

Monthly Pulse Survey



January 2022 Report

By Painted Dog Research

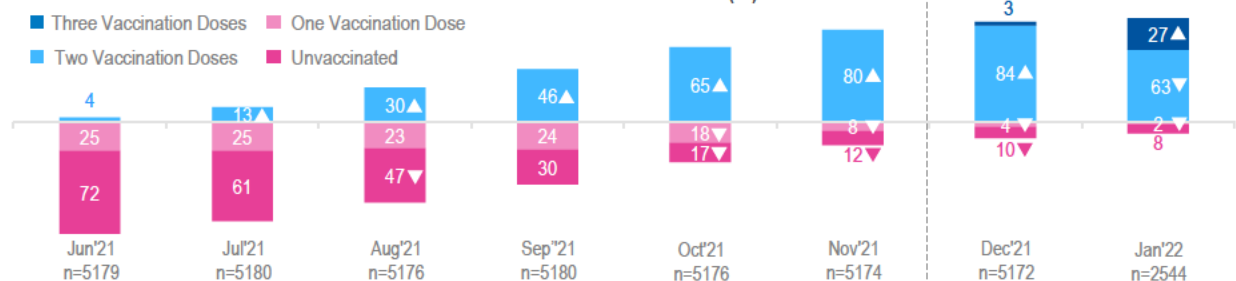
For the Department of the Prime Minister and Cabinet

Insight 1	Insight 2	Insight 3	Insight 4	Insight 5
National booster adoption increased significantly, reaching 89% this wave. This was driven by NSW and WA, both of which saw significant increases in booster adoption from December.	Across every state and territory, there were significant increases in the perceived need for protective health behaviours in January, compared to December.	Physical distancing, mask wearing and contactless shopping increased significantly in January. However, drops in 'frequent' (always / often) QR code check-ins in NSW, SA and VIC drove a significant decrease this wave; the only behaviour to decline.	Parents have stronger vaccination hesitancy for their younger children (aged 5-11) compared to older children (aged 12-15) – with more concerns about vaccine safety for younger children.	Overall, 3 in 4 who had COVID symptoms reported staying home, consistent with December. However, employees in industries including Health Care, Financial Services, Public Admin and Safety, Admin and Support, Construction, Rental, Hiring and Real Estate, indicated they stayed home less this month, despite symptoms.

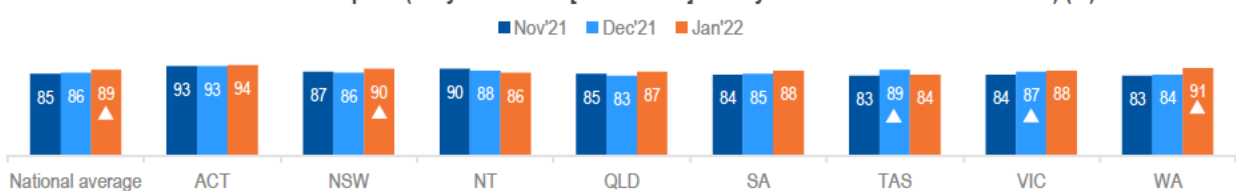
Vaccination trends and protective health behaviours

Nine in ten (90%) Australians indicate that they have received two or more vaccinations – and the proportion who indicate they are triple dosed increased significantly from 3% in December to 27% this wave. Additionally, national adoption of the COVID-19 booster vaccination (those who have or intend to receive it) increased significantly from 86% to 89% in January. Sentiment in NSW and WA both increased significantly from December. NT and TAS both saw notable drops in booster vaccination adoption this month. Compared to last month, significantly more Australians in every state indicated that protective health behaviours are currently needed. Of these protective behaviours, physical distancing, mask wearing, and contactless shopping all increased significantly. However, overall usage of QR code check-ins decreased significantly this wave, driven by significant drops in NSW, SA and VIC.

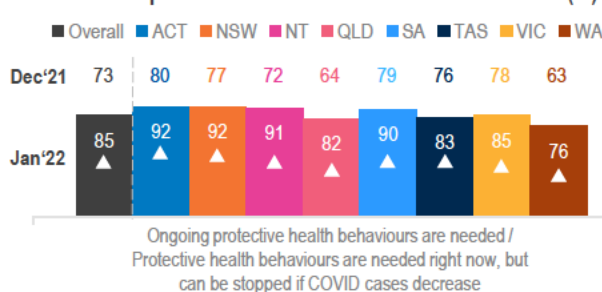
Overall Vaccination Trends (%)



Booster Vaccine Adoption (Fully vaccinated [three doses] / Likely to receive the booster vaccine) (%)



View for protective health behaviours – NET: Needed (%)



Frequency of protective health behaviours – NET: Frequently (%)





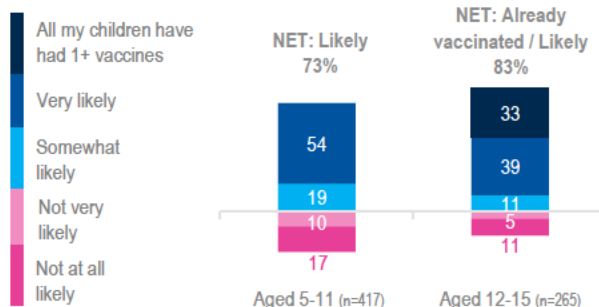
Vaccination sentiment among children

While around 3 in 4 parents are likely to vaccinate their children, they are more hesitant to vaccinate younger children (aged 5 to 11) against COVID-19 compared to older children (aged 12 to 15). Overall, 73% of parents are likely to vaccinate their younger children (54% very likely, 19% somewhat likely), while 83% of parents indicate that their older children have either already been vaccinated (33%), or are likely to receive the vaccine (39% very likely and 11% somewhat likely). However, more than a quarter (27%) of parents indicate that they are unlikely to vaccinate their younger children, while only 17% of parents with older children are unlikely to vaccinate them.

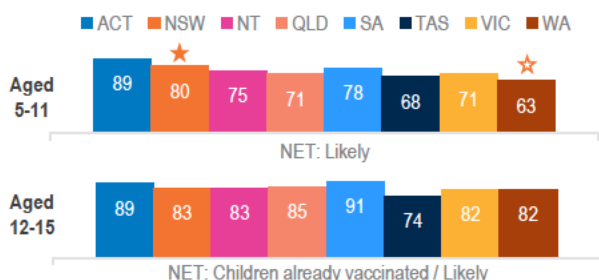
The likelihood of parents vaccinating their older children is higher in every state (with the exception of ACT, where it is equal at 89%). Parents in NSW are significantly more likely to vaccinate their younger children (80%) compared to WA parents (63%).

The age of a parent's child/children also affects what influences their likelihood to get that child vaccinated. With older children, parents are significantly more likely to be influenced by the advice of health authorities and by venue/event access requirements. Parents of younger children are most concerned about safety of the vaccine itself for children under 12 years.

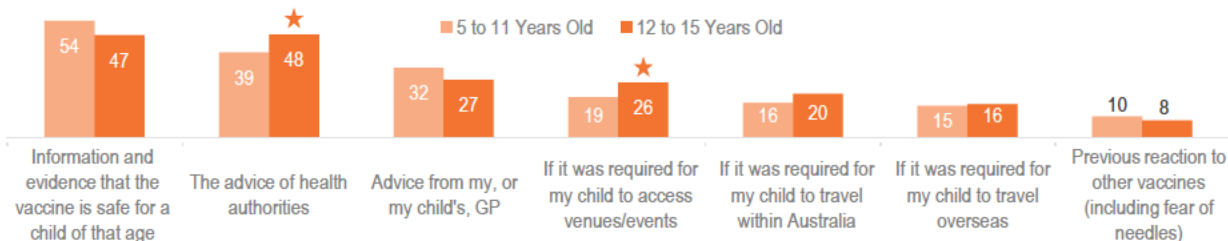
Likelihood to get children vaccinated – Overall (%)



Likelihood to get children vaccinated – State (%)



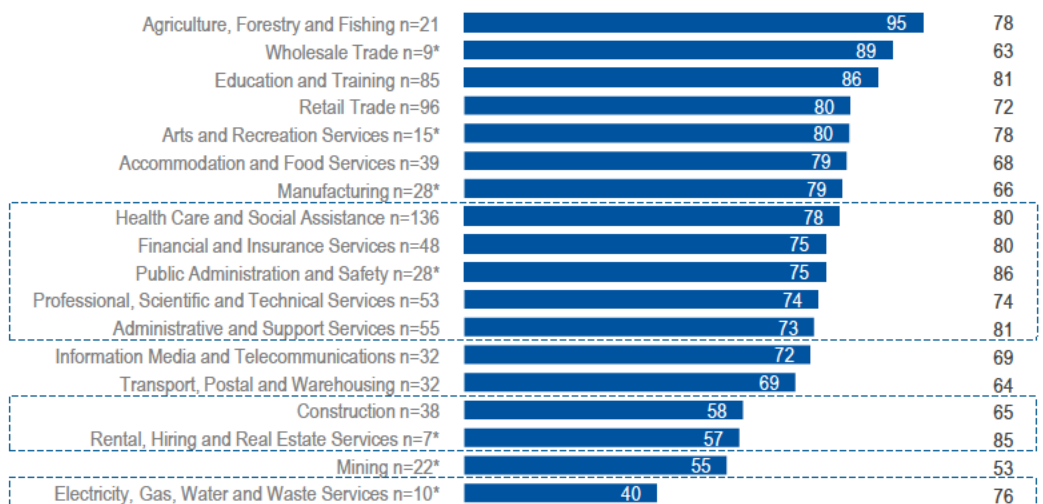
Influences on child vaccination – Overall (%)



Workplace absenteeism

Of those who have recently experienced COVID-19 symptoms (41%), 77% of these people in January indicated that they stayed at home, similar to 75% in December. Those employed in Agriculture, Education and Wholesale / Retail Trade were among those who reported the highest levels of staying at home. However, when compared to December, fewer employees in a range of industries, including Health Care, Financial Services, Public Administration, Professional Services and Construction, indicated that they stayed at home as a result of their symptoms – likely indicative of current labour pressures affecting these industries.

COVID-19 Symptom Response – Stayed at Home – Jan (%)



*Small sample size, interpret with caution

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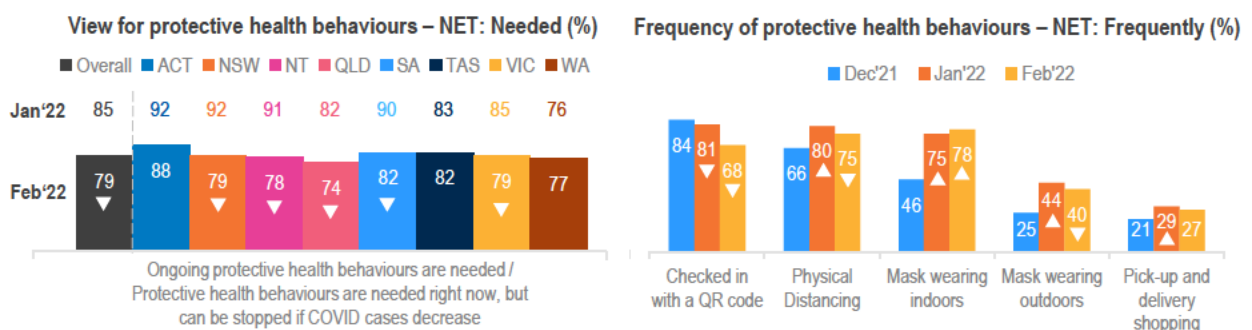
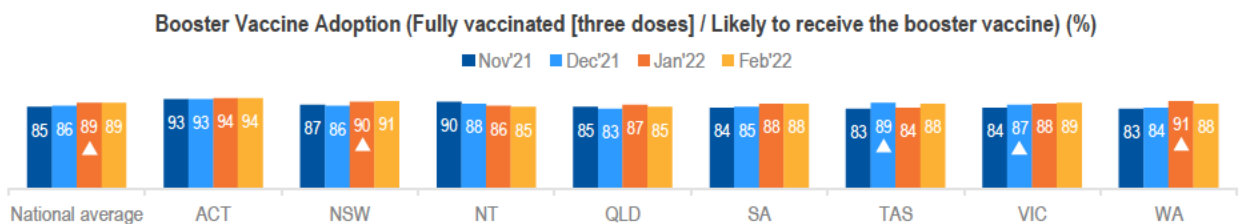
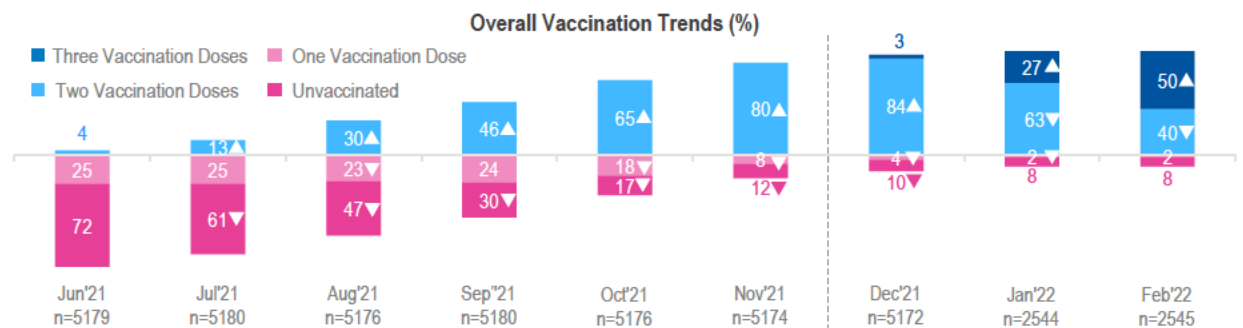
For the Department of the Prime Minister and Cabinet



Insight 1	Insight 2	Insight 3	Insight 4	Insight 5
National vaccine sentiment remained stable in February – with booster adoption stabilising at 89% and attitudes among parents regarding child vaccination also remaining unchanged.	Compared to January, NSW, NT, QLD, SA and VIC all saw significant decreases in the perceived need for protective health behaviours.	Those that have not contracted COVID-19 are significantly more likely to be 'worried' about catching the virus, than those who have previously been infected by it.	Two in five (40%) Australians report having previously used a RAT, with 14% of those receiving a positive result. Among those who have previously received a positive RAT result, around 3 in 5 (59%) indicate that they reported their result to a Government health agency.	Australians are significantly more likely to use a RAT rather than a PCR test in a number of circumstances, including if they have COVID-like symptoms, have been near someone who may have been infectious, are visiting a vulnerable person or have been to a crowded location.

Vaccination trends and protective health behaviours

As seen in January, nine in ten (90%) Australians indicated that they have received two or more vaccinations in February. The number of Australians who indicated that they have received the booster vaccination increased significantly, almost doubling since January, increasing from 27% to 50%. National adoption of the COVID-19 booster vaccination (those who have or intend to receive it) remained steady at 89% in February. Across the states and territories, there were no significant shifts in booster vaccination adoption. Compared to January, significantly fewer Australians from NSW, NT, QLD, SA and VIC indicated that protective health behaviours are 'needed', driving a significant overall drop in the national sentiment. The number of Australians who indicated that they 'frequently' (always/often) use QR code check ins, physically distance and wear masks outdoors all decreased significantly. Conversely, the frequency of indoor mask wearing increased in February.

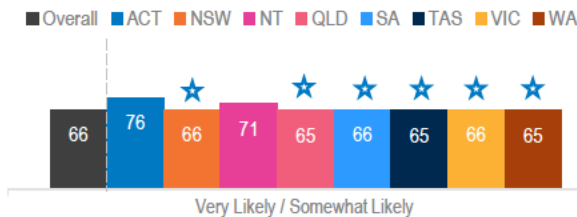




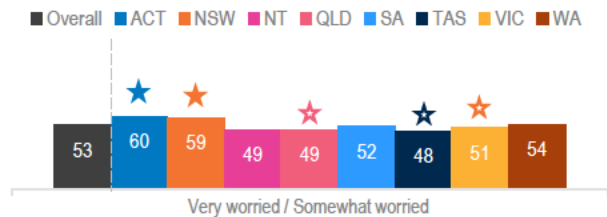
COVID-19 sentiment

Two thirds of Australians (66%) believe they are 'likely' (somewhat or very likely) to contract COVID-19. Significantly more from the ACT believe they are likely to become infected than those from NSW, QLD, SA, TAS, VIC and WA. However, there is no significant difference in perceived likelihood of becoming infected between those who have previously been infected (68%), and those who have not (66%). Around half of Australians (53%) are 'worried' (very or somewhat worried) about contracting COVID-19. Australians from ACT and NSW are significantly more likely than those from TAS and QLD to be 'worried' about catching the virus. Australians who have previously had COVID-19 are significantly less likely to be 'worried' about contracting it (41%), compared to those who have not been infected (55%).

Likelihood of contracting COVID-19 – State (%)



Worry about contracting COVID-19 – State (%)

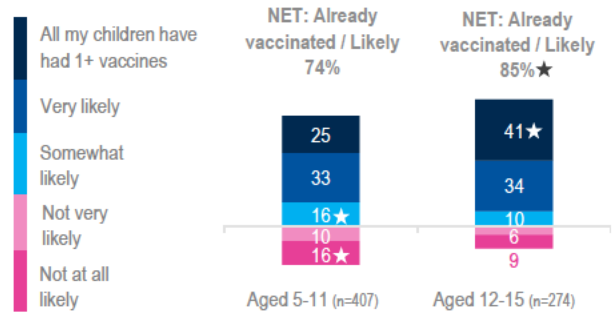


Childhood vaccination

Aligning with previous results, parents are more hesitant to vaccinate their child/children aged 5-11 years old compared to children aged 12-15 years old. As a result of this, significantly more parents indicate that their 12-15 year old children have either already been vaccinated or are 'likely' to be.

Compared to January, there were no significant shifts in the specific influencers of childhood vaccination. 'Information and evidence that the vaccine is safe a child of that age' is the strongest influencer for parents of children in both age brackets (5-11 years – 55%, 12-15 years – 48%).

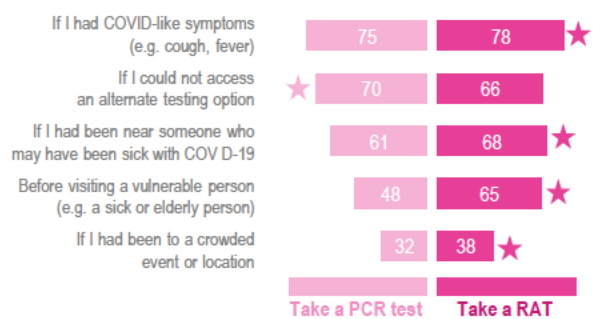
Likelihood to get children vaccinated – Overall (%)



Testing behaviours

Around 3 in 4 Australians indicate they would 'frequently' (always or often) take either a RAT or PCR test if they were experiencing COVID-like symptoms. Australians are significantly more likely to use a RAT over a PCR test in a number of circumstances – including if they had COVID-like symptoms; had been near someone who may have had COVID-19; were visiting a vulnerable person; or had been to a crowded event or location. The only scenario in which a PCR test is significantly more likely to be used over a RAT is if they could not access an alternate testing option. In February, 40% of Australians reported having used a RAT, with 14% of those receiving a positive result. Around 2 in 5 (41%) of those who have received a positive RAT indicate they did not report this to a Government health agency.

Scenario-based testing frequency – NET: Frequently (%)



Protective behaviours

At least 6 in 10 Australians who have never received a positive RAT result indicate that they are 'very likely' to participate in all protective health behaviours. However, self-reported protective health behaviours among those who have received a positive RAT result is markedly lower. This suggests that Australians are more likely to *believe* they will engage in protective health behaviours if they test positive, than they are to *actually* carry out such behaviours when they are infected. The greatest differences in perceived vs actual protective health behaviours are in the reporting of RAT results to employers (30% difference) and getting a PCR test (33% difference). This result may suggest a level of complacency among positive COVID-19 cases.

Predicted vs self reported protective health behaviours – (%)



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March 2022 Report

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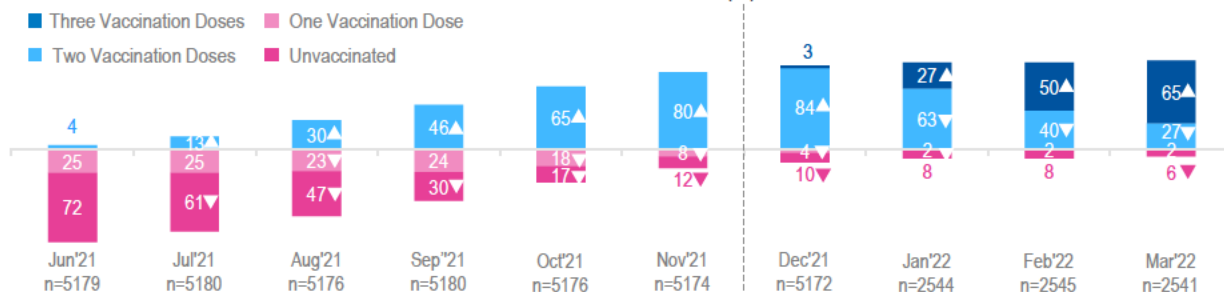
For the Department of the Prime Minister and Cabinet

Insight 1	Insight 2	Insight 3	Insight 4	Insight 5
National vaccine sentiment remained stable in March – with booster adoption sitting at 88%. Furthermore, attitudes among parents regarding child vaccination remained unchanged.	Compared to February, the perceived need for and adoption of protective health behaviours decreased significantly. WA was the only state that recorded an increase in the perceived need for protective behaviours this month.	Nation-wide, Rapid Antigen Tests were more accessible in March. However, as stock and availability of RATs improves, more Australians who cannot access a RAT cite price as a key barrier to accessibility.	Among those experiencing symptoms, COVID-safe behaviours such as mask wearing and physical distancing have trended upwards since December. Further, more Australians indicate that they are testing for COVID-19 (via either PCR or RAT test), with significant increases month-on-month since December.	In March, Australians employed in Essential Research, Arts and Recreation Services, Telecommunications and Media, and Wholesale Trade were among those most likely to stay at home from work to avoid exposure to COVID-19.

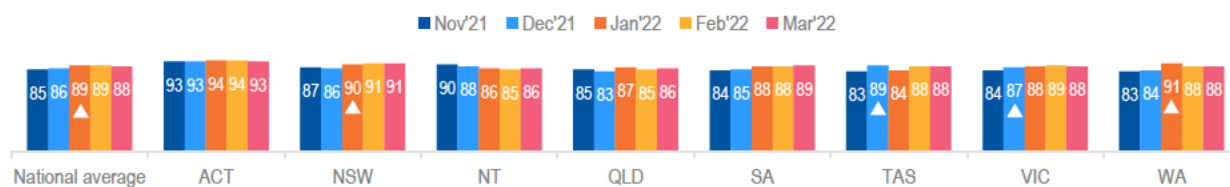
Vaccination trends and protective health behaviours

In March, more than 9 in 10 (92%) Australians indicated they have received two or more vaccinations. Following trends seen in recent months, significantly more Australians indicated that they received the booster vaccination, increasing from 50% in February to 65% in March. Although booster vaccination adoption remained stable overall, with 88% of Australian's indicating they are either already triple vaccinated or likely to receive the booster vaccine. There were no significant shifts in booster vaccination adoption across all states and territories this wave. However, those living in NT, QLD, SA, TAS and VIC were significantly less likely to indicate that protective health behaviours are 'needed' this month, resulting in a significant overall drop in national sentiment. Across all protective health behaviours, the number of Australians who 'frequently' (always/often) engaged in these also decreased significantly this month.

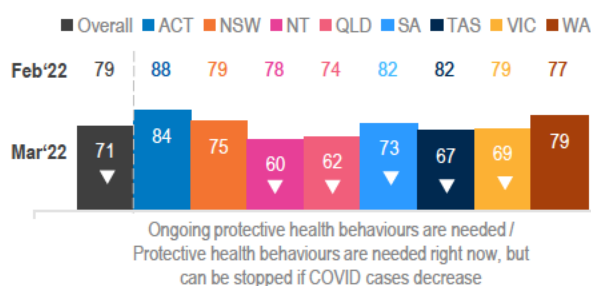
Overall Vaccination Trends (%)



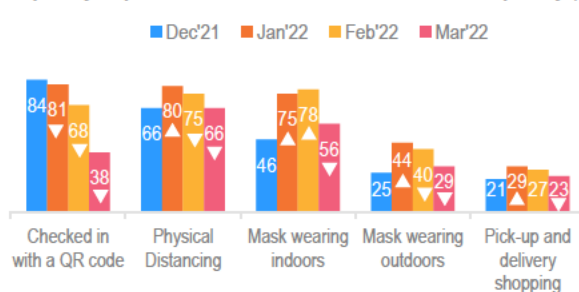
Booster Vaccine Adoption (Fully vaccinated [three doses] / Likely to receive the booster vaccine) (%)



Need for protective health behaviours – NET: Needed (%)



Frequency of protective health behaviours – NET: Frequently (%)





Rapid Antigen Tests (RATs)

In line with last wave, RATs remain the preferred method of.

Australians are significantly more likely to test using a RAT, rather than a PCR in all scenarios. Positively, perceived accessibility of RATs increased significantly across all states and territories this month, resulting in an overall increase from 52% in February to 82% in March. Just under 2 in 3 (63%) of those who indicated that they can quickly access a RAT indicate that they can purchase them from a pharmacy, with 59% indicating that they already own RAT(s).

As a result of this, the proportion of Australians unable to access RAT tests decreased significantly in March. Furthermore, significantly fewer Australians indicated that stock availability was a reason for RAT inaccessibility (falling from 68% in February to 46% in March). Conversely, significantly more Australians unable to access a RAT cited affordability as a barrier, increasing from 24% in February to 34% in March. As RAT stock and availability increases, price intuitively becomes the leading barrier to accessibility.

Childhood vaccination

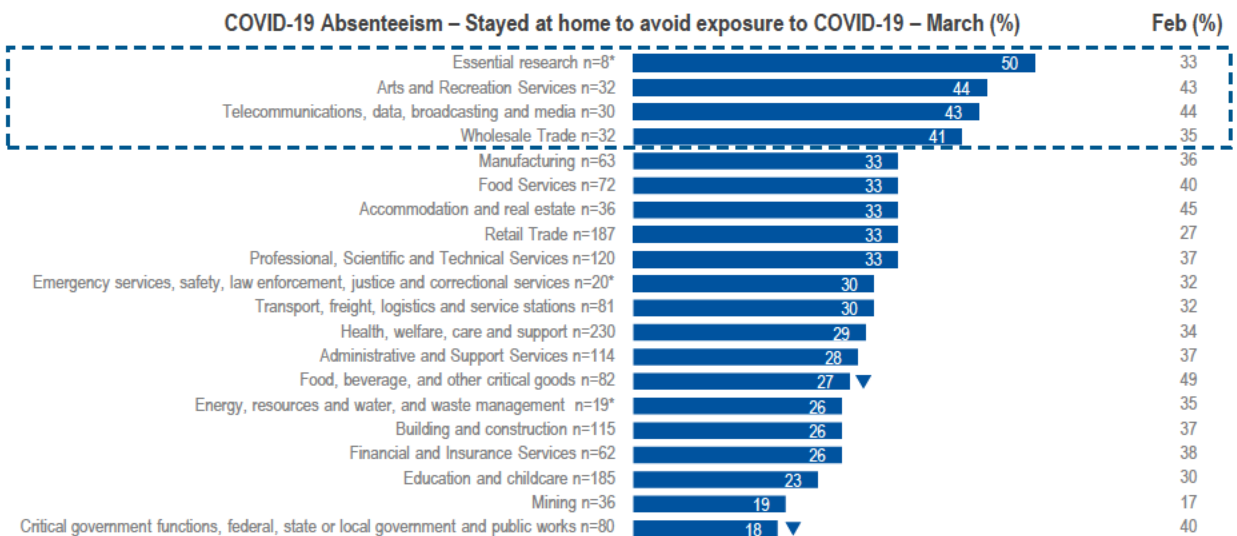
There were no significant shifts in intended childhood vaccination rates this month. Compared to parents with children aged 5-11, those with children aged 12-15 are still significantly more likely to indicate that their child is already vaccinated, or is likely to be vaccinated.

COVID-safe behaviours

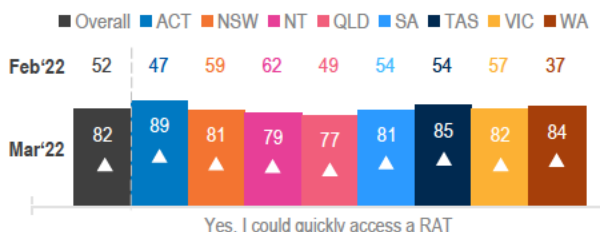
Among those who have recently experienced COVID-19 symptoms, the proportion who indicate they have been tested (either RAT or PCR) has increased significantly each month since December. In addition, other COVID-safe behaviours such as mask wearing and physical distancing also demonstrate upward trends in adoption among those who have experienced symptoms. This demonstrates that while protective behaviours may be becoming less 'needed' and engaged with over time, those experiencing symptoms are increasingly taking more precautions to protect those around them.

COVID-19 Absenteeism

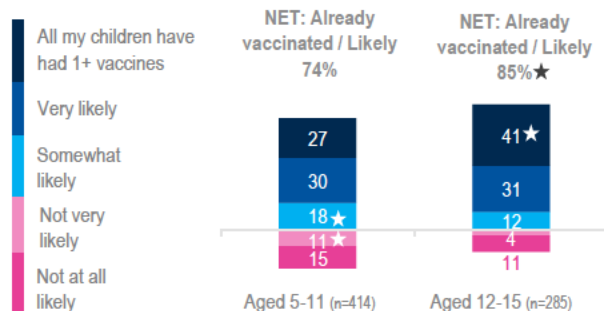
This month, employees working in Essential Research, Arts and Recreation Services, Telecommunications and Media, and Wholesale Trade were most likely to stay at home to avoid exposure to COVID-19. Employees working in Food, Beverage and Other Critical Goods, as well as Critical Government Functions, were significantly less likely to stay home to avoid COVID-19 in March, compared to February.



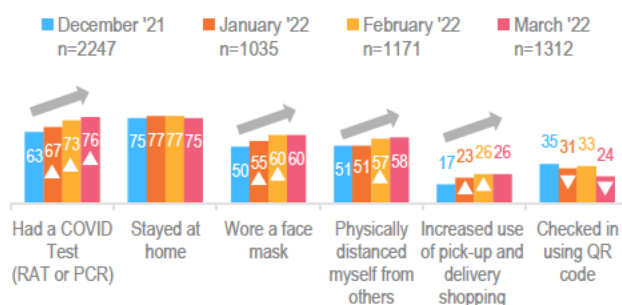
Rapid Antigen Test Accessibility (%)



Likelihood to get children vaccinated – March (%)



Recent COVID-safe Behaviours – Experienced Symptoms (%)





Australian Government

Department of the Prime Minister and Cabinet

Citizen Experience Survey



January 2022

Flagging and addressing whole-of-APS service-delivery issues to support a step change in the delivery of Australian public services.

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Insights

1

Trust in Australian public services remains stable to begin 2022 – trust sits at 61% and distrust is at 19%. However, trust is significantly lower this month compared to one year ago (Feb'21, 67%).

2

Satisfaction with public services also remains stable with past waves. Satisfaction sits at 71% while dissatisfaction is at 12%. As with trust, satisfaction is significantly lower than Feb'21 (77%).

3

The effect of age level of trust has reemerged this month as trust among 75+ year olds increased from 70% to 79%. Trust remained stable for other age brackets. A similar effect can be noticed in satisfaction, although less apparent.

4

Permanently employed Australians are no longer significantly more trusting than some other types of employment, decreasing non-significantly from 68% in Dec'21 to 62%. Distrust among permanently employed Australians has increased significantly (13% in Dec'21 to 19%).

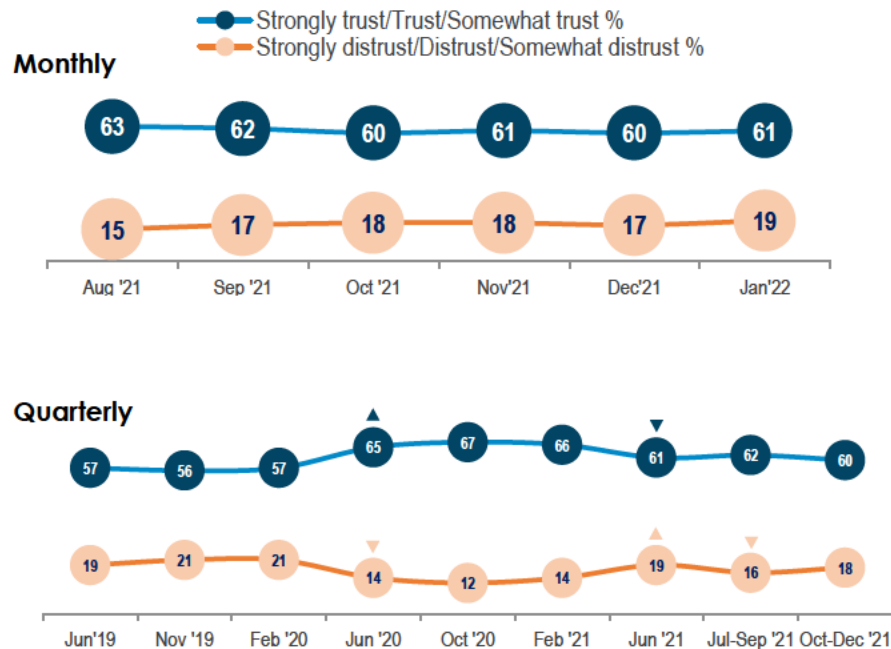
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South Australians and West Australians are less trusting this wave. Trust for these two states has decreased non-significantly by -5pts and -6pts respectively, but distrust has increased significantly for SA (14% to 19%) and WA (8% to 22%).

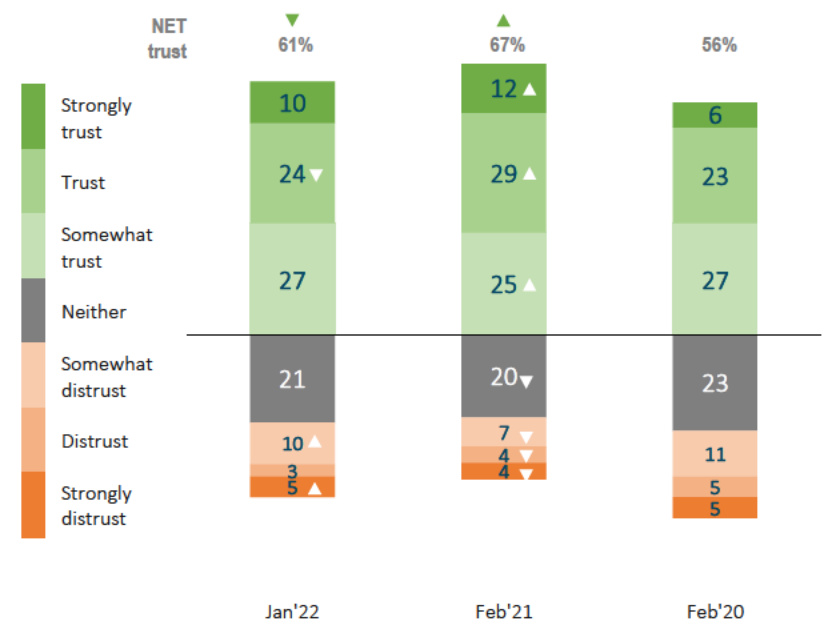
Trust with APS Experience

Trust in Australian public services has remained fairly stable again this month with a non-significant increase of 1pt (60% to 61%). Distrust also increased slightly but non-significantly in January '22, up 2pts from 17% to 19%. Year-on-year, level of trust in January '22 is significantly lower than early 2021 (Feb '21, 67%).

Trust in Australian Public Services (time series)



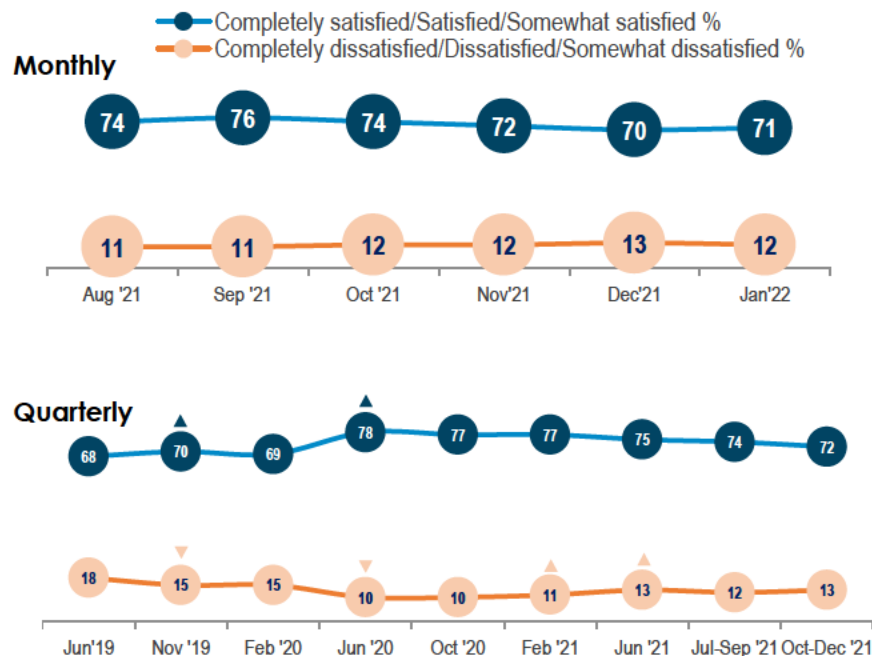
Trust in Australian Public Services (broken down - annual)



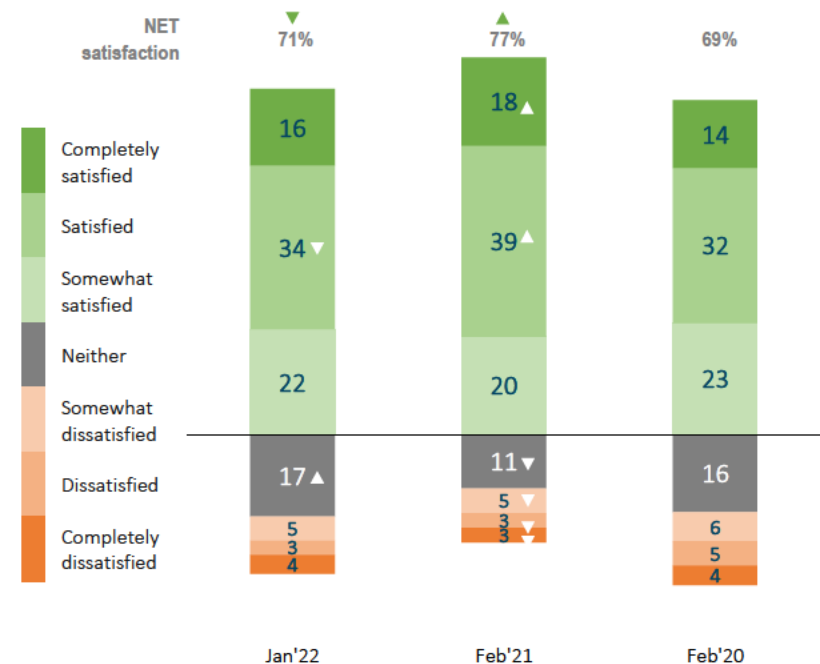
Satisfaction with APS Experience

Month-on-month satisfaction with Australian public services has remained stable in January '22 at 71%. Similar to trust, satisfaction with Australian public services in Jan'22 sits significantly lower than the levels recorded in Feb'21 (77% down to 71%).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

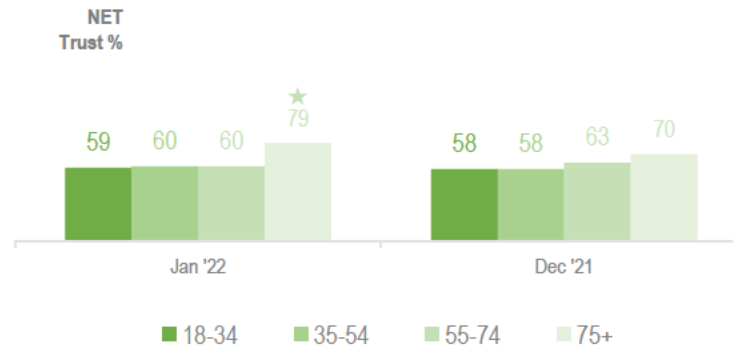


Age Statistics

Trust

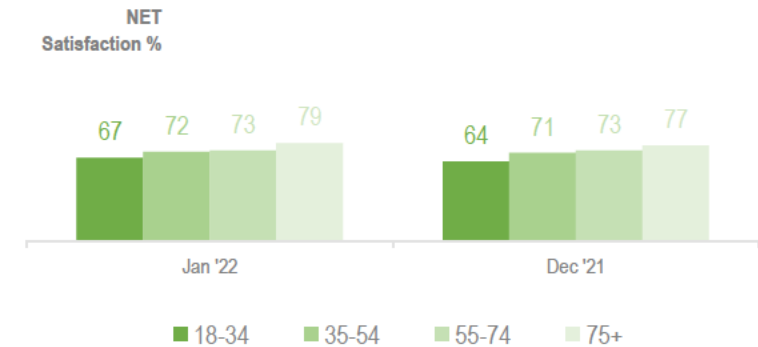
After falling non-significantly from 81% in Nov'21 to 70% in Dec'21, trust among over 75 year-olds has climbed again to 79%. With this increase, over 75s are once again significantly more likely to trust Australian public services than all other age groups – consistent with results commonly seen.

