



The citizen lens

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Introduction

Understanding public attitudes has always been important to government and the public sector. It helps political leaders respond to the electorate’s priorities and helps public service managers deliver on citizen expectations. But the power of the public’s voice has been amplified in recent years – not least through unexpected election and referendum results – and the sector is more alert than ever to balancing what the public wants with what the state can afford.

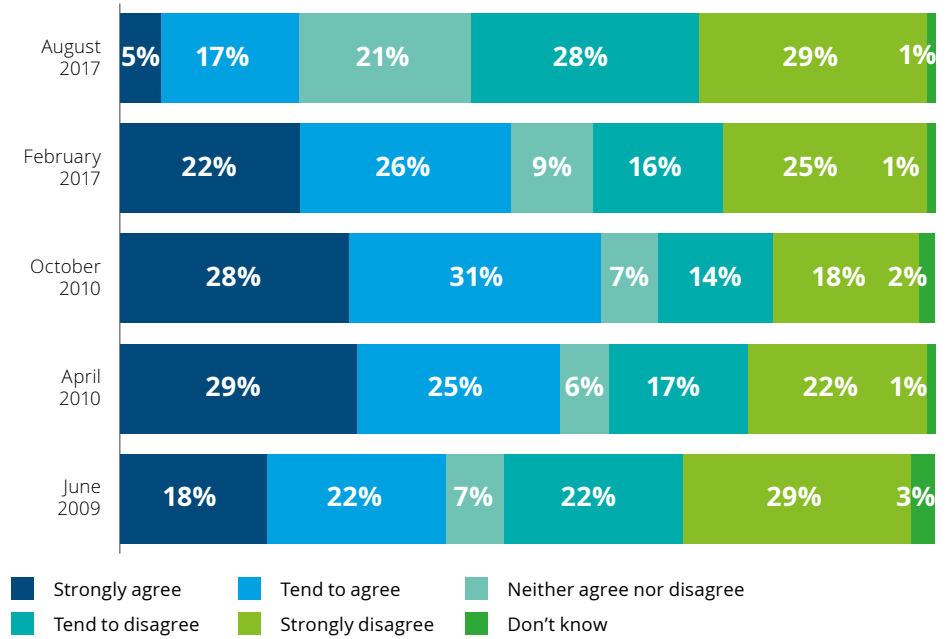
For the second year, Deloitte and Reform have commissioned Ipsos MORI to undertake an exclusive survey into public attitudes and expectations on the state. The polling took place this summer with 1,071 face-to-face interviews of adults across the UK and the results have been weighted to reflect the known profile of the adult population. This chapter of *The State of the State* sets out the survey findings across four themes – exploring perceptions of austerity, tax and spending, social care and cyber trust.

1 Attitudes towards austerity have shifted

Our poll finds that public attitudes towards austerity have hardened. As Figure 6 shows, support for cutting public spending to restore the public finances has halved since austerity began in 2010 and only a fifth of the public now see a need to make cuts.

Figure 6. Support for austerity has halved since 2010

Do you agree: There is a real need to cut spending on public services in order to pay off the very high national debt we now have.



Base: 1071 UK adults

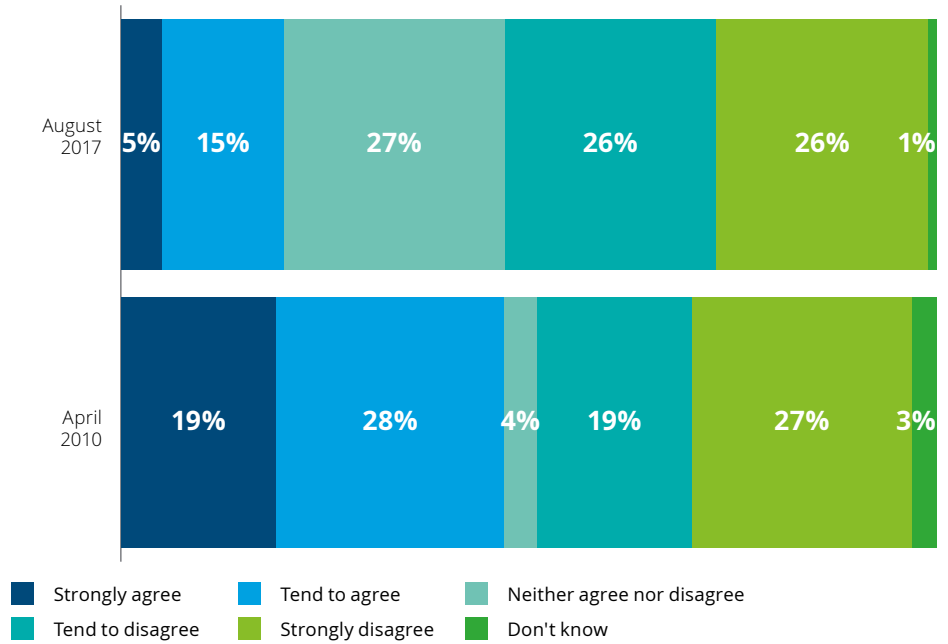
These findings represent a substantial shift in public opinion. Our survey also asked respondents whether they personally would be willing to accept less from the public services to pay back national debt. In April 2010, an Ipsos MORI poll found that almost half of the public would be willing to sacrifice their own public services for the good of the public finances. This year, our poll found that number has shrunk to one in five, as shown in Figure 7.

