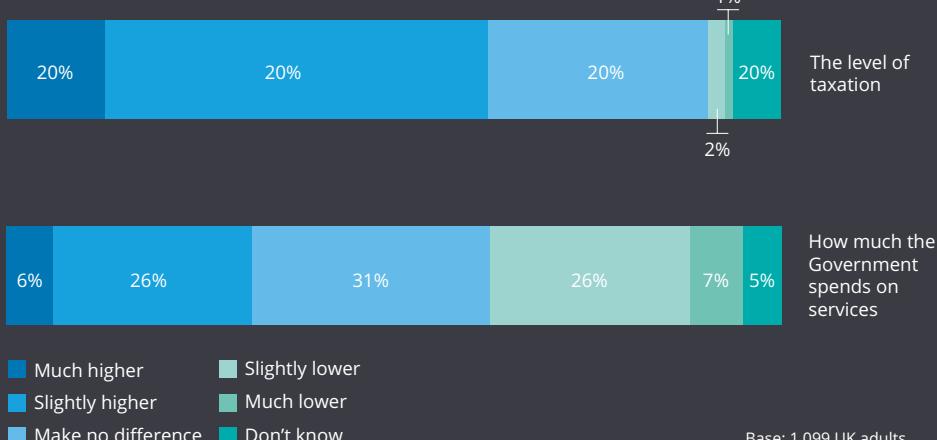
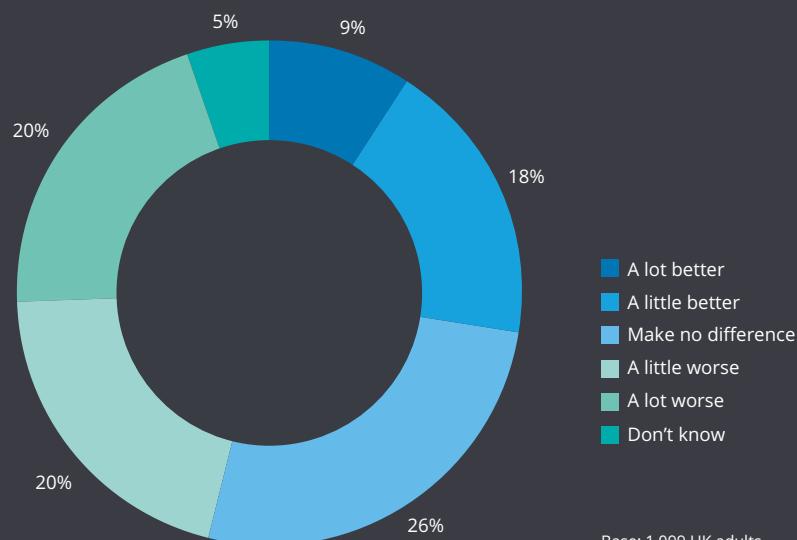


Figure 11.
To what extent will leaving the EU be better or worse for Britain's public services than if we had voted to remain?



Base: 1,099 UK adults

As we might expect, groups of people who were more likely to vote to stay in the EU hold more negative views about the consequences for public services. Those groups more likely to vote to leave are more positive, although less strongly. It seems likely that the remain voters are still convinced that Brexit will damage the public services while leave voters are convinced it will not, albeit less firmly. This holds in terms of regional differences too. Voters in London, Scotland and Northern Ireland, for example, were more likely to have voted to remain in the EU and are now more likely to be pessimistic about the future of the public services as the UK exits.

We also asked people if they expect taxes to increase as a result of the EU referendum result. Three in five believe that they will – but the public is evenly split on whether those tax rises will deliver more public spending, as shown in figure 12.