Trust is similar across other age groups and remains consistent with previous waves.



Satisfaction

Consistent with previous waves of tracking, satisfaction continues to trend upwards with age. While not significant, residents aged 75+ are notably most satisfied with Australian public services compared to younger age groups.

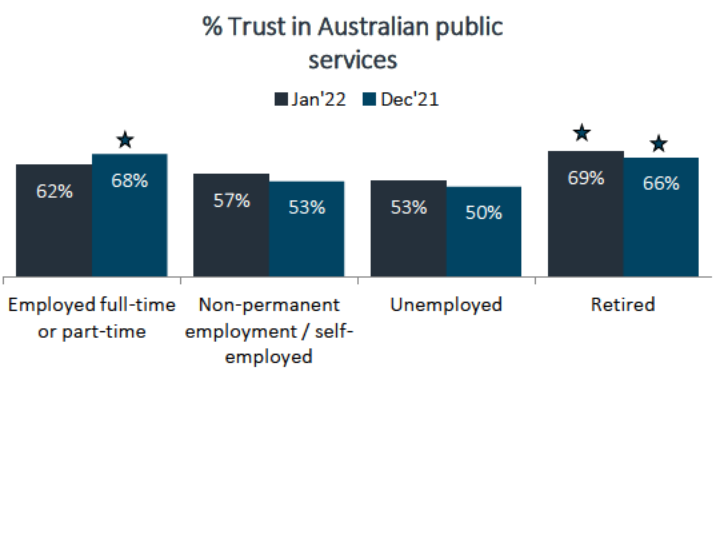


Employment Status

Trust

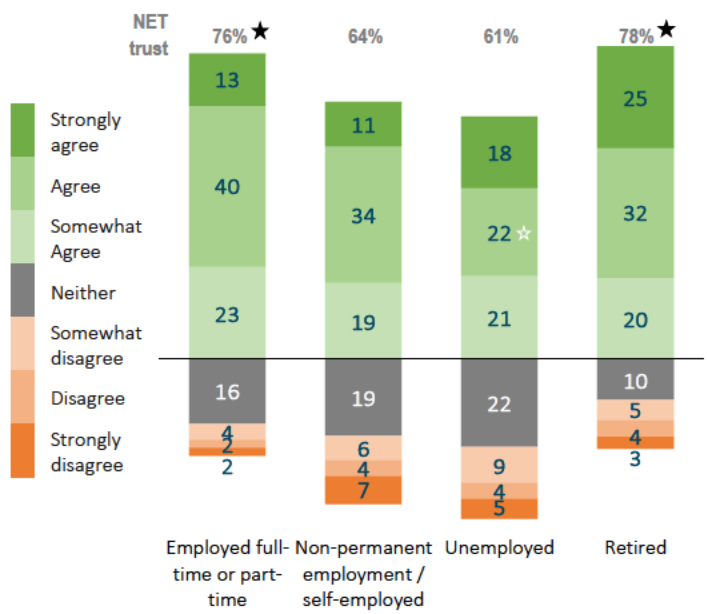
The role employment status has on trust in Australian public services has shifted slightly this wave. While retired Australians are still the most trusting, trust among permanently employed Australians has dropped slightly (non-significantly, 68% down to 62%), now on par with other types of employment.

Furthermore, distrust among permanently employed Australians has increased significantly this month (13% Dec'22, 19% Jan '22).



Satisfaction

Employment status continues to be a determinant of satisfaction with Australian public services, with retired and permanently employed residents most satisfied. Notably, while there was a slight decline in trust among permanently employed Australians from Dec'21 to Jan'22, the shift isn't reflected in satisfaction levels (77% in Dec'21, 76% in Jan'22).

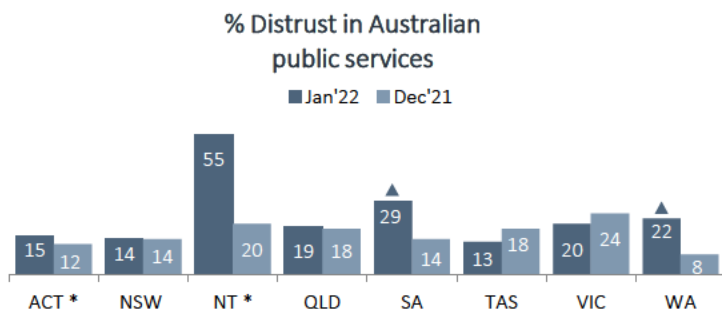
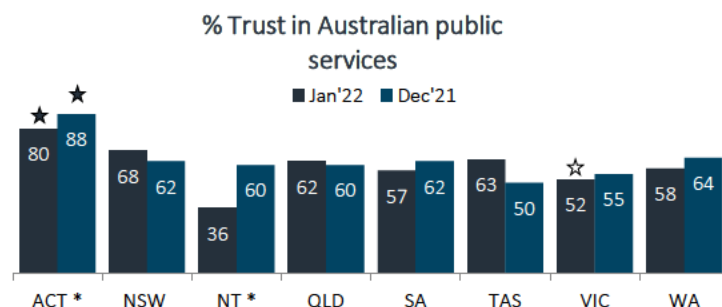


State or territory Statistics

Trust

Overall trust in Australian public services around Australia has shifted in the first month of 2022. ACT residents continue to be the most trusting despite a non-significant decrease in sentiment (88% down to 80%).

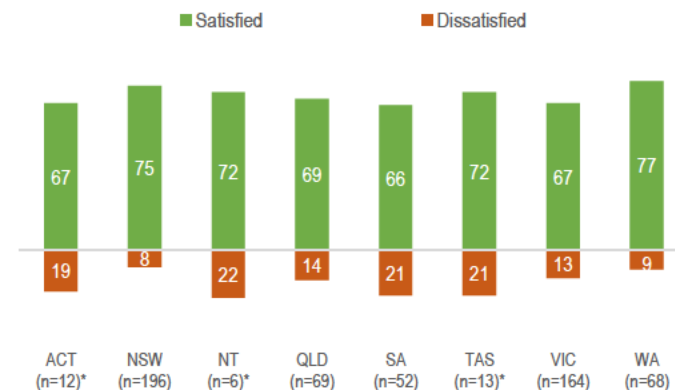
Importantly however, trust among South Australians and West Australians has taken the biggest hit. Trust has decreased by -5pts and -6pts respectively (non-significant) but distrust has increased significantly for both these states. Distrust in SA has increased from 14% to 29% and from 8% to 22% for WA.



Satisfaction

Satisfaction in Australian public services around Australia has remained relatively stable and is generally consistent across states/territories in January '22.

There are a few notable wave-on-wave shifts, although non-significant. NSW residents are slightly more satisfied in January (69% to 75%). Meanwhile, some states did decline in satisfaction including ACT (94% to 67%) and NT residents (100% to 72%), although non-significant due to smaller sample size.



**Caution low base size.*

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Insights

1

Overall trust in Australian public services stayed consistent with January '22 – trust sits at 59% and distrust at 20%. Trust is, however, significantly lower in February '22 compared to the same period in 2021 (66%).

2

Satisfaction in February has also remained stable with 74% satisfied in Australian public services and 13% dissatisfied. Satisfaction in February '22 is in line with the level of satisfaction in 2021 (77%).

3

The gender gap in trust has continued to increase over the last month, now 12pts difference between males (66%) and females (54%). Males are significantly more likely to *strongly trust* and *trust* Australian public services compared to females.

4

Individuals aged 18-34 are significantly more satisfied with Australian public services this month than they were in January '21 – increasing by 9pts (67% in Jan'22 to 76% in Feb'22). Satisfaction among all other age groups remained stable.

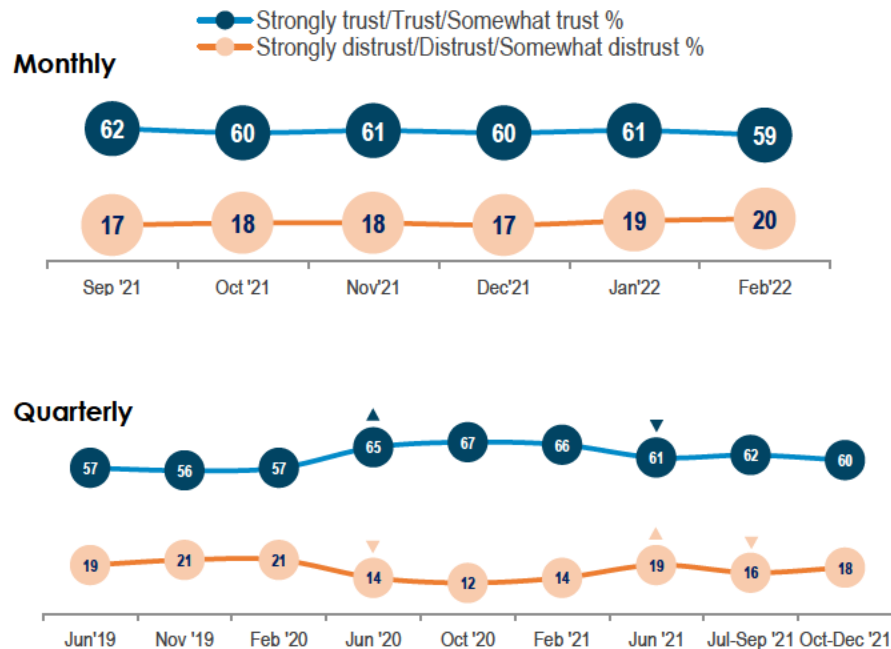
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Trust and satisfaction in Australian public services has remained stable around Australia's states and territories with no significant shifts from last month.

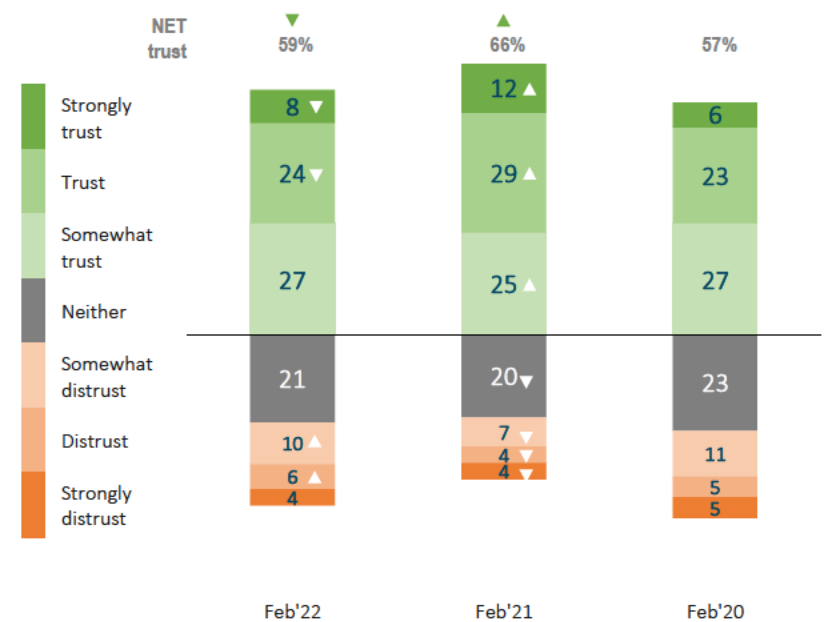
Trust in Australian public services

Overall trust in Australian public services has stayed stable in February '22 with a non-significant decrease of 2pts (61% to 59%). Distrust is also consistent this month with a non-significant increase of 1pt (19% to 20%). Notably, the level of trust is significantly lower in Feb '22 compared to Feb '21 (59% vs. 66%).

Trust in Australian Public Services (time series)



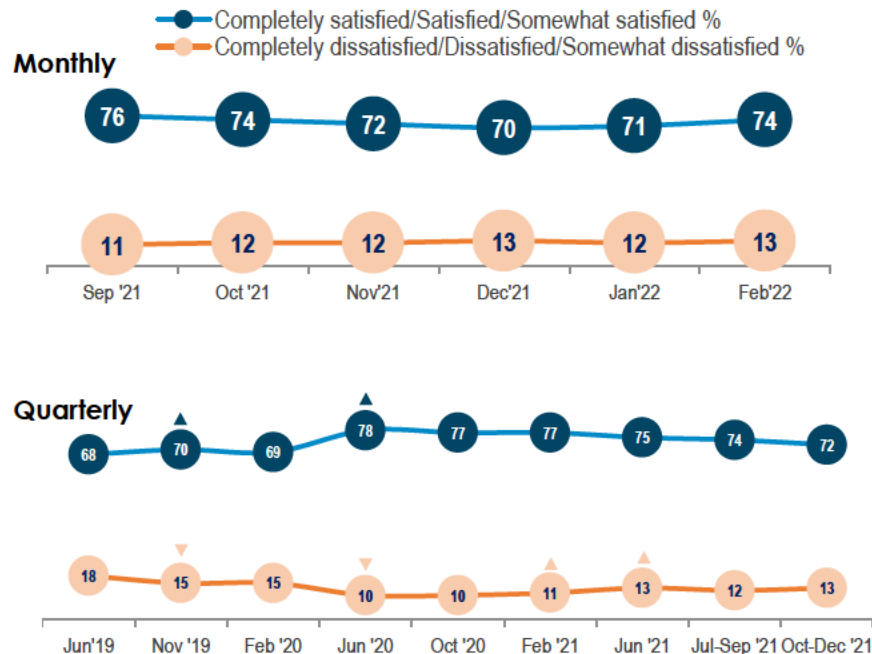
Trust in Australian Public Services (broken down - annual)



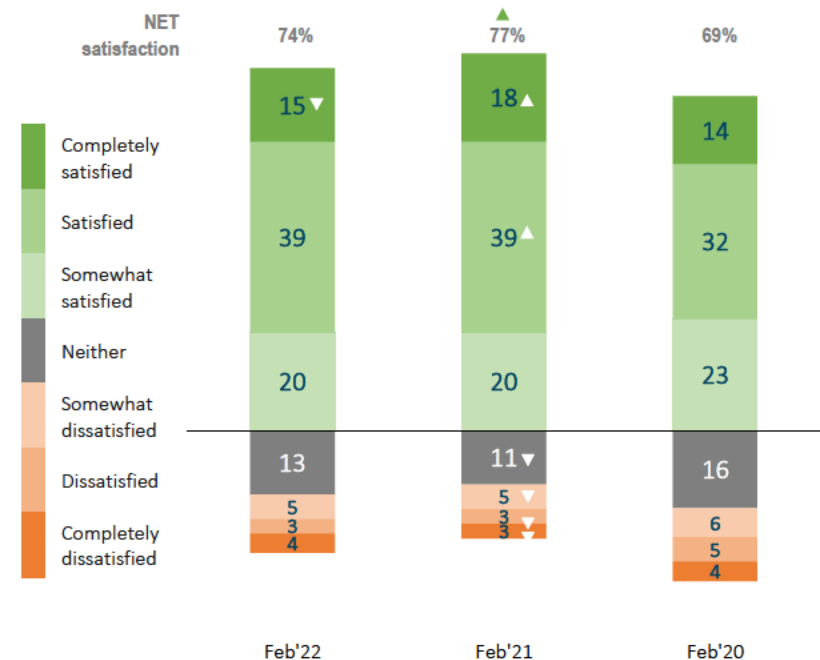
Satisfaction with public service experience

Satisfaction in Feb'22 has also remained stable with a non-significant increase of 3pts (71% to 74%). Dissatisfaction has also stayed consistent with previous months sitting at 13%. While trust was significantly lower in Feb'22 compared to 2021, the level of satisfaction year-on-year has remained fairly stable (74% vs. 77% this time last year).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

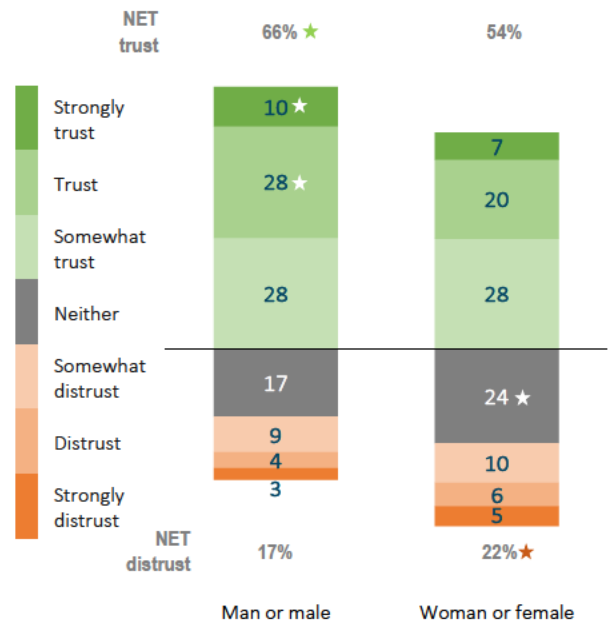


Gender

Trust

Like previous waves, gender still plays a role in determining trust in Australian public services; however, the gap in trust between genders has widened in Feb '22 to 12pts. Males are significantly more trusting of Australian public services compared to females (66% vs. 54%) and are more likely to both *strongly trust* and *trust*.

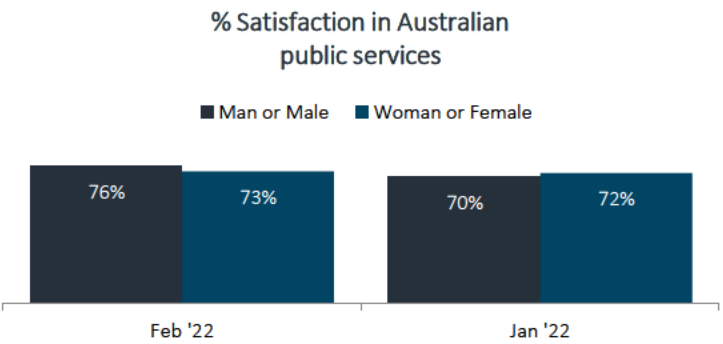
In contrast, females are significantly more likely to *distrust* Australian public services.



Satisfaction

Despite such as disparity in trust between males and females, this doesn't translate into their satisfaction with Australian public services.

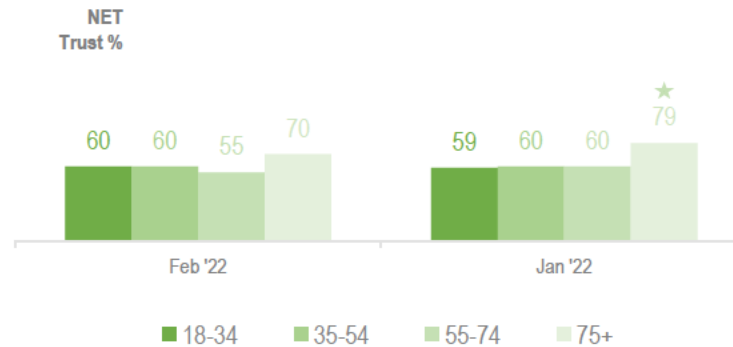
The satisfaction of Australian males has increased non-significantly in February'22 (from 70% to 76%) and they are now slightly but non-significantly more likely to be satisfied with Australian public services than females.



Age Statistics

Trust

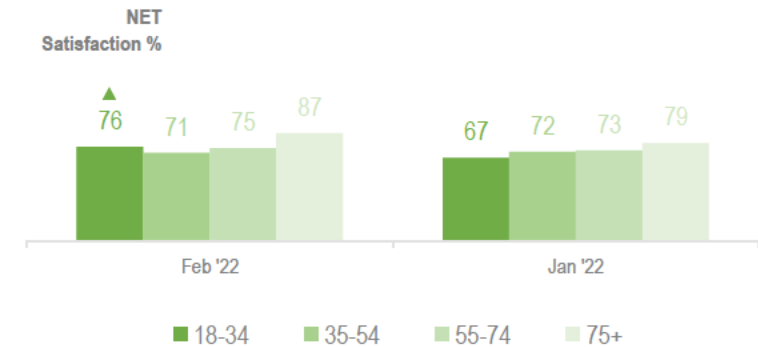
Trust in Australian public services is consistent across age groups this wave and has remained relatively stable with last month's results. Interestingly, 75+ years are no longer significantly more trusting in public services in February, after recording a non-significant decline in trust from January (70% from 79%).



Satisfaction

Interestingly, the level of satisfaction with Australian public services has shifted significantly among 18-34 year olds. This youngest age group are significantly more satisfied in February '22 than they were last month, increasing by 9pts (67% to 76%).

Satisfaction among all other age groups have remained consistent with previous waves.

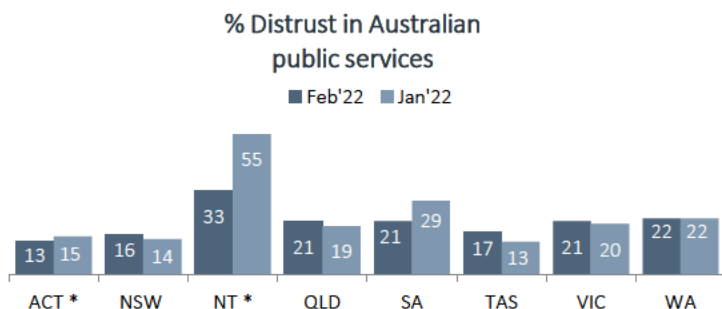
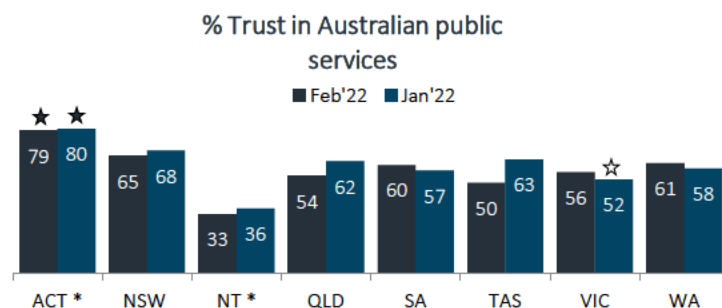


State or territory Statistics

Trust

Trust in Australian public services across Australia has remained consistent with January'22 results. Consistent with previous waves, the level of trust from ACT residents is significantly higher compared to those from other states or territories.

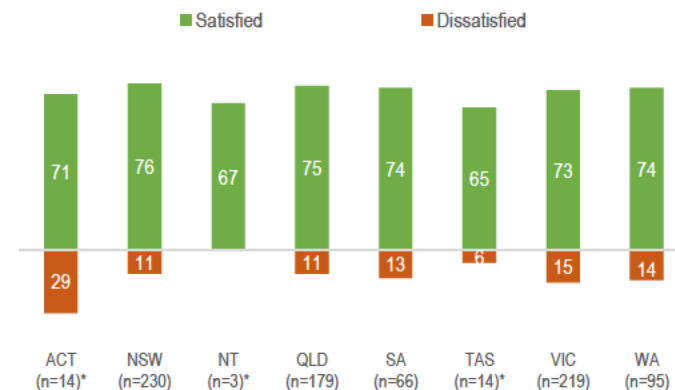
Distrust in Australian public services has also remained stable across states and territories with no significant changes since last month.



Satisfaction

Like trust, satisfaction with Australian public services has remained generally stable and consistent across the country this month.

Although non-significant, there are some states that have improved slightly in satisfaction since January'22, including QLD (69% to 75%), SA (66% to 74%) and Victorian residents (67% to 73%). Meanwhile, other states did decline non-significantly in satisfaction including WA (77% to 74%) and TAS (72% to 65%).



**Caution low base size.*

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Australian Government

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March 2022

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Insights

1

Trust in public services has remained stable in March '22. Trust has increased slightly (non-significantly) from 59% last month to 61% this month. Distrust has also remained stable, declining non-significantly by 2pts (20% to 18%).

2

Overall satisfaction in Australian public services has stayed stable in March '22 and currently sits at 73% satisfaction and 12% dissatisfaction. Consistent with previous waves, the levels of satisfaction in Mar'22 (73%) are significantly lower than the ratings experienced in Feb '21 (77%).

3

Unlike previous waves, there was no clear gender gap in trust in March '22. The difference in trust between males and females decreased from 12pts to 5pts in March. This is driven by a 3pt decrease in trust by males and a 4pt increase in trust by females (both non-significant).

4

Trust and satisfaction among different age groups remained in line with previous waves. Consistent with recent waves, the overall level of trust and satisfaction continues to be slightly (non-significantly) higher for those aged 75+ compared to any other age group.

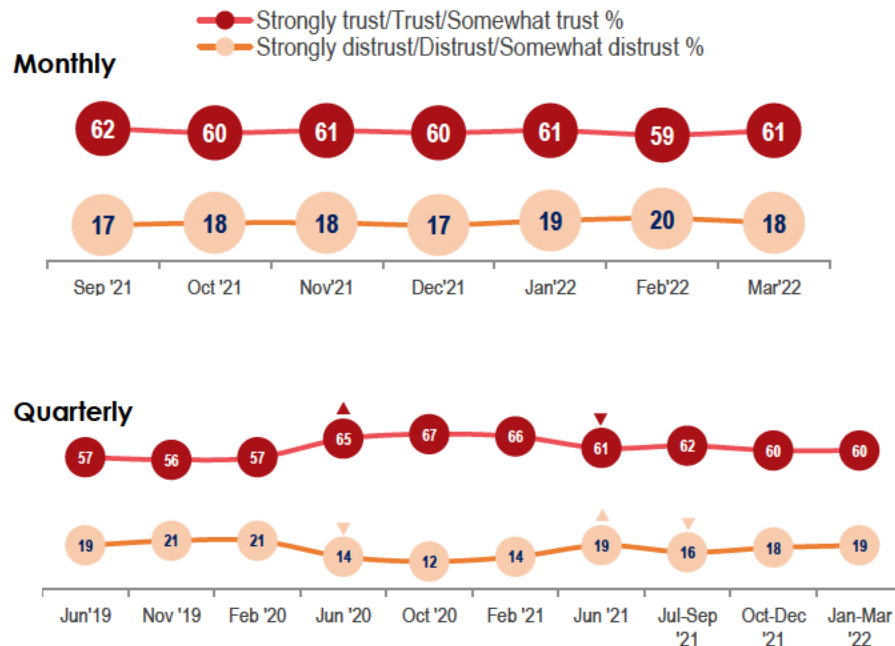
5

The levels of trust and satisfaction in Australian public services remains stable across Australia. No notable shifts have been noted this wave around Australia's states and territories.

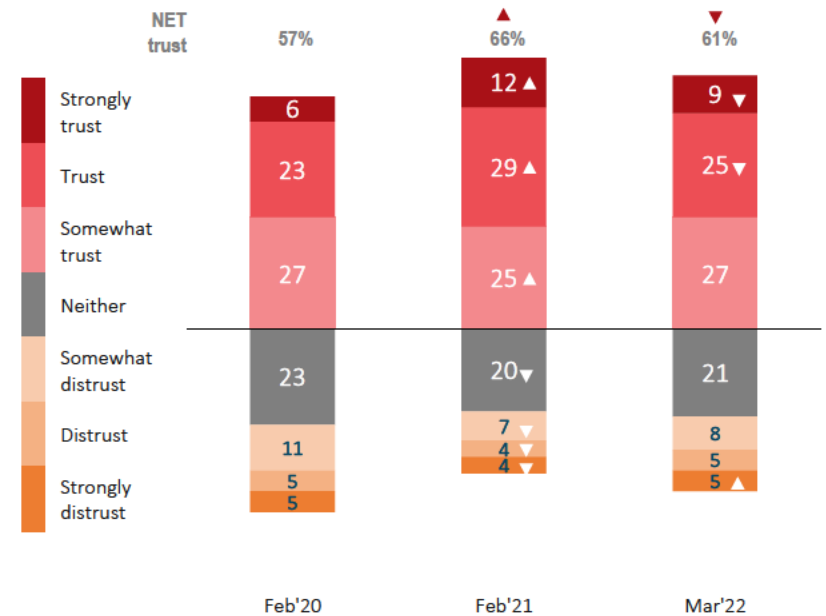
Trust in Australian public services

Trust in Australian public services has remained stable for another wave with a non-significant increase of 2pts (59% to 61%). Similarly, distrust among Australians has decreased non-significantly by 2pts (20% to 18%). Consistent with recent waves, trust in Mar'22 is significantly lower compared to the levels in Feb'21 (66% vs. 61%).

Trust in Australian Public Services (time series)



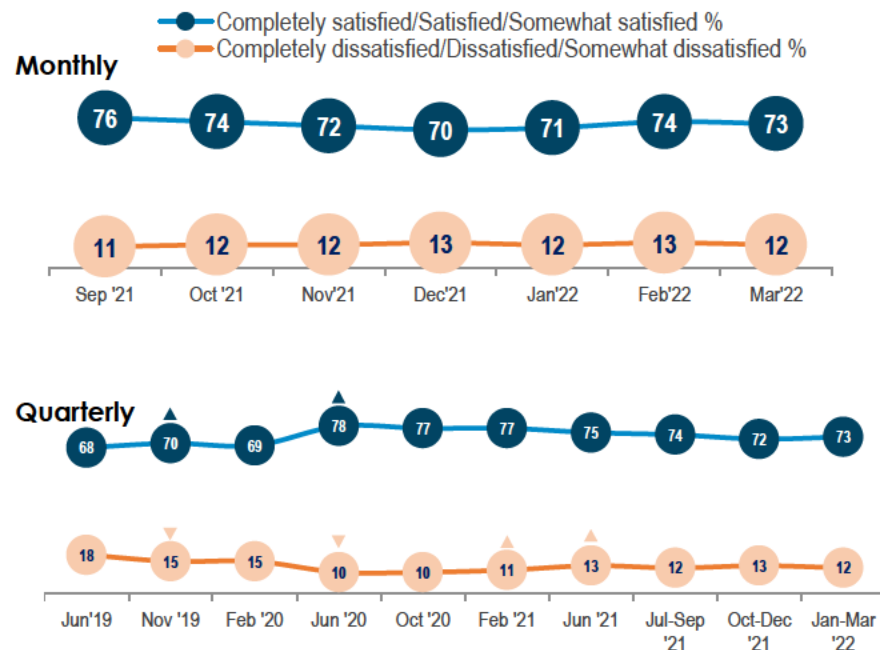
Trust in Australian Public Services (broken down - annual)



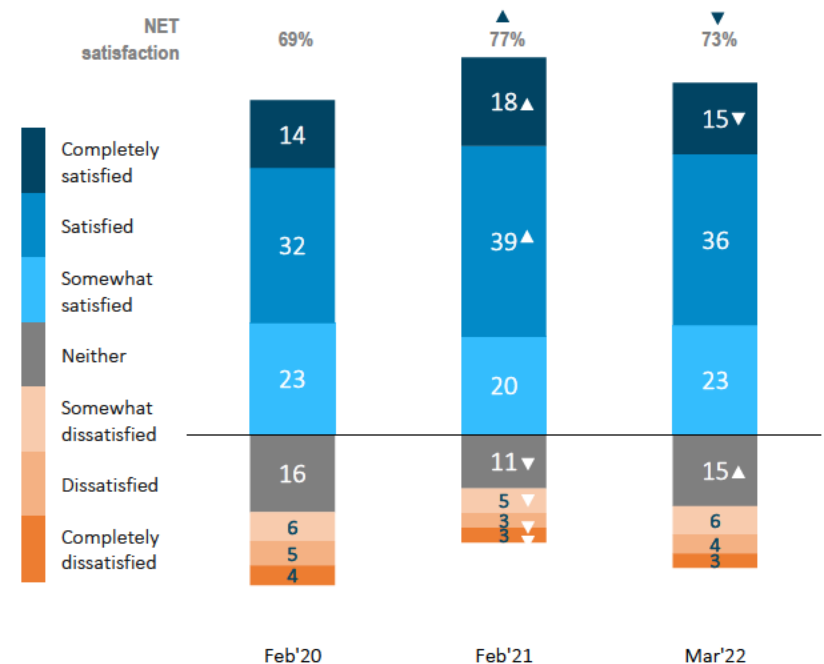
Satisfaction with public service experience

Overall satisfaction with Australian public services is in line with recent waves of tracking. A non-significant decrease of 1pt was experienced in Mar'22 (74% to 73%) in addition to a 1pt decrease in dissatisfaction compared to last wave (13% to 12%). Similar to trust, the levels of satisfaction in Mar'22 is significantly lower than the satisfaction ratings a year prior in Feb'21 (77% vs. 73% now).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

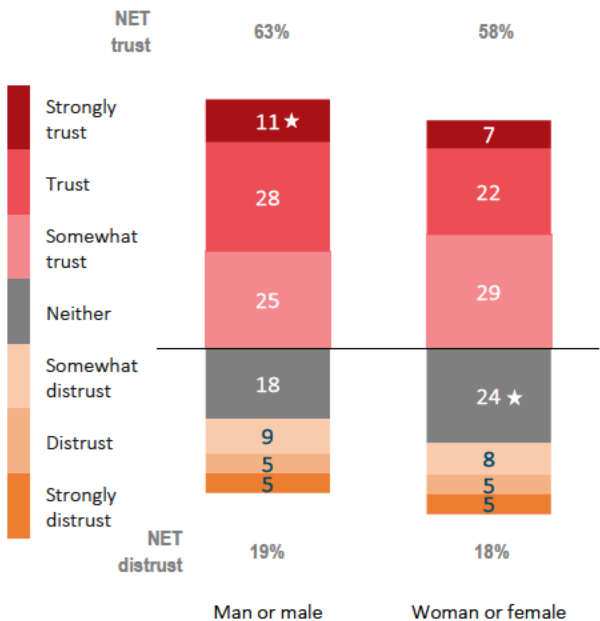


Gender

Trust

A shift in trust has occurred in March among men and women. While there is a slight (non-significant) difference between men and women this wave, the gap between genders has decreased from 12pts in February to 5pts in March. This comes as a result of a minor decline in trust among males (66% Feb'22 to 63% Mar'22), and a slight jump in trust among females (54% Feb'22 to 58% Mar'22)

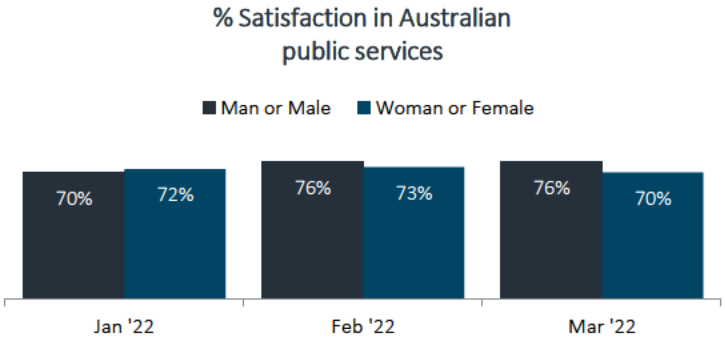
Additionally, distrust among males and females is consistent in March.



Satisfaction

Satisfaction with Australian public services among males and females remained stable. However, males are slightly (non-significantly) more satisfied in public services compared to females (76% vs. 70%).

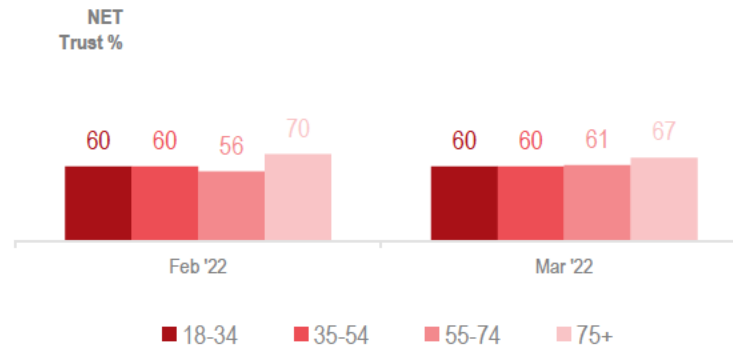
Although minor and not statistically significantly, satisfaction in public services has decreased slightly for females in March (73% Feb'22 to 70% Mar'22).



Age Statistics

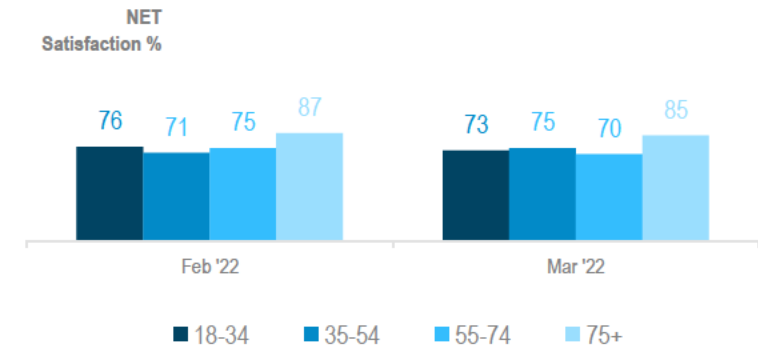
Trust

Consistent with Feb'22, trust in public services is consistent across all groups this month. Overall, roughly three in five Australians in each age group place trust in Australian public services. Those aged 75+ are slightly (although non-significantly) more trusting (67%) compared to their counterparts, as was the case last month.



Satisfaction

Overall satisfaction among Australians across all age groups has remained stable in Mar'22. Roughly three quarters are satisfied with public services while individuals aged 75+ are slightly (non-significantly) more satisfied compared to others.

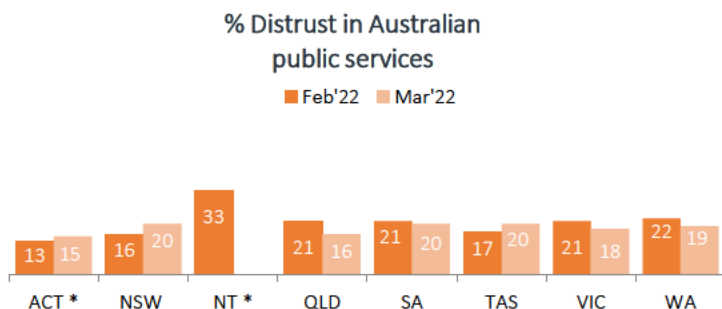
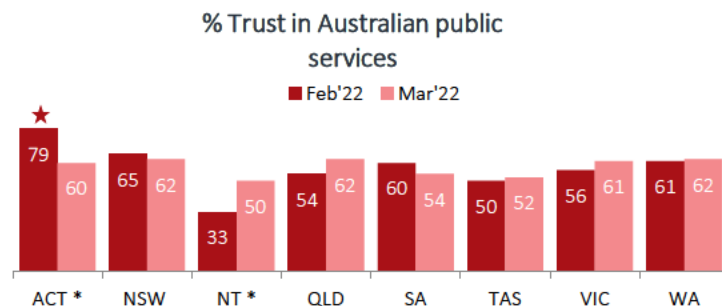


State or territory Statistics

Trust

Positively, trust and distrust has remained mostly stable across Australian states and territories. Notably, while ACT residents had held the significantly higher levels of trust in the past, this was not the case in this month after a non-significant decrease from 79% to 60%.

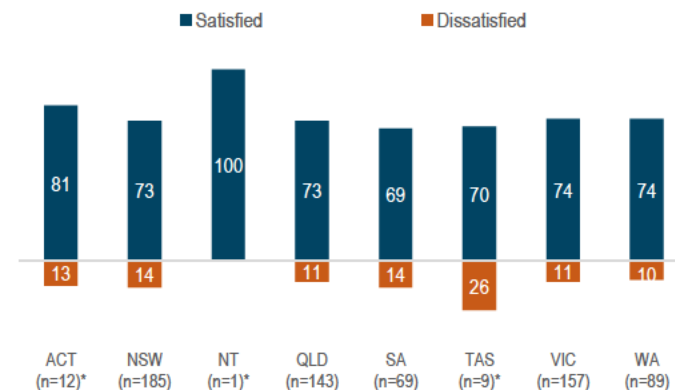
Distrust has also remained stable this wave with no significant shifts since last month.



Satisfaction

Similar with trust, the overall satisfaction with Australian public services has stayed stable across the nation. No significant shifts were noted wave-on-wave.

ACT and NT residents are slightly more satisfied with public services compared to other Australians – however, this should be taken with caution due to small sample sizes.