To explore citizen priorities further, our survey asked people to identify areas of public spending they think should be protected from cuts. Figure 8 shows the top ten areas that people would like to see protected and, as ever, the NHS tops the list by some margin.



Figure 7. Fewer people are willing to receive less from the public sector

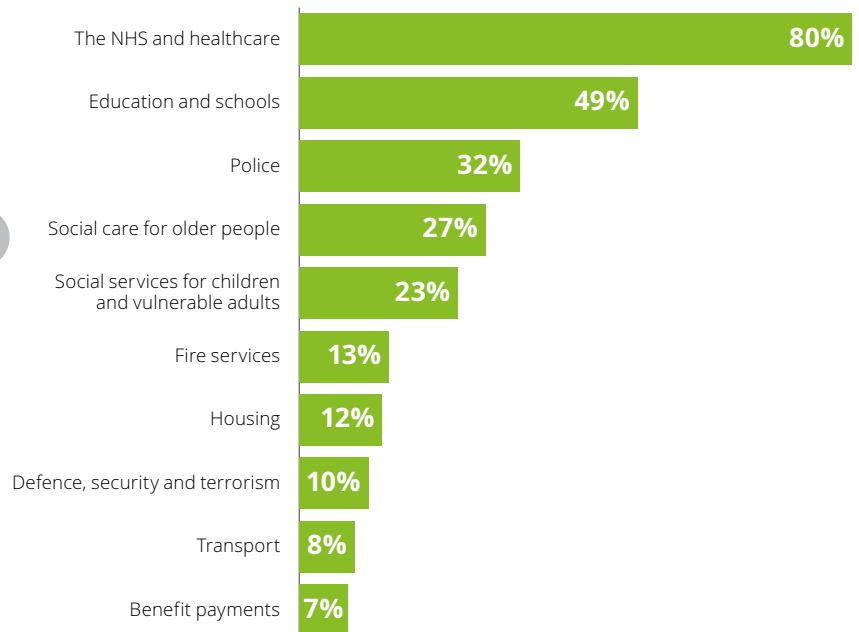
Do you agree: I am personally happy to accept less from public services than I currently get in order to pay off the very high national debt we now have.



Base: 1071 UK adults

Figure 8. The public want to protect NHS, education and police spending

Which two or three, if any, of the following main areas of public spending do you think should be protected from any cuts?



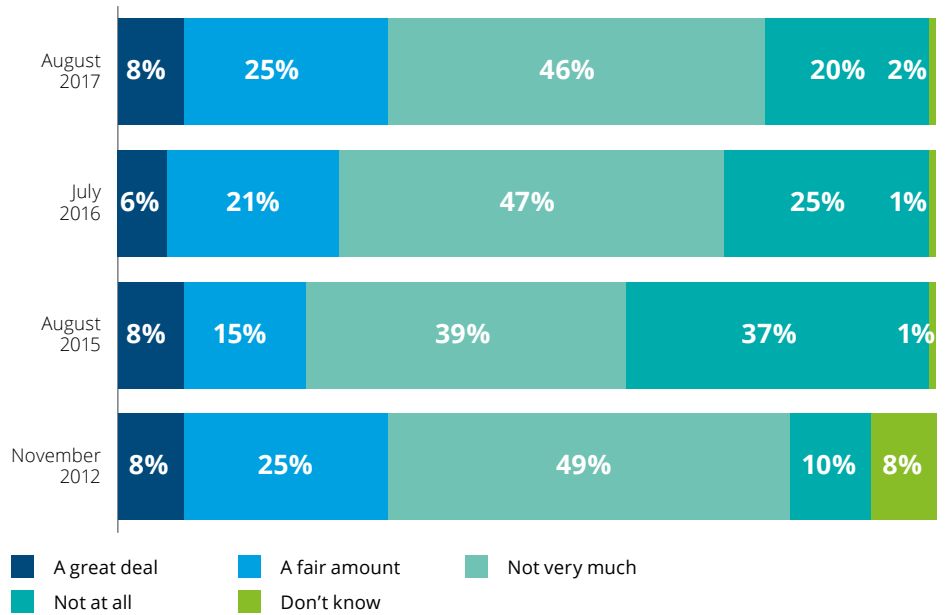
Base: 1071 UK adults

Our survey also explored whether citizens have any personal experience of austerity. Last year's *State of the State* found that 27 per cent of people reported some experience of spending cuts, but this year that figure has risen to 33 per cent. In other words, the impact of austerity has grown in the past two years and a third of the public now say they have felt its impact. These findings are illustrated in Figure 9.

The data also suggests some regional variations in experiences of austerity. As Figure 10 shows, people in the north of England are the most likely to have felt the impact of spending cuts and people in Scotland – where the Scottish Government has followed its own, less austere spending plans – have felt them the least overall.