3. Satisfaction with most public services remains high

Headlines

- Nationally, people believe the public services are getting worse – yet their own experience is positive
- The number of people saying the public services exceed their expectations has grown
- Public services are less likely to fall short of expectations than in 1998

Our survey explored whether people believe public services are getting better or worse, with trend data going back to 1998 that allows us to see how this has changed over the past 18 years. Overall, our survey found that nationally, more people believe public services are getting worse than in 1998. However, their own experience of individual services is largely positive and in some cases has improved over the last 18 years. That suggests public awareness about austerity has created a sense of worsening services, or reducing expectations – but actual experience of services remains good.

Figure 13.
How satisfied are you with each of these public services?

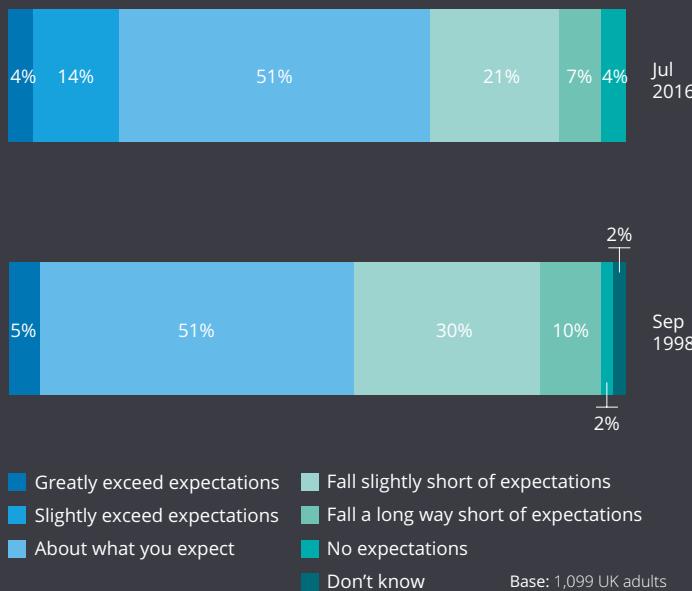
Satisfaction with...	1998	2000	2002	2016
Local sports or leisure centres	77%	76%	76%	86%
Parks and open spaces	79%	81%	81%	86%
Libraries	87%	88%	85%	85%
Recycling facilities	78%	80%	76%	82%
Universities and higher education	82%			78%
Schools				78%
NHS hospitals	80%	82%	76%	77%
GP surgeries				72%
Police				68%
Local bus services	62%	64%	66%	67%
Social services for adults/older people				60%

Base: 1,099 UK adults

In fact, the proportion of people who say that public services exceed their expectations has jumped from five per cent in 1998 to 18 per cent. The number of people reporting that public services fall sort of their expectations has dropped as well – from 40 per cent in 1998 to 28 per cent. And the number of people saying that their experience of public services is about what they would expect has remained the same at 51 per cent, as shown in figure 14. While there is still some way to go, this suggests that public services are doing a better job of exceeding public expectations, even if more are still disappointed than delighted. What is harder to measure is whether expectations have become more or less demanding over that time.

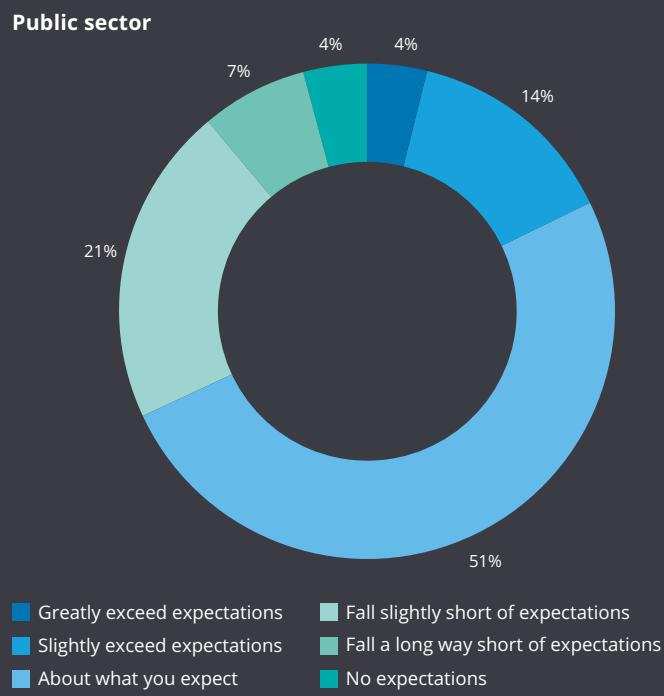
"Overall, our survey found that nationally, more people believe public services are getting worse than in 1998. However, their own experience of individual services is largely positive."