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April 2022

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Insights

1

Trust in Australian public services has remained stable in April '22. Trust sits at 61% while distrust has dropped non-significantly by 1pt from 18% to 17%.

2

Satisfaction with public services in April '22 has stayed stable and currently sits at 72% (a 1pt decrease from last wave) while dissatisfaction has remained stable at 12%.

3

Men are significantly more trusting in Australian public services in April '22 compared to women (66% vs. 57%). The gender difference in trust has increased to 9% this month and is now significant.

4

Individuals aged 75+ are significantly more trusting in Australian public services in April '22 after a slight increase (non-significant) from 67% to 75% trust. Interestingly, satisfaction with public services has decreased slightly (non-significant) among 75+ year olds from 85% to 78% satisfaction.

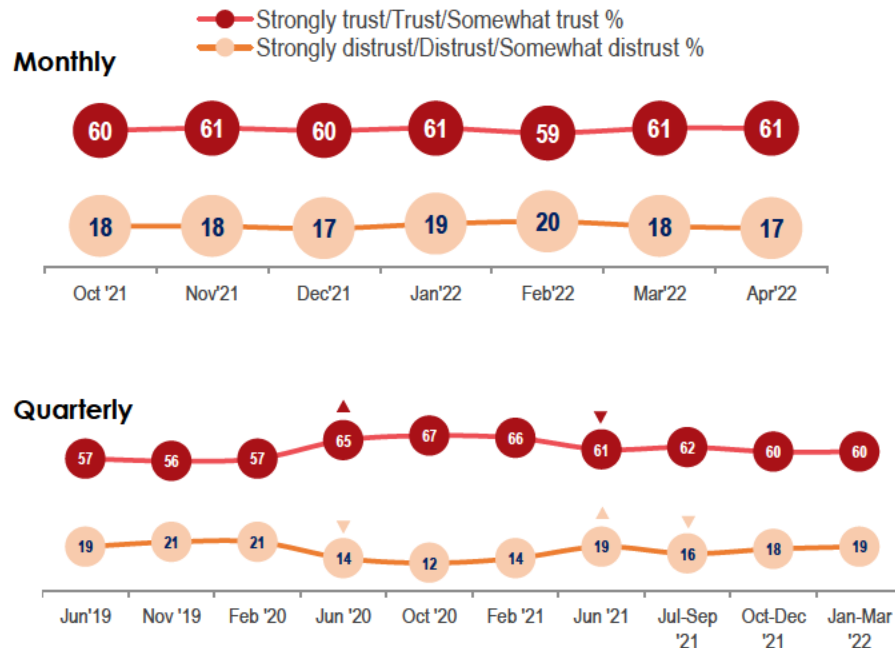
5

The levels of trust and satisfaction with Australian public services has stayed generally stable across Australia. Although non-significant, ACT, TAS and WA residents are slightly more satisfied compared to last month, while NSW and SA residents are slightly less satisfied.

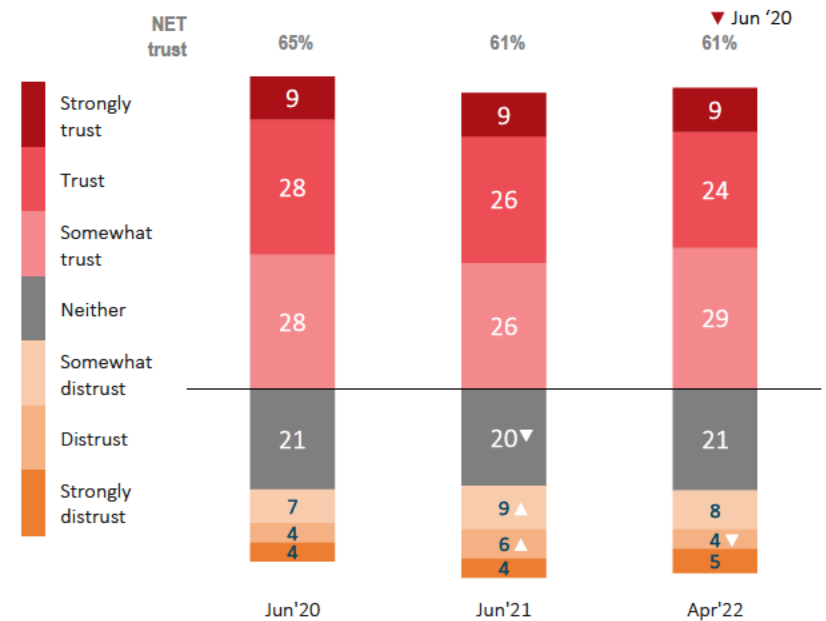
Trust in Australian public services

Overall trust in Australian public services is stable at 61% while distrust has decreased non-significantly by 1pt (18% to 17%). Trust in April '22 is consistent with the trust levels from June 2021 and significantly lower compared to Jun'20 (61% Apr'22 vs. 65% Jun'20).

Trust in Australian Public Services (time series)



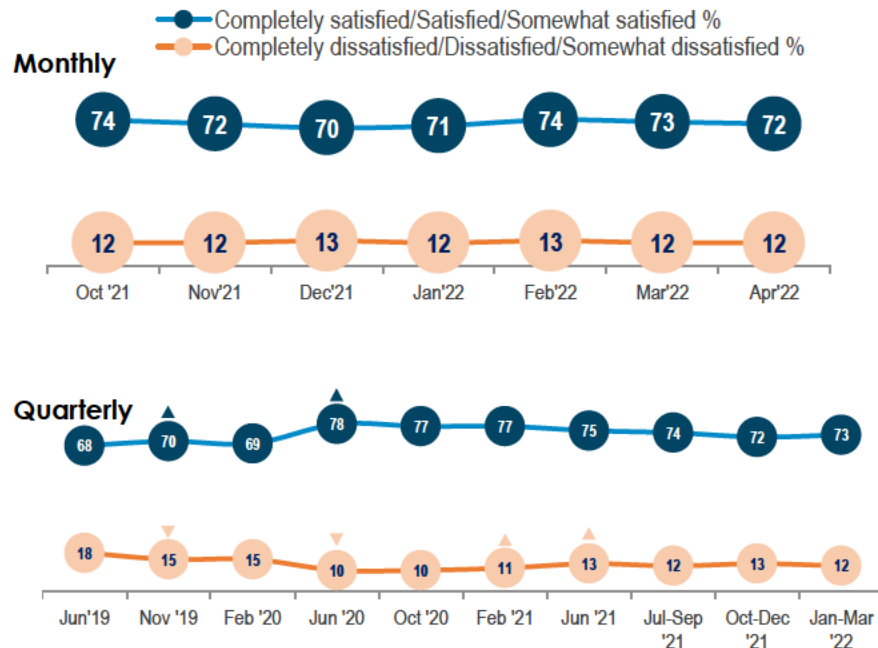
Trust in Australian Public Services (broken down - annual)



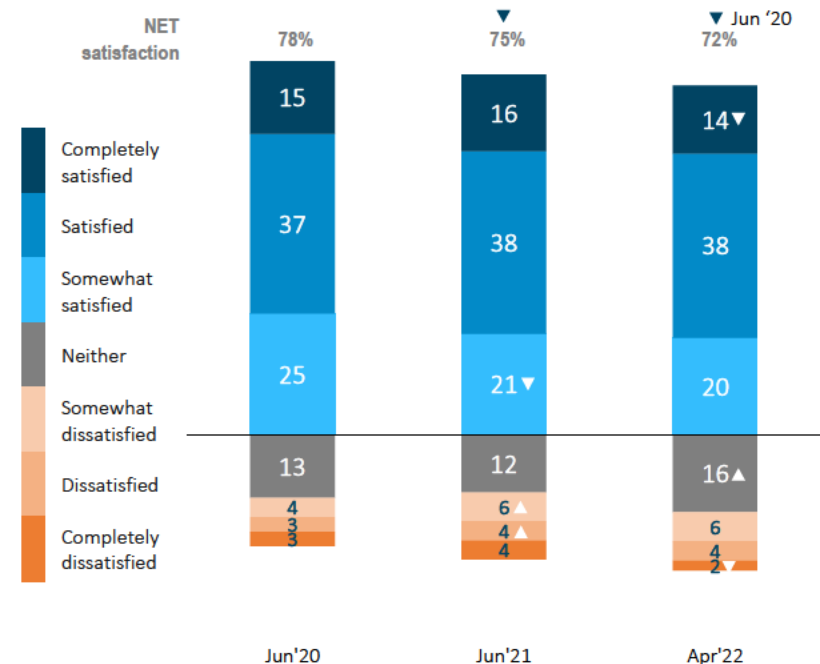
Satisfaction with public service experience

Like trust, overall satisfaction with Australian public services in April '22 is consistent with last wave. A non-significant decrease of 1pt was experienced this wave (73% to 72%) while dissatisfaction remains stable at 12%. Satisfaction in Apr'22 is slightly (non-significant) lower compared to Jun'21 (75% vs. 72% now) and significantly lower compared to Jun'20 (78%).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)



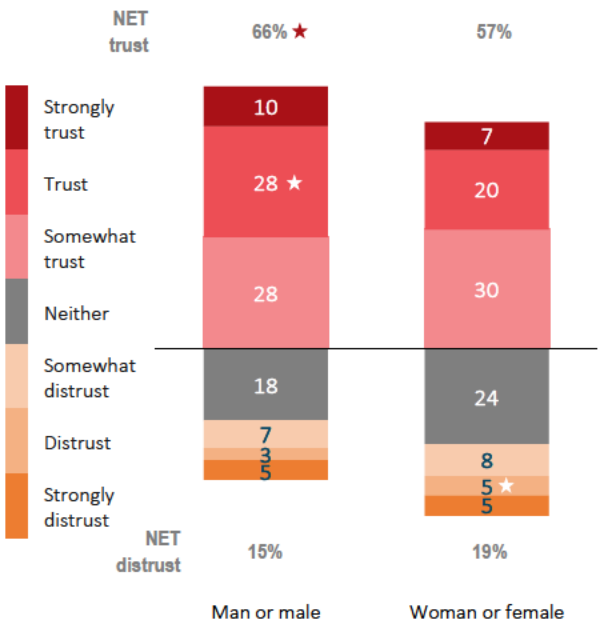
Gender

Trust

Men are significantly more trusting in Australian public services in April '22 compared to women (66% vs. 57%). This increases the gender gap in trust to 9pts after it decreased to a 5pt difference in March.

This shift was driven by a non-significant increase in trust among men (64% to 66%). Meanwhile, trust by women decreased non-significantly by 1pt (58% to 57%).

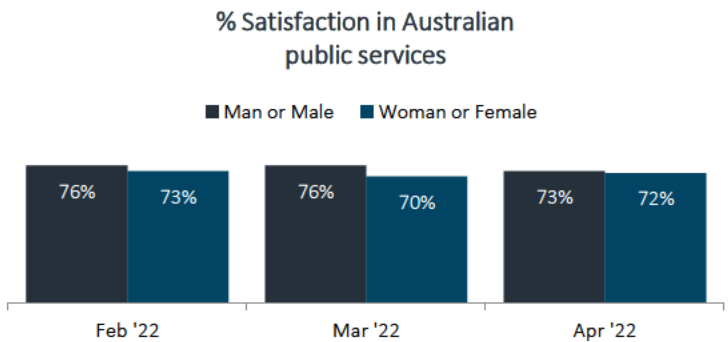
Positively, distrust in public services has also decreased in April from 19% to 15%, although non-significant.



Satisfaction

A similar proportion of men and women are satisfied with Australian public services in April '22 (73% men vs. 72% women). Notably, satisfaction has decreased (non-significantly) from 76% to 73% for men, while satisfaction has increased slightly for women (70% to 72%).

The 6pt difference in satisfaction established in March among men and women was not carried across into April.

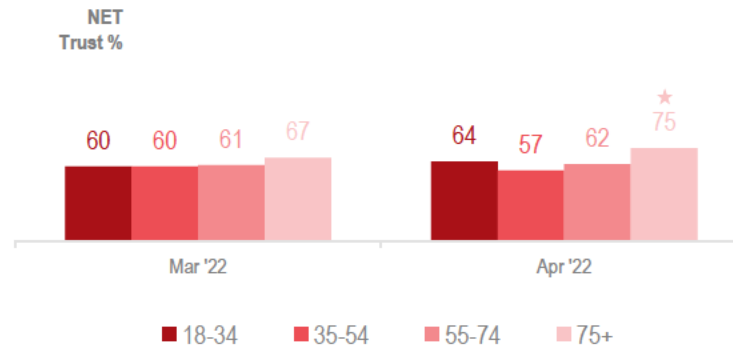


Age Statistics

Trust

Individuals aged 75+ are significantly more trusting in Australian public services compared to their counterparts. Notably, trust among this age group has increased (non-significantly) this month from 67% to 75%.

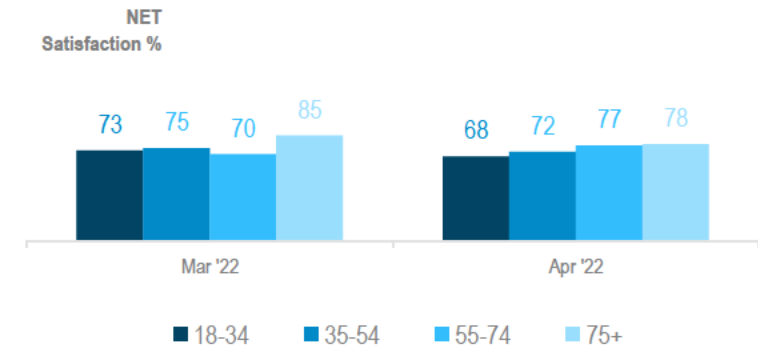
Meanwhile, trust among all other age groups has remained stable.



Satisfaction

Satisfaction across age groups has shifted slightly but non-significantly in April. Interestingly, satisfaction is slightly lower among 75+ year olds this month (85% to 78%), but slightly higher among 55-74 year olds (70% to 77%).

Younger Australians (18-54) are slightly less satisfied in April compared to March.

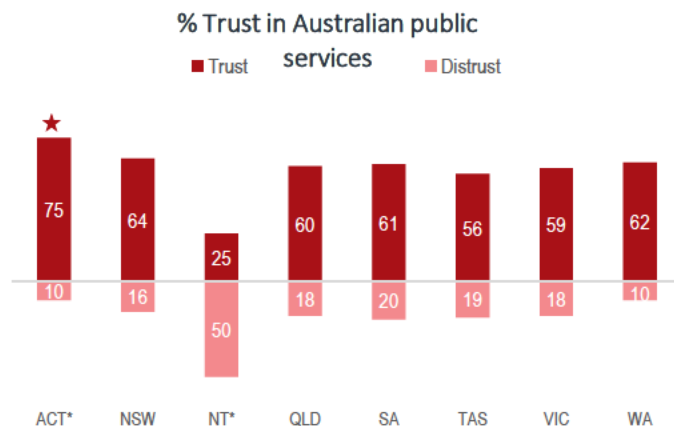


State or territory Statistics

Trust

Trust in Australian public services across Australia has also stayed relatively stable. ACT residents are significantly more trusting in public services this wave, increasing from 60% to 75% (non-significant change from Mar'22).

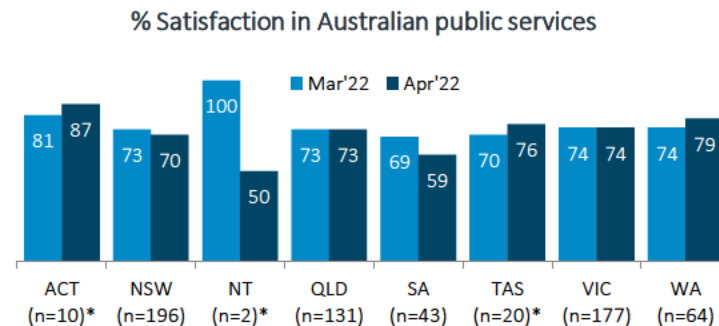
Distrust has also remained fairly stable across all states and territories in April with no significant shifts.



Satisfaction

Although non-significant, satisfaction has increased slightly among ACT, TAS and WA residents while NSW and SA residents are less satisfied with Australian public services in April compared to March.

Despite these small shifts, the satisfaction ratings across Australia are fairly consistent between all the states and territories.



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May 2022

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Insights

1

Trust in Australian public services sits stable for another wave but has dipped (non-significantly) to 59% this month - the second time in 2022 trust has dropped below 60%.

2

Almost three in four (74%) Australians feel satisfied with Australian public services. Despite being stable and in line with satisfaction in 2021, it is significantly lower compared to Jun'20 (78%).

3

Men are still more trusting than women, and the gap between genders in trust has increased for two consecutive waves since March 2021 and now sits at 11pts difference (9pts in Apr'22 and 5pts in Mar'22).

4

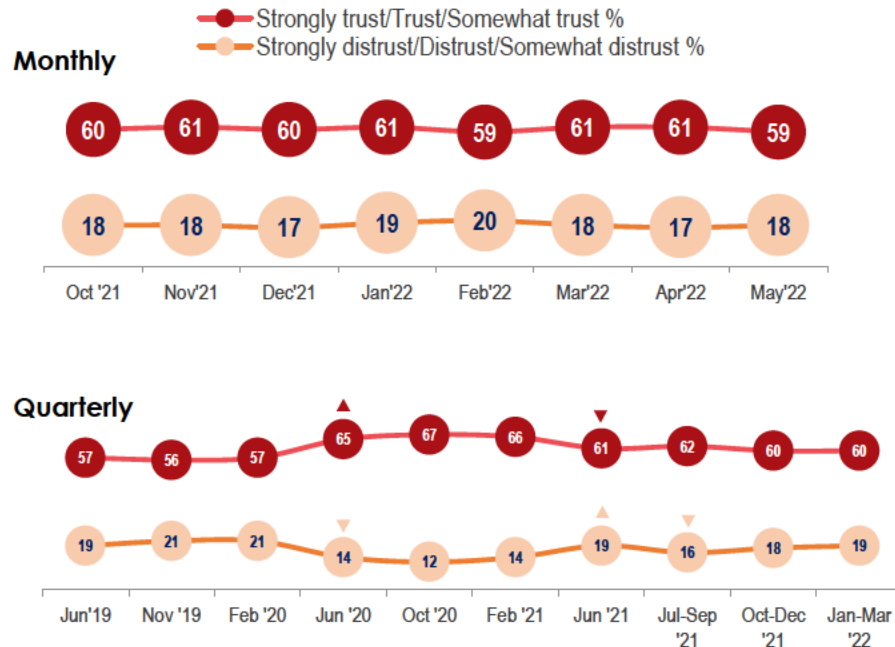
Satisfaction among 75+ year old Australians has decreased considerably this wave (although not statistically significant). Importantly, this age group has shifted from being the most satisfied last month to the least satisfied.

Trust in Australian public services

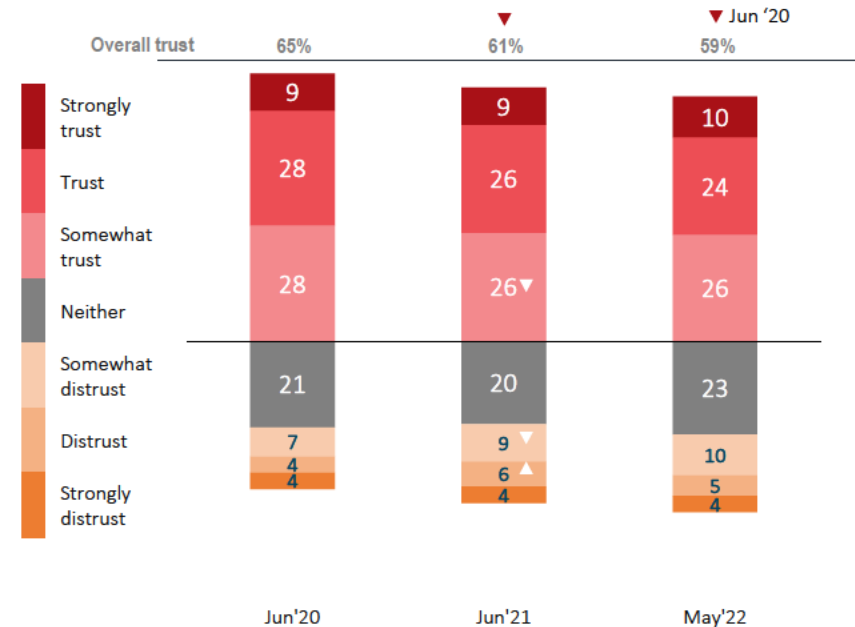
Trust in Australian public services sits at roughly three in five (59%). Although not a significant shift, trust in public services has dropped below 60% for the second time this year.

Overall trust has remained stable compared to a year ago, and significantly lower compared to 2020 (61% in Jun'21: 65% in Jun'20).

Trust in Australian Public Services (time series)



Trust in Australian Public Services (broken down - annual)

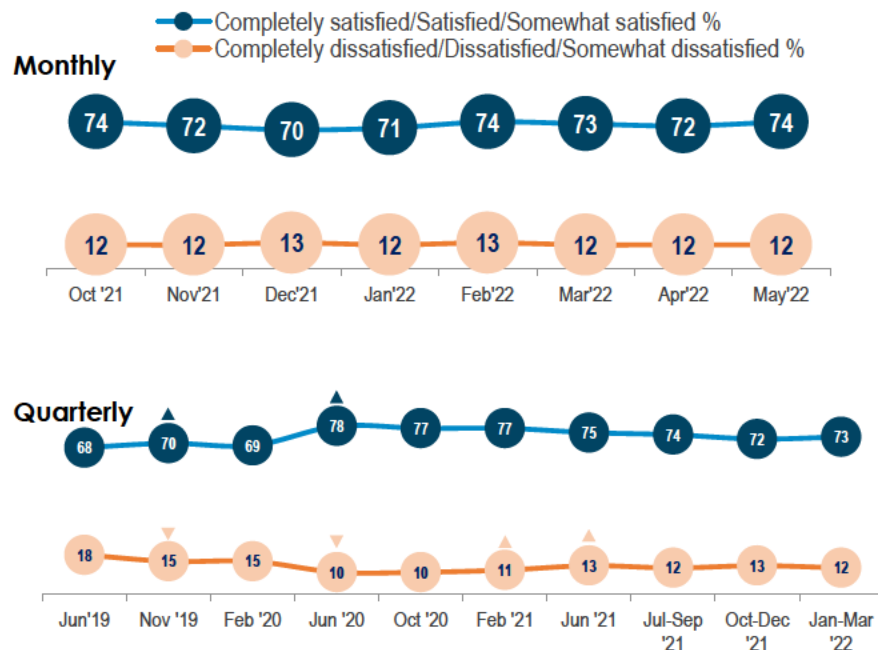


Satisfaction with public service experience

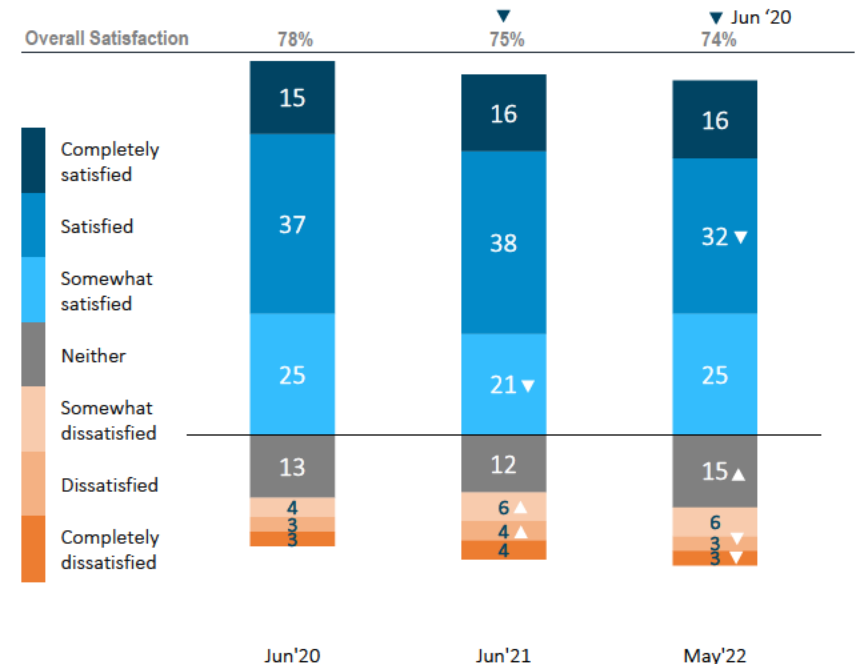
Positively, satisfaction with public services has remained high and stable for another month with roughly three quarters (74%) satisfied with their experience.

The satisfaction levels are consistent when compared with last year (75%), but like trust are significantly lower compared to 2020 (78%).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)



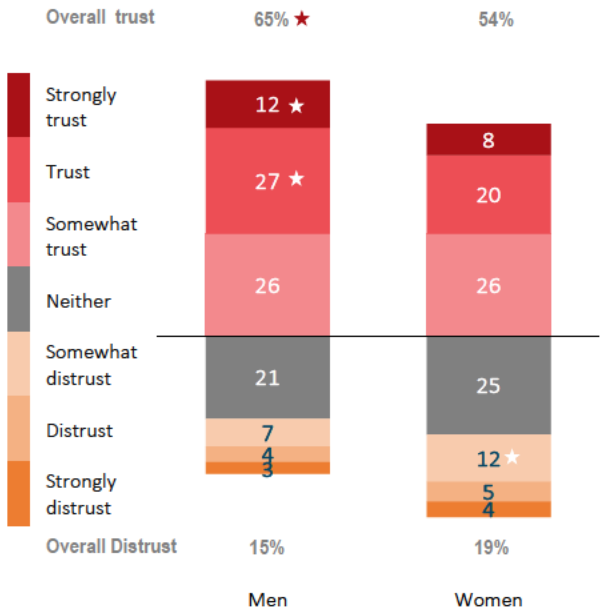
Gender

Trust

Consistent with April '22, men are significantly more trusting of Australian public services compared to women (65% vs. 54%). The trust gap between genders has increased for two consecutive waves, up from +9pts in April and +5pts in March.

This shift is driven by a non-significant decrease in trust among women (from 57% to 54%), while trust in men has dipped by 1pt from 66% to 65%.

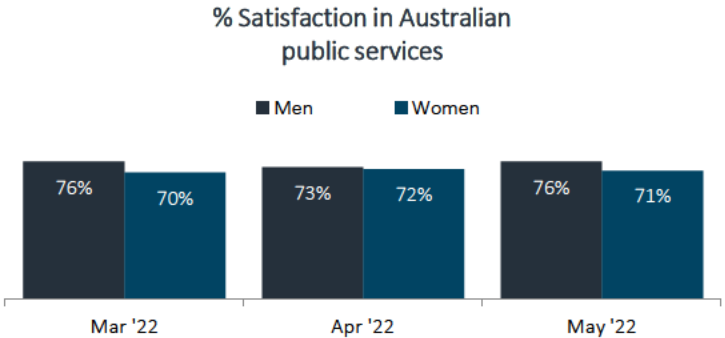
Notably, distrust is also significantly higher among women compared to men (21% vs. 15%).



Satisfaction

Satisfaction with Australian public services has shifted slightly this wave among genders. Slightly more men are satisfied in May (73% April to 76% May), while satisfaction among women has decreased by 1pt (72% to 71%). Neither are significant.

The gender difference in satisfaction has increased to 5pts this month (from 1pt in Apr'22).



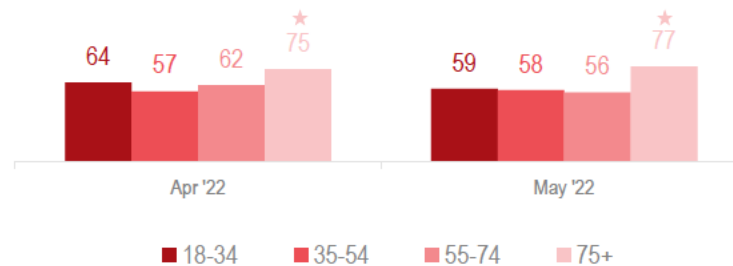
Age Statistics

Trust

Trust across age groups has shifted slightly since April '22. Specifically, 18-34 and 55-74 year olds are both less trusting of Australian public services this month (not statistically significant), while individuals aged 75+ are slightly more trusting (up 2pts from last wave).

In line with last wave, Australians aged 75+ are significantly more trusting of Australian public services compared to all other age groups. Further, this age groups is significantly less distrusting compared to their counterparts.

Overall Trust %



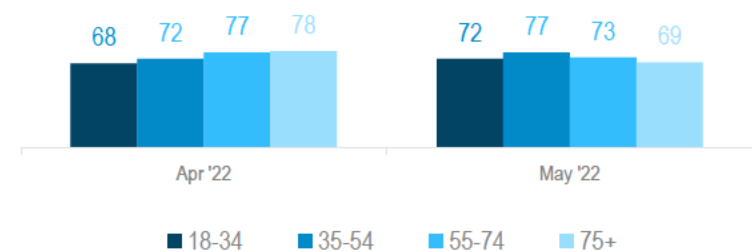
Satisfaction

Satisfaction with Australian public services have shifted notably over the past month across all age groups (although no changes were significant).

Australians aged 18-54 are slightly more satisfied with public services in May, while individuals aged 55+ are slightly less satisfied.

Notably, Australians aged 75+ had the largest shift and are now the least satisfied age group.

Overall Satisfaction %

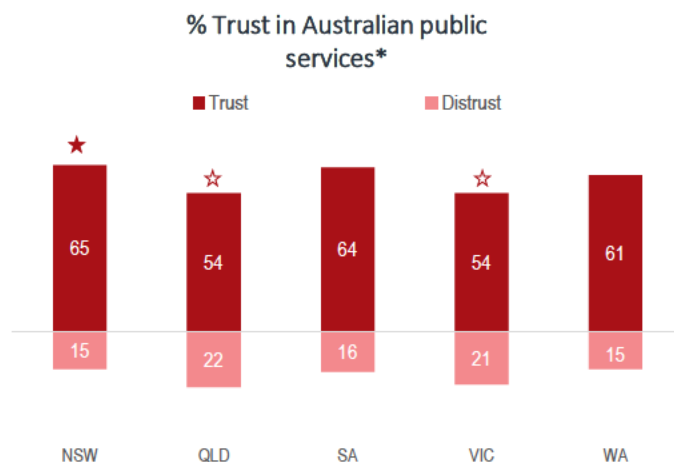


State or territory Statistics

Trust

Trust in public services has shifted slightly across Australian states and territories. Of note, although not statistically significant, trust among QLD and VIC residents has decreased this wave (-5pts and -6pts respectively).

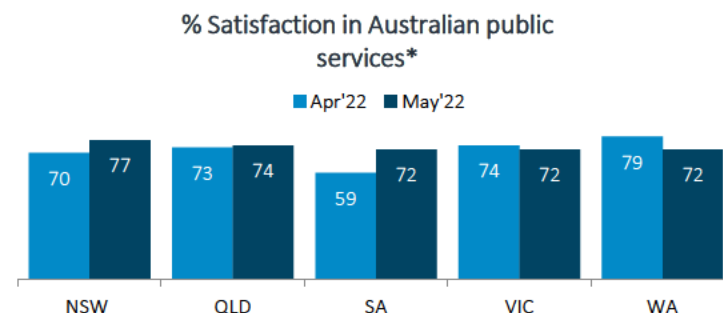
NSW residents show the highest level of trust around the nation (65%), significantly higher than QLD (54%) and VIC residents (54%).



Satisfaction

SA and NSW residents are more satisfied with Australian public services in May '22 (although non-significant).

In contrast, WA residents are slightly less satisfied with public services this month (79% to 72%, also non-significant). Satisfaction across all other states and territories has remained stable.



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Jun 2022

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Insights

1

Trust in Australian public services increased slightly this wave (by 2pts) and now sits at 61%. Despite the increase in trust, the level of distrust in public services also increased slightly this month, from 18% to 21%.

2

Satisfaction with public services has remained stable at 73%. Notably, the average satisfaction level for the quarter (Apr-Jun '22) is consistent with the first quarter ratings (73%).

3

Like previous waves, we see some clear differences in trust and satisfaction across gender and age. Specifically, men are more trusting and satisfied with Australian public services, as are older Australians – particularly those aged 75+.

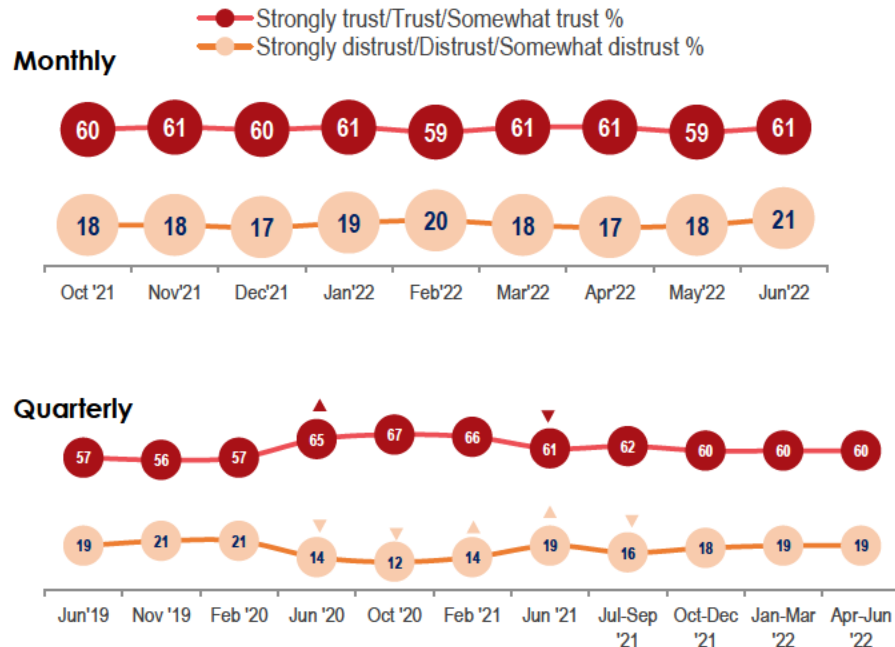
4

Individuals that are full-time employed or retired are significantly more trusting and satisfied with Australian public services compared to those that are unemployed.

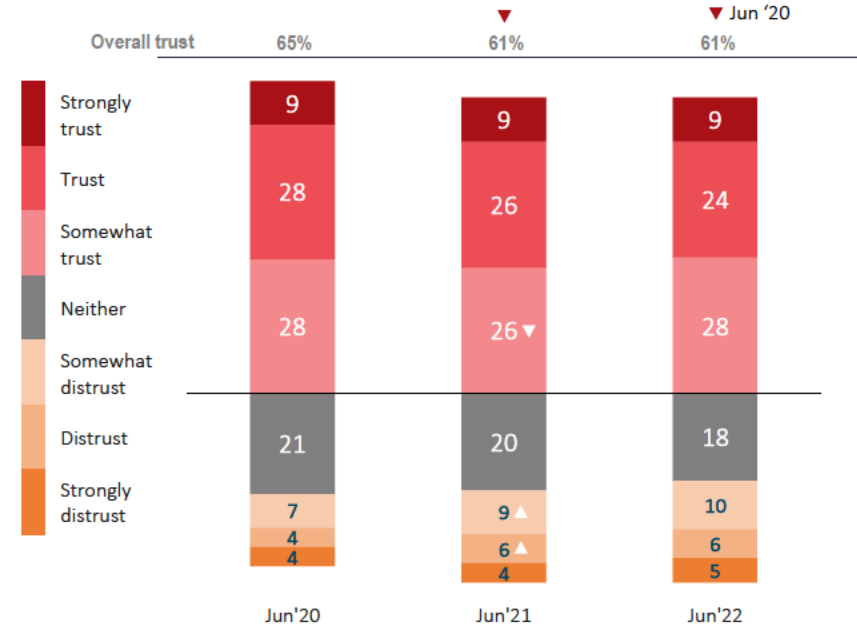
Trust in Australian public services

Overall, Trust has increased slightly (non-significantly) in June'22 from 59% up to 61%. Distrust in Australian public services also increased slightly from 18% up to 21% this wave. Interestingly, the average level of trust in the Apr-Jun '22 quarter is in line with the Jan-Mar '22 quarter (60%).

Trust in Australian Public Services (time series)



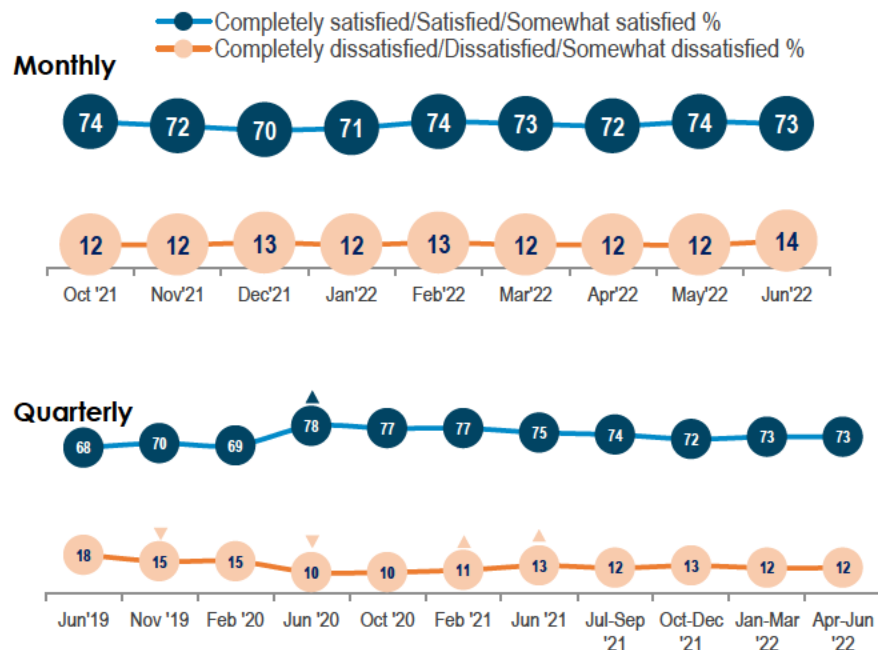
Trust in Australian Public Services (broken down - annual)



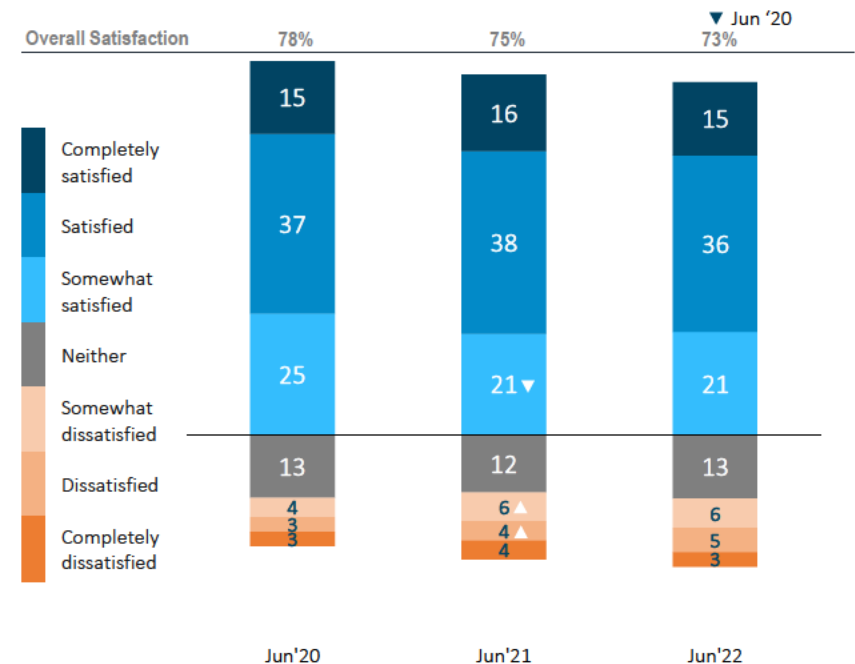
Satisfaction with public service experience

Satisfaction with Australian public services has remained stable at 73%, a 1pt decrease from May'22 (74%). Similar to trust, satisfaction with public services this quarter is in line with the levels in Jan-Mar '22 (73%). Notably, satisfaction in the June'22 Quarter (73%) are significantly lower compared to June'20 (78%).