Figure 9. Austerity is being felt by more

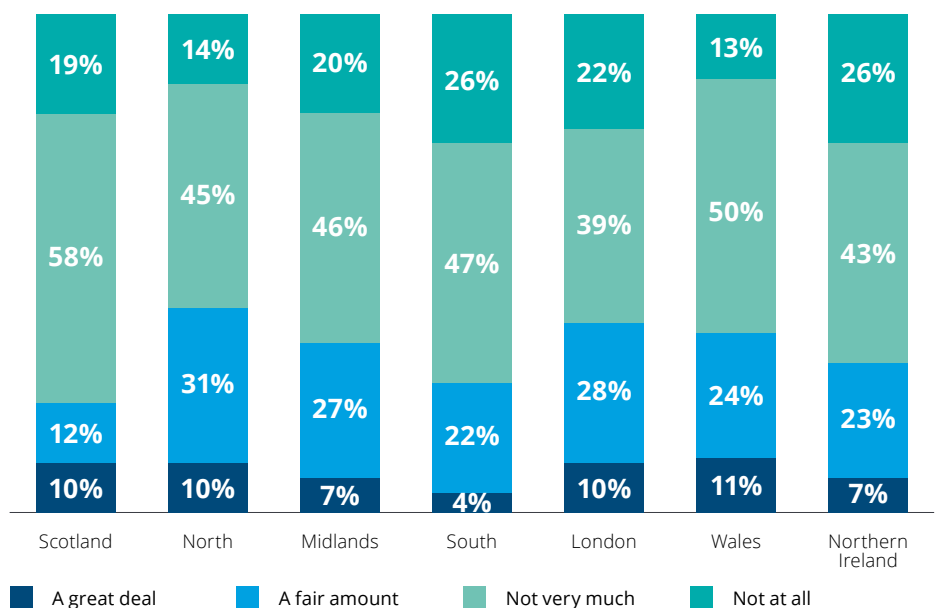
As you may know, over recent years the government has announced a number of spending cuts to help reduce the national deficit. To what extent, if at all, have you and your family been affected by the cuts so far?



Base: 1071 UK adults

Figure 10. Regional experiences of austerity

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Base: 1071 UK adults

2 Support continues to grow for extending public services – even if tax rises are needed

Since 1997, Ipsos MORI has gauged public sentiment on the balance between tax and spending. In last year’s *State of the State*, our survey showed an increase in the proportion of people who wanted to see more extensive public services – even if that required tax rises. The survey for this year’s report shows such support has grown even further, with some 63 per cent of the public now open to more tax and more spending. Of course, substantial amounts of research shows that the public expects its public sector to offer value for money and organise themselves effectively, but this finding suggests a significant shift in sentiment over the balance between tax and spending. Figure 11 illustrates this trend over time.

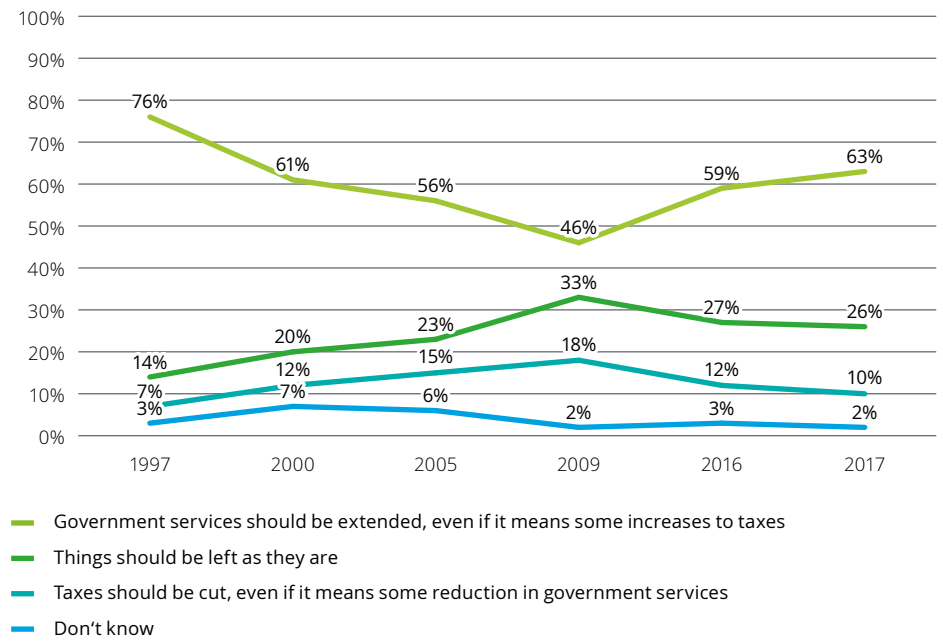
3 People are uninformed, unconvinced and unprepared for their own social care

The need to address the future of social care in the UK is now widely recognised. The UK population aged over 85 is expected to grow by 106 per cent and the cost of state-funded long-term care is expected to rise from £19 billion to £31 billion in the next 20 years.^{21, 22} Maintaining current funding models is not sustainable and the UK government is expected to review its structure in a consultation promised earlier this year. To help inform that debate, this year’s *State of the State* survey asked the public about their views on current policy as well as plans for their own social care. We found that people are largely uninformed about how social care is delivered in the UK, unconvinced by existing policy and unprepared for their own care.