Figure 14.
Thinking about what you expect of public services,
do they...



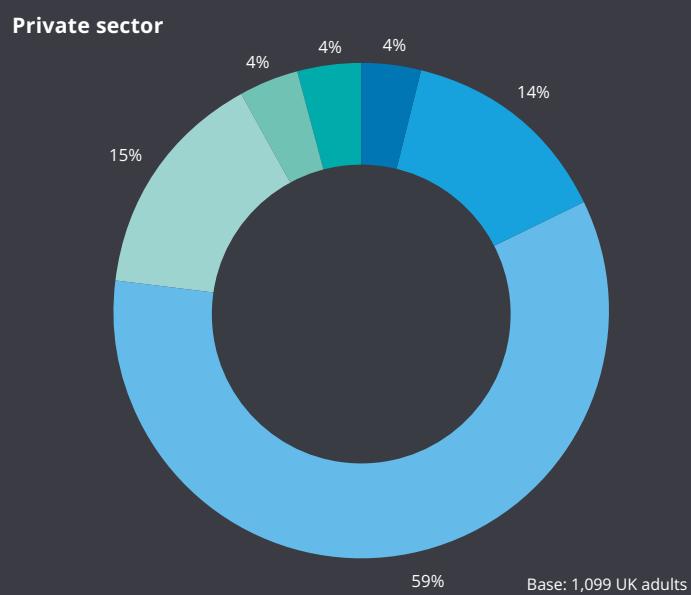
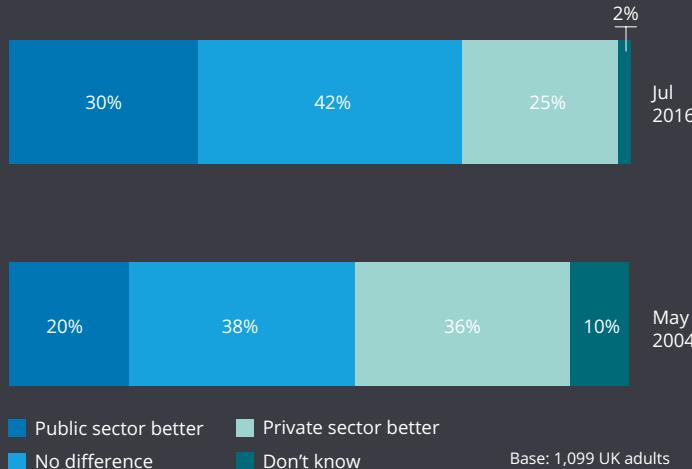
While the survey shows that the public sector is more likely to fall short of meeting peoples' expectations than the private sector, it shows that it is just as likely to exceed them.

Figure 16.
Thinking about public services and private sector
companies, would you say they...



We asked people to compare their experience of public sector services with private sector services like shops and banks. Our results found that three in ten people think the public sector is better at providing services than the private sector, although the majority see no difference. Drilling down into the data, heavy users of public services are no more or less positive about them than those who are less reliant.

Figure 15.
Do you think the public or private sector is better
at providing services?