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

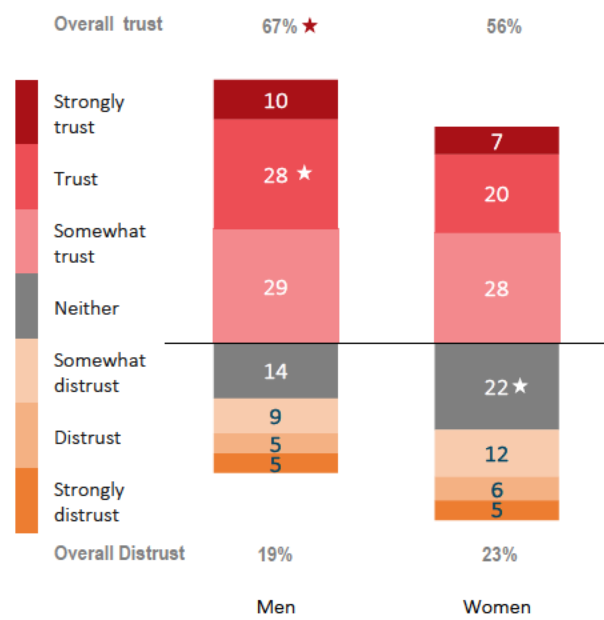


Gender

Trust

Trust in both men and women have increased slightly by +2pts this wave (non-significant). Evidently, the trust gap between genders is still apparent and sits at 11pts this wave.

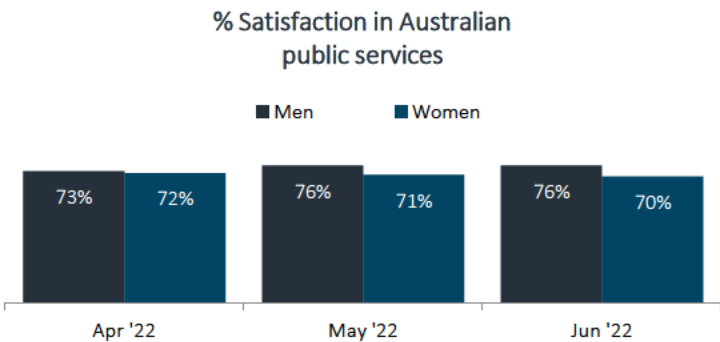
Interestingly, while trust increased across both genders; the increase in distrust this wave is particularly driven by men (increasing from 15% to 19%), although non-significant.



Satisfaction

The satisfaction levels of men and women have remained stable in June, with 76% men and 70% women feeling satisfied with public services.

The gender gap for satisfaction has increased to 6pts (5pts in May '22).



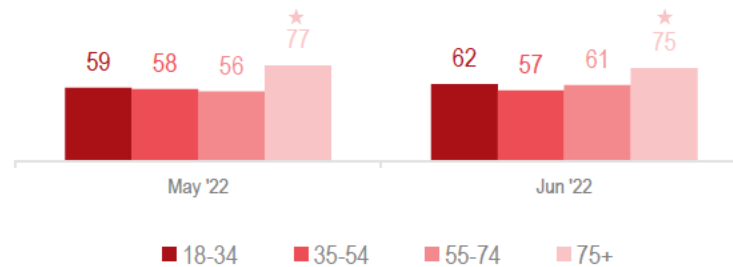
Age Statistics

Trust

Trust across age groups have remained mostly stable with a few slight non-significant shifts. 18-34 and 55-74 year olds are both slightly more trusting of public services this month, whereas 35-54 and 75+ year olds are slightly less trusting.

Consistent with previous waves, Australians aged 75+ feel most trusting of Australian public services – significantly higher than their counterparts.

Overall Trust %

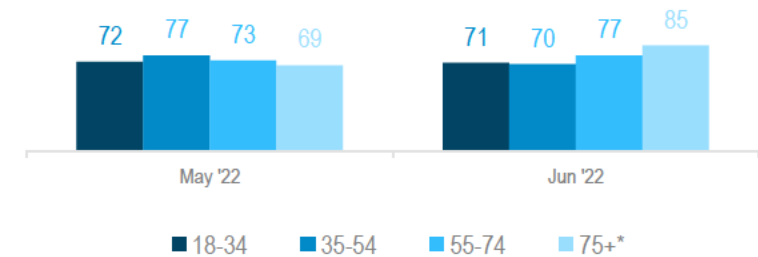


Satisfaction

Satisfaction with public services differed slightly in June '22 compared to last month. Although non-significant, there is a link between age and satisfaction, with satisfaction levels slightly higher among those aged 55+ and more so for those aged 75+.

The differences by age is driven by increased satisfaction among 75+ year olds (from 69% to 85%), as well as for 55–74-year-olds (73% to 77%). In contrast, satisfaction by those aged 35-54 years dropped by 7pts (77% to 70%), although non-significant.

Overall Satisfaction %



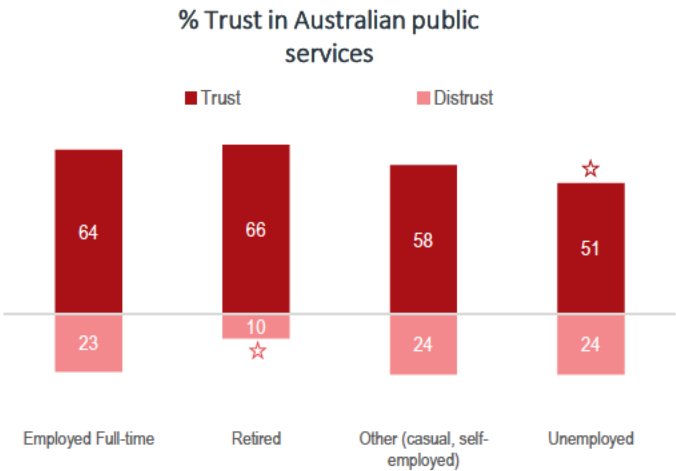
Employment Status

Trust

Employment status plays a role in people’s trust with Australian public services. The trust ratings suggest that individuals that are full-time employed (64%) or retired (66%) are significantly more trusting compared to those unemployed (51%).

Further, retired Australians are significantly less likely to feel distrust towards public services.

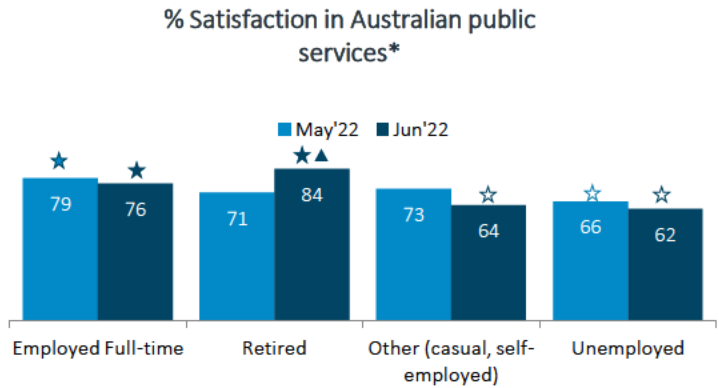
This is consistently seen across previous waves of research. Although, distrust for the full-time employed increased in June (from 14% to 23%).



Satisfaction

Satisfaction with Australian public services is highest among full-time employed and retired Australians and lowest among those unemployed or through other forms of employment.

Interestingly, the satisfaction levels among retired Australians increased significantly from May’22 (from 71% to 84%).



*Caution low base size. ★ = Significantly higher ☆ = Significantly lower.

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Australian Government

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Citizen Experience Survey



Jul 2022

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Insights

1

Trust in Australian public services has increased notably (non-significant) by 4 percentage-points this month to 65%, the highest level of trust since Feb'21. Distrust has also decreased slightly from 21% to 16% this month.

2

Satisfaction with Australian public services has also increased (non-significant) by 3 percentage-points to 76%, the highest level of satisfaction since September 2021.

3

Men are still significantly more trusting of public services than women. Older Australians over 75 are the most trusting, however they are not more satisfied with their service experience.

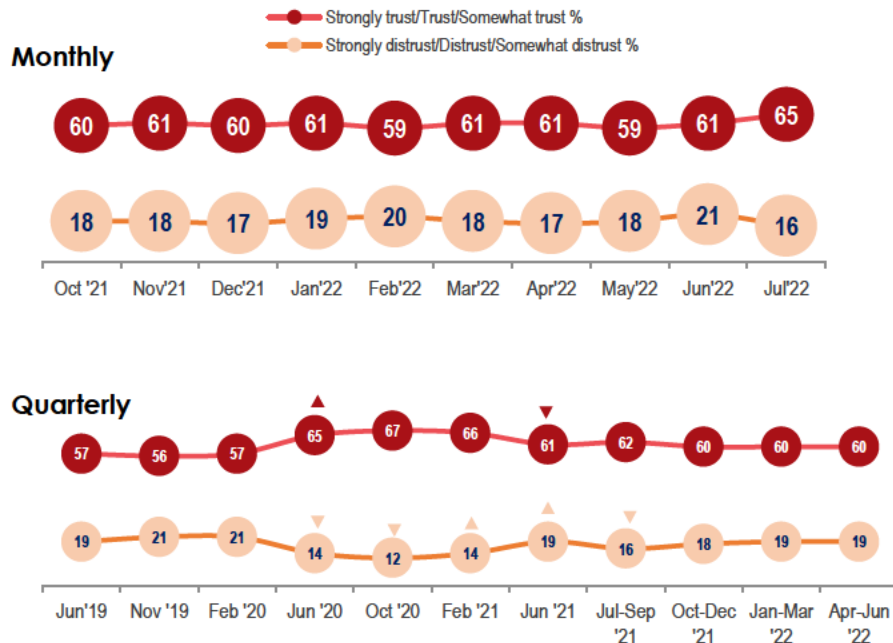
4

The increase in trust this month is being driven most notably by Australians from Queensland, South Australia and Victoria.

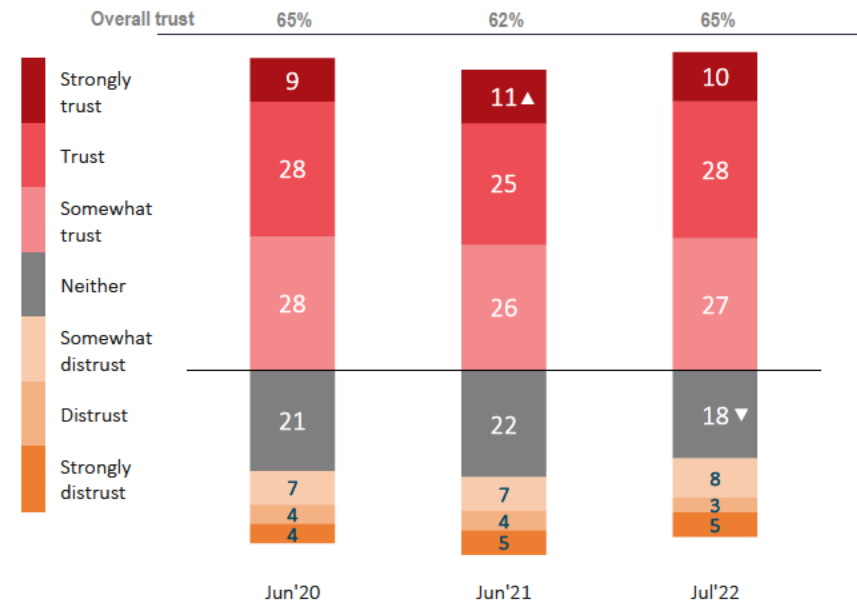
Trust in Australian public services

Trust in Australian public services has increased slightly in Jul'22 (although non-significant) from 61% to 65%. Notably, this is the highest level of trust since Feb'21 (66%). Additionally, distrust has decreased to 16% from 21% this month.

Trust in Australian Public Services (time series)



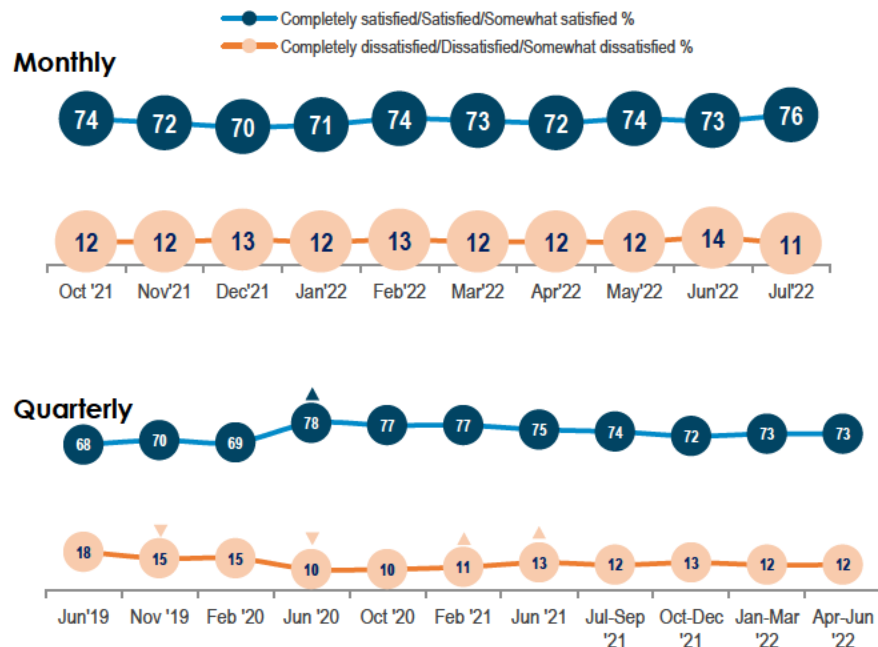
Trust in Australian Public Services (broken down - annual)



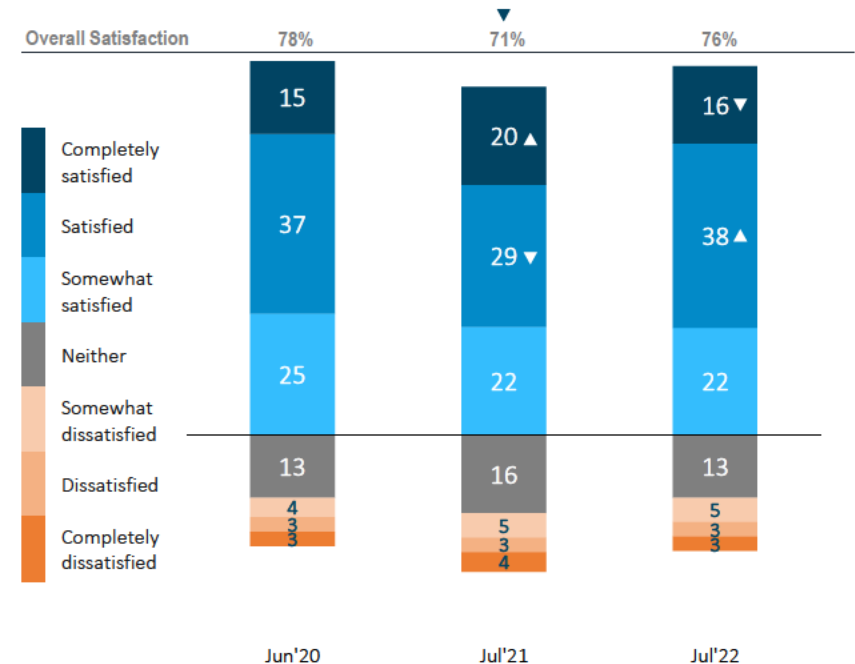
Satisfaction with public service experience

Satisfaction with Australian public services has also increased slightly this wave from 73% to 76% (although non-significant). Notably, this is the highest level of satisfaction since Sep'21 (76%). Dissatisfaction has also decreased slightly (non-significant) from 14% to 11%.

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

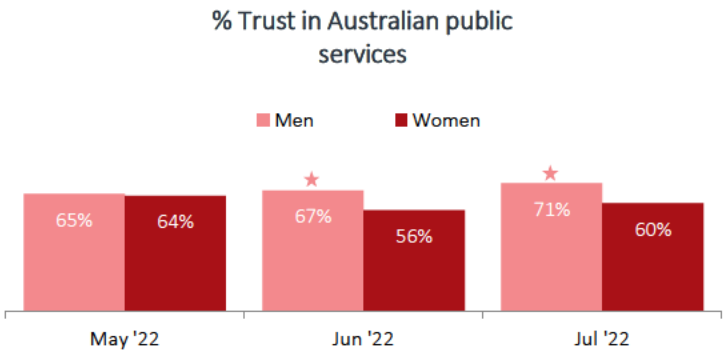


Gender

Trust

The level of trust has increased by similar proportions for both men and women this month (both increasing by 4pts, although non-significant).

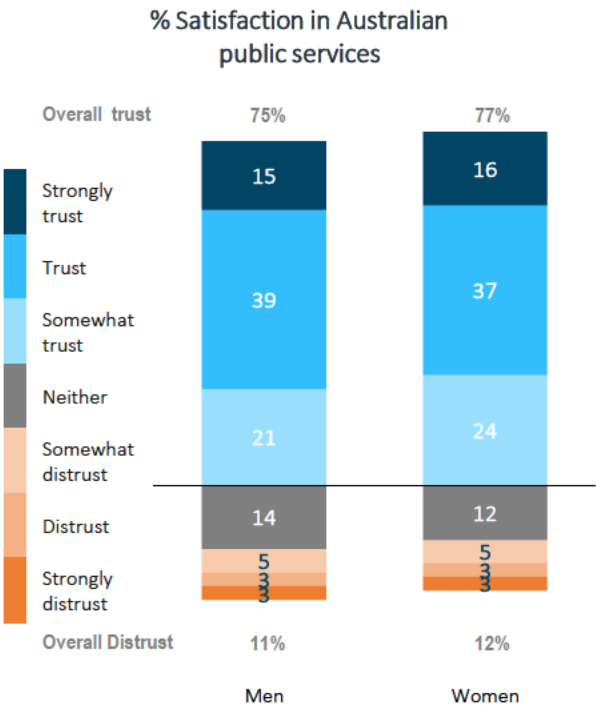
Interestingly, the jump in trust among Australians in Jul'22 is not driven by one specific gender as the gender differences in trust continue to appear and remains at 11pts.



Satisfaction

Despite the significant difference in trust between men and women, there is still now significant difference between men and women in terms of satisfaction with Australian public services.

Notably, while trust is skewed heavily towards men, satisfaction with public services is slightly higher among women compared to men (77% vs. 75%).



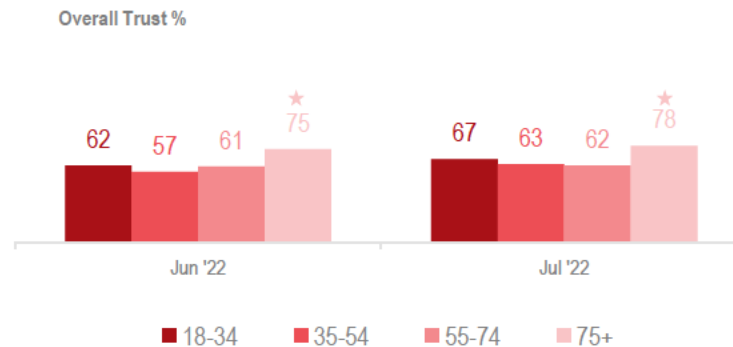
Age Statistics

Trust

The increase in trust has not been driven by one particular age group with the overall trust sentiment towards Australian public services increasing slightly (non-significantly) for all ages.

Individuals aged 75+ continue to be the most trusting compared to other ages, sitting significantly higher in comparison.

% Trust in Australian public services

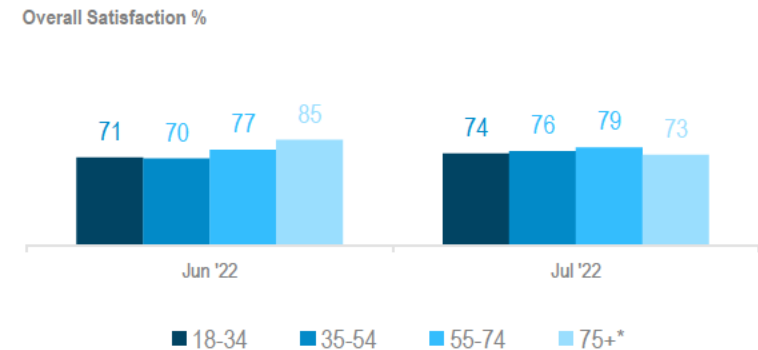


Satisfaction

Satisfaction with Australian public services has remained fairly stable across age groups. Satisfaction increased slightly for all ages (non-significantly) besides individuals 75+ (decreasing slightly from 85% to 73%).

Importantly, the level of satisfaction among 75+ year olds is now lowest (not significantly) compared to all other age groups this wave.

% Satisfaction in Australian public services

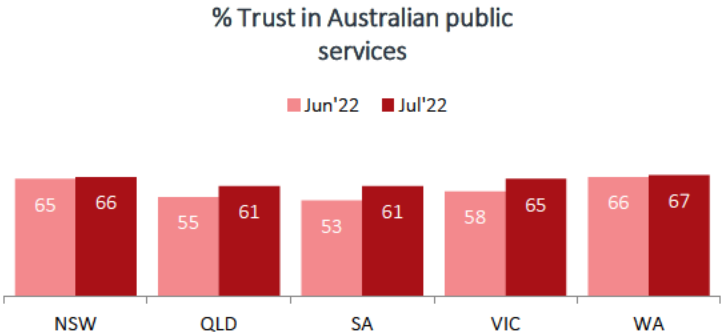


State or Territory

Trust

The overall increase in trust in Australian public services has been driven by slight (non-significant) increases from people from QLD, SA and VIC.

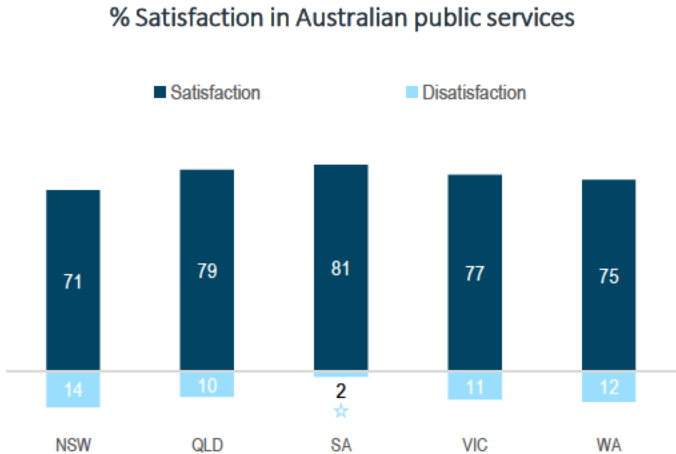
Notably, these three states had slightly lower levels of trust compared to NSW and WA, who have remained stable in their trust this wave.



Satisfaction

Satisfaction with Australian public services is consistent across all states this month.

Most notably, satisfaction in NSW is slightly lower compared to other states in Australia, while SA residents are significantly less likely to feel dissatisfied compared to other states.



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Insights

1

Trust in Australian public services has decreased significantly from 65% to 58% in August. Notably, this is the lowest recorded level of trust since Feb'20. Distrust has also increased slightly from 16% to 19% (although non-significant).

2

Overall satisfaction with Australian public services has also decreased significantly this wave (from 76% to 70%). This is the lowest satisfaction rating since Dec'21.

3

The significant decreases this wave are consistently seen among both men and women with fairly proportionate decreases, but are notably being driven by younger Australians.

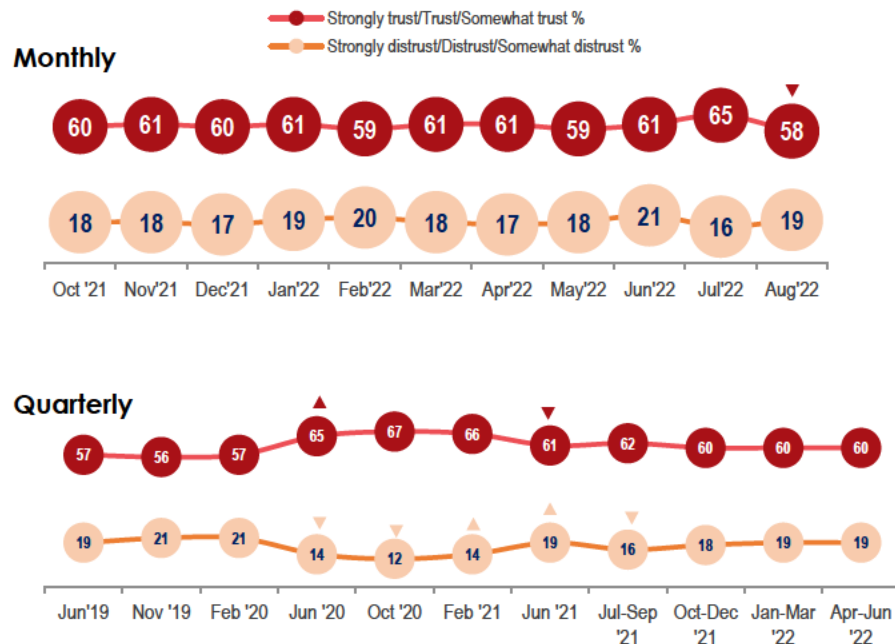
4

The drops in trust and satisfaction were driven most strongly by QLD and VIC. Levels of trust and satisfaction both decreased significantly for QLD and VIC residents.

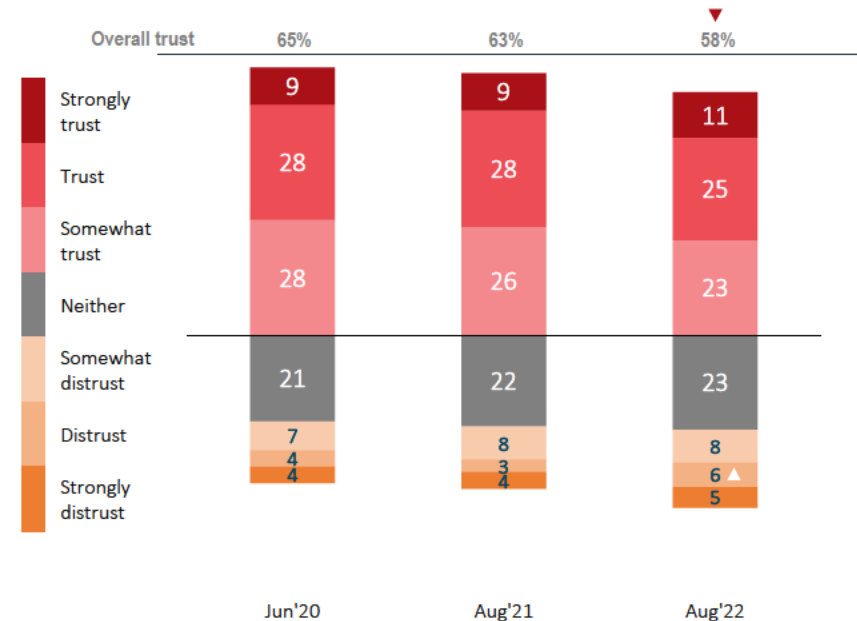
Trust in Australian public services

The overall level of trust in Australian public services has decreased significantly from 65% to 58% in Aug'22. Notably, this is the lowest recorded level of trust since Feb '20. Distrust has remained fairly stable however, increasing non-significantly from 16% to 19%.

Trust in Australian Public Services (time series)



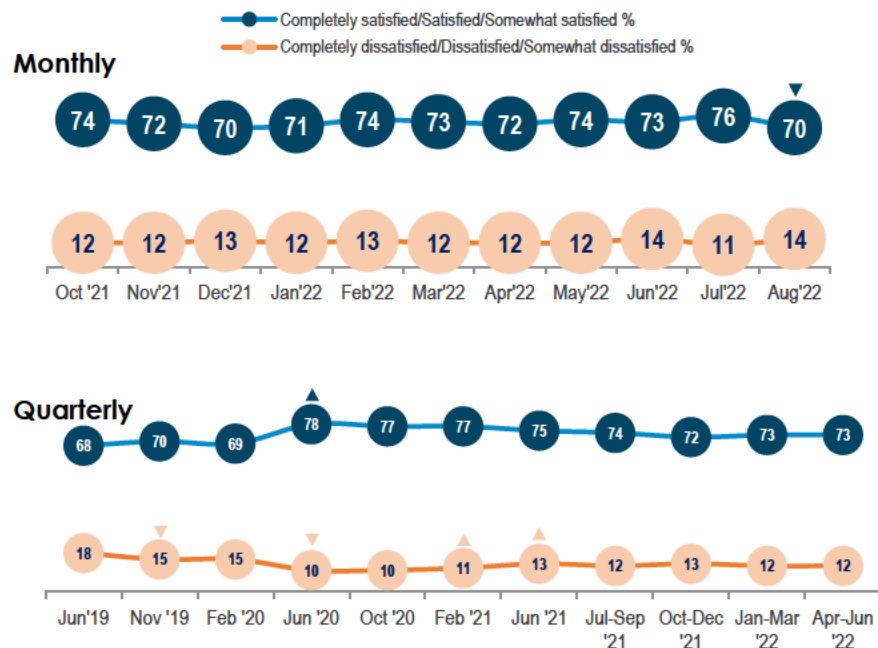
Trust in Australian Public Services (broken down - annual)



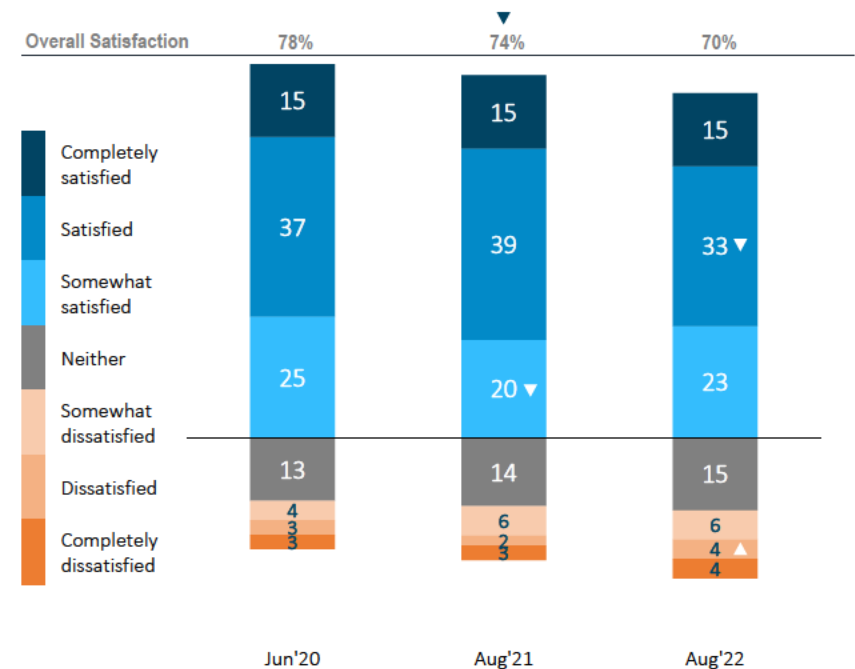
Satisfaction with public service experience

In line with trust, satisfaction with Australian public services has also decreased significantly this wave (from 76% to 70%). This level of satisfaction was last recorded in Dec'21. Interestingly, this comes after the Jul'22 wave which recorded the highest satisfaction in over a year.

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

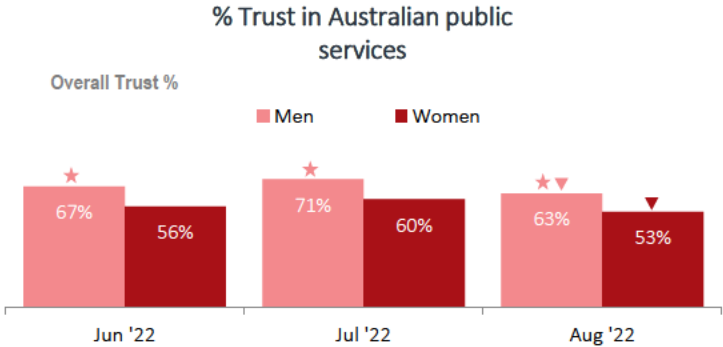


Gender

Trust

Trust in Australian public services has fallen proportionally for both men and women in August. Trust has decreased significantly for men from 71% to 63% and from 60% to 53% for women.

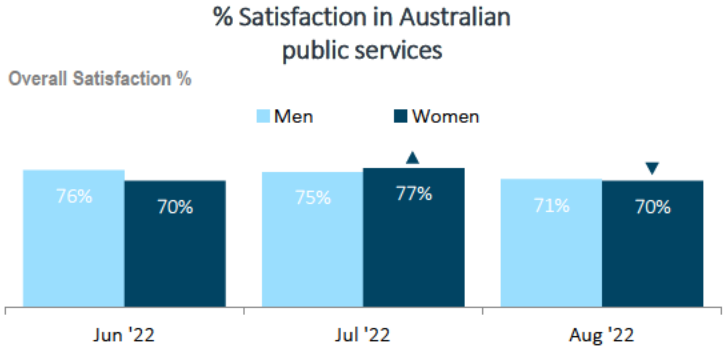
Of note, despite the significant changes, the trust gap between men and women remains (11pt difference).



Satisfaction

Similarly, satisfaction has decreased for both men and women in August.

Satisfaction with public services amongst men has fallen slightly (non-significantly from 75% to 71%, while satisfaction among women has decreased significantly from 77% down to 70% this wave.



@s 22(1)(a)(ii) – pls confirm if sig change for women from Jun'22 to Jul'22

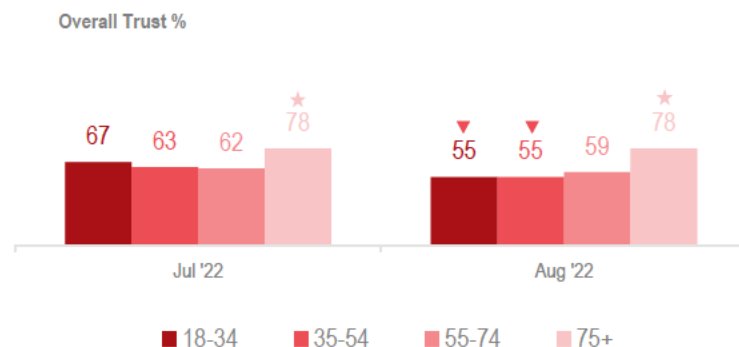
Age Statistics

Trust

The decline in trust experienced this wave was felt largely among younger Australians. In particular, trust among 18-34 year olds decreased from 67% to 55% and 35-54 year olds decreased from 63% to 55% (both significant).

Consistent with previous waves, individuals aged 75+ are significantly more trusting compared to their counter parts.

% Trust in Australian public services

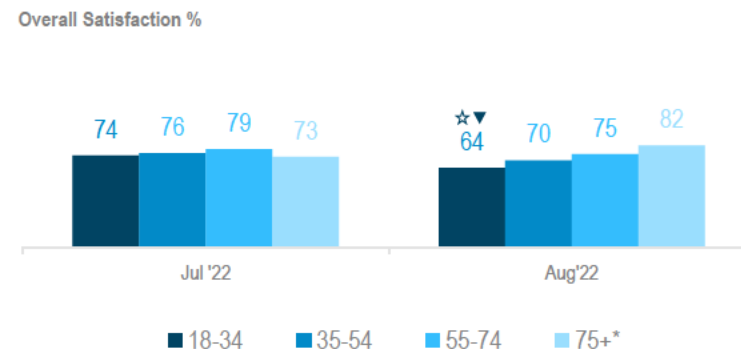


Satisfaction

Younger Australians are also reporting lower levels of satisfaction (while older Australians are slightly more satisfied).

18-34 year olds saw the largest decline in satisfaction (consistent with trust), falling significantly from 74% to 64%.

% Satisfaction in Australian public services

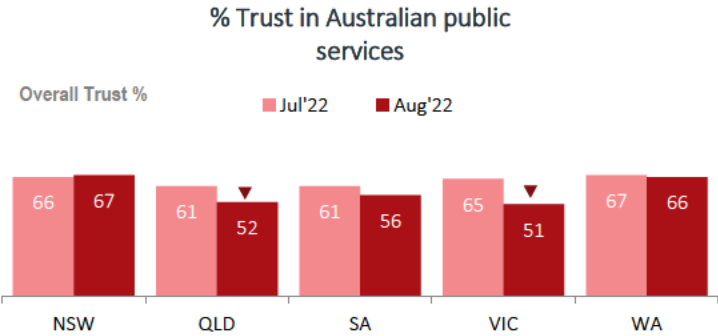


State or Territory

Trust

Interestingly, QLD and Victoria are prominent drivers for the declines in trust experienced this wave. The levels of trust decreased from 61% to 52% for QLD residents, and from 65% to 51% for VIC residents.

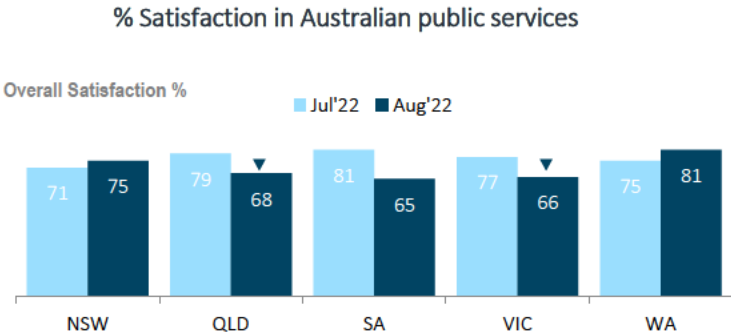
SA residents also feel slightly less trusting this wave compared to last, although non-significant.



Satisfaction

Similar to trust, the decline in satisfaction was primarily driven by QLD, VIC and SA residents (not significant for SA). Satisfaction levels decreased significantly from 79% to 68% for QLD residents and a similar decline was seen by VIC residents (77% to 66%).

On the other hand, satisfaction in public services actually increased slightly among NSW and WA residents (non-significantly).



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September 2022

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Insights

1 Overall levels of trust in Australian public services sits at three in five (60%), increasing slightly this wave from 58% in Aug '22. The average quarterly trust for Q3 '22 is 61%, consistent with past quarters.

2 Satisfaction with Australian public services also increased slightly after last wave's decline (from 70% to 73%). The average level of satisfaction over the last quarter is stable and sits at 73%.

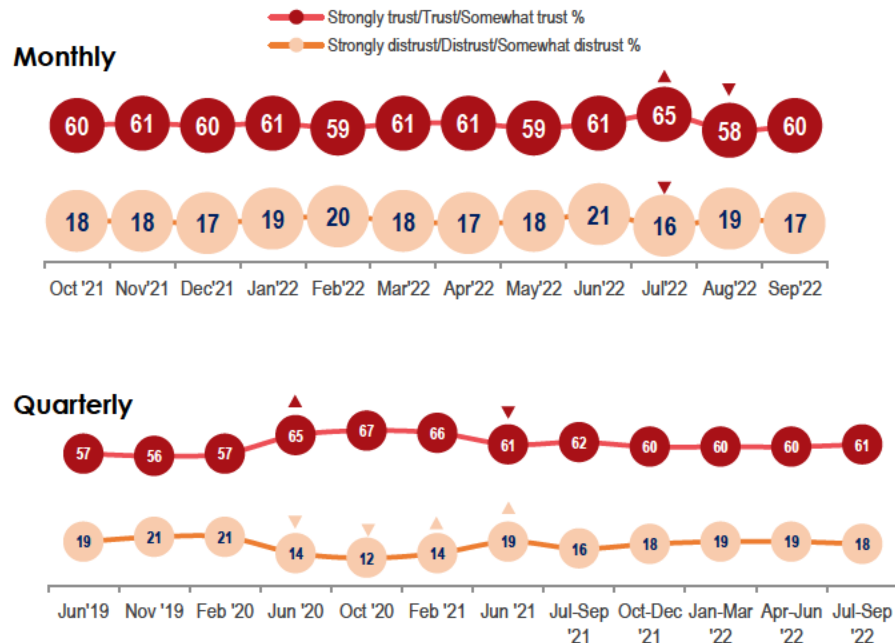
3 After last month's shifts in trust, only the level of trust among males recovered as trust from females has remained stable at 53%. Notably, this has led to the trust gap between men and women to increase to +14pts (11pts last wave).

4 Australians located in metro cities are significantly more trusting in Australian public services compared to those from regional cities this wave (63% vs. 54%). Interestingly, while trust in metro residents increased slightly after last wave's decline, trust from regional residents has remained unchanged this wave.

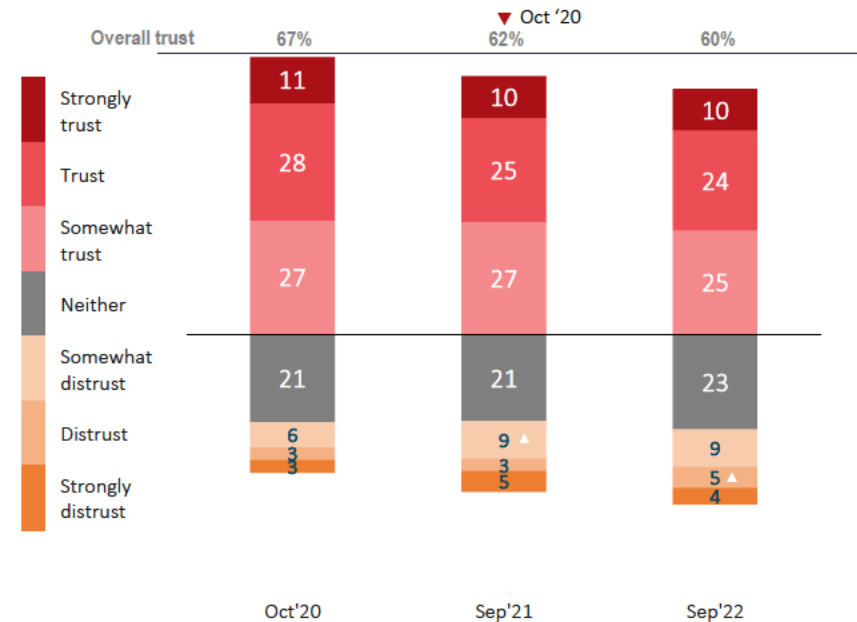
Trust in Australian public services

Three in five (60%) trust in Australian public services, a slight (non-significant) increase from Aug'22 (58% to 60%). The quarterly level of trust for Jul-Sep'22 sits at 61% which is on par with previous quarters.