Our survey gave respondents a definition of social care and asked whether they believed it was free at the point of delivery. Almost half wrongly believe that social care is free and two-thirds believe that it is provided by the NHS, as Figure 12 shows.

Figure 11. Public sentiment over tax and spending continues to change

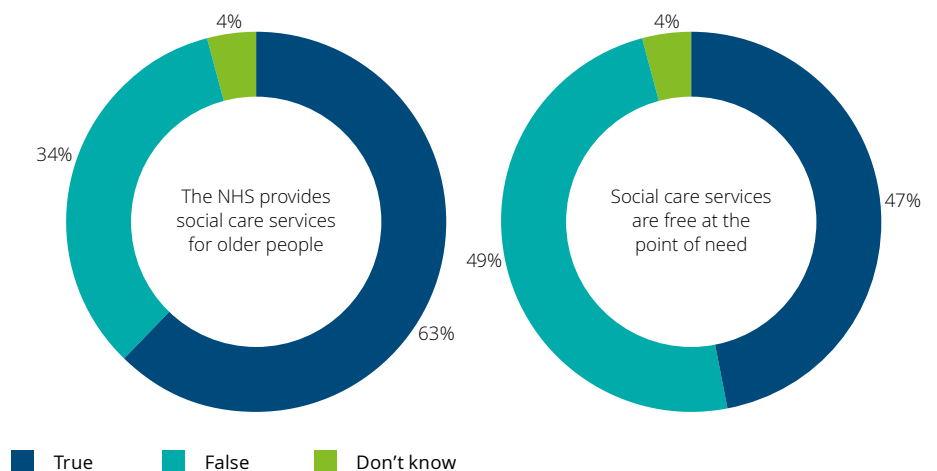
People have different views about whether it is more important to reduce taxes or keep up government spending. How about you? Which of these statements comes closest to your own view?



Base: 1000 GB adults

Figure 12. Many wrongly believe social care is free and provided by the NHS

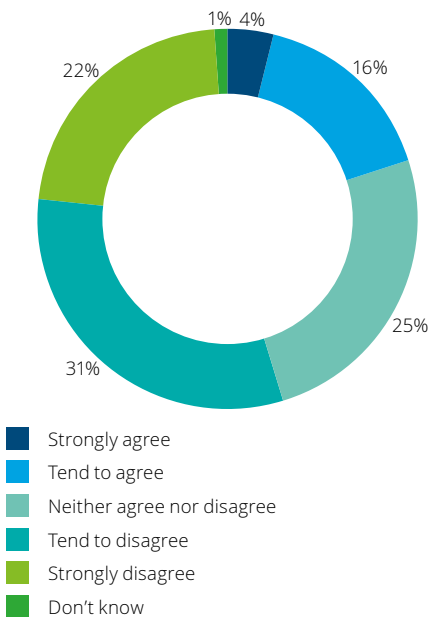
I am now going to read out a couple of statements. For each one, please can you tell me whether you think it is true or false...



Base: 1071 UK adults

Figure 13. Few believe that existing social care policy is adequate

To what extent do you agree or disagree with the following statement? The government has the right policies about social care for older people in the UK.



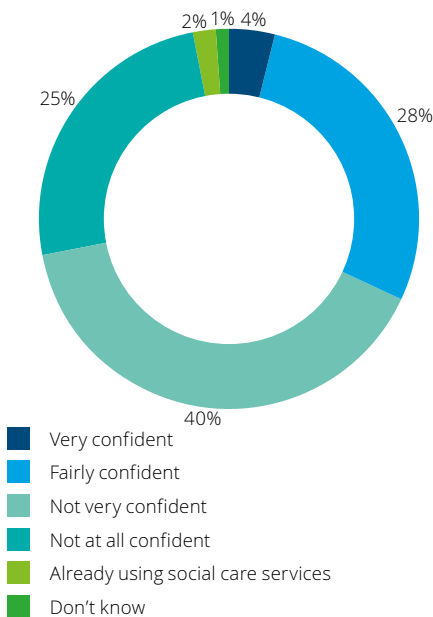
Base: 1071 UK adults

Our survey also found that the public is not convinced the government has the right policies on social care for older people. Just one fifth think that the government's existing approach is right for the UK, as shown in Figure 13.

Analysis of this data shows that sections of the public differ in their confidence levels. Among the groups most confident that social care will be available to them are men, younger people and people in lower-skilled jobs. Conversely, the groups least confident that social care will be available to them are women, higher earners and homeowners with mortgages.

Figure 14. Just one third are confident that care services will be available

How confident or not do you feel that there will be social care services available to support you when you need them?