4. Austerity's impact has been felt most within certain groups – and has risen in the past year

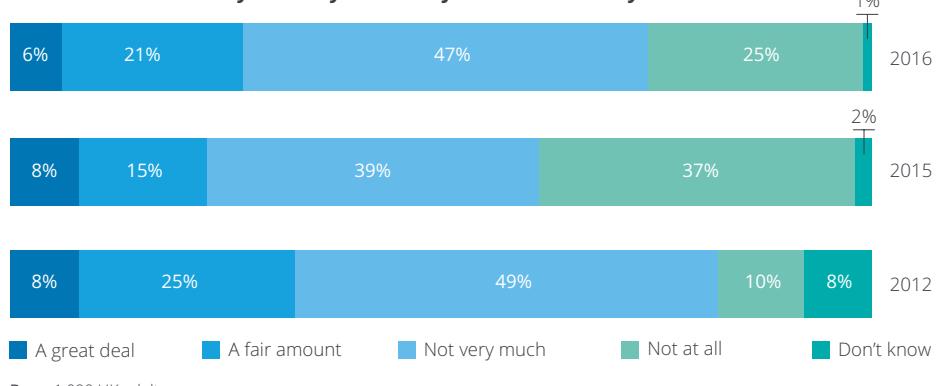
Headlines

- The number of people saying they have been affected by cuts has increased in the past year
- But most people say they have not been affected much or at all
- The impact of austerity is felt most by parents, renters and BAMEs

Most people in the UK do not feel they have been affected significantly by austerity measures. As figure 18 shows, a quarter of the public told us that they had not been affected at all and almost half told us they had not been affected very much by spending cuts. However, over a quarter have felt the impact of cuts and this has increased since last year.

Those who feel most affected are found in certain groups in the population: parents, people from black and minority ethnic backgrounds, and people who rent their homes are more likely to have felt a personal impact from the cuts. At the other end of the spectrum, people over 65 are the least likely to have noticed cuts affecting them or their families.

Figure 18.
To what extent have you and your family been affected by cuts so far?



Base: 1,099 UK adults

5. Support for tax rises to fund public spending has risen since austerity began

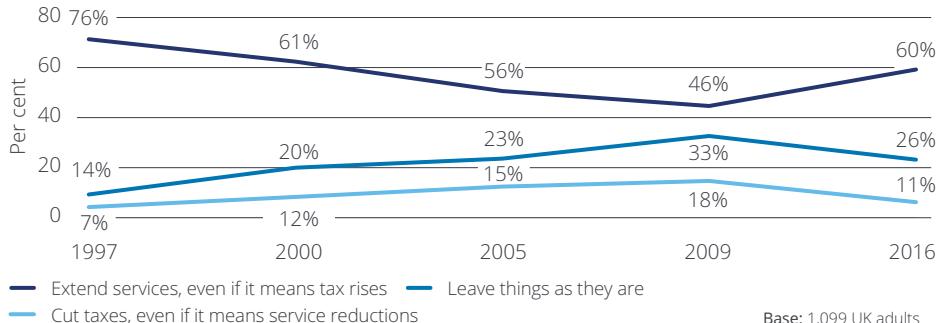
Headlines

- Support for tax rises to fund more public spending has gone up significantly since 2009
- People in Scotland, women and high earners are more likely to want spending rises
- People on low incomes, men and younger people are more likely to want tax cuts

Our survey asked people how they felt about the extent of government services in relation to levels of taxation. More people now want to see increased spending on public services, even if that means tax rises, than was the case in 2009. Support for tax rises to fund public spending has therefore risen since

austerity began, bringing public opinion in line with the early 2000s, as shown in figure 19. However, responses to further questions on expectation make clear that the public continues to expect the public sector to be cost effective and accountable.

Figure 19.
Which of these statements comes closest to your view?



Base: 1,099 UK adults

The types of people more likely to support extending government services are high users of public services, women, high earners and those aged 45-64. Scots also stand out as being more supportive of greater public spending. By contrast, those more likely to support tax cuts include men, those on lower incomes and people aged 15-34.