Trust in Australian Public Services (time series)



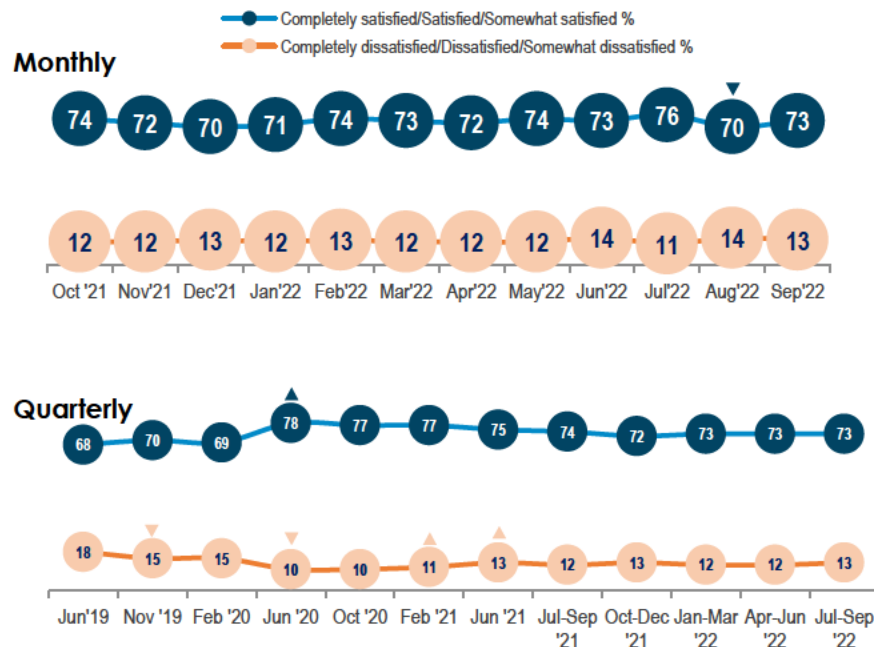
Trust in Australian Public Services (broken down - annual)



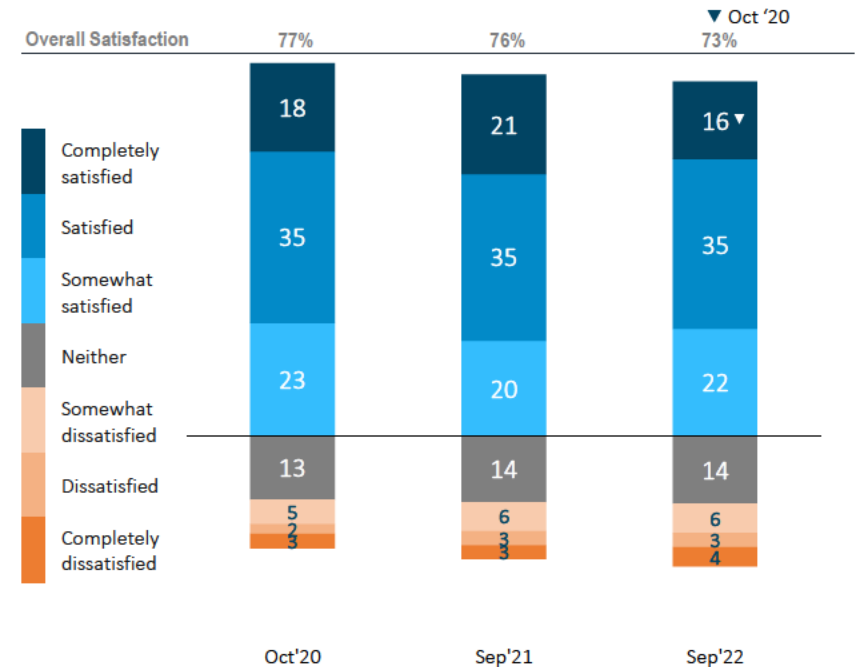
Satisfaction with public service experience

After the significant decrease recorded in Aug'22, satisfaction with Australian public services has recovered with a slight, non-significant increase (from 70% to 73%). Like trust, the quarterly level of satisfaction is stable and sits at 73%.

Satisfaction with Australian Public Services (time series)



Satisfaction with Australian Public Services (broken down - annual)

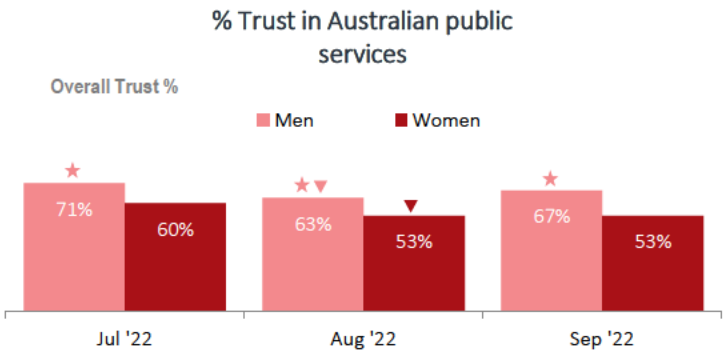


Gender

Trust

Interestingly, after last month's significant decline, only the level of trust in Australian public services from males has recovered (63% to 67%). Trust from females has remained stable at 53%.

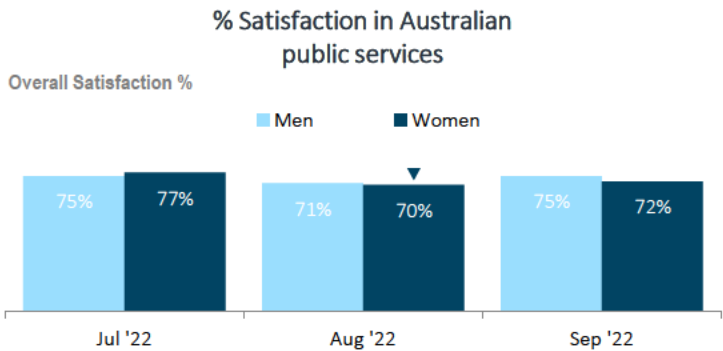
Notably, the shifts from this wave has increased the trust gap between men and women to +14 pts (from 11pts last wave).



Satisfaction

Satisfaction with Australian public services has increased slightly (non-significantly) for both men and women this month.

Satisfaction for men increased by +4pts (71% to 75%) since August, while among women has increased by 2pts (70% to 72%).



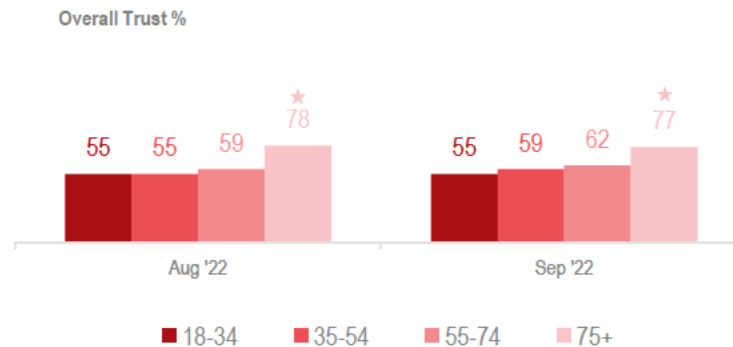
Age Statistics

Trust

The slight increase in overall trust this wave was driven by non-significant increases for those aged 35-54 years (55% to 59%) and 55-74 years (59% to 62%).

Consistent with Aug'22, Australians aged 75+ are significantly more trusting in public services compared to their counterparts.

% Trust in Australian public services

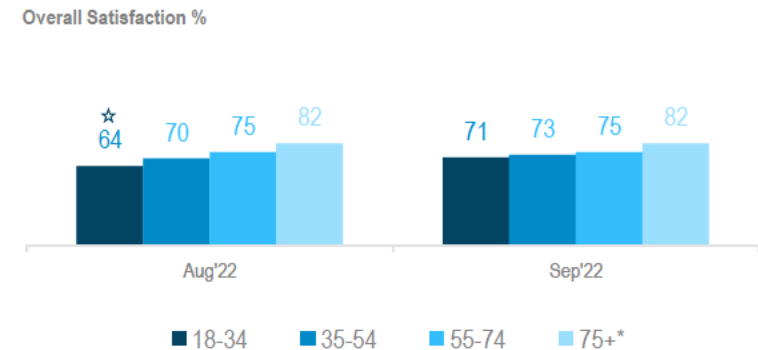


Satisfaction

The level of satisfaction among age groups is fairly consistent in Sep'22 with no significant differences. Satisfaction still trends upwards with age.

However, unlike last wave, Australians aged 18-34 years were not significantly less satisfied with public services. This is driven by a slight (non-significant) increase in satisfaction among this youngest group from 64% to 71%.

% Satisfaction in Australian public services

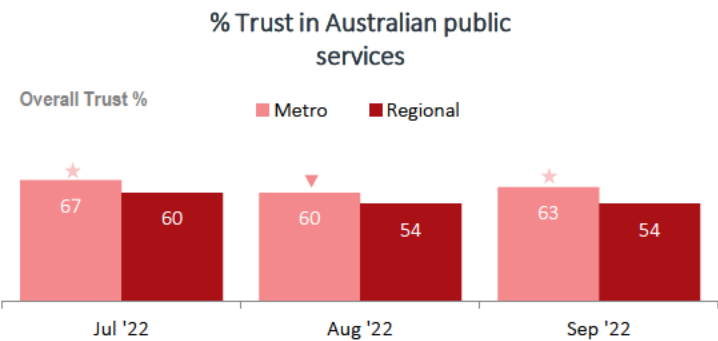


Metro vs Regional Split

Trust

Consistent with previous waves, people located in Metro cities are more trusting (significantly) in Australian public services compared to those from regional cities.

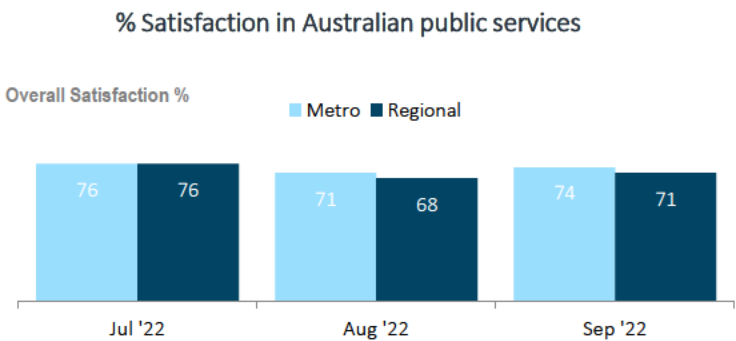
Notably, after last waves decrease, the level of trust from metro residents increased slightly (non-significantly) from 60% to 63%. However, trust among regional residents remains at 54%.



Satisfaction

Despite the slightly lower levels of trust among regional Australians, the satisfaction in Australian public services is consistent between those based in metro or regional cities.

Satisfaction for both metro and regional residents increased slightly this wave by 3 pts (although non-significant).



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Citizen Experience Survey



March 2022 Quarterly update

Flagging and addressing whole-of-APS service-delivery issues to support a step change in the delivery of Australian public services.

Contacts

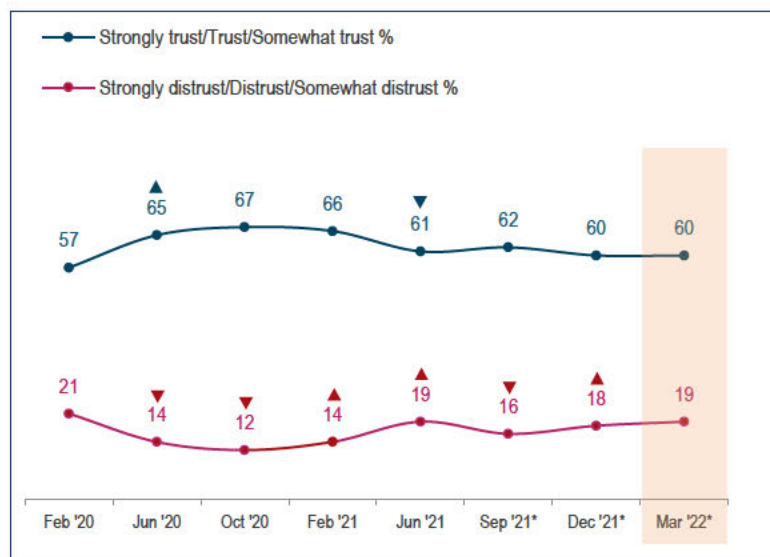
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Trust & satisfaction

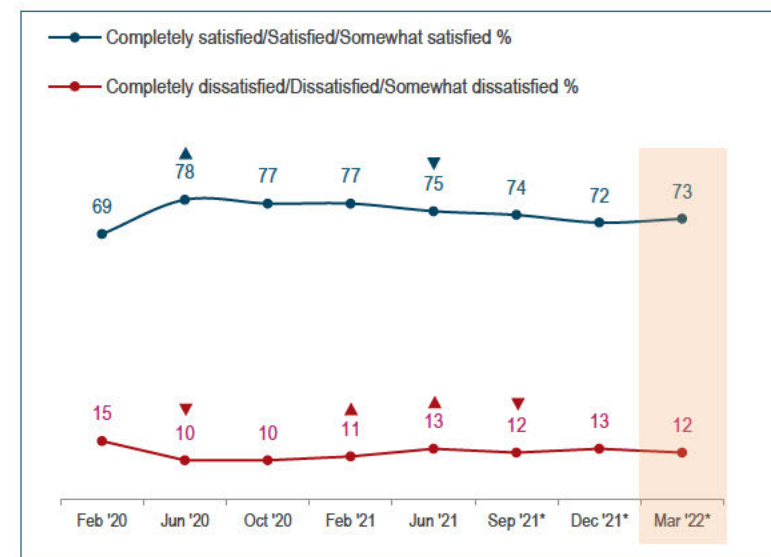
Trends over time

Trust in Australian public services



- Three in five people **trust** public services, stable since last quarter.
- Australians are significantly more likely to **trust** Australian public services if they have used them.
- The drivers of **trust** are stable, but some are still trending down.

Satisfaction with public service experience



- Almost three quarters of service users are **satisfied** with public services, remaining high and stable since last quarter.
- Satisfaction with most service elements is yet to recover but has stayed stable after dropping significantly last quarter.

Insights

1

COVID-19 has affected younger Australians the most – they're the most likely to have contracted the disease and are being disproportionately affected in their employment.

2

Over two in five young Australians report having a mental health condition, but of those **only a quarter** access help for it through Australian public services. A lack of trust in public services may contribute to this.

3

People who experienced a natural disaster recently are relying on Australian public services less than those who experienced a natural disaster in 2020 and are less trusting and satisfied.

Citizen Experience Survey— At a glance

Overall quarterly performance of two key measures: trust and satisfaction.

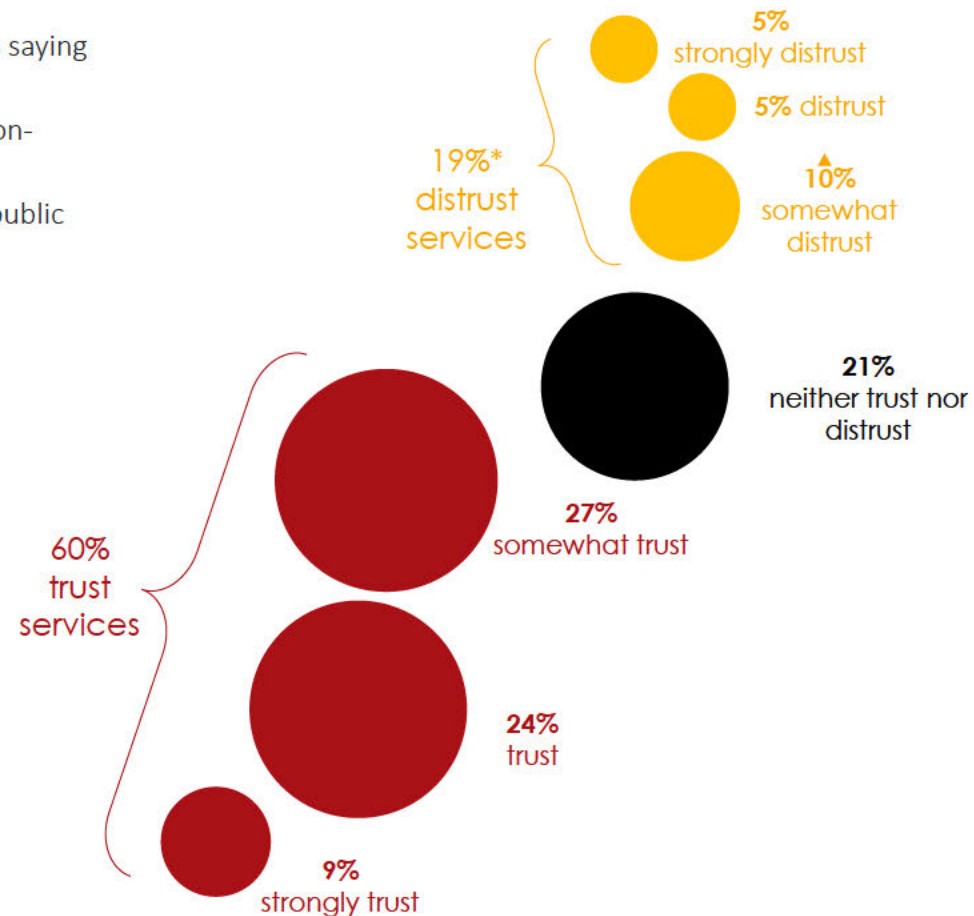
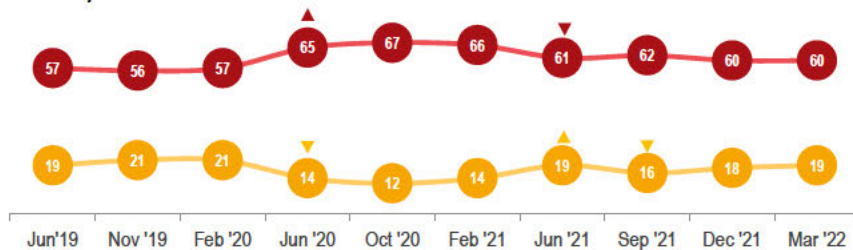
Three in five Australians are trusting of Australian public services

Overall trust has stayed consistent in the March 2022 quarter with 60% saying they trust Australian public services.

Distrust in Australian public services has also remained stable, with a non-significant increase from 18% in December to 19% in March.

There was a significant increase in Australians who *somewhat distrust* public services, up from 9% in December to 10% in March.

Quarterly

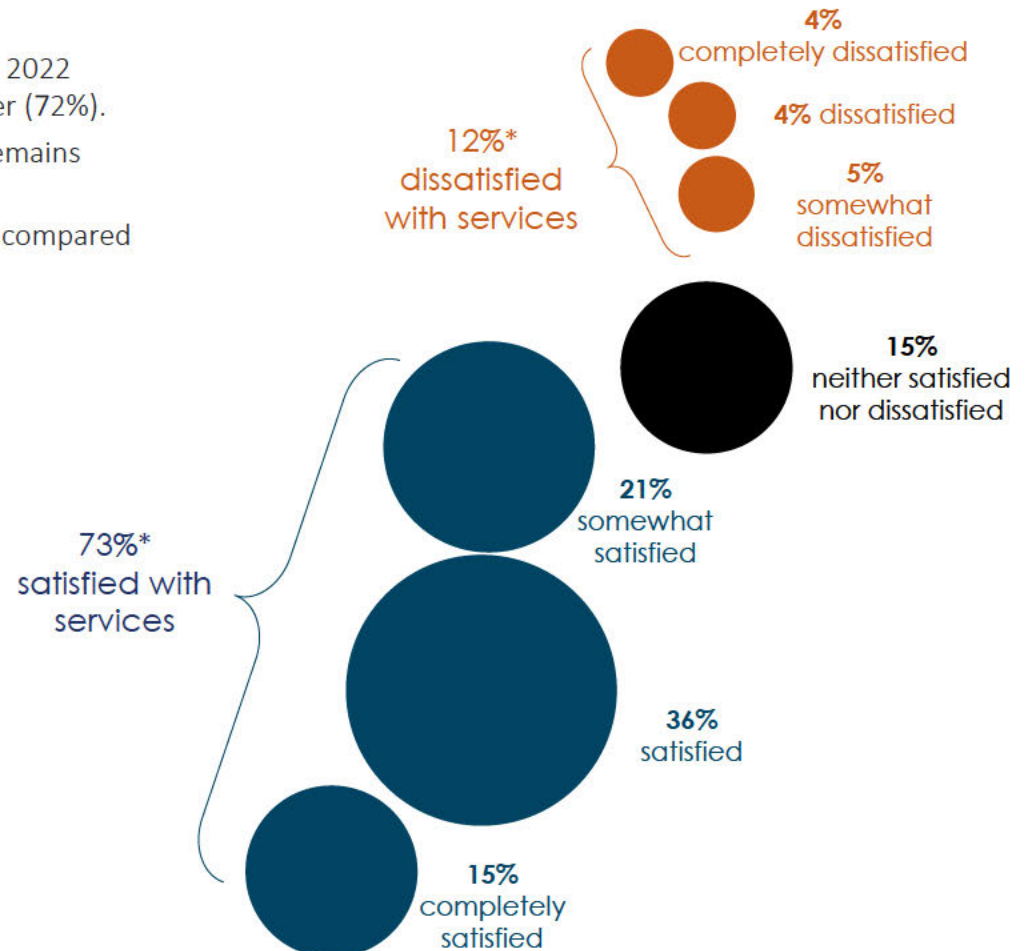
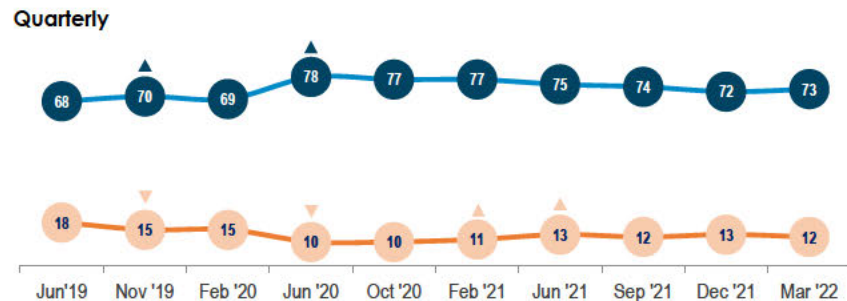


Almost three quarters of Australians are satisfied with Australian public services

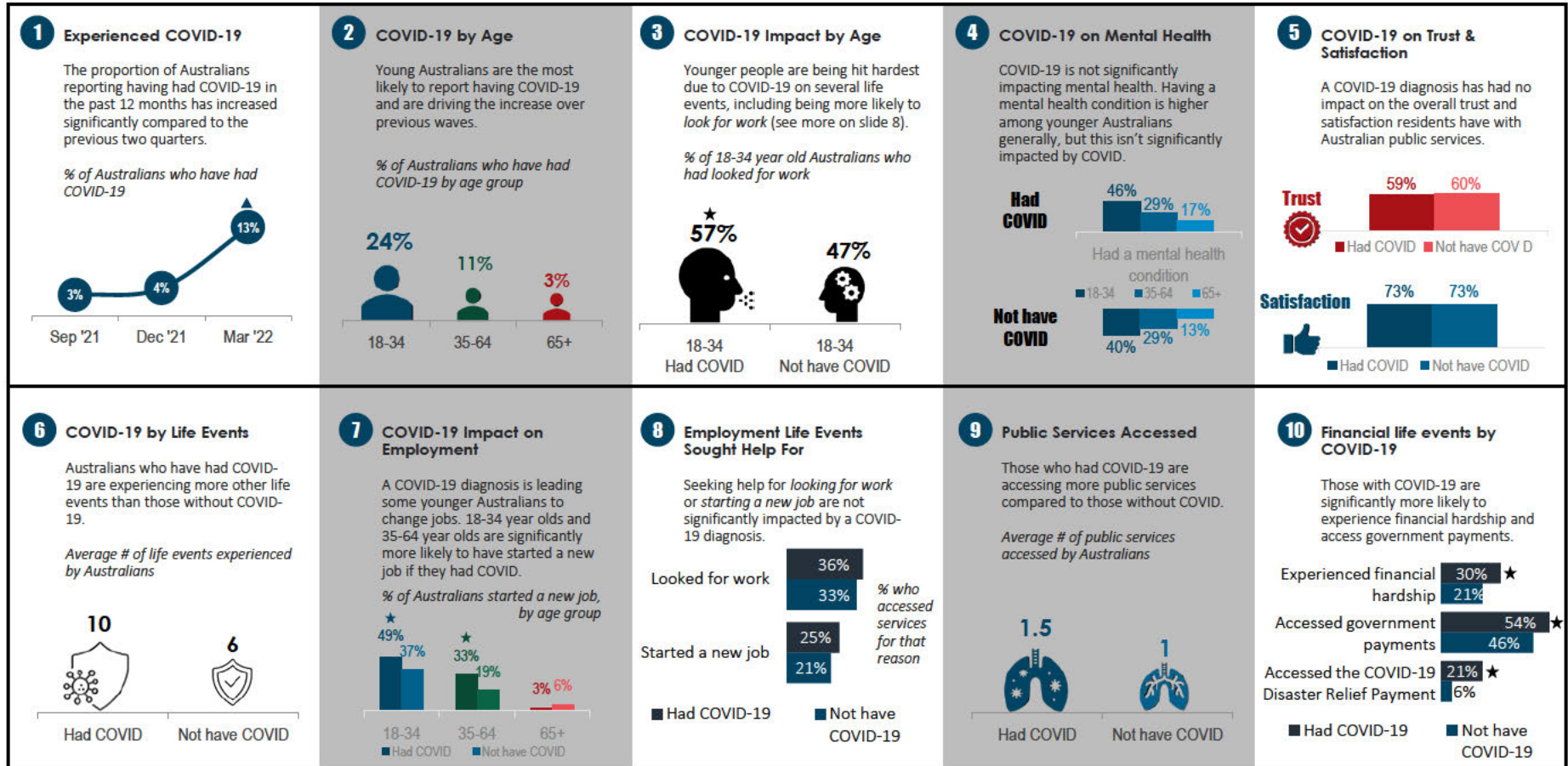
Satisfaction with Australian public services sits at 73% in the March 2022 quarter, stable at just 1pt higher than in the December 2021 quarter (72%).

Dissatisfaction with Australian public services in March 2022 also remains stable at 12%, stable at 1pt below December 2021 (13%).

There are no significant shifts in the overall satisfaction breakdown compared to previous waves.



Life Event Deep Dive COVID-19



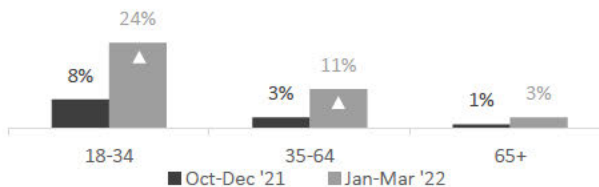
Life Event Deep Dive

COVID-19

This quarter, over 1 in 10 Australian residents (13%) reported having COVID-19 in the past 12 months, a significantly higher proportion than the previous two quarters (3% in September and 4% in December 2021). Similarly, the proportion of Australians who went into mandatory isolation (22%) and whose immediate family had COVID (33%) have both increased significantly since December (13% and 7%, respectively).

Younger people are the most likely to report having COVID-19 and they are driving the increase since the Dec '21 quarter – a quarter (24%) of 18-34 year-olds and 11% of 35-64 year-olds reported getting COVID in the March quarter, while the proportion of over 65s having COVID remains relatively stable (3% from 1%).

% had COVID-19



Residents from NSW (18%), VIC (17%) and QLD (14%) are the most likely to report having had COVID-19 this quarter, and these states are driving the increased proportion significantly (Dec '21 quarter: 5%, 4%, 3%, respectively).

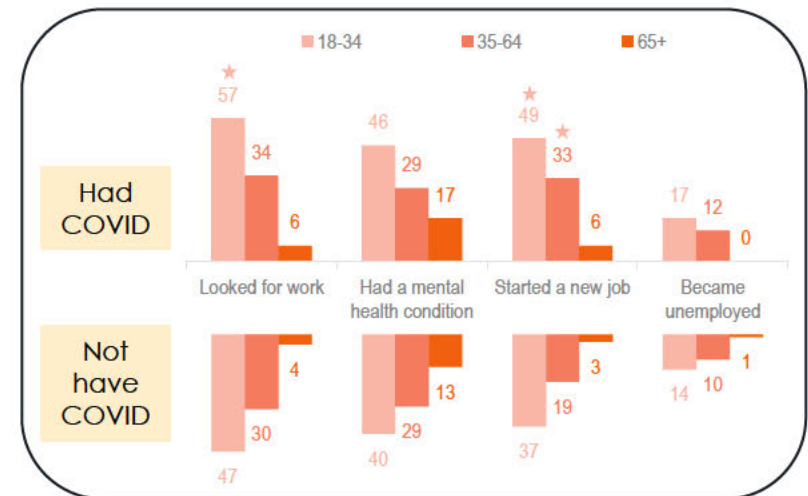
Australians who had COVID-19 are experiencing more life events than those without COVID, and younger people are hit hardest

Those who had COVID-19 are significantly more likely to have experienced four or more life events than those without COVID-19 (95% vs 67%) – their average number of life events was 10 compared to 6 for those without COVID.

Compared to those without COVID-19, they are notably more likely to have become or currently be unemployed (15% vs 9%); experience financial hardship (30% vs 21%); looked for work (46% vs 29%); and had a mental health condition (38% vs 28%).

However, some life events are disproportionately occurring for younger Australians compared to those older. For instance as shown in the chart below, 18-34 year-olds with COVID are significantly more likely to have looked for work than same-age counterparts without COVID* – moreover, among those with COVID, 18-34 year-olds are also significantly more likely than 35-64 year-olds to look for work (57% vs 34%), while there was no difference in looking for work among 35-64 year-olds regardless of having COVID or not.

COVID is not significantly impacting mental health. Having a mental health condition is higher among younger Australians generally but no age group is significantly more likely to experience mental health event because of having COVID-19 (see below).



A COVID-19 diagnosis isn't causing mass job loss but is leading some younger Australians to change jobs

Across all age groups, those with COVID are not significantly more likely to have become or be unemployed. However, among both 18-34 (49%) and 35-64 (33%) year-old age groups (working age), those who had COVID are significantly more likely to have started a new job – with 18-34s the most likely.

Life Event Deep Dive

COVID-19

Aligned with more life events, those who had COVID are accessing more public services and seeking help for more life events

Those who had COVID-19 accessed on average 1.5 public services compared to an average of 1 service for those without COVID. They are also significantly more likely to access 3 or more different services compared to those without COVID. In particular, those with COVID are more likely to access Centrelink (43% vs 29%) and Medicare (38% vs 24%).

Similarly, those with COVID are significantly more likely to access services and seek help for 3 or more *life events* compared to those without COVID (47% vs. 27%).

Having COVID-19 did not have a major impact on the likelihood of seeking help when looking for work or starting a new job.

Of those with COVID-19 who looked for work (46%), 36% sought help for that reason, compared to 33% for those that did not have COVID. Similarly, of those with COVID-19 that started a new job (41%), 25% accessed services for that reason compared to 21% of those without COVID-19.

Interestingly, those with COVID are significantly more likely to experience financial hardship (30% vs 21% for those without COVID) but are *significantly less likely* to access services for this event (24% with COVID-19 vs. 34% without COVID-19).

However, those with COVID are more likely to access government payments (54% vs 46% for those without COVID), particularly the COVID-19 Disaster Relief Payment (21% vs 6%).

Trust and satisfaction with Australian public services are no different between those who had COVID and those who did not

Overall, 60% of Australians trust the public services, no different for those who have had (59%) and not had (60%) COVID-19.

Similarly, service users who had COVID-19 are just as satisfied (73%) as service users who did not (73%). Those who *accessed* a service because of having COVID-19 are also no more or less satisfied than those who had COVID but didn't access services *for that reason* (76% vs 71%, non-significant).

There are no significant differences in the drivers of trust or satisfaction among those who had and did not have COVID-19.



I was able to communicate my issues and questions with Australian public services workers and they were extremely helpful.

– Person who accessed services for COVID-19 and 'somewhat trusts' Australian Public Services

Life Event Deep Dive Mental Health

Mental health conditions are common – almost a third of Australians report having a mental health condition including depression or anxiety

30% of Australian residents report experiencing a mental health condition in the last 12 months from March 2022, similar across all Australian states (non-significantly highest among Victorians at 33%) and no difference between metro and regional. Unemployed Australians* are the most likely to have had a mental health condition (46% vs 30% employed).

Younger Australians are suffering the most. Over 2 in 5 of those aged 18-34 experienced a mental health condition (42%), significantly more than 35-64 (29%) and 65+ (13%) year-olds. Women are also more likely than men to report a mental health condition (36% vs 22%), with young women most affected (48%).

Those with a mental health condition experience more life events

On average, those who reported a mental health condition experienced 9 life events in the past year compared to 5 life events for those without a mental health condition – and they are significantly more likely to experience four or more life events (95% vs 60%).

Job loss and financial hardship contribute to poor mental health, but COVID-19 does not

Overall, those with a mental health condition are significantly more likely to have become unemployed (18% vs 7%); looked for work (46% vs 25%); and experienced financial hardship (40% vs 15%) than those without a mental health condition. They are also more likely to report having COVID-19 overall (17% vs 12%), but this appears to be due to the younger age skew of those with both COVID and a mental health condition rather than COVID itself being directly related to poor mental health (see chart right) – within age groups, there is not a significant difference in COVID rates by mental health status.

Across all age groups, looking for work and experiencing financial hardship is significantly higher among those who had a mental health experience.

% experienced a mental health condition

Most: Women 18-34

Least: Men 65+

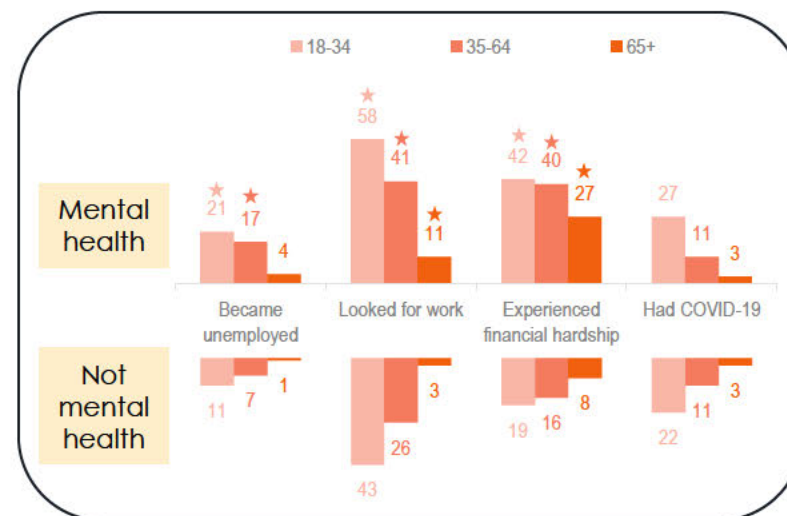


48%



9%

Young women are significantly more likely than any other age / gender cohort to experience a mental health condition



Life Event Deep Dive Mental Health

Australians with a mental health condition access more services and seek help for more life events

Those who experienced a mental health condition access on average 1.4 public services compared to 1.0 for those without a mental health condition. They are significantly more likely to access *any* services (73% vs 57%) and more likely to access 3 or more (18% vs 10%) than those without a mental health condition.

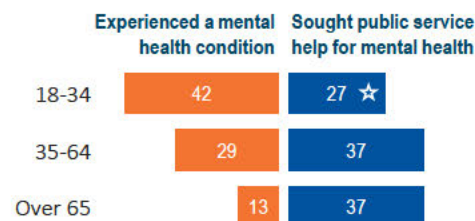
Across all age groups, Australians with a mental health condition are also more likely to access services for more life events – almost half (47%) seek help for three or more life events compared to 22% of those without a mental health condition.

They're more likely than those without a mental health condition to access some services. Of those with a mental health condition looking for work (46%), 40% accessed services – significantly higher than those without a mental health condition (29%). Similarly, of those with a mental health condition with a disability (25%), 41% accessed services for the disability – significantly higher than those without a mental health condition (30%).

Young Australians are affected the most, but they're less likely to seek help from public services

While 42% of 18-34 year-olds report a mental health condition, only 27% of them sought help from an Australian public service (significantly lower than other age groups). This may be because younger people access other services (e.g., online mental health support) or could indicate distrust in Australian public services.

Women aged 18-34 year years are more likely to have a mental health condition (48%) than young men, but they access help via public services at the same rate (both 27%). This suggest young women are less likely to access services because of their condition.



Young Australians with a mental health condition are less likely to seek help for it, but they seek more support in general and are accessing more help for other life events

Compared to 18-34 year-olds *without* a mental health condition, those in this age cohort with a mental health experience are more likely to seek support when they start university (10% vs 4%); change a place of residence (9% vs 6%); apply for or renew a licence (28% vs 17%). These life events aren't necessarily indicative of poor mental health, suggesting young people with mental health conditions have greater support requirements for more life events in general.

Young Australians with mental health conditions trust Australian public services less than those without

Overall, 56% of Australians with a mental health condition trust public services, significantly lower than those without (62%). This difference was clear among young people as those with mental health conditions are significantly less trusting (56% trust among 18-34 year-olds with a mental health condition vs 63% for those this age without a mental health condition). This lower trust may be a reason young people aren't seeking support from public services for their mental health. Trust among 35+ year old Australians is consistent between those with and without mental health conditions.

Overall there's no difference in drivers of trust between those with and without a mental health condition – but amongst 18-34 year-olds, those with a mental health condition are less likely to agree *Australian public services are responsive* (48% vs 57%) and *Australian public services are fair* (50% vs 56%), contributing to their lower trust.

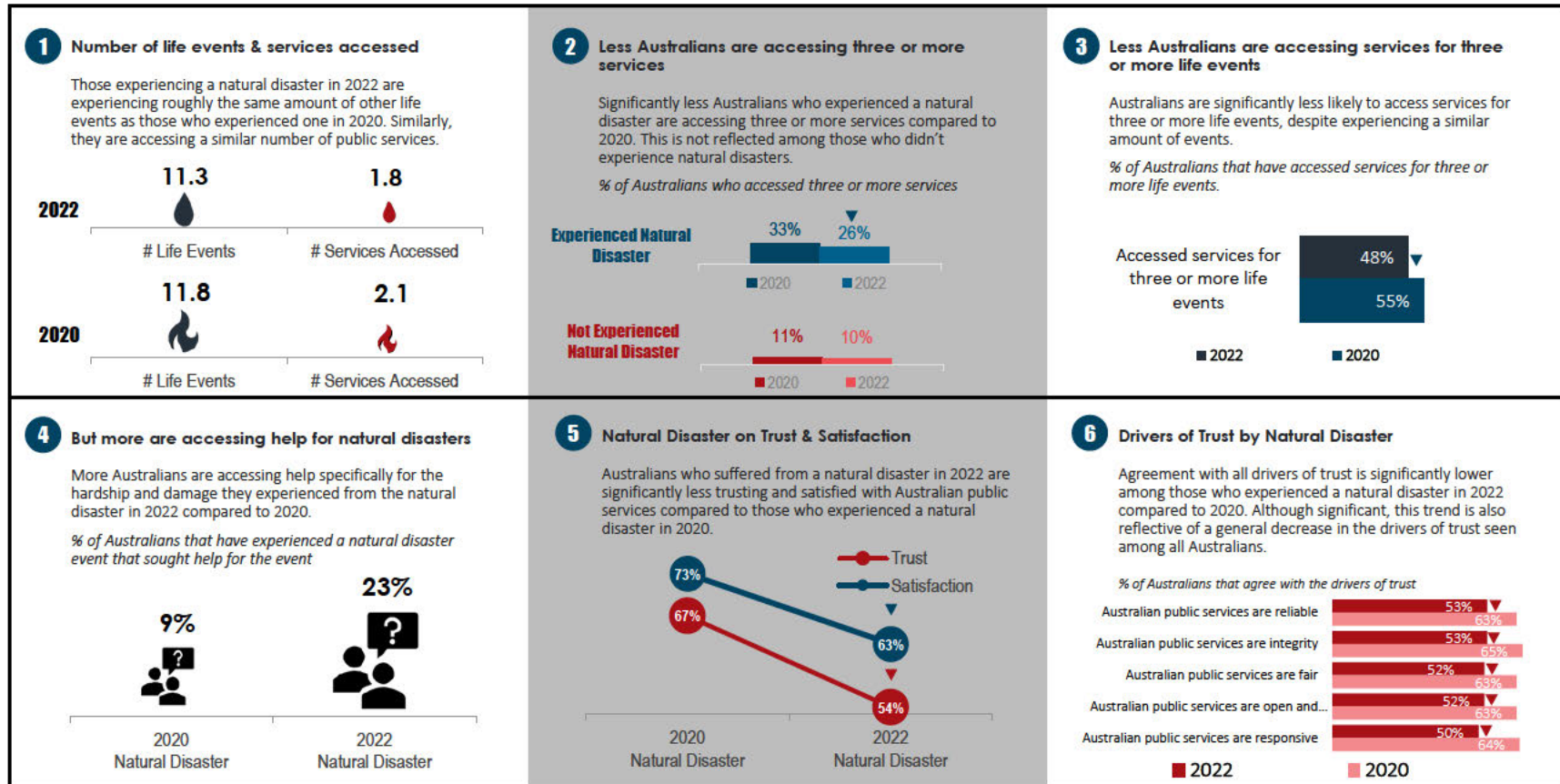
Satisfaction is lower for those with a mental health condition, but it doesn't seem to be driven by their experience related to their mental health

Those who experienced a mental health life event and accessed *any* public services are less satisfied overall with their experience (68%) than service users without a mental health condition (76%). However, those with a mental health condition who accessed services for their mental health are no less satisfied than those who did not seek help (both 68%) – suggesting it may be other services people with mental health conditions are accessing that is driving down their satisfaction.