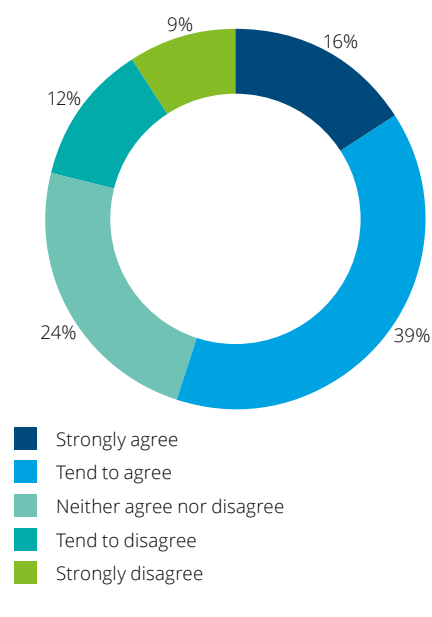


Base: 1071 UK adults

One central issue in debates about the future of social care is whether the state should be responsible for its funding or whether that should fall to the individual. Our survey found that more than half the public believe it is their responsibility to provide for their own social care when they are older, as shown in Figure 15.

Figure 15. More than half believe it is their responsibility to fund their care

Please tell me whether you agree or disagree with the following statement: it is my responsibility to save or make other financial plans so that I can pay towards my care when I am older.



Base: 1071 UK adults

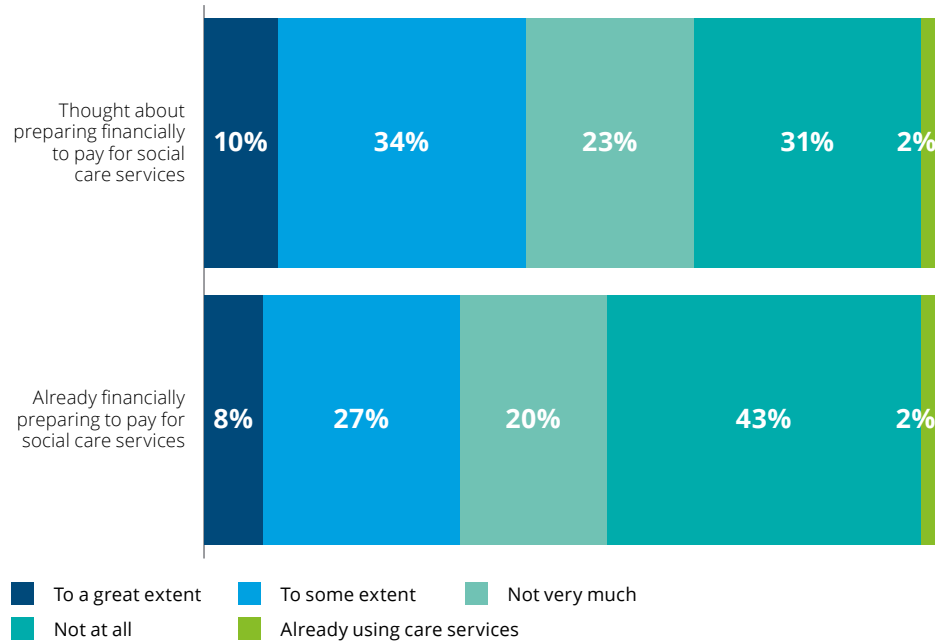
Rationally, this might suggest that half the public, believing themselves responsible for funding their own care, will be taking steps to do so. Actually, 44 per cent told us that they have thought about making financial plans and just one third have actually done so, as shown in Figure 16.

We asked the people who said they were preparing for their care needs about their plans. The top three answers were saving, pensions and owning property but the top two answers were most significant. Some 45 per cent told us that they were saving, 29 per cent told us they have a pension and just 6 per cent said they own properties which they viewed as a form of financial plan.

Perhaps inevitably, our data shows that people over 35 are far more likely to be preparing for their future needs than younger people. However, it also finds that people on lower incomes, in more manual occupations and in rented accommodation are far less likely to be making financial plans, as illustrated in Figure 17.

Figure 16. One third have taken steps to prepare financially for social care

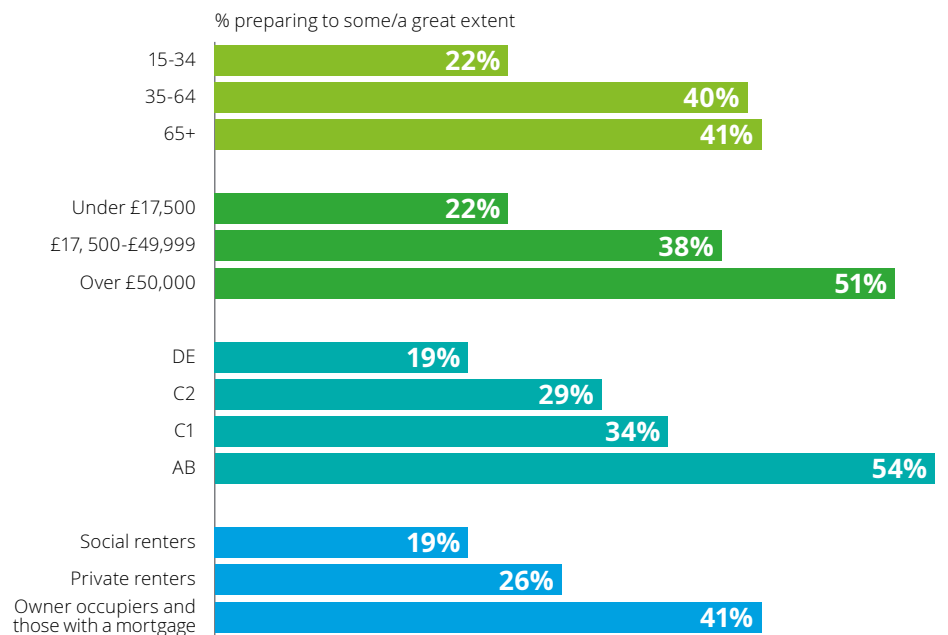
Before today, to what extent, if at all, had you thought about preparing financially for social care services you might need when you are older?