6. Citizens want the public sector to listen more and collaborate better

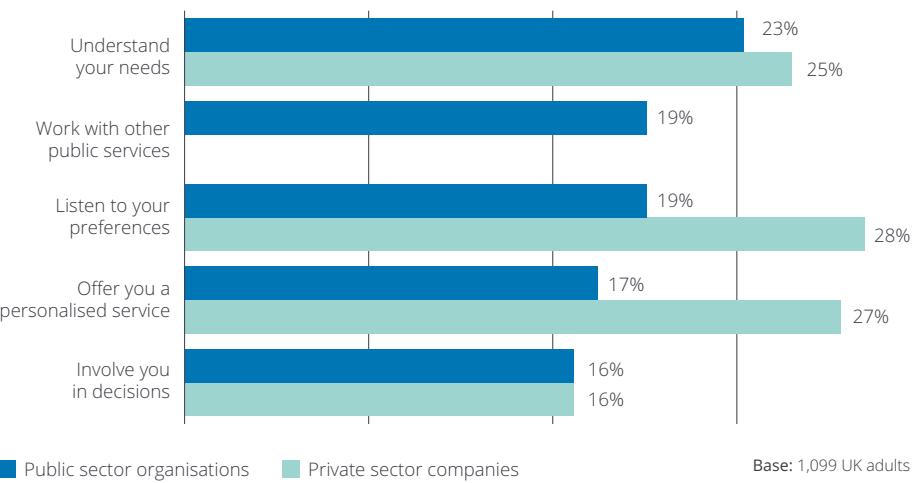
Headlines

- People feel the public sector is behind the private sector in listening to customer preferences and offering a personalised experience
- Those over 65 are less likely to feel the public sector is responsive to them
- Citizens believe public services should work better together and that partnerships with businesses and charities deliver the best quality, cost effectiveness and accountability

Our survey asked people about how they interact with the public sector in order to explore how customer experiences of services might be improved. This element of the research used the private sector as a reference point.

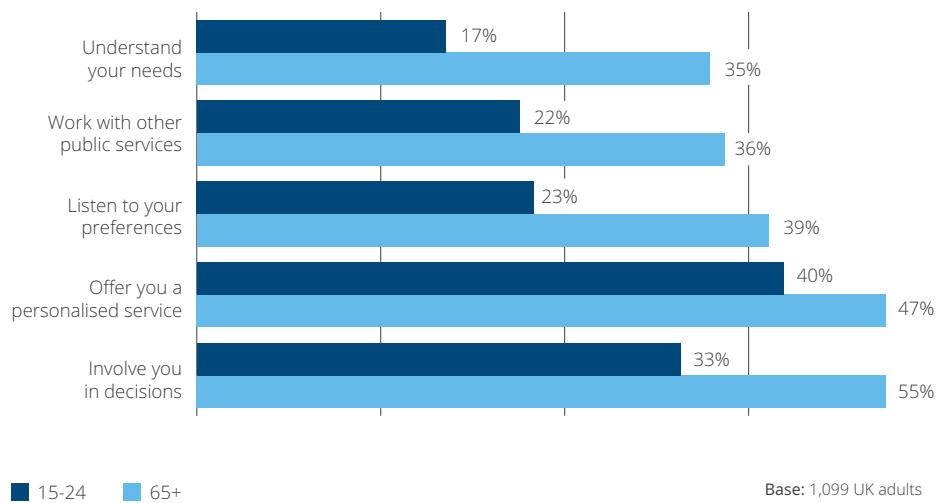
Overall, the results show that the public sector lags behind the private sector in two main aspects. First, 19 per cent of people believe that the public sector listens to their preferences, whereas 28 per cent think that the private sector does. Second, 17 per cent believe that the public sector offers a personalised experience whereas 27 per cent think that this is the case in the private sector.

Figure 20.
How often do organisations that deliver services...



As figure 21 shows, older people – who are more likely to use public services – are consistently less likely to feel that the public services are responsive to them. More than half of over 65 year-olds say that the public services do not involve them in decisions, compared to one third of younger people.