Overall there is no difference in drivers of satisfaction between those who experienced a mental health event and not, nor between those who accessed services for mental health and not.

Life Event Deep Dive

Natural Disasters – A comparison of service usage and experience in 2020 vs 2022



Life Event Deep Dive

Natural Disasters

2020 vs 2022 comparison*

Those who experienced a natural disaster in 2020 are experiencing roughly the same amount of other life events as those experiencing natural disasters in 2022

Those reporting experiencing hardship from a natural disaster across 2020 experienced on average 11.7 life events, similar to 11.3 life events among those who experienced a natural disaster more recently to 2022. In both time periods, those experiencing a natural disaster accessed notably more services on average than those who did not experience a natural disaster (2.1 in 2020 and 1.8 in 2022, compared to an average of 1 service for those who did not experience a natural disaster).

Those experiencing a natural disaster in 2022 are also not experiencing any particular other life events more or less than in 2020. While the proportion experiencing some other life events among those who experienced a natural disaster has changed, it is reflective of a general change in the proportion experiencing these life events since 2022, not just among those who experienced natural disasters.

Significantly less are accessing help specifically for the hardship endured by the natural disaster, and there is less usage of Australian public services overall among those who experienced a natural disaster

The proportion who accessed services specifically for the hardship and damage they experienced from natural disasters has decreased significantly from 28% in 2020 to 23% in 2022.

Further, in general they are using *less* public services now. In 2022, just over a quarter (25%) of those who experienced a natural disaster accessed three or more services, a significant decrease from 42% in 2020. This drop is not reflected among those who didn't experience natural disasters (44% accessed 3+ services in 2020 compared to a stable 38% in 2022), suggesting those experiencing a natural disaster are less likely to access more services now compared to 2020.

They are also accessing services for less life events, despite experiencing a similar amount of events. In 2022, 48% of natural disaster victims accessed services for three or more life events, a significant decline since 2020 (55%).

Trust and satisfaction with Australian public services among those who experienced a natural disaster

2020		2022
67%	Trust	54% ▼
73%	Satisfaction [^]	63% ▼

Trust and satisfaction are both lower in 2022 among those who experienced a natural disaster compared to 2020

Trust has fallen significantly for *all* residents since 2020 (64% vs 60% in 2022); however, the decline has been steeper for those who experienced a natural disaster: 67% in 2020 falling significantly to 54% in 2022.

Satisfaction among service users who experienced a natural disaster has also dropped significantly in 2022 (73%) compared to 2020 (63%). While there has been a significant drop in satisfaction overall from 2020 to 2022, it is not as marked (75% to 73%), suggesting those who experienced a natural disaster are notably less satisfied with public services.

Agreement with *all* drivers of trust is significantly lower in 2022 among those who experienced a natural disaster compared to those who did so in 2020 – however, this is reflective of a general significant decrease in all drivers seen across the board since 2020 and not unique to those who experienced a natural disaster.

Drivers of satisfaction have not changed significantly between 2020 and 2022 among those who experienced a natural disaster.

Life Event Deep Dive

Natural Disasters

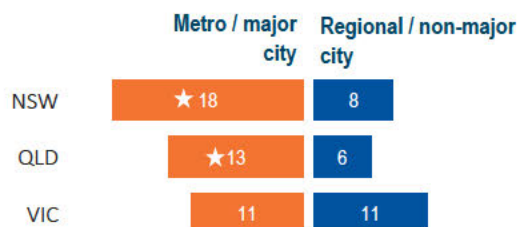
2022 March quarter breakdown

Residents from NSW, Queensland and Victoria are most likely to report experiencing hardship from a natural disaster this quarter

15% of NSW residents, 11% from Queensland and 10% from Victoria reported experiencing a natural disaster in the past 12 months this quarter – significantly higher than last quarter for NSW (11% Dec'21 qtr) and Queensland (6% Dec'21 qtr), likely due to flooding in that region.

More specifically, this quarter residents from metro NSW (Sydney, Newcastle, Wollongong or the Central Coast) are the most likely to experience a natural disaster (18%), followed by QLD metro (Brisbane, Gold Coast, sunshine Coast). The same proportion of residents from major and non-major VIC cities reported experiencing a natural disaster (11%).

% experienced natural disaster*



Those experiencing a natural disaster accessed more public services than those who didn't and have greater service needs

On average, those who experienced hardship from a natural disaster used almost twice as many services (1.8) than those who didn't experience a disaster (1), and are significantly more likely to access three or more (26% vs 11%).

Similarly, those experiencing hardship from disaster accessed on average services for twice as many life events (4) than those not (2) and are more likely to access services for three or more events (48% vs 28%).

They are more likely to access services for a range of life events, many not seemingly related to a natural disaster. This suggests they have greater needs for support from public services in navigating life events in general, compared to those who didn't experience a natural disaster. Notably, those experiencing a disaster are more likely to access services for looking for work (26% vs 9%); starting a new job (15% vs 4%); being / becoming unemployed (8% vs 3%); experiencing death in the family (10% vs 3%); and experiencing a chronic illness (15% vs 6%).

Trust in APS is lower among those who experienced a natural disaster, but satisfaction is similar

54% of those who experienced a natural disaster trust Australian public services, significantly lower than those who did not (61%). However, among service users, those who accessed services because of a natural disaster are *not* significantly less satisfied (57%) with services than users who did not access these services (65%).

Despite lower trust, there's no difference in the drivers of trust between those who experienced a natural disaster vs did not. Similarly, there is no difference in the drivers of satisfaction.

Those who experienced natural disasters use a wider mix of channels to access services, both digital and non-digital

53% of service users who experienced a natural disaster life event used a mix of digital and non-digital channels when accessing public services (significantly higher than 36% who did not experience a disaster) – they are less likely to use purely digital or non-digital channels. On average, they used 3 channels compared to 2 for those who didn't experience a natural disaster and are significantly more likely to use all channels (except for MyGov).

% used

Top channels by service users who experienced natural disasters vs did not

47%



Telephone

vs. 31%

33%



APS websites

vs. 19%

31%



App

vs. 17%

28%



Face to face

vs. 18%

Trust and Satisfaction – Details

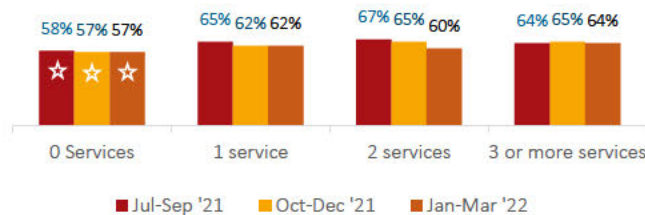
Drivers of trust and satisfaction, and breaking down the data by different groups of interest.

Citizen trust in Australian public services

Australians who access public services have greater trust than those who have not accessed them

Individuals who used public services in the March quarter are significantly more likely to trust Australian public services (62%), compared to those who haven't accessed any services (57%). This is a recurring theme that has been seen over the past few waves.

Interestingly, the number of services they've accessed doesn't affect their overall trust.



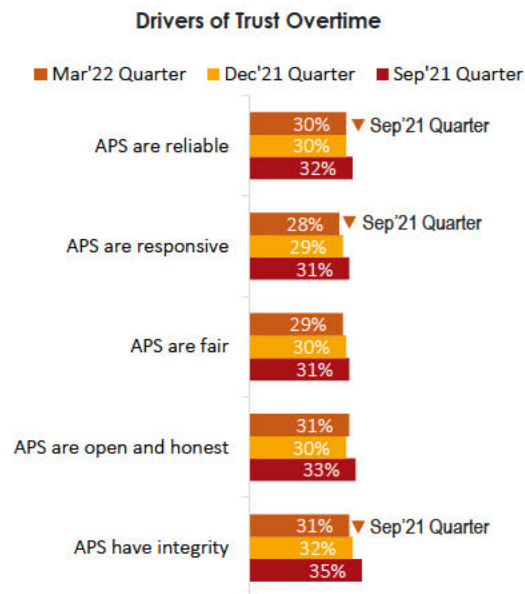
The drivers of trust have remained stable in the March quarter but have been declining over time

Interestingly, although the drivers are mostly stable in the March quarter, a few drivers are sitting significantly lower than their September quarter levels (see right).

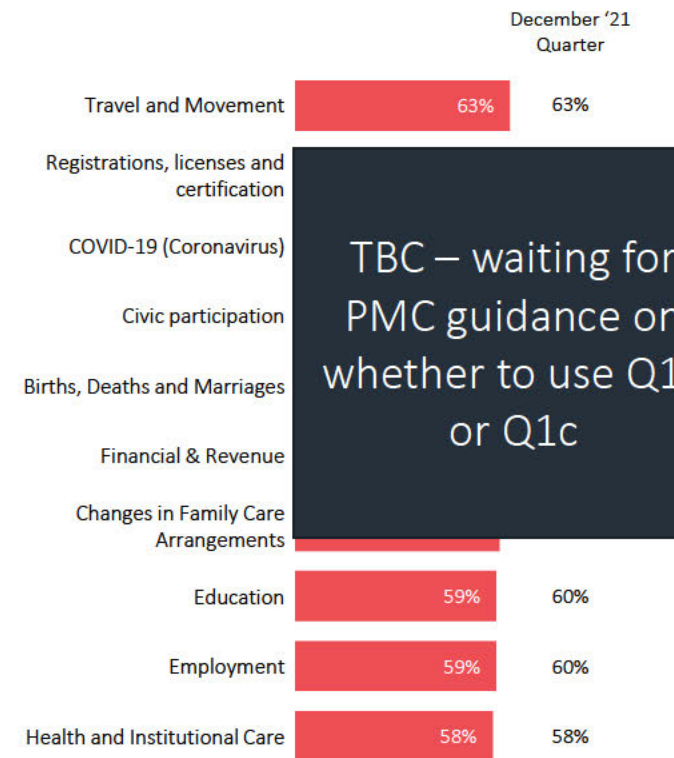
In particular, significantly less see APS as being *reliable* (32% Sep'21; 30% Mar'22), *responsive* (31% Sep'21; 28% Mar'22) and *having integrity* (35% Sep'21; 31% Mar'22).

Overall trust by life event is stable with roughly two thirds who've experienced life events trusting Australian public services.

Consistent with the December quarter, individuals that have experienced Travel and Registrations life events remain the most trusting in public services (63%). Meanwhile, those who've experienced a health event continue to report the lowest levels of trust (58%).



Trust by life event experienced in the past 12 months (broad groupings)



Satisfaction with Australian public services

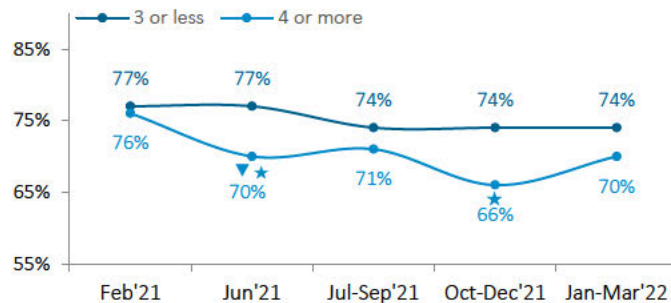
Drivers of satisfaction are stable

Agreement with all drivers of satisfaction remains stable this quarter. Agreement was still highest that *staff treated me with respect* (62% agree to strongly agree) and lowest that *the service explained how my personal information would be used and stored* (51%). As in previous periods, agreement with all drivers is slightly, but not significantly, highest among older Australian service users.

Satisfaction for those with more complex service needs is showing signs of improving

Last quarter, a downwards trend was clearly showing worsening satisfaction over time among those who accessed services for a greater number of life events. This quarter, the trend has been stemmed with a slight (non-significant) increase in satisfaction among those with 4 or more life events (from 66% Dec'21 to 70% Mar'22); moreover, the difference in satisfaction between those experiencing 3 or less vs 4 or more life events is no longer significantly different.

Satisfaction with public services by number of life events



Using less channels to access services is associated with greater satisfaction

There is a small yet significant correlation between the number of channels used to access services and overall satisfaction (-.07), suggesting the more channels someone has to use to interact with public services (e.g., by phone, face-to-face, APS websites, etc.), the less positive their experience.

Indeed, satisfaction among users who accessed services via just one channel was significantly higher (79%) than those who used more than one channel (68%).

Satisfaction among those accessing services for Travel & Migration related life events has decreased this quarter.

In December'21, satisfaction was highest among the Travel & Migrations service group (85%) but has fallen (non-significantly) in March'22 (76%). Positively, satisfaction has increased slightly for those accessing Health services (from 64% to 69% satisfied) and among those seeking support for Employment (from 61% to 67% satisfied).

Satisfaction by life event sought help for (broad groupings)

		December'21 Quarter
Travel & Migration	76%	85%
Family Formation	71%	72%
Health	69%	64%
Employment	67%	61%
Family Dissolution	57%	59%




Satisfaction with service elements

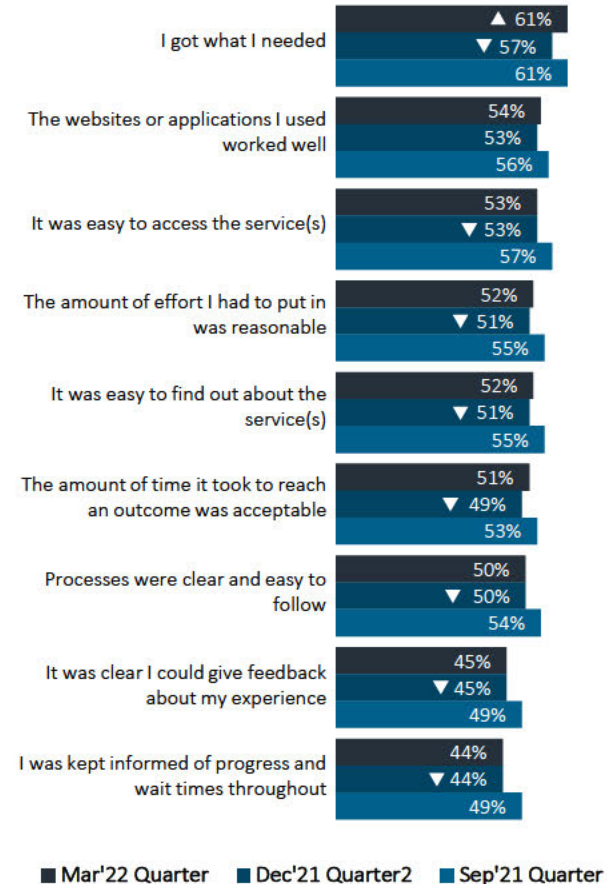
After falling last quarter, satisfaction with service elements has stabilised – but is yet to improve again for most elements

Since last quarter, there has been no change in agreement with most service elements after falling significantly the previous quarter. Positively, the proportion who agreed they *got what they needed* from their service has increased significantly to levels seen in the Sep '21 qtr.

Those using purely digital channels are more satisfied with most service elements, while those who use a mix of digital and non-digital typically rate elements lower

Digital-only users agreed most they *got what they needed* and that it was *easy to access the service*. Digital users also agree they are *kept updated on progress* more so than other users.

		<i>I got what I needed</i>	<i>Easy to access the service</i>	<i>Kept informed of progress</i>	<i>Amount of effort was reasonable</i>
Digital only		69%	62%	51%	59%
Non-digital only		58%	57%	43%	59%
Mix		55%	44%	40%	44%



Cohort Differences

Breaking down the data by different groups of interest.

Cohort Differences

Young Australians (18-34 years)

	Unemployed Young Men	Unemployed Young Women	Employed Young Men	Employed Young Women
A brief overview...	Unemployed young men are the least satisfied with Australian public services, and have a slightly lower level of trust. However they experience slightly less life events. The time it takes to achieve an outcome is a key area to improve to boost their satisfaction.	Unemployed young women experience a similar number of life events to their male counterparts, but are more satisfied with public services. Their highest driver of trust is that Australian public services is reliable.	Employed young men are satisfied with public services and have the highest trust. They think public services processes are clear and easy to follow but want to be kept more informed of progress.	Employed young women are also satisfied with public services despite being less trusting than their male counterparts. Like unemployed young men and women, their lowest driver of trust is that APS is responsive.
Satisfaction	57% ☆	72%	74%	74%
Drivers of satisfaction	<ul style="list-style-type: none"> Highest: "I got what I needed" (54%) Lowest: "The amount of time it took to reach an outcome was acceptable" (35%) 	<ul style="list-style-type: none"> Highest: "The amount of effort I had to put in was reasonable" (58%) Lowest: "I was kept informed of progress and wait times throughout" (41%) 	<ul style="list-style-type: none"> Highest: "Processes were clear and easy to follow" (56%) Lowest: "I was kept informed of progress and wait times throughout" (47%) 	<ul style="list-style-type: none"> Highest: "Processes were clear and easy to follow" (62%) Lowest: "It was easy to find out about the service(s)" (49%)
Trust	53%	57%	66% ★	58%
Drivers of Trust	<ul style="list-style-type: none"> Highest: "APS are open and honest" (61%) Lowest: "APS are responsive" (49%) 	<ul style="list-style-type: none"> Highest: "APS are reliable" (52%) Lowest: "APS are responsive" (48%) 	<ul style="list-style-type: none"> Highest: "APS are fair" (61%) Lowest: "APS are responsive" (59%) / APS are open and honest (59%) 	<ul style="list-style-type: none"> Highest: "APS have integrity" (56%) Lowest: "APS are responsive" (52%)
Average Number of life events	7	7	8	9
Average number of services accessed	1.8	1.7	1.9	1.7

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Note: ★ = Significantly higher ☆ = Significantly lower (compared to the other cohorts).

Cohort Differences

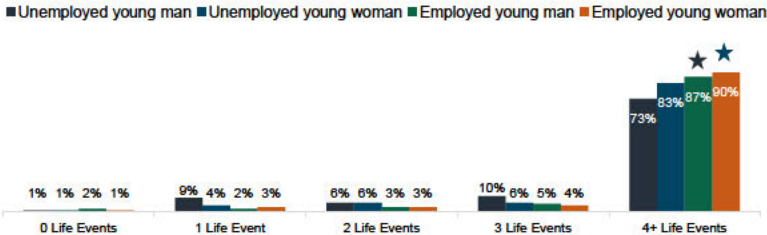
Young Australians (18-34 years)

Employment status among young men is a strong determinant of satisfaction with Australian public services

Unemployed young men are significantly less satisfied with Australian public services (57%) compared to those employed (74%). Interestingly, this isn't mirrored among women as they're equally as satisfied with public services regardless of if they're employed or unemployed.

Although non-significant, employed men and women are slightly more likely to agree with many of the drivers of satisfaction compared to their unemployed counterparts. Of note, employed men are (non-significantly) more likely to agree that *staff did what they said they would do* compared to unemployed men (56% employed vs. 35% unemployed).

Number of life events experienced (By young age group)



Employed men and women are more likely to experience four or more life events compared to those unemployed

However, they access a similar number of services on average, between 1.7 and 1.9 services. The life events they've accessed services for did differ among the cohorts however. Unemployed men and women are significantly more likely to access services related to *looking for work, becoming or being unemployed and having a disability*.

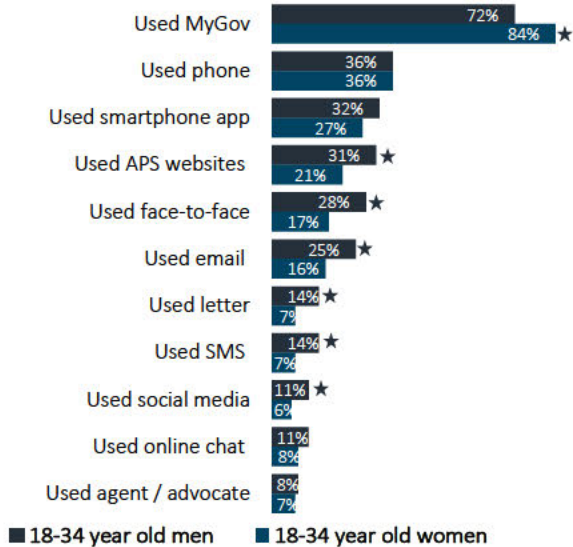
Employed young men are more trusting of Australian public services compared to other groups

Employed young men have a significantly higher level of trust (66%) compared to employed young women (58%), as well as unemployed young men (53%) and women (57%). Like satisfaction, employment status doesn't play a major factor in the evaluation of trust by women.

The employed men are also significantly more likely to agree that public services are *responsive, fair, and open and honest* compared to others.

Usage of different access channels differs slightly among young Australians

Interestingly, women are significantly more likely to have used MyGov (83%), compared to men (72%). Potentially as a result, men are significantly more likely to access a wider range of channels including APS websites, face-to-face, email, letters, SMS and social media (see below).



Cohort Differences

Middle-aged Australians (35-64 years)

	Unemployed Middle-aged Men	Unemployed Middle-aged Women	Employed Middle-aged Men	Employed Middle-aged Women
A brief overview...	Unemployed middle-aged men are slightly more satisfied with Australian public services than unemployed women, but have slightly lower levels of trust. Knowing about how their personal information is used and stored is a key area to improve to boost their satisfaction.	Unemployed middle-aged women have the lowest level of satisfaction among their peers. However, they have slightly higher levels of trust compared to unemployed middle-aged men. Similar with unemployed men, understanding how their personal information is stored is their lowest driver of satisfaction.	Employed middle-aged men are the most satisfied with public services and have significantly higher trust compared to their counterparts. APS being open and honest is a clear driver of trust for this group.	Employed middle-aged women feel a higher level of satisfaction compared to their unemployed counterparts. However, trust among this group is identical to the levels of trust of unemployed middle-aged women. The APS being seen as fair is a clear area of improvement for trust, along with the other drivers of trust.
Satisfaction	69%	65% ☆	76%	73%
Drivers of satisfaction	<ul style="list-style-type: none"> Highest: "Staff were knowledgeable" (59%) Lowest: "The service explained how my personal information would be used and stored" (41%) 	<ul style="list-style-type: none"> Highest: "Staff treated me with respect" (56%) Lowest: "The service explained how my personal information would be used and stored" (36%) 	<ul style="list-style-type: none"> Highest: "Information from the service was accurate" (66%) Lowest: "I was kept informed of progress and wait times throughout" (52%) 	<ul style="list-style-type: none"> Highest: "Information from the service was accurate" (59%) Lowest: "I was kept informed of progress and wait times throughout" (41%)
Trust	51%	53%	67% ★	53%
Drivers of Trust	<ul style="list-style-type: none"> Highest: "APS are responsive" (56%) Lowest: "APS are open and honest (49%) / APS have integrity (49%) 	<ul style="list-style-type: none"> Highest: "APS have integrity" (52%) Lowest: "APS are fair" (47%) 	<ul style="list-style-type: none"> Highest: "APS are open and honest" (63%) Lowest: "APS are responsive" (57%) 	<ul style="list-style-type: none"> Highest: "APS are open and honest" (51%) Lowest: "APS are fair" (46%)
Average Number of life events	6	6	6	6
Average number of services accessed	1.8	1.7	1.8	1.7

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Note: ★ = Significantly higher ☆ = Significantly lower (compared to the other cohorts).

Cohort Differences

Middle-aged Australians (35-64 years)

Employment status also impacted satisfaction with Australian public services among middle-aged Australians

Unemployed middle-aged Australians (men and women) are significantly less satisfied with Australian public services compared to those employed (75% vs. 67%).

Interestingly, although non-significant, it's evident that men (employed and unemployed) are more likely to agree with the drivers compared to women (see right).

Employed middle-aged men are most trusting of Australian public service compared to all other groups in their cohort

Satisfaction by employed middle-aged men (67%) is significantly higher than unemployed middle-aged men (51%), women (53%) and employed women (53%).

Once again, it's evident that employed middle-aged women have a similar level of trust to both unemployed middle-aged men and women.

The employed men are also significantly more likely to agree that public services are reliable, responsive, trusting, and open and honest compared to others.

Number of life events and services used is relatively consistent across all groups in this age cohort

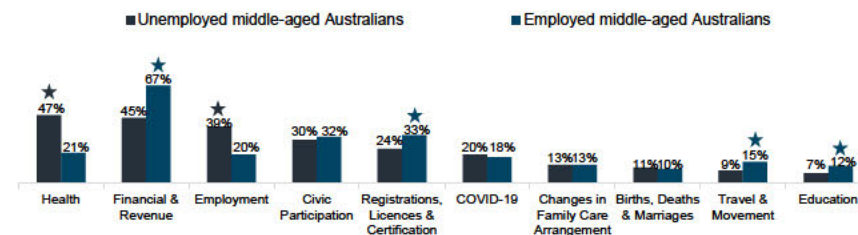
On average, all middle-aged Australians have experienced six life events, regardless of their gender or employment. Further, these Australians all access 1.7 – 1.8 different public services.

Unemployed middle-aged men and women are significantly more likely to access public services for employment and health related services, while those employed are significantly more likely to use education, financial & revenue, travel and registration services (see right).

Drivers of Satisfaction (By middle-age group)



Broad Life Event Groupings Accessed Services For (By middle-age group)



Cohort Differences

Mature-aged Australians (65+ years)

	Retired Mature-aged Men	Retired Mature-aged Women	Employed Mature-aged Men	Employed Mature-aged Women
A brief overview...	Retired mature-aged men have similar trust in and satisfaction with Australian public services to unemployed men. On average, they have less reasons to interact with public services than employed mature-aged Australians.	Retired mature-aged women have slightly lower trust and satisfaction than retired men. Similar to retired men they largely feel respected, but being informed of progress is a clear area for improvement.	Mature-aged men have higher trust and satisfaction than mature-aged women, whether retired or employed. However on each satisfaction driver, employed mature-aged men rated them the highest compared to other mature-aged Australians.	Employed mature-aged women had significantly lower satisfaction than other mature-aged Australians. They averaged the most reasons to interact with Australian public services; and when they did interact, they were more likely to access multiple services.
Satisfaction	70%	66%	69%	57% ☆
Drivers of satisfaction	<ul style="list-style-type: none"> Highest: "Staff treated me with respect" (79%) Lowest: "I was kept informed of progress and wait times throughout" (44%) 	<ul style="list-style-type: none"> Highest: "Staff treated me with respect" (67%) Lowest: "I was kept informed of progress and wait times throughout" (41%) 	<ul style="list-style-type: none"> Highest: "Staff treated me with respect" (85%) Lowest: "It was clear I could give feedback about my experience" (71%) 	<ul style="list-style-type: none"> Highest: "Staff treated me with respect" (63%) Lowest: "The service understood my individual needs" (41%)
Trust	81%	77%	82%	76%
Drivers of Trust	<ul style="list-style-type: none"> Highest: "APS are fair" (67%) Lowest: "APS are responsive" (61%) 	<ul style="list-style-type: none"> Highest: "APS are reliable" (64%) Lowest: "APS are fair" (59%) 	<ul style="list-style-type: none"> Highest: "APS are fair" (72%) Lowest: "APS are responsive" (66%) 	<ul style="list-style-type: none"> Highest: "APS are open and honest" (58%) Lowest: "APS are responsive" (49%)
Average Number of life events	3 ☆	3	4	5 ★
Average number of services accessed	1.7	1.9	1.7	2.2 ★

This report is not for publication or open release to the public. Contact the Citizen Engagement team (citizenengagement@pmc.gov.au) before sharing any findings or data from this report. Results are subject to quality assurance. Rounding may cause some aggregate numbers to not equal 100%, or the sum of their parts.

Note: ★ = Significantly higher ☆ = Significantly lower (compared to the other cohorts).

Cohort Differences

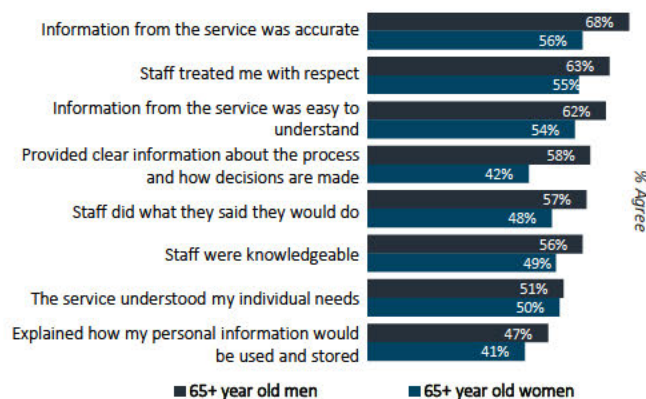
Mature Australians (65+ years)

Employment status has little impact on the satisfaction on Australian public services for individuals aged 65+

Women aged 65+ rate their satisfaction with Australian public services consistently, regardless of their employment status (77% unemployed, 76% employed, 77% retired). Similarly, employed and retired men rated their satisfaction evenly (82% and 81% respectively). **There were not enough unemployed mature men to report their results.**

Overall, satisfaction by men aged 65+ sits slightly (non-significantly) higher compared to women in this age group (80% vs. 76%). Similarly, although non-significant, men aged over 65 are slightly more likely to agree with our drivers of satisfaction (see below).

Drivers of Satisfaction (By mature age group)



Usage of digital channels is generally consistent among mature men and women

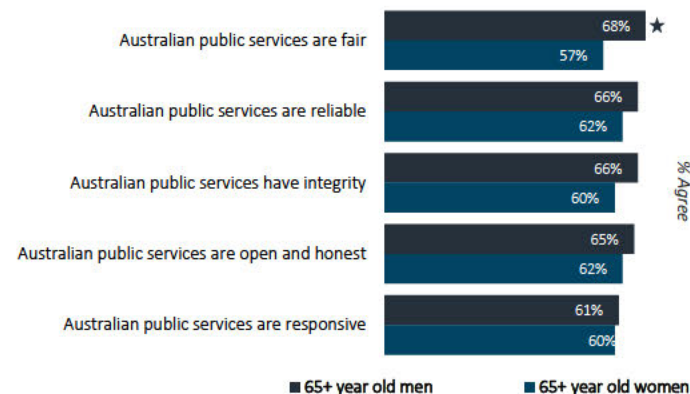
Men access 1.6 digital channels on average, while women access 1.9 channels. Mature women are significantly more likely to use a mix of digital and non-digital platforms (42% vs. 28% men) and are significantly more likely to use their phone to access service compared to men (35% women vs. 22% men).

Overall trust is slightly (non-significantly) higher among mature Australian men compared to women

Seven in ten (70%) of older men trust Australian public services, slightly higher than trust among women in the age group (64%). Again, there was little deviation in trust across the three core employment statuses.

Ratings of drivers of trust also positively skewed slightly towards men. Specifically, mature men are significantly more likely to agree that *Australian public services are fair* (68% vs. 57% women).

Drivers of Satisfaction (By mature age group)



Men and women in the mature age cohort are similar in the number of life events experienced and accessed services for

Men experience three life events and access 1.7 services on average. Meanwhile, women experienced four life events and access 1.9 services on average in March 2022.

Women are significantly more likely to access services for life events related to births, deaths and marriages (10% vs. 3% men), changes in family care arrangement (14% vs. 5%) and civic participation (40% vs. 24%).

The Survey Details

Background to the survey and information that's collected

Analysis conducted and survey sample

Questions Included

The core survey questions included in the analysis conducted this quarter are:

- Q1 (including Life Events Experienced and Accessed Services For)
- Q2 (Drivers of Trust)
- Q3 (Measure of Trust in Australian public services)
- Q5 (Ratings of Service Element Interactions)
- Q8 (Measure of Satisfaction in Australian public services)
- Q9 (Drivers of Satisfaction)
- Q12 (Channels Used to Access Services)

Each of the questions has been analysed by key demographic variables and applicable results have been included in this report.

Sample Specifics

A total of n=3,509 Australians aged 18+ completed the survey between January – March 2022.

This results in a margin of error of +/- 1.65% at a 95% confidence interval.

The data has been left unweighted at the request of the Department.

The sample breakdown by key demographics (such as gender, age and location) has been provided right.

Report Interpretation

Values shown in the charts are percentages (%), unless otherwise indicated.

Some figures may add up to 101 or 99 due to rounding (if they are not multi-response questions).

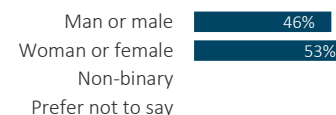
Significance is tested at the 95% confidence interval. Differences between sub-groups are indicated by stars:

★ = Significantly higher

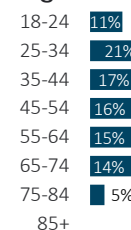
☆ = Significantly lower

Significant increases or decreases between waves are indicated by up/down arrows: ▲ ▼

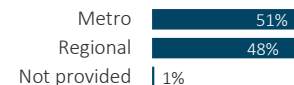
Gender



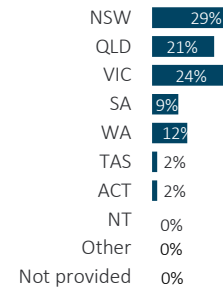
Age



Location



State



Citizen Experience Survey

June 2022 Quarterly update

Australian Government

Department of the Prime Minister and Cabinet

Prepared by Painted Dog Research



Key insights

1

Those accessing services on digital channels are the most satisfied, while those accessing a mix of digital and non-digital channels are least satisfied.

2

Misalignment of channel preference and usage leads to lower satisfaction, particularly for people who prefer non-digital channels and are required to utilise digital.

3

Unemployed Australians are the least trusting and satisfied with public services and using mixed channels to engage with services lower satisfaction more.

4

Those accessing services for complex life events have lower trust and satisfaction with public services. Experience varies across different complex life events but may indicate where there is room to improve the channel experience.

Overall experience with Australian public services



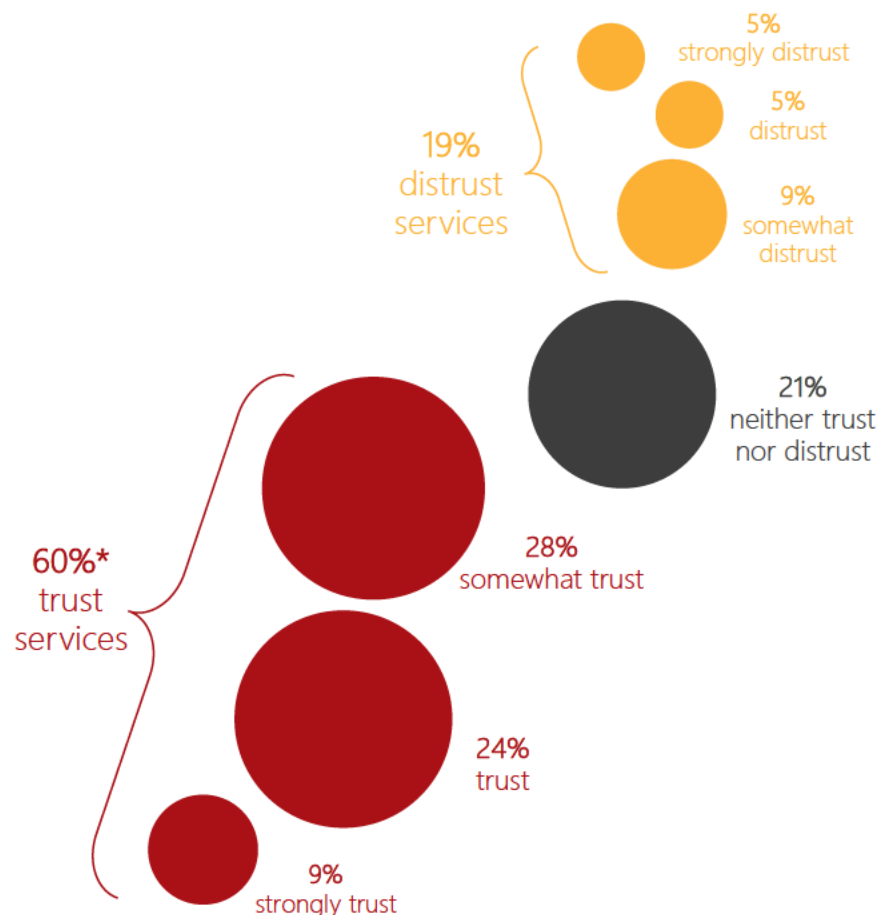
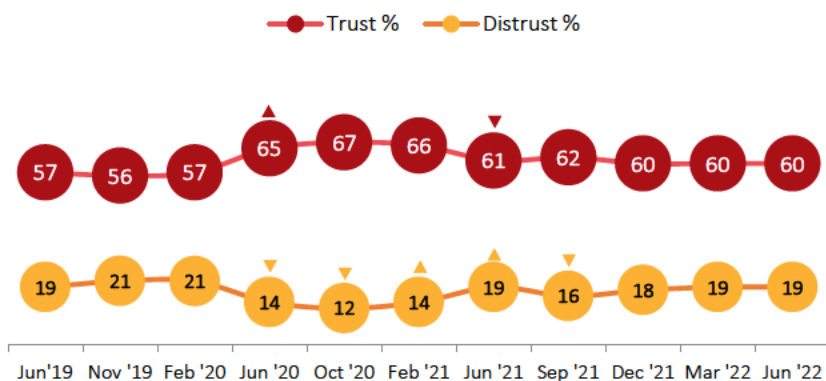
Three in five Australians are trusting of Australian public services.

Overall trust remains stable this quarter with 60% saying they trust Australian public services. Distrust also remains stable and low this quarter with 19% saying they distrust public services.

There have been no significant changes in any key drivers of trust this quarter. The top rated driver of trust is that *Australian public services have integrity* (58% agree) while lowest rated is that *Australian public services are fair* (55%).

@DPC – we don't have the Feb '19 data on our end to add in.