Base: 1071 UK adults

Figure 17. Demographics and preparing for future care needs

To what extent are you already preparing financially to pay for the social care services you might need when you are older?



Base: 574 UK adults preparing financially for social care

4 Citizens trust government with their data – as long as certain rules apply

The ability to capture, store and manipulate data at scale is one of the central benefits of digital technology. For the wider public sector, exploiting data offers incredible potential to inform policymaking, co-ordinate public services and deliver a more personalised citizen experience. Government is of course alert to those possibilities. John Manzoni, the Chief Executive of the Civil Service, told a Reform conference earlier this year that harnessing data “is the next phase of public service modernisation”.²³

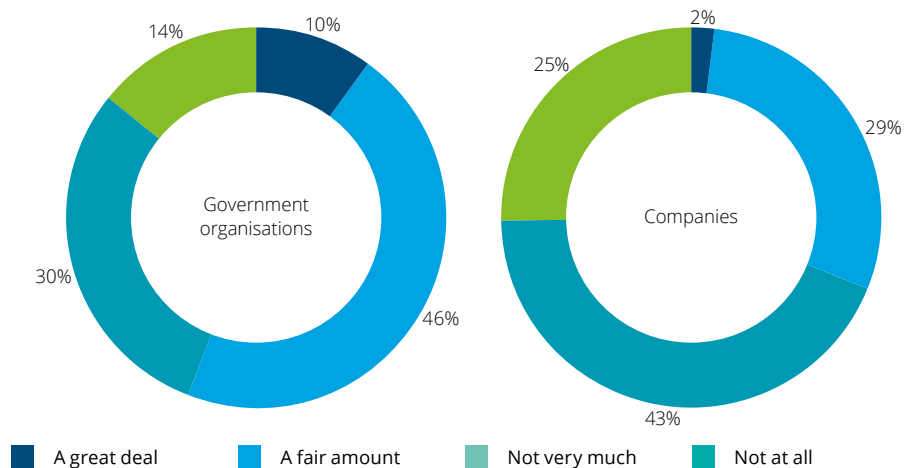
However, Manzoni went on to recognise that “public trust is absolutely critical to achieving our ambition for a data-driven government”.²⁴ To help inform thinking around data and cyber-security in government, our *State of the State* survey asked a series of questions on data trust.

We found some encouraging views for the public sector. When we asked about levels of trust with personal data, more than half of the public told us that they trusted government organisations. By comparison, less than a third trust companies, as shown in Figure 18.

Analysis of the survey responses once again suggests some demographic divides. Younger people tend to be more trusting of both government and the private sector with their data, and so do higher earners and professionals in the ABC1 grades. These demographic divides are illustrated in Figure 19.

Figure 18. More trust government with data than companies

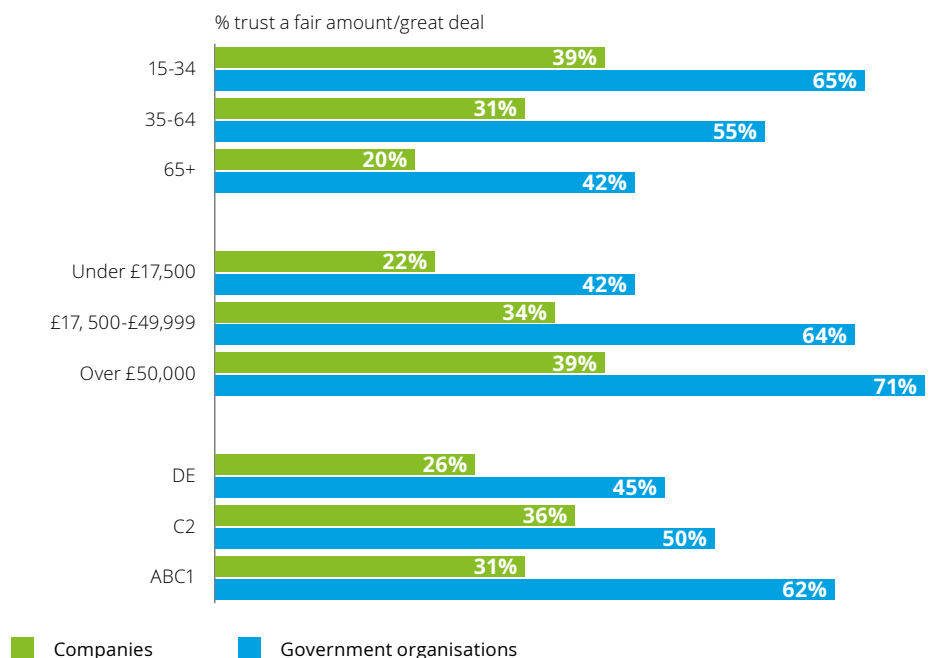
How much, if at all, do you trust government organisations or companies with your personal data?



Base: 1071 UK adults

Figure 19. Demographics and data trust divides

How much, if at all, do you trust government organisations or companies with your personal data?



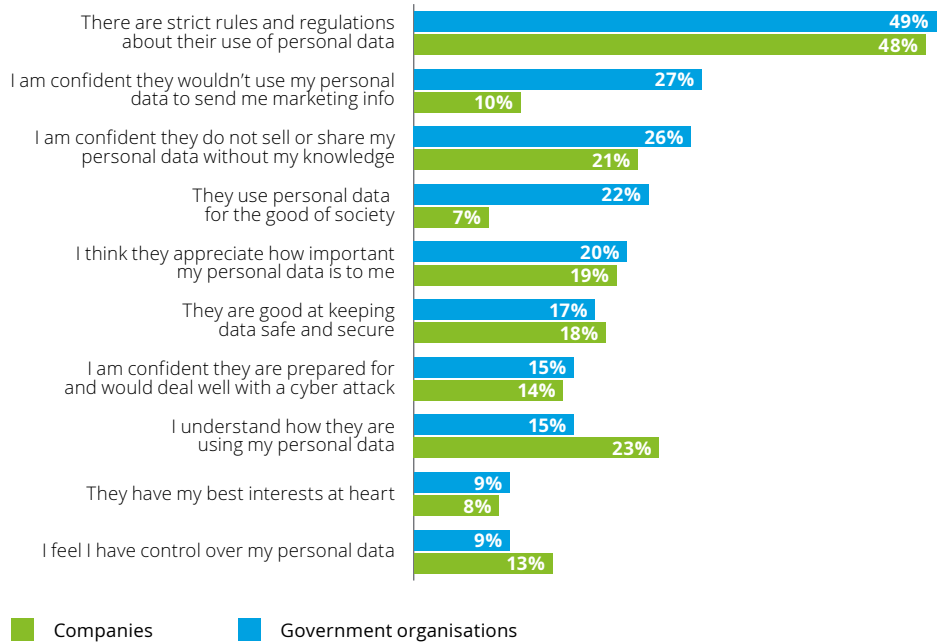
Base: 1071 UK adults

Our survey went on to explore the drivers that lead people to trust or mistrust government organisations with their data. We found that people are more comfortable when they know regulations apply to how their data is used and in addition, we identified two factors that drive trust in government agencies in particular: a belief that public bodies will not use data for marketing purposes and a belief that public bodies will use data for the good of society. Figure 20 shows the factors that drive data trust.

Another finding to note is that the public have limited faith in both the public and private sectors in relation to cybersecurity, with just 15 per cent believing that government bodies are well prepared. Attacks such as the ransomware breaches in May 2017 are increasing in profile, and this could be driving a perception that all organisations need to improve their resilience.

Figure 20. Drivers of why people trust government with data

Which two or three of the following reasons, if any, do you think are most important in explaining why you trust government organisations or companies with your personal data?



Base: UK adults who trust government organisations (587) and companies (333) with their personal data

Cyber-security issues seemed to be more important to the public when we explored why they might mistrust organisations with their data. Building on our earlier questions about what drives trust, our survey asked the public to explain why they might not trust government organisations with their data. The results are shown in Figure 21.

This shows that public mistrust rises when people feel they have lost control over their data, they do not believe their data is kept securely and they are not convinced that an organisation has their best interests at heart. For government, addressing these concerns could build further on existing levels of trust.

Both questions found that knowing what an organisation does with data is a factor in driving trust or mistrust – and importantly, the public say that they are less likely to know what government organisations do with data. So, public bodies could boost levels of data trust further still by explaining how they plan to use the public’s data and the benefits it can bring.

Our survey went on to explore how comfortable people feel about sharing data online with public bodies compared to other organisations. Again, we found that people are more comfortable sharing data online with government departments than when shopping online or using social media. Some 55 per cent are comfortable sharing data online with the government in order to access a service compared to 23 per cent sharing personal data via social media. We also found that people are more confident that their data is used, stored and secured appropriately through the use of a government website than when shopping online or using social media as shown in Figure 22.

Figure 21. Drivers of why people do not trust government with data

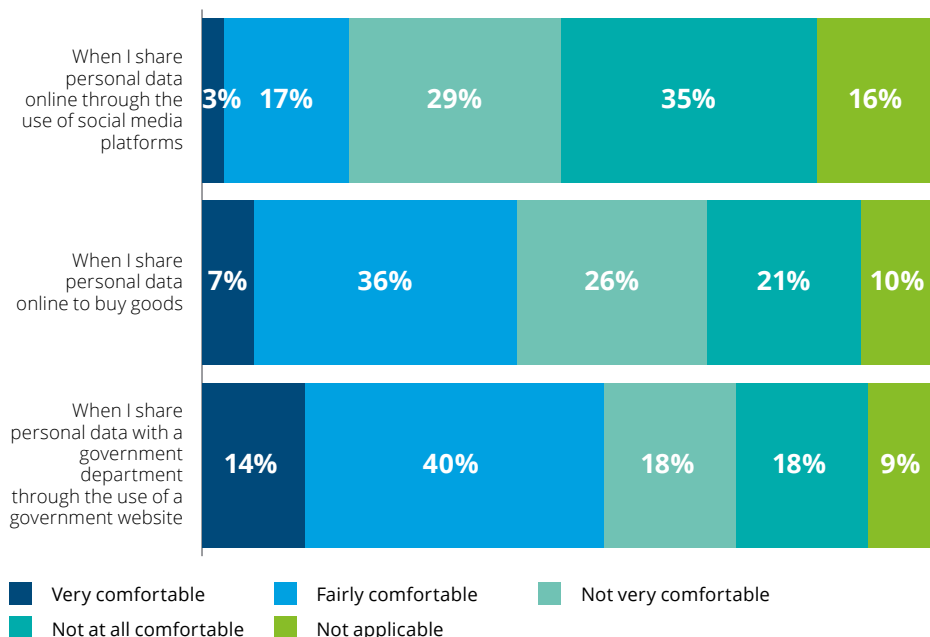
Which two or three of the following reasons, if any, do you think are most important in explaining why you do not trust government organisations or companies with your personal data?



Base: UK adults who don't trust government organisations (479) and companies (736) with their personal data

Figure 22. Confidence that data is used, stored and secured appropriately

How confident, if at all, are you that your personal data is used, stored and secured appropriately in each of the following circumstances?



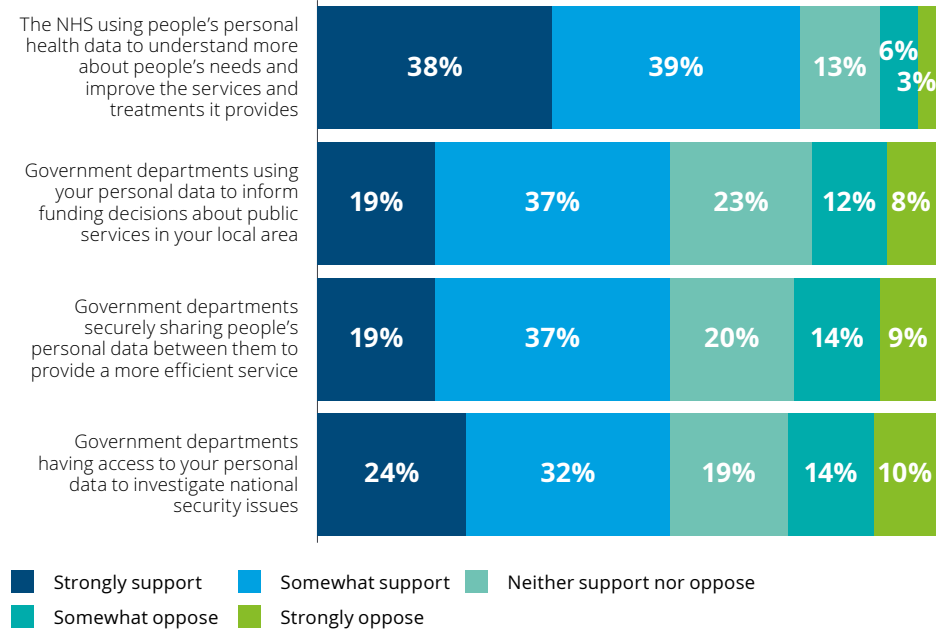
Base: 1071 UK adults

To explore how people feel about the government using data for different purposes, our survey asked people to comment on a series of examples. We found strong levels of support for data use in the NHS, with some 77 per cent supporting its use of data to improve its services and treatments. While the public are less overwhelmingly convinced by other uses of data – to improve public sector efficiency, for example – the majority are still supportive. Figure 23 illustrates the extent of public support for data use in government.

Overall, our *State of the State* survey shows an encouraging public perception of data use in the public sector. People are relatively trusting of government with their data, tend to believe that it will use their data for the good of society and do not think their information will be used for marketing. They are also supportive of the public sector using their data for a host of reasons, and especially the NHS. These findings also suggest that if government wants to boost public trust in its use of data, it needs to engage people in why it uses data, give confidence that personal information will not be breached in a cyber-attack, and assure the public that data is managed under strict regulations.

Figure 23. Public support for government use of data

To what extent, if at all, do you support or oppose government organisations, such as public services and government departments, using your personal data in the following ways?



Base: 1071 UK adults