Figure 21.
How often do organisations that deliver public services...



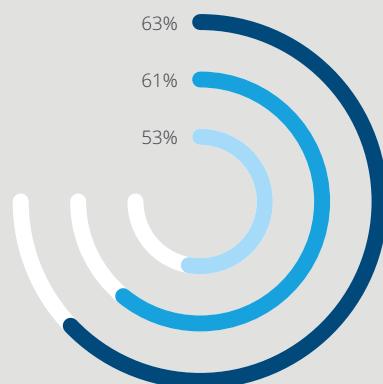
We also asked the public about partnership working to deliver public services. The results suggest people see better joined-up working across the public sector as key to improving quality, maximising cost effectiveness and ensuring accountability to the public. As figure 22 shows, most people also believe that the public sector should work with businesses and charities to deliver public services. But where businesses or charities alone deliver services, the public are less convinced that quality, cost effectiveness and accountability will be delivered to the same extent.

Of course, many public bodies already collaborate effectively and at scale. For example, the One Public Estate programme led by the Cabinet Office and Local Government Association brings together local public sector organisations to manage their land and property collectively – delivering savings, supporting better integrated services, creating more convenience for users and freeing land or property for housing or enterprise.

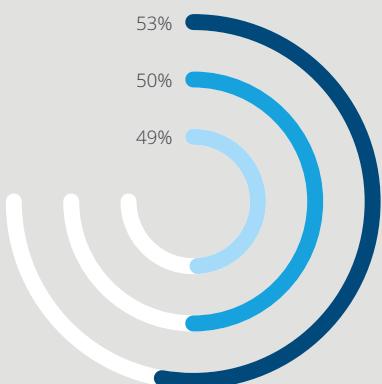
Figure 22.
What impact do you think these different ways of organising public services would have on each of the following?

Per cent better

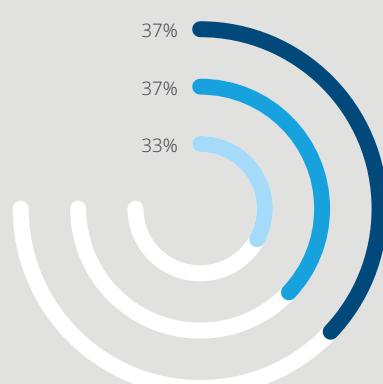
Different public services working together more often



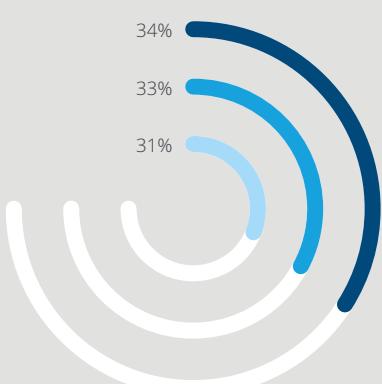
Public sector, businesses and charities all working together



Businesses delivering public services



Charities delivering public services



█ Quality
█ Cost-effectiveness
█ Accountability

Base: 1,099 UK adults

7. The public sector needs to bridge the digital divide

Headlines

- Overall, people prefer using the telephone for engagement with the public services beyond finding out information
- There is a clear digital divide, with a very high preference for digital interaction in the under 45s and among professionals
- The public don't see any difference in digital ability between the public and private sector

Our survey asked people to tell us which means of communication they prefer to use when contacting public services for a variety of different needs. It shows that people generally prefer telephone contact if they need to engage with a public body beyond just finding out information (something they are generally happy to do online).

However, deeper analysis of the data suggests a digital divide by age and social class. In other words, a preference for online contact with the public services is very high among people aged under 45 and more affluent people, but trails off with age and socio-economic status. Further detail is shown in figure 24.

"Deeper analysis of the data suggests a digital divide by age and social class."

Figure 23.

What two or three ways would you prefer to contact public services for each reason?