% Trust over time - Quarterly



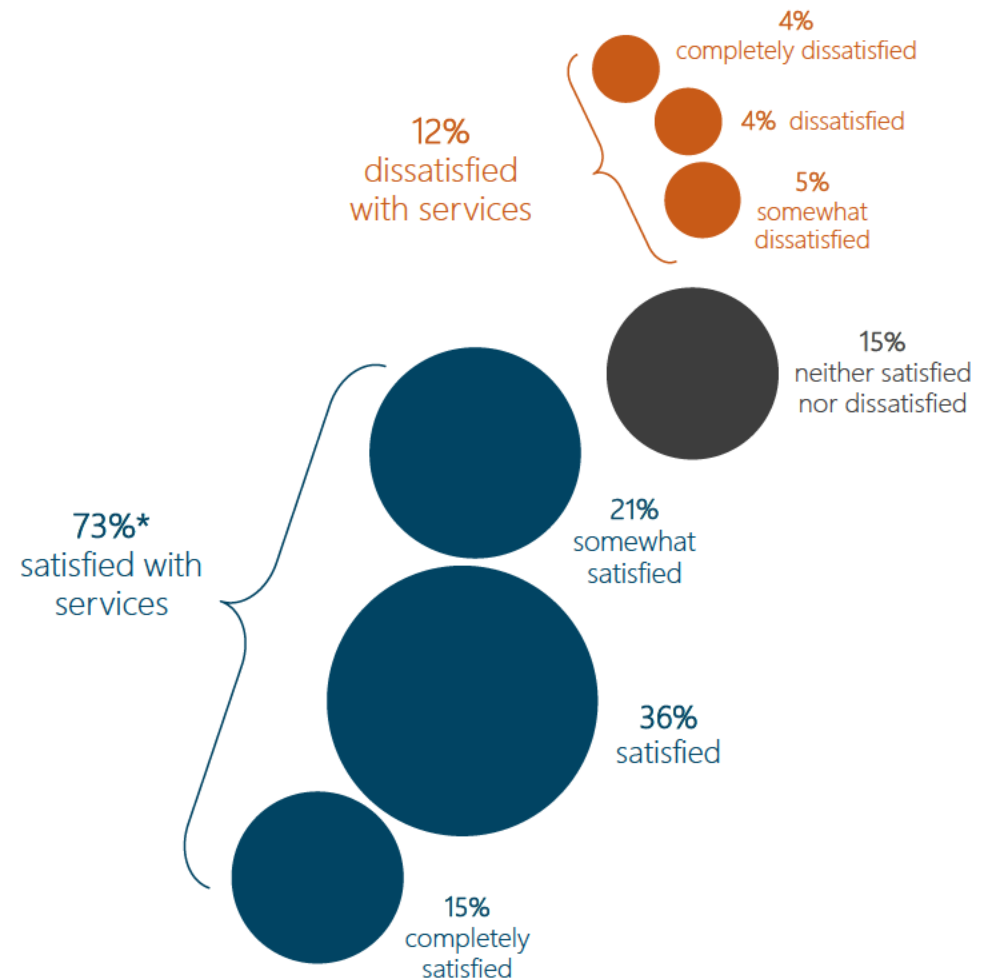
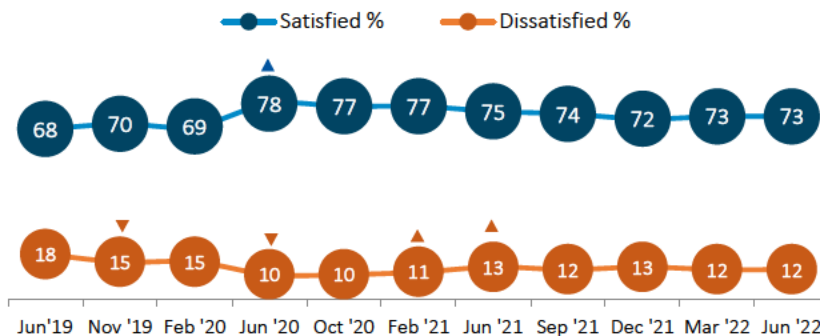
Satisfaction remains high, with almost three quarter of service users satisfied with Australian public services.

Satisfaction with public services remain stable this quarter, with 73% of service users indicating they are satisfied with their experience. Dissatisfaction also remains stable at just 12%.

Key drivers of satisfaction remain stable this quarter. The top rated driver of satisfaction is that *staff treated me with respect* (64% agree) while the lowest remains *the service explained how my personal information would be used and stored* (52%).

@DPC – we don't have the Feb'19 data on our end to add in.

% Satisfaction over time - Quarterly



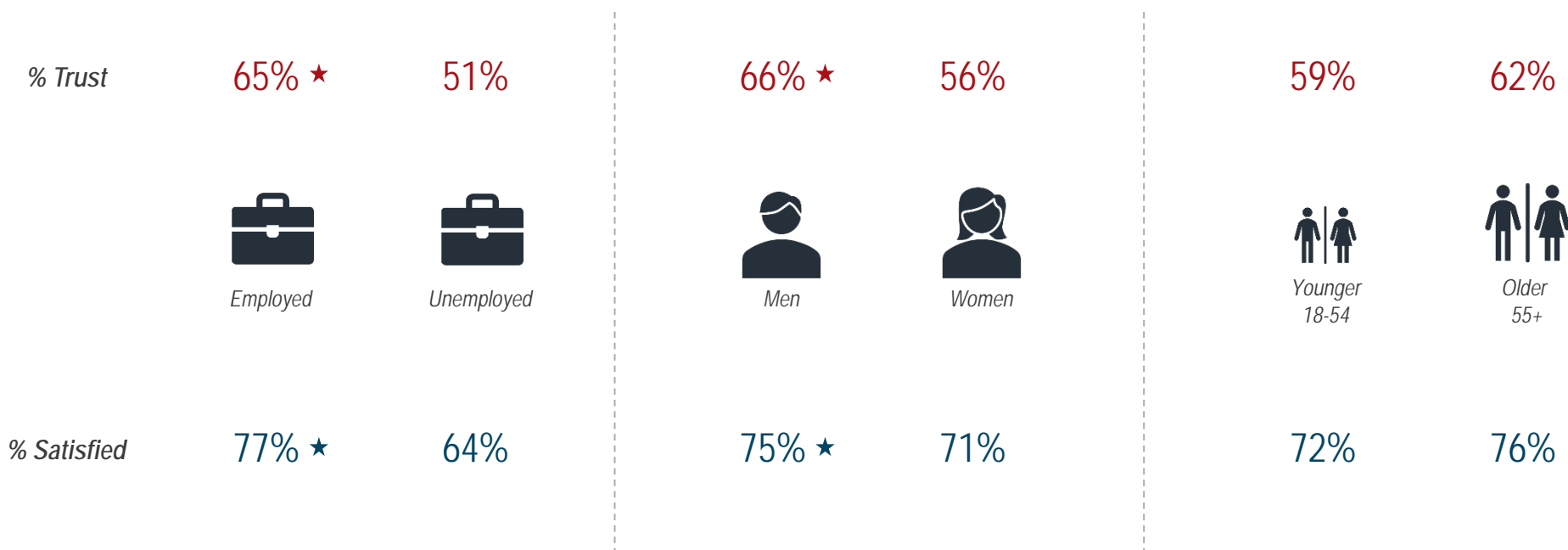
Unemployed people are the least trusting and have the worst experiences with Australian public services overall.

Almost two thirds (65%) of employed Australians trust public services compared to just over half (51%) of unemployed Australians. Satisfaction among those who access services is also significantly lower among those who are unemployed (64% satisfied vs 77% for employed Australians).

As in previous quarters, trust and satisfaction both remain significantly higher among men (66% and 75% respectively) compared to women (56% and 71% respectively) .

Younger Australians who access services are the least satisfied. Younger people aged 18-54 years-old are slightly but *not significantly* less satisfied (72%) with public services than those aged 55 or over (76%). However this slightly lower satisfaction is being driven by the youngest cohort of service users aged 18-24 – satisfaction among this cohort is significantly lower at 66% compared to the average overall satisfaction of all older age groups (74%).

While young people aged 18-54 are also slightly less trusting of Australian public services, this difference isn't significant and isn't being driven by any specific narrow age group.



Service across channels

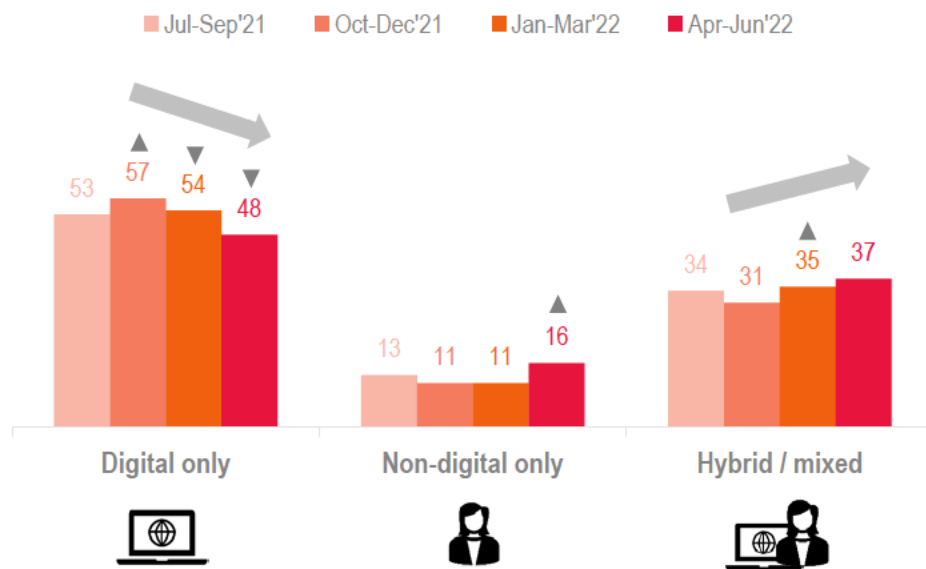


Digital channels are the most commonly used, with over half of service users accessing services via digital only channels in the past 12 months.

Since July 2021, 53% of service users have accessed services using digital only channels, compared to 13% non-digital only and 35% mixed / hybrid.

Digital only usage is trending down. Since peaking at 57% of service users in Dec'21, the proportion of service users accessing purely digital channels has decreased, now at less than half (48%). Hybrid usage has trended up in the time, with non-digital only usage increasing significantly this quarter to 16%.

% used channel types, over time



Most use three or more channels when accessing services, but the proportion using only one has increased this quarter. Over half (56%) of service users accessed services via three or more channels in the past year (compared to 42% two channels and only 2% one channel). However this quarter, the proportion using just one channel has increased significantly from 2% to 3%.

MyGov is the most commonly used channel overall, but its reported usage dropped significantly this quarter. Over two thirds reported accessing Australian public services via MyGov this year, followed by 29% who accessed services via the phone. In line with previous quarters, usage was lowest for online chat (6%) and social media (5%).

After increasing in the March quarter to 72% (up from 69% previous quarter), usage of MyGov has decreased significantly this quarter to 55% - the most notable driver of the lower proportion of digital only channel usage this quarter.

Top two specific channels used, Jul'21 to Jun'22



67%



29%

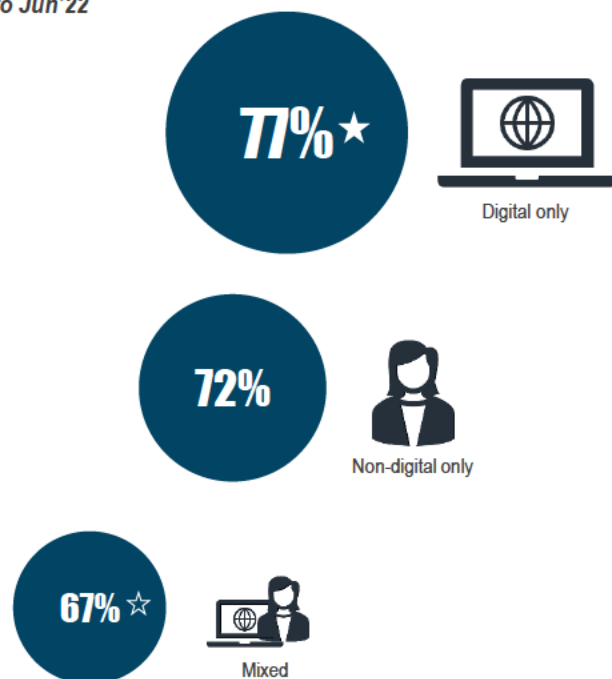
Overall satisfaction is highest for service users who access digital only channels, and lowest for those using a mix of digital and non-digital.

Over three quarters (77%) of service users who accessed digital only channels were satisfied overall with their public services experience in the past 12 months, significantly higher than 72% of non-digital only and 67% of mixed channel users. This could explain in part the lower overall satisfaction experienced by cohorts more likely to use a mix of channels (i.e., younger people and those who are unemployed). Despite garnering the lowest satisfaction across the year, satisfaction among those accessing a mix of channels has increased significantly this quarter (up to 70% satisfied vs 66% in Jan-Mar'22).

Across the year, overall public service satisfaction was highest for those who used MyGov, SMS and an agent / advocate (all 74% satisfied) to access services, and lowest for those who used mail / post (69%), face-to-face (68%) and telephone (67%).

Satisfaction

12 months - Jul'21 to Jun'22

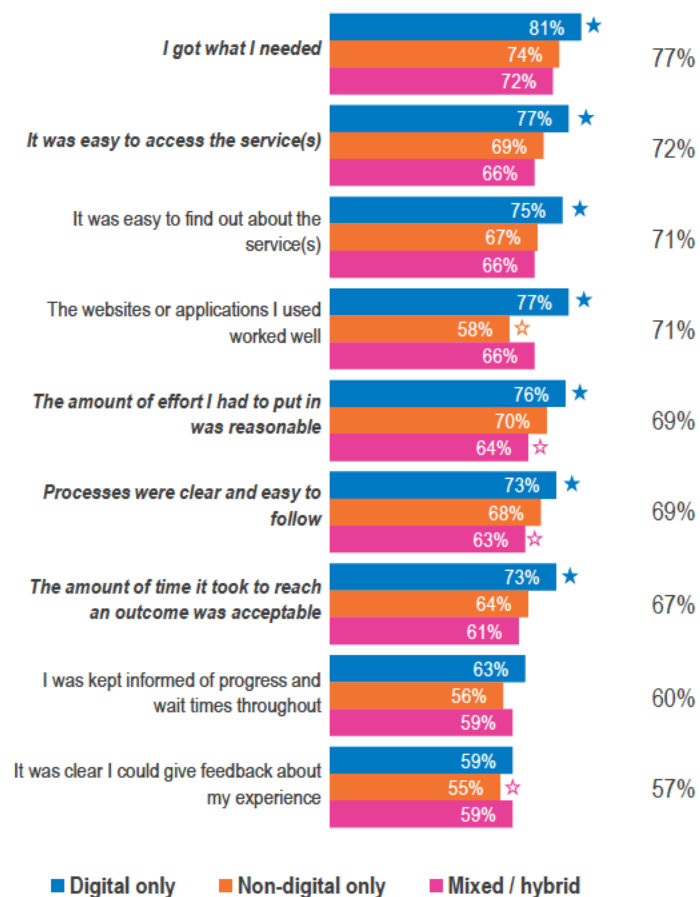


People who used digital channels rate a range of service elements better than other users.

Those who used non-digital and a mix of digital and non-digital reported the lowest agreement with a range of service elements. Notably, those using mixed channels reported lower agreement that *the amount of effort they had to put in was reasonable*, and that *processes were clear and easy to follow*. This further indicates that the service experience of those who use a mix of channels is less positive than those who use purely digital or non-digital channels.

People using mixed channels are accessing more services than others. Over 1 in 5 who used mixed channels accessed three or more services, significantly higher than those who used digital only (16% accessed three or more services) and non-digital only channels (17%). This indicates those using mixed channels may be doing so because the different services they access require them to use different channels and could explain why they report lower agreement that the *level of effort required was reasonable*.

Ratings of service elements by channel type used
(somewhat agree to strongly agree)



The experience of accessing multiple services tends to be worse for those using non-digital channels only.

Agreement with ratings about how multiple services interact is a strong driver of overall service satisfaction among multi-service users. Overall, agreement is highest that multi-service users *understood what each service does* (79% agree) but lowest that *information provided to one service doesn't need to be repeated to others* (58%), suggesting the requirement to repeat information to multiple services could lead to poorer experience for multi-service users.

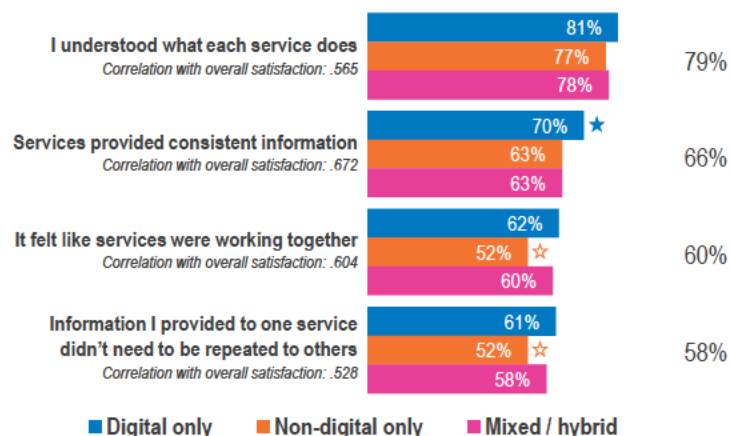
All attributes are strongly correlated with multi-service users' overall satisfaction with public services (correlations at the overall level shown below), however agreement that *all services provided consistent information* is the strongest driver of overall satisfaction (.672), which garners strongest agreement from multi-service users who accessed digital only channels.

The experience of accessing multiple services is not worse for those who used mixed channels. Agreement with multi-service interaction statements are not meaningfully lower for those who used mixed channels compared to those who used digital or non-digital channels only. This suggests it may not be poor interactivity between a mix of digital and non-digital channels used to access different services that leads to poorer experience among mixed channel users.

Notably, agreement that *services provided consistent information* (the strongest driver of overall satisfaction) is significantly higher among digital only users, contributing to higher overall satisfaction among multi-service digital only users (76%) compared to non-digital (71%) and mixed channel (69%) multi-service users.

Different non-digital channels interact with each other worst. Those accessing multiple services across purely non-digital channels were least likely to agree that *is felt like the services were working together* (52%) and that *information they provided to one service didn't need to be repeated to others* (52%) This suggests the experience of accessing multiple services on different non-digital channels offers a worse experience than digital channels. Higher ratings for mixed channels on these measures are likely driven up by the digital channel accessed by these multi-service users.

Agreement with multi-service performance statements (somewhat agree to strongly agree)



Preference for using mixed channels is lower than its usage.

Aligned with usage, the majority (56%) prefer to use digital only channels, with MyGov the top preferred channel (50% prefer) followed by phone (24%) and email (20%).

However, at the overall level, there is an indication that some service users are using types of channels to access services that are not their preferred channels. This discrepancy is biggest for those using *mixed channels* – only 25% of service users would prefer a mixed channel approach to accessing services, which is notably lower than the proportion who reported using mixed channels (35%).

While preference for a mixed approach is still higher than digital only, this large discrepancy indicates there is a sizable segment of service users who are being forced to use mixed channels.

Using channels they don't want to use worsens the experience with public services.

At the overall level (regardless of which channels they use or prefer), satisfaction with Australian public services is significantly lower among those who had to use channels that they prefer not to use (70% satisfied) compared to those whose usage aligns with their preference (76%).

This is true of all key cohorts, but younger people are the most dissatisfied with using channels they don't want to. Overall satisfaction is 68% among younger people aged 18-54 who use channels incongruent with their preference, significantly lower than 75% among those who use their preferred channels as well as 73% among older people (aged 55+) who use non-preferred channels.

% used

53%



Digital only

13%



Non-digital only

35%



Mixed

% prefer

56%

+3

19%

+6

25%

-10

76% ★
satisfied



Used channels
they prefer

70%
satisfied



Used channels they
do not prefer

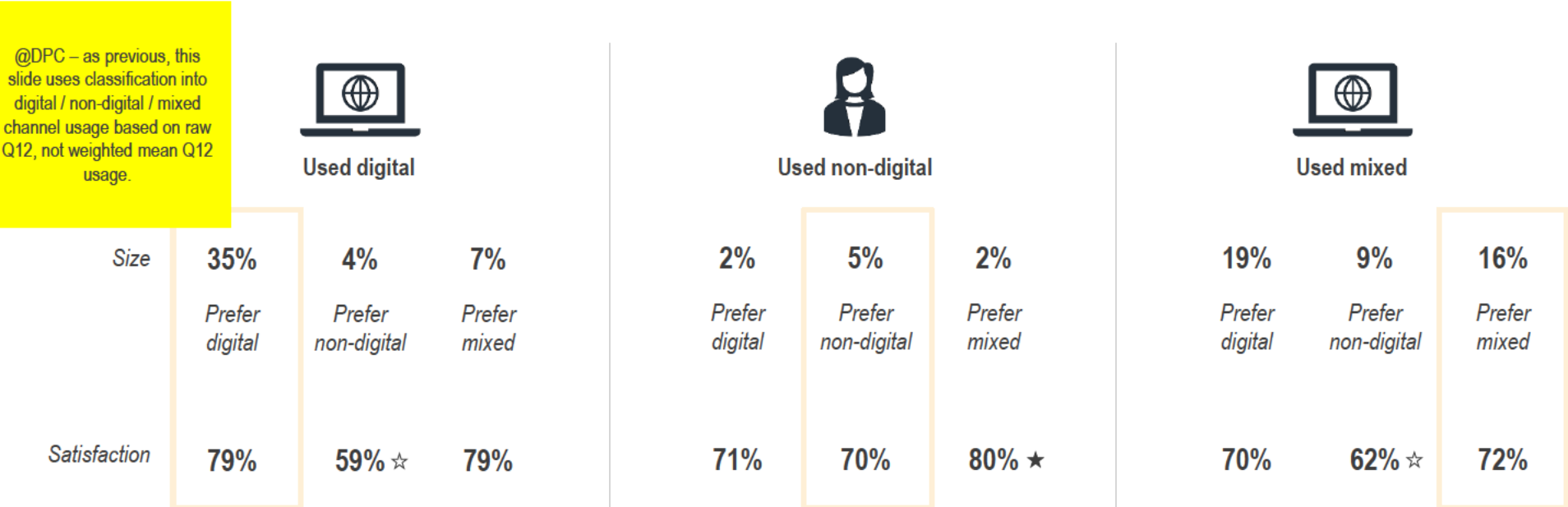
@DPC – note that the congruent vs non-congruent variable uses classification based on overall raw Q12 responses (i.e., not the weighted mean Q12 classification used in other instances so far). That is, it is based on a variable created that classifies people (at the respondent level) into groups based on whether they used digital only channels across all services

We think this works as preference is not related to service but at the respondent level, but obviously want to flag this. We haven't been able to figure out a way to incorporate the weighted mean Q12 usage groupings into this analysis with preference, but of course can explore further if needed.

Satisfaction is lowest for those who **prefer** non-digital channels but are forced to use digital channels.

Overall, more than half (56%) of service users use channels that align with their preference (*in terms of digital, non-digital or mixed*). However, people forced to use digital channels when they prefer non-digital channels have a poorer experience (59% satisfied). Satisfaction is also significantly lower among those who used mixed channels but preferred non-digital (62%). This suggests forcing users to access digital channels could drive down satisfaction. However, it is worth noting that the segment who use digital but prefer non-digital represents a small proportion of service users at 4%.

	Size	Satisfaction
Used channel type that aligns to preference	56%	76%
Used channel type not aligned to preference	44%	70%



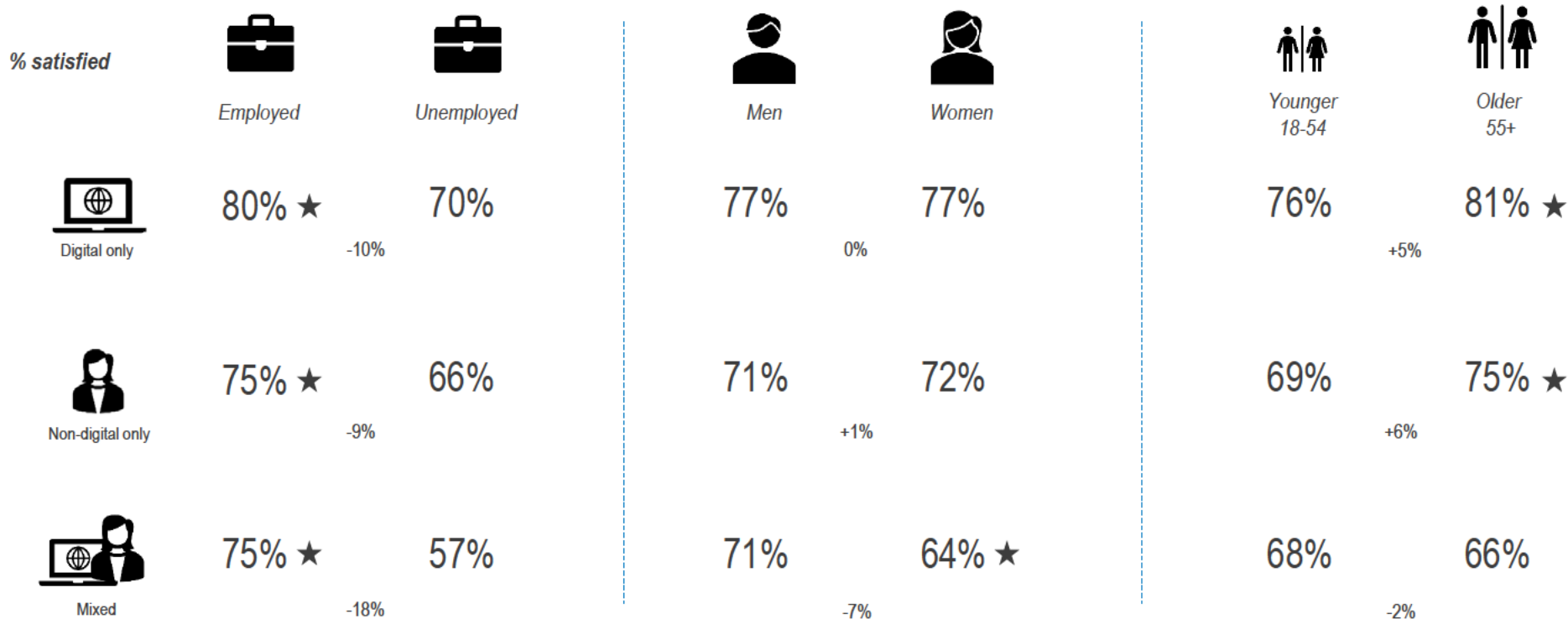
COHORTS



Using mixed channels to access services is driving down satisfaction among unemployed service users and women.

















Less than three in five (57%) unemployed service users who used mixed channels were satisfied with public services this year, compared to 75% among employed service users accessing mixed channels. While unemployed users' satisfaction is lower across all channels, an 18 percentage-point differential compared to employed mixed channel users suggests *using mixed channels could be driving down satisfaction among this unemployed cohort.*

Using a mix of digital and non-digital channels appears to be driving the lower satisfaction among women compared to men. Satisfaction between men and women is similar among those who use digital only and non-digital only channels. However, women who use mixed channels report significantly lower overall satisfaction than men who used mixed (64% vs 71%), suggesting it's this channel usage that impacts their satisfaction.



Cohort experience snapshot – Young people (18-34)

















Employed young men and women have indicatively higher overall satisfaction than their unemployed counterparts, with unemployed young men the least satisfied. Agreeing that *they got what they needed* is a top driver for all young cohorts, however is rated significantly higher among employed young men and women. While the difference isn't significant, unemployed young men and women use channels they don't prefer slightly more than those employed.

	Unemployed Young Men			Unemployed Young Women			Employed Young Men			Employed Young Women		
A brief overview...	The least satisfied cohort, unemployed young men are most likely to have interacted with Australian public services for help looking for work. They have the lowest satisfaction using digital only channels despite the majority preferring a digital approach.			Unemployed young women are more satisfied than their male counterparts overall; however they report a significantly worse experience using non-digital channels than all other cohorts.			A satisfied cohort, employed young men are notably more satisfied with their mixed channel usage than other cohorts. They are more likely than unemployed people to agree they reached an outcome in an acceptable time, which is their strongest driver of satisfaction.			Just as satisfied as their employed male counterparts, they have indicatively higher usage and preference for digital only channels. They are also the only young cohort for which agreeing the websites / aps worked well was a top driver of satisfaction.		
Top event accessed services for	Looked for work 			Applied for / renewed licence 			Submitted a personal tax return 			Submitted a personal tax return 		
Overall satisfaction	56% ☆			64%			75%			73%		
Channel type used	43%	9%	48%	46%	8%	46%	50%	8%	42%	56%	7%	37%
												
Channel type preferred	62%	13%	25%	62%	12%	26%	63%	15%	22%	66%	11%	23%
Channel satisfaction	59% <i>digital only</i>	69% <i>non-digital only</i>	54% <i>mixed</i>	73% <i>digital only</i>	60% <i>non-digital only</i>	57% <i>mixed</i>	73% <i>digital only</i>	68% <i>non-digital only</i>	77% <i>mixed</i>	76% <i>digital only</i>	73% <i>non-digital only</i>	69% <i>mixed</i>
Used channel type <u>not</u> preferred	48%			48%			47%			45%		
Satisfaction with service elements*: <i>Top two drivers of overall satisfaction</i>	"I got what I needed" (68%**) "The websites or applications I used worked well" (64%)			"I got what I needed" (71%) "It was easy to find out about the service(s)" (66%)			"The amount of time it took to reach an outcome was acceptable" (73%) "I got what I needed" (79%)			"I got what I needed" (77%) "The websites or applications I used worked well" (73%)		

*Linear regression analysis (backward entry method) used – Q5 satisfaction with service elements x Q8 overall satisfaction (average satisfaction score across services). **Percentage score shown is % agree (somewhat to strongly) with the statement at Q5.

Cohort experience snapshot – Middle-aged people (35-64)

















Unemployed middle-aged men and women are both significantly less satisfied than their employed counterparts. Notably, employed people have a significantly higher preference for digital only channels than those unemployed. While not significant, unemployed middle-aged people were more likely to use channels they don't prefer, and are more likely than those employed to used mixed channels.

	Unemployed Middle-aged Men	Unemployed Middle-aged Women	Employed Middle-aged Men	Employed Middle-aged Women
A brief overview...	Unemployed middle-aged men are more satisfied with non-digital channels than same-age unemployed women. Agreeing they <i>got what they needed</i> from their service interaction is the strongest driver of satisfaction for this cohort, but is rated lower than their employed counterparts.	The least satisfied middle-aged cohort, unemployed women report the poorest non-digital and mixed channels experience. Agreeing they <i>got what they needed</i> is the strongest driver of satisfaction but again rated lower than their employed counterparts.	A more satisfied cohort, over 8 in 10 agree they <i>got what they needed</i> from their service interaction, driving up their satisfaction. This cohort has a significantly lower preference for non-digital channels than all other cohorts.	Like employed middle-aged men, this cohort has strong agreement in their top drivers of satisfaction and compared to their unemployed female counterparts are more likely to agree the <i>amount of effort they put in was reasonable</i> .
Top event accessed services for	Looked for work 	Submitted a personal tax return 	Submitted a personal tax return 	Submitted a personal tax return 
Overall satisfaction	67% ☆	63% ☆	77%	75%
Channel type used	50%  12%  39% 	47%  15%  38% 	59%  11%  30% 	61%  11%  28% 
Channel type preferred	50% 22% 28%	47% 25% 28%	61% 15% 24%	62% 18% 21%
Channel satisfaction	70% digital only 76% non-digital only 63% mixed	72% digital only 62% non-digital only 56% mixed	80% digital only 70% non-digital only 73% mixed	79% digital only 73% non-digital only 67% mixed
Used channel type <u>not</u> preferred	46%	45%	40%	42%
Satisfaction with service elements*: Top two drivers of overall satisfaction	"I got what I needed" (66%**) "The amount of time it took to reach an outcome was acceptable" (60%)	"I got what I needed" (66%) "The amount of effort I had to put in was reasonable" (60%)	"I got what I needed" (82%) "The amount of effort I had to put in was reasonable" (76%)	"I got what I needed" (79%) "The amount of effort I had to put in was reasonable" (72%)

*Linear regression analysis (backward entry method) used – Q5 satisfaction with service elements x Q8 overall satisfaction (average satisfaction score across services). **Percentage score shown is % agree (somewhat to strongly) with the statement at Q5.

Cohort experience snapshot – Mature-aged people (65+)

Unlike younger age groups, there are no significant differences in the experience of different mature-aged cohorts and satisfaction is high. The top event accessed services for was to submit a personal tax return, expectedly higher among those still employed. There is notably a higher preference than younger cohorts for using **non-digital** channels, although there is still an overall preference for digital. Satisfaction with mixed channels is indicatively lower across all cohorts in this age group, despite being equally preferred to non-digital channels.

	Employed Mature-aged Men			Employed Mature-aged Women			Retired Mature-aged Men			Retired Mature-aged Women		
A brief overview...	Overall satisfaction of this cohort is high, however employed mature-aged men are the least satisfied on mixed channels.			Unique to this cohort in this age group, the strongest driver of satisfaction among service elements for employed mature-aged women is that <i>the website / app worked well</i> . However, there is room to improve agreement with this element.			Compared to retired mature-aged women, this cohort have similar satisfaction however indicate a higher usage and preference for using digital only channels. Their satisfaction with non-digital channels is significantly lower than their female counterparts.			This cohort has a relatively even spread across channel preference, but is more likely (not significantly) to be using a channel different to their preferred, with preference for digital only channels indicatively lower than other cohorts.		
Top event accessed services for	Submitted a personal tax return 			Submitted a personal tax return 			Submitted a personal tax return 			Submitted a personal tax return 		
Overall satisfaction	76%			73%			80%			79%		
Channel type used	56%	18%	26%	54%	22%	24%	52%	22%	27%	44%	28%	28%
												
Channel type preferred	43%	27%	29%	43%	27%	29%	42%	29%	29%	35%	33%	30%
Channel satisfaction	81% <i>digital only</i>	78% <i>non-digital only</i>	59% <i>mixed</i>	72% <i>digital only</i>	80% <i>non-digital only</i>	66% <i>mixed</i>	86% <i>digital only</i>	76% <i>non-digital only</i>	73% <i>mixed</i>	84% <i>digital only</i>	84% <i>non-digital only</i>	67% <i>mixed</i>
Used channel type <u>not</u> preferred	41%			40%			41%			47%		
Satisfaction with service elements*: Top two drivers of overall satisfaction	"The amount of time it took to reach an outcome was acceptable" (72%**) "I got what I needed" (84%)			"The websites or applications I used worked well" (67%) "I got what I needed" (77%)			"I got what I needed" (82%) "The amount of effort I had to put in was reasonable" (73%)			"I got what I needed" (80%) "The amount of time it took to reach an outcome was acceptable" (68%)		

*Linear regression analysis (backward entry method) used – Q5 satisfaction with service elements x Q8 overall satisfaction (average satisfaction score across services). **Percentage score shown is % agree (somewhat to strongly) with the statement at Q5. Note: There is a low sample size <n=100 (n=93) for the employed mature-aged women cohort.

Service across life events

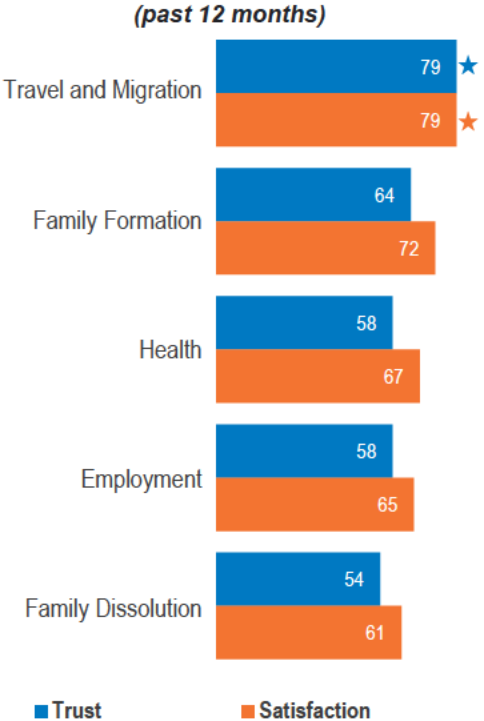


Trust and Satisfaction with Australian public services varies across the life events people are experiencing, as does the service channels they use.

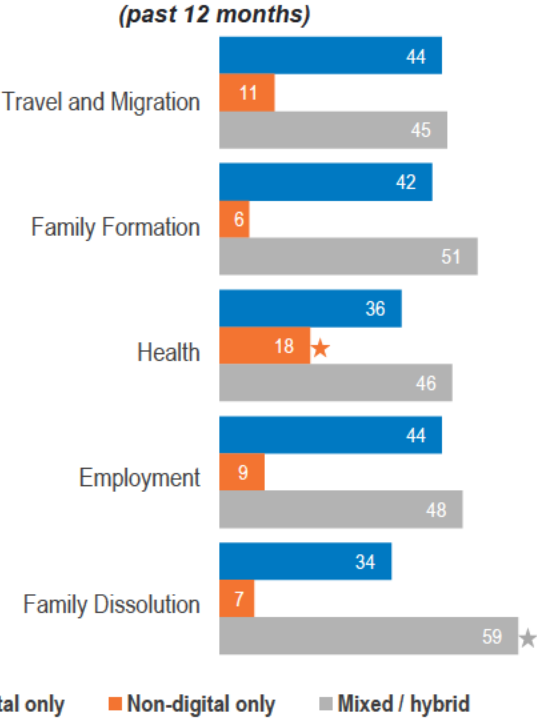
Australians who have accessed services for Travel and Migration life events are more trusting and satisfied with Australian public services. People that have accessed public services for Family Dissolution life events are the least trusting and satisfied with public services.

Usage of a mix between digital and non-digital channels is most common among these five broad life event groupings. Interestingly, usage of a mixed approach to accessing services is highest for Family and Dissolution related life events. This does provide some further support that using a mixed channels may result in lower levels of trust and satisfaction.

Trust & Satisfaction by Life Event Groupings



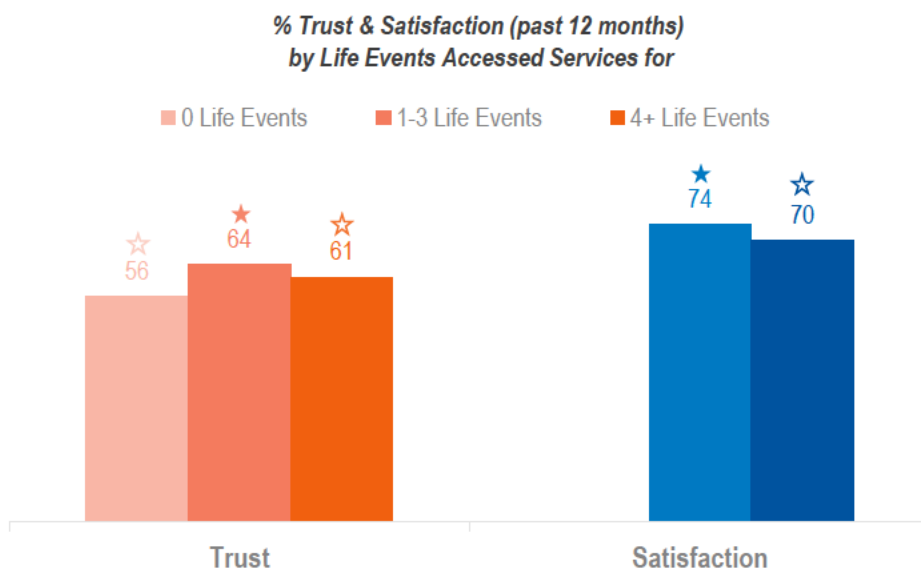
Channel usage by Life Event Groupings



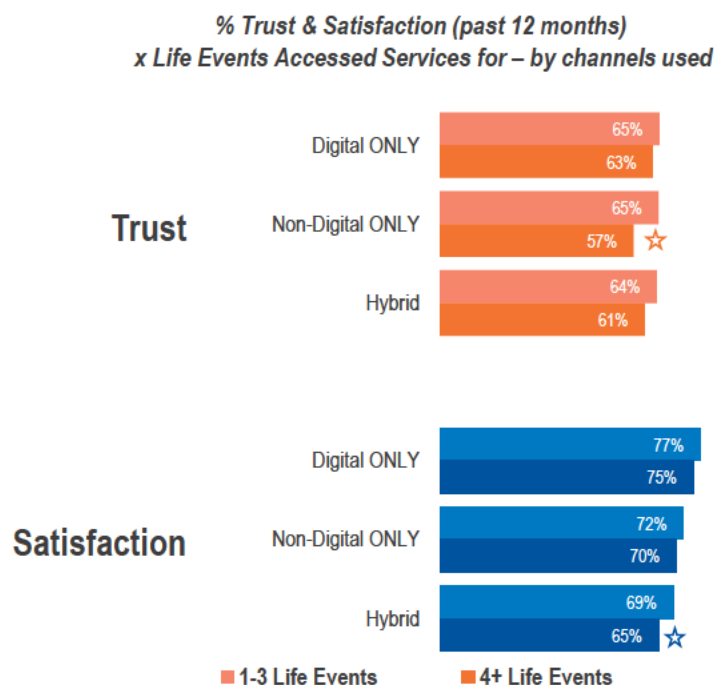
The number of life events accessed services for has an inverse effect on trust and satisfaction with Public services.

Australians that are required to access services for four or more life events are significantly less trusting with Australian public services. As is typical, trust in Australian public services is higher among those who accessed at least one service, compared to those who do not. However, compared to those who access Australian public services for one to three life events, Australians who are accessing services for four or more life events are significantly less trusting (61% vs. 64%).

Satisfaction in public services is significantly lower among those accessing services for four or more life events. Similar to trust, Australians that need to access services for four or more life events are less satisfied (70%), compared to those accessing services for one to three life events (74%).



Overall satisfaction is lowest among those who used mixed methods to access public services. Moreover, in the past 12 months – among those who used mixed channels, satisfaction is significantly lower for those who accessed services for four or more life events (65%) than those who accessed services for one to three (69%). This does suggest that more life events generally lead to a worse experience for those using mixed channels. Similarly for trust, Australians that access four or more life events are less trusting of Australian public services compared to those accessing services for less than three services.



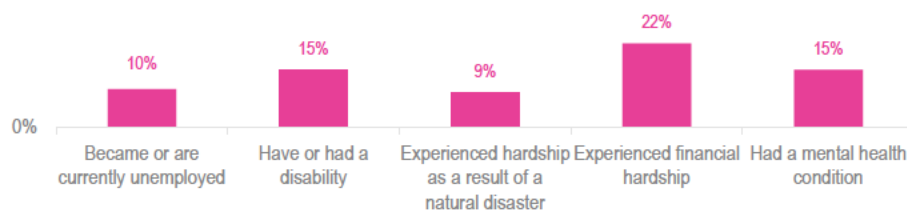
Experiencing and accessing services for complex life events has an influence with people's overall trust and satisfaction with public services.

Around one in five Australians (or less) have experienced a complex life event. Experiencing financial hardship is the most common identified complex life event (22%), followed by having or had a disability (15%).

15% of Australians have experienced a mental health condition, while 10% have become or are currently unemployed. 9% of Australians have experienced hardship as a result of a natural disaster.

Those that have accessed services for a complex life event are significantly less likely to trust or feel satisfied towards Australian public services, compared to the general population. Of the complex life events, individuals that accessed services for a mental health condition are significantly more satisfied compared to other life events. In contrast, individuals that have accessed services because they became or are currently unemployed are slightly less satisfied.

% Who experienced complex life events
(past 12 months)



Trust & Satisfaction by complex life events
(past 12 months)

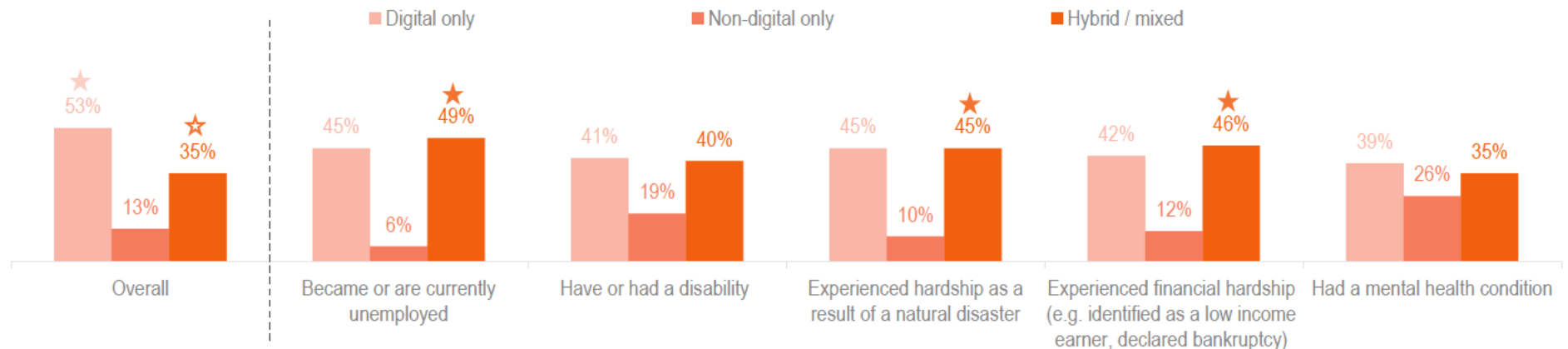
	Trust	Satisfaction
Overall	63 ★	73 ★
Have or had a mental health condition	55	73 ★
Experienced hardship as a result of a natural disaster	55	62
Experienced financial hardship	53	60
Have or has a disability	51	63
Became or are currently unemployed	51	58

Compared to the overall population, individuals that have accessed services for complex life events are more likely to use a mix of digital and non-digital channels to access services.

Despite most Australians using digital only channels (53%) compared to non-digital (13%) and mixed (35%), this is not reflected among those who've accessed Australian public services for complex life events such as unemployment, disability, natural disasters and financial hardship.

Interestingly, individuals that have accessed services for a mental health condition are likely to use a range of methods. While a quarter use non-digital channels only (26%), over a third either use digital only (39%) or a hybrid approach (35%).

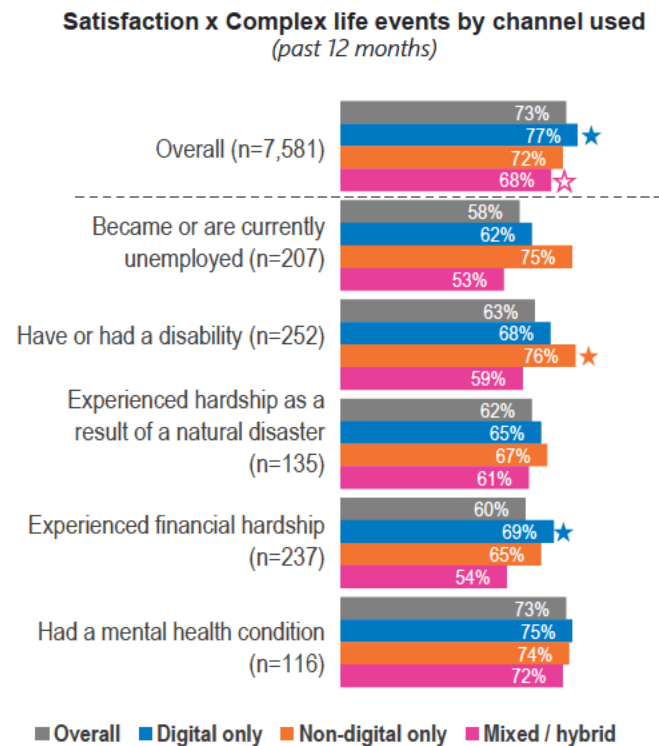
% Complex life events by channels used
(past 12 months)



In line with the overall population, individuals that have accessed services using a hybrid approach are generally less satisfied compared to those using only digital or non-digital channels

As shown previously, individuals that have accessed services for these complex life events are more likely to use a hybrid approach (digital and non-digital) compared to the rest of the population.

This posits that people that have experienced these complex life events are more likely to use hybrid approaches AND using this hybrid approach is impacting their satisfaction with the services they access.



Deep diving into access for
specific life event:
Becoming unemployed

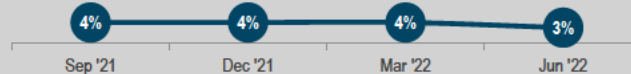


Life Event Deep Dive

Became or currently unemployed

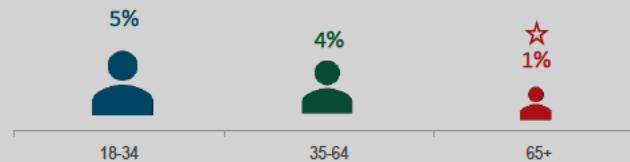
Unemployment over time

The proportion of Australians having accessed services because they have become or are currently unemployed in the past 12 months has remained stable and decreased slightly to 3% this quarter.



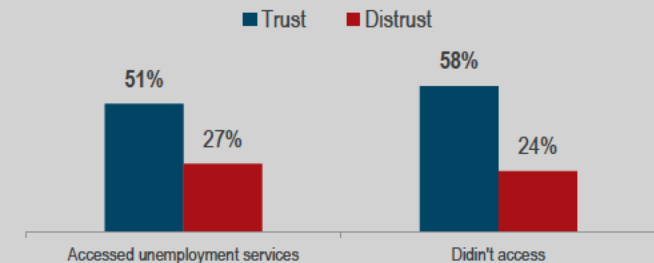
Who is accessing unemployment services?

Younger Australians are more likely to have accessed services. Those living in metro areas are higher than those in regional (11% vs 9%). There is no difference by gender.



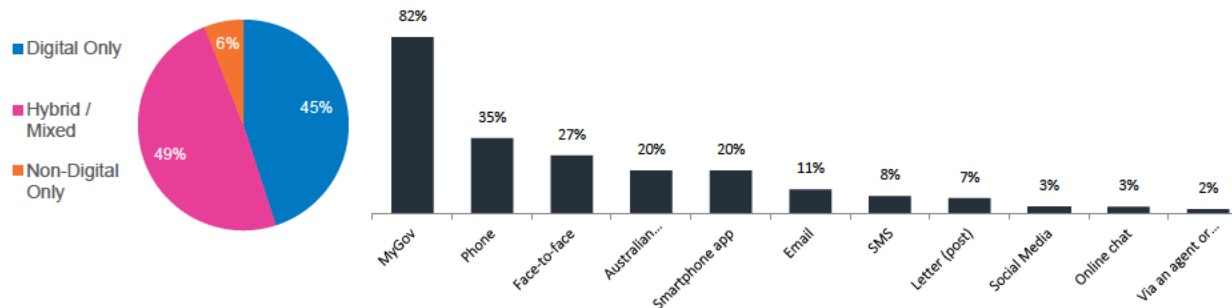
Trust of those accessing services

Those who've accessed unemployment services are slightly less trusting, with 51% agreeing they can trust Australian public services; and 27% disagreeing.



Channels used for accessing services

Almost half are using hybrid / mixed channels, with more than four in five using MyGov; one third using telephone and one in four using face-to-face.



Rating of service elements

When considering overall service elements, access and digital experience are rated highest. Greatest room to improve notifications and resolution wait times.

Top 2	It was easy to find out about the service(s)	67%
	The websites or applications I used worked well	66%
Bottom 2	The amount of time it took to reach an outcome was acceptable	54%
	I was kept informed of progress and wait times throughout	49%

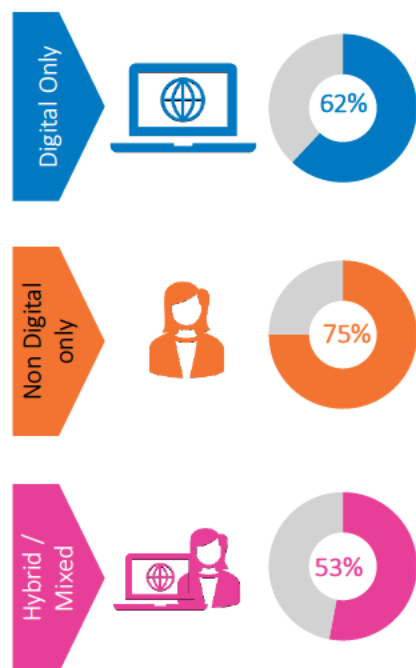
Life Event Deep Dive

Became or currently unemployed

Satisfaction and Performance by Channel Type

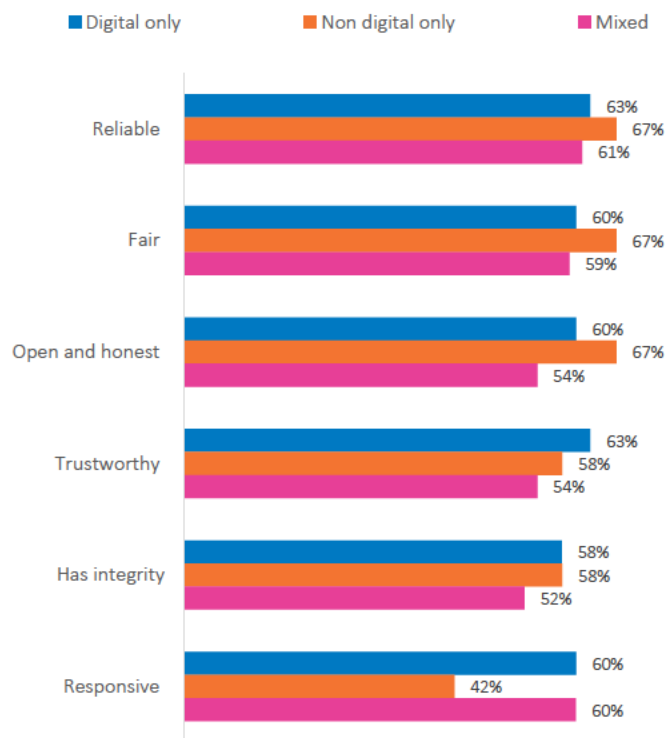
Highest satisfaction with service is seen among those who use non-digital only channels. Mixed / hybrid is lowest with just over half (53%) satisfied.

Satisfied with service...



Trust Drivers

Non-digital only performs best on reliability, fairness, openness / honesty and integrity, while digital channels better on trustworthiness and responsiveness. Those interacting on hybrid channels are rating lower on reliability, trust, fairness, honesty and integrity.



Satisfaction Drivers

For those accessing hybrid channels, there is greatest room to improve the personalisation of service and process information or notification.

Digital Only		
Top 2	Information from the service was easy to understand	46%
	Staff treated me with respect	46%
Bottom 2	The service understood my individual needs	33%
	Staff were knowledgeable	37%
Non Digital Only		
Top 2	Information from the service was easy to understand	50%
	Information from the service was accurate	50%
Bottom 2	The service understood my individual needs	42%
	Staff were knowledgeable	42%
Hybrid / Mixed		
Top 2	Staff treated me with respect	56%
	Information from the service was accurate	49%
Bottom 2	The service understood my individual needs	35%
	Service provided clear information about process and how decisions are made	36%

This report is not for publication or open release to the public. Contact the Citizen Engagement team (citizenengagement@pmc.gov.au) before sharing any findings or data from this report. Results are subject to quality assurance. *Rounding may cause some aggregate numbers to not equal 100%, or the sum of their parts.

Note: ▲ ▼ Denotes a significant increase / decrease from the previous wave. ★ ☆ Denotes significantly higher / lower than other cohort(s).

Appendix



Differences among key cohorts on channel usage

Unemployed people are more likely to access services via a mix of digital and non-digital channels. Compared to those who are employed, unemployed Australians are more likely to be accessing services using both digital and non-digital channels (42% vs 32%) and less likely to use digital only (46% vs 58%). While there is no difference in broad channel type usage between men and women, younger Australians under 55 are also more likely to use a mix of channels than their older counterparts.

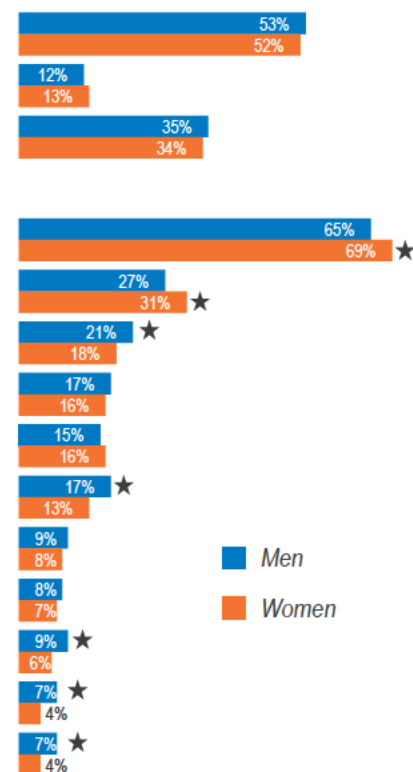
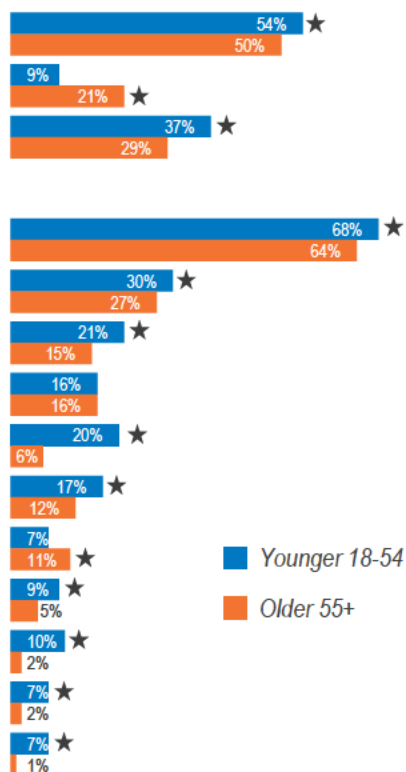
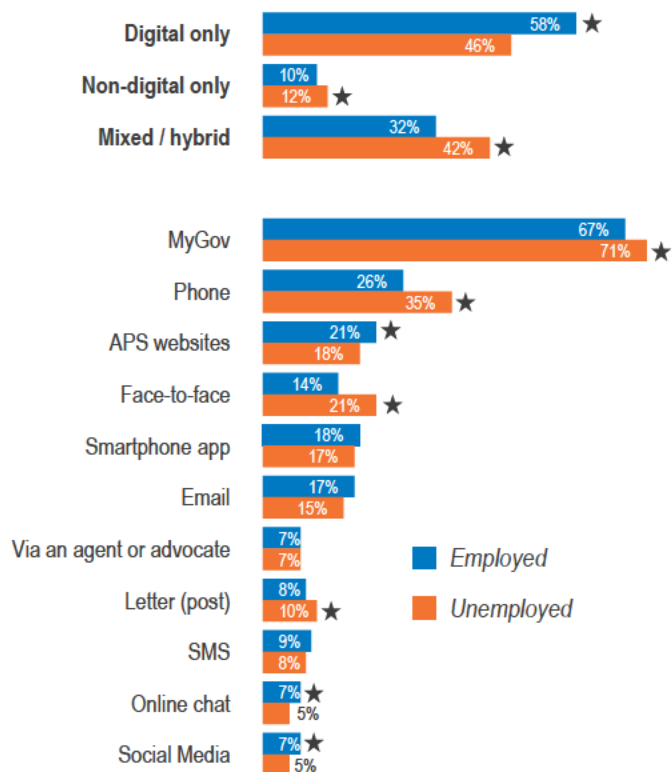
Unemployed people are also using more channels to access public services. Service users who are unemployed are significantly more likely to access services via three or more channels (61%) than those who are employed (55%). As this is more likely to be via a hybrid approach, diverse channel usage could be an early indication of their lower overall satisfaction. Similarly, younger service users aged under 55 (who have indicatively lower satisfaction than older Australians and also more likely to use mixed channels) are significantly more likely to use three or more channels (59%) than those aged over 55 (49%).

% used channels

Employment status

Age

Gender



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Results are subject to quality assurance. ★ = Significantly higher ★ = Significantly lower. Base: Jul'21 – Jun'22.

Hunt Smarter.



Citizen Experience Survey

DESE Case Study

Australian Government
Department of the Prime Minister and Cabinet

Prepared by Painted Dog Research
September 2022



DESE Case Study



The key take-outs...



1

68% of Australians who accessed DESE were satisfied with the service, lower than the national average across services of 73%. On a whole, service elements that see greatest room for improvement relate to personalisation, transparency and level of detail provided on the service process.

2

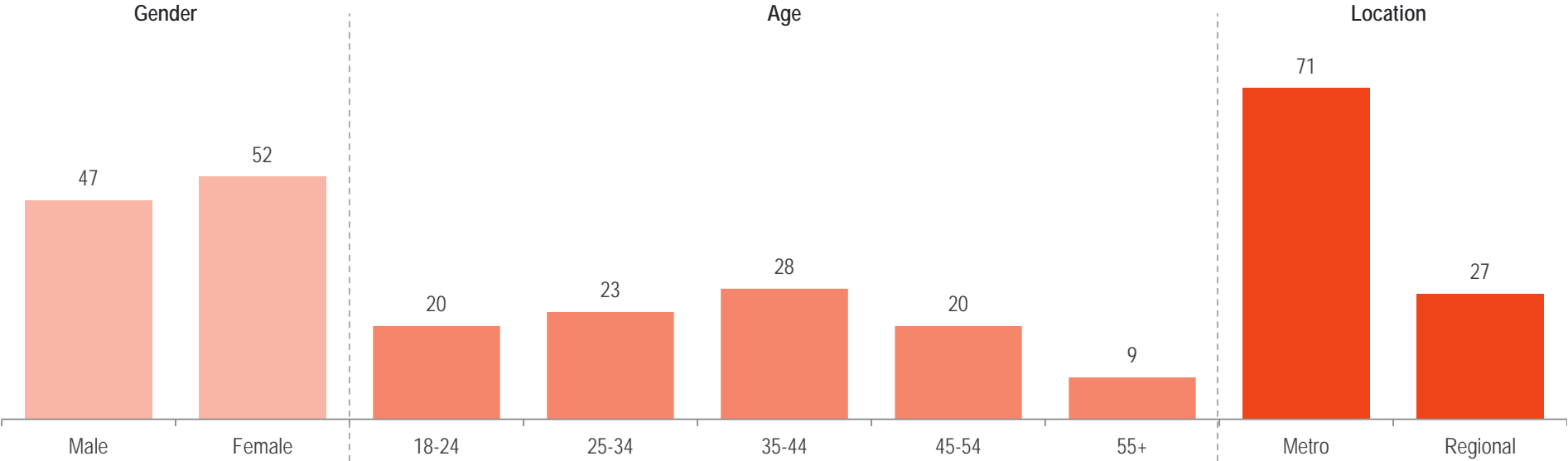
Those unemployed and females have higher levels of ambivalence or dissatisfaction with the service DESE has provided and lower expectations of future improvements in the service. For females, satisfaction drivers of respect, integrity and individual understanding are lower than males. Those unemployed rated lower on all drivers of satisfaction, with less than one in three agreeing that the service understood their individual needs.

3

MyGov is the top individual channel used and digital only channel usage is most common, although this has dropped over the past year, with hybrid access picking up; likely due to use of increase in telephone access – an area to watch out given lower ratings of satisfaction with hybrid service users, including lower ratings of fairness and integrity and of comprehension of information.

Compared to the overall population, those accessing DESE skewed female, younger and metro located.

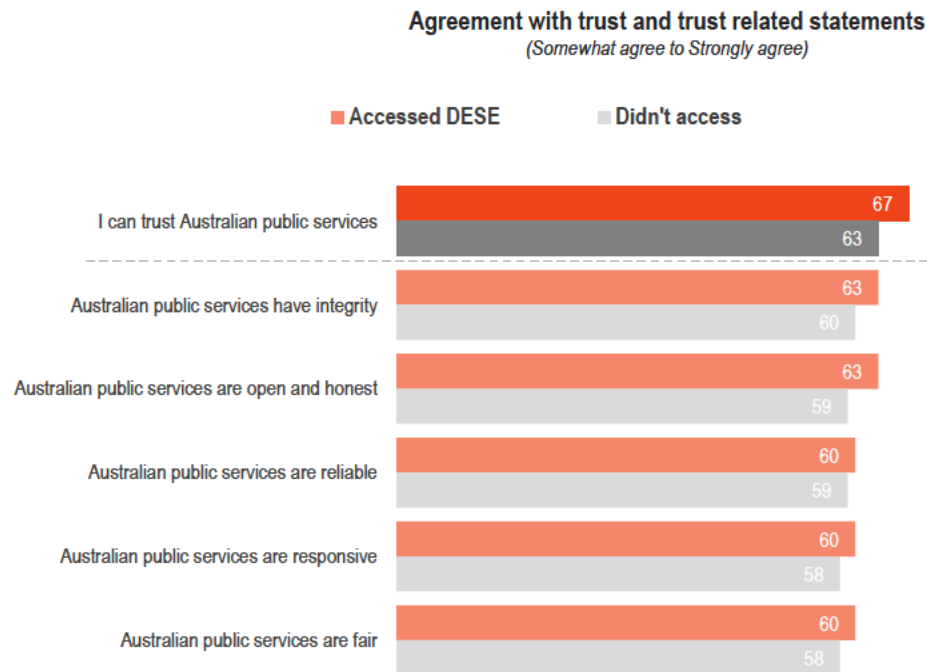
- Middle aged 35-54 year-old Australians make up the biggest group accessing DESE (48%), with 43% being young Australians adults (18-34) and 9% older.



Q1e: In the last 12 months you accessed Australian public services because [dActor] [dAllocation]. Which services did you access? [MR] Department of Employment and Workplace Relations (e.g. jobactive, Workforce Australia, Australian Job Search). Base: Jul-21-Jun22 Those who accessed DESE for allocated life event (n=460).

Trust in Australian public services and the drivers of trust are rated higher (although non-significant) among those who have accessed DESE services, compared to those who haven't accessed DESE services.

- 67% of those who've accessed DESE trust the public services, with key trust elements being integrity and honesty with both seeing agreement from 63% of Australians who've accessed DESE.



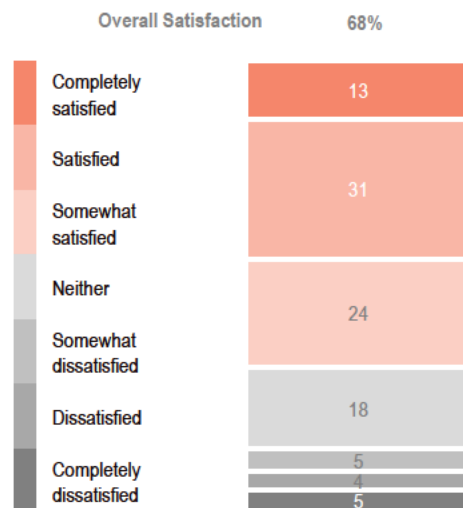
Men who accessed DESE more likely to have higher trust than females who accessed DESE (76% vs 59%)

68% of Australians who have accessed DESE are satisfied with DESE. Notably, this is lower than the national average (73%)

- There is room to improve satisfaction with almost one in three (32%) not satisfied and almost one in four (24%) only somewhat satisfied.
- Satisfaction assessment involving personalisation and transparency see biggest room to improve.

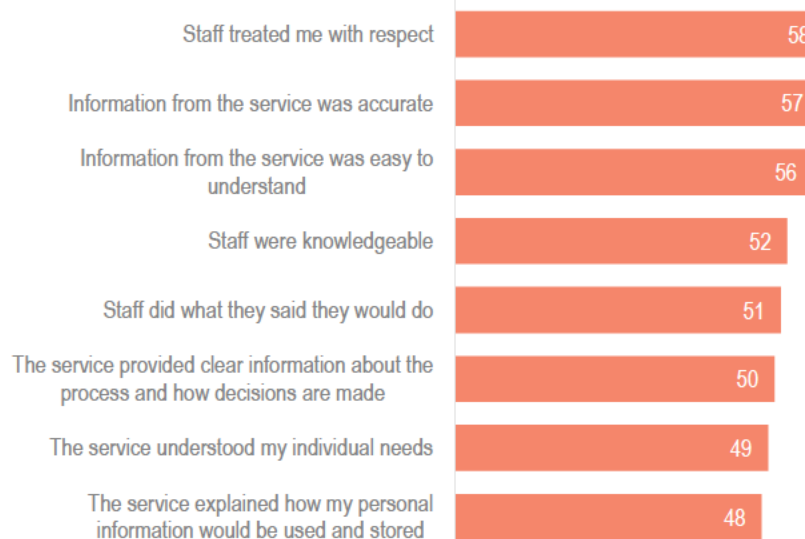
Satisfaction with specific service (DESE)

(Somewhat agree to Strongly agree)



Drivers of satisfaction of specific service (DESE)

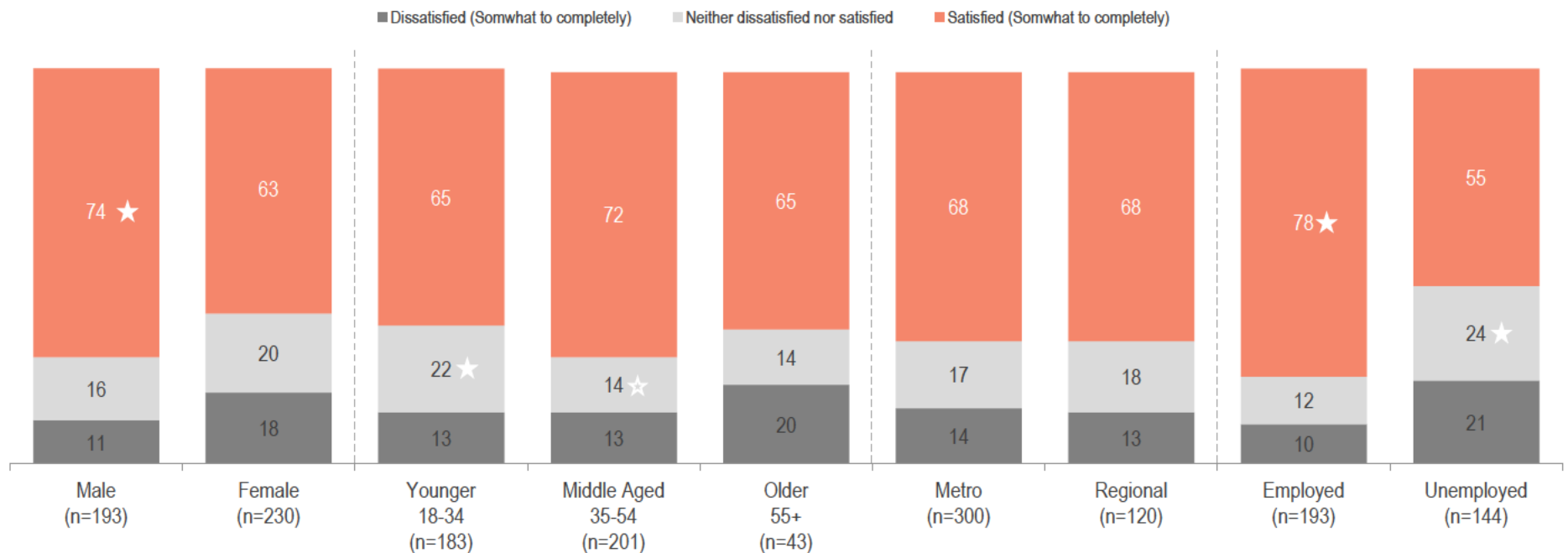
(Somewhat agree to Strongly agree)



Males and those employed have higher satisfaction with DESE. Younger Australians who have used the service were more ambivalent about their level of satisfaction than those middle aged.

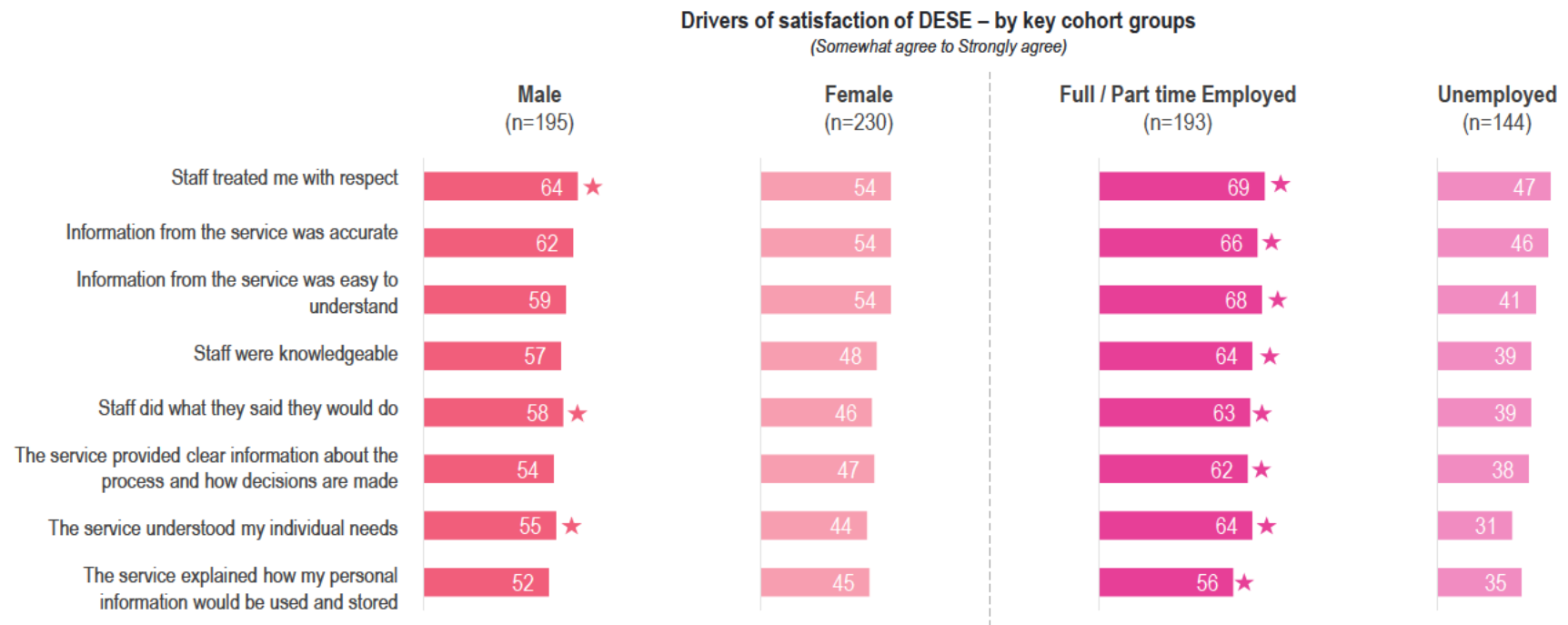
- 74% of males indicated they were satisfied with DESE, compared to only 63% of women.
- Only 55% of those unemployed were satisfied with DESE, with 24% being neither satisfied or dissatisfied.

Satisfaction levels with DESE by cohorts



Females see greater room to improve on satisfaction drivers; with ratings of respect, integrity and individual understanding needs significantly lower than males.

- Those unemployed rated lower on all drivers of satisfaction, with less than one in three (31%) agreeing that the service understood their individual needs.



There are no differences in drivers of satisfaction by age

Males rate higher on all service performance measures. Older Australians rate indicatively higher, significantly so on ratings of integrity.

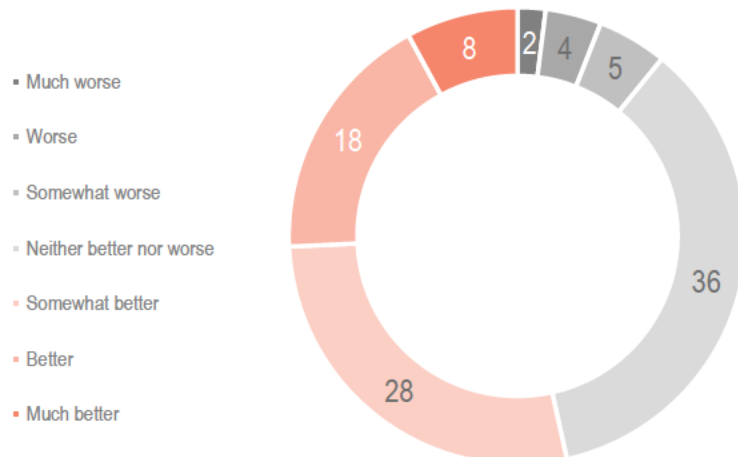
- Across service rating elements, males rate highly with between 72%-78% agreeing to the statements shown.
- Younger Australian adults (18-34) rate slightly lower than older (between 64%-72% vs 77%-79%; with ratings of integrity significantly lower (64%).

		Service ratings of DESE by key cohorts						
		Somewhat agree to completely agree						
	Overall	Male (n=195)	Female (n=230)	18-34 (n=183)	35-54 (n=201)	55+ (n=43)	Full time / Part time employed (n=193)	Unemployed (n=144)
The service is trustworthy	73	78 ★	68	72	73	77	71★	77
The service is reliable	70	75 ★	66	67	71	77	67	75
The service is responsible	70	77 ★	64	67	71	79	67	75
The service is fair	70	74 ★	66	69	68	79	67	75
The service is open and honest	70	72 ★	70	67	72	79	71	71
The service has integrity	69	74 ★	64	64 ☆	70	79 ★	68	71

Half of those who've used DESE service expect it to improve in the future, with males, those living metro and those employed having indicatively higher expectations

Expectations for future interactions

54% expect the future interactions to get better (somewhat to much)



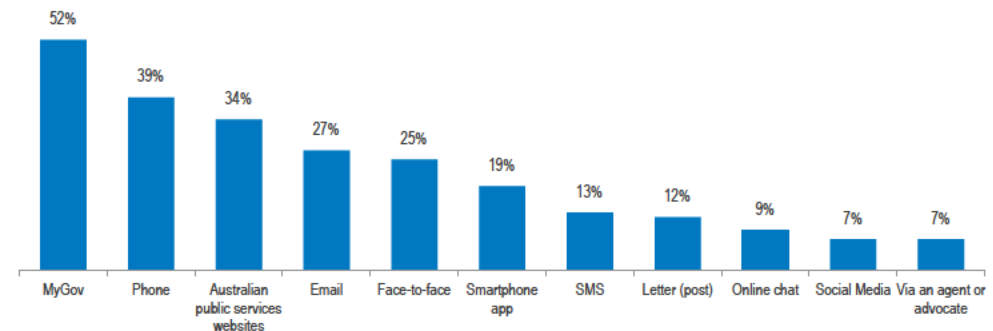
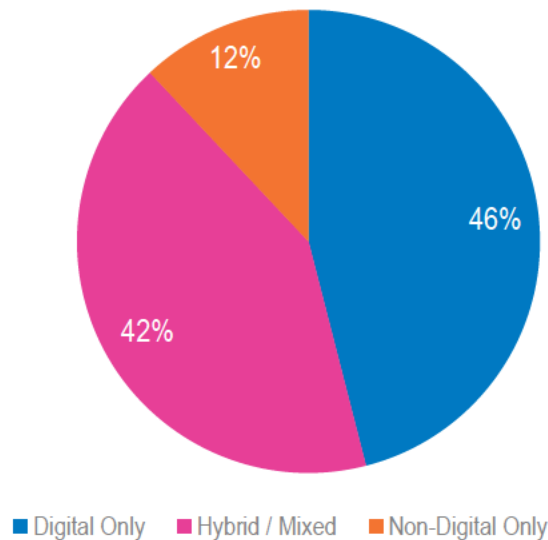
% who expect future intentions to be better (somewhat to much)

Gender	Male (n=45)	Female (n=64)
	69%	44%
Location	Metro (n=58)	Regional (n=50)
	62%	44%
Employment	Employed (n=55)	Unemployed (n=35)
	77%	31%

Digital-only top interaction type, with MyGov being accessed by half.

- 46% used a digital only approach, 40% use a hybrid approach and only 12% use non-digital only.
- Currently, 50% of DESE users are accessing services through MyGov. 38% access it through Phone and 32% through the APS website.

*% Channel usage for DESE specific interactions
(past 12 months)*



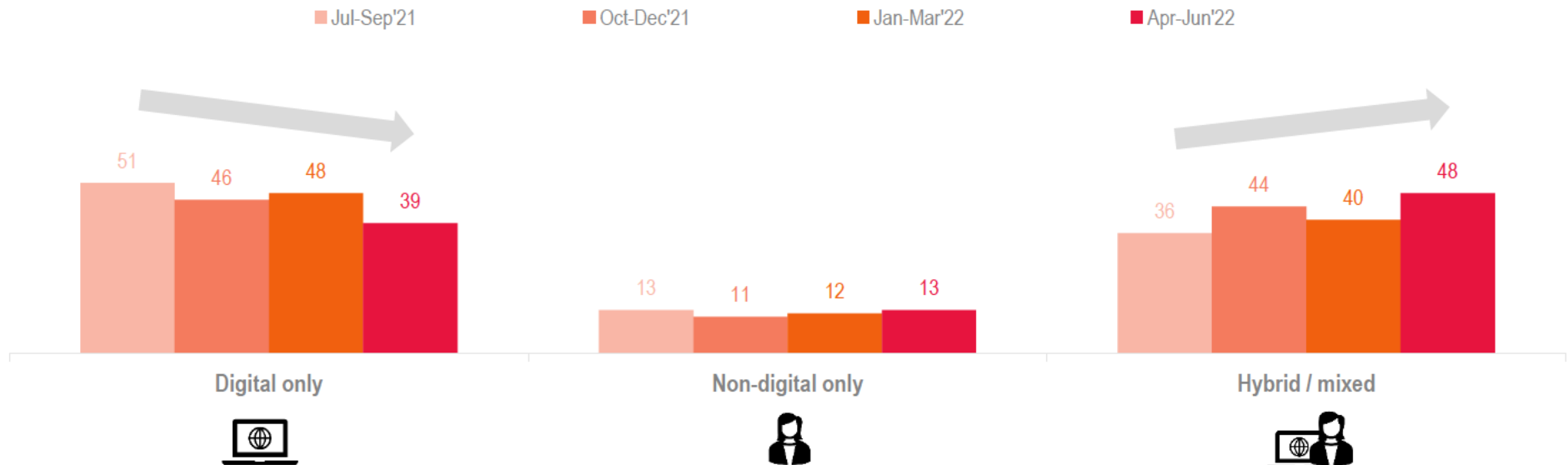
@DPC – note that for this DESE specific broad channel usage variable, we have created it using classification based on overall raw Q12 responses (i.e., not the weighted mean Q12 classification used in other instances so far). We figure this should work, however, as it is specific for the DESE service and therefore shouldn't be affected by the # services.

There has been a movement away from digital only interaction over the past year, with hybrid communication picking up.

- Usage of Mygov decreased to 43% in Apr-Jun'22, lower than previous quarters. Meanwhile phone usage increased to 47%.

@DPC – as on previous