Table shows per cent of people who mentioned each method in their two or three options

Preferred method of contact to...	Phone	Email	Meet	Online	Letter	Social Media	Text	Any Online
Find out information about a public service	46%	17%	14%	59%	5%	8%	2%	70%
Change personal details	54%	28%	23%	32%	16%	1%	2%	53%
Ask a public service to deal with a problem	76%	29%	24%	17%	10%	1%	2%	40%
Make a complaint about a public service	63%	38%	21%	17%	20%	4%	1%	49%
Suggest improvements in how a public service is run	40%	40%	15%	23%	18%	6%	1%	55%
Provide positive feedback about the service you received	40%	40%	17%	25%	18%	9%	4%	57%
Make an appointment with a public service	82%	20%	20%	18%	5%	1%	3%	34%

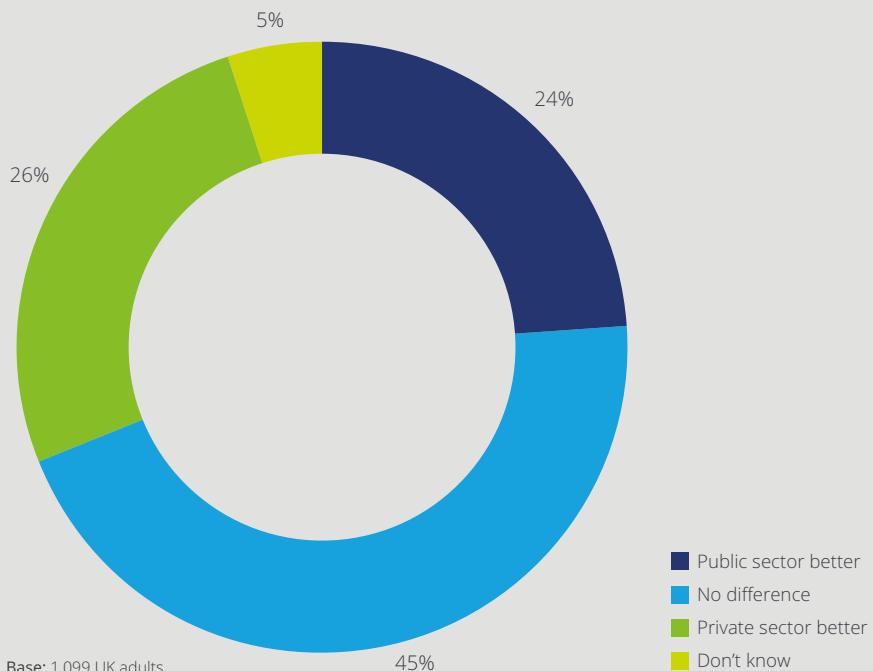
■ Most preferred method of contact

Base: 1,099 UK adults

Figure 24.**What two or three ways would you prefer to contact public services for each reason?**

Per cent who prefer online to...	Age			Social class			
	15-44	45-64	65+	AB	C1	C2	DE
Find out information about a public service	82	68	44	81	73	72	51
Change personal details	61	53	28	72	58	49	29
Ask a public service to deal with a problem	47	41	25	56	47	35	21
Make a complaint about a public service	61	47	26	64	56	45	29
Suggest improvements in how a public service is run	67	55	28	71	61	53	32
Provide positive feedback about the service you received	70	59	28	70	66	56	35
Make an appointment with a public service	42	32	18	50	37	27	19

Base: 1,099 UK adults

Figure 25.**Which is better at offering services and information online – private companies or the public services?**

For public bodies working on digital transformation in their customer engagement, these findings suggest that they need to encourage the use of digital channels by providing well-designed digital experiences that will become increasingly accepted by the public. The survey also shows the very strong appetite for digital interaction in the under 45s and among professionals. While that suggests a very strong future for digital channels as contact methods for the public sector, it also highlights the challenge of making sure that they do not exclude any user groups as interactions move online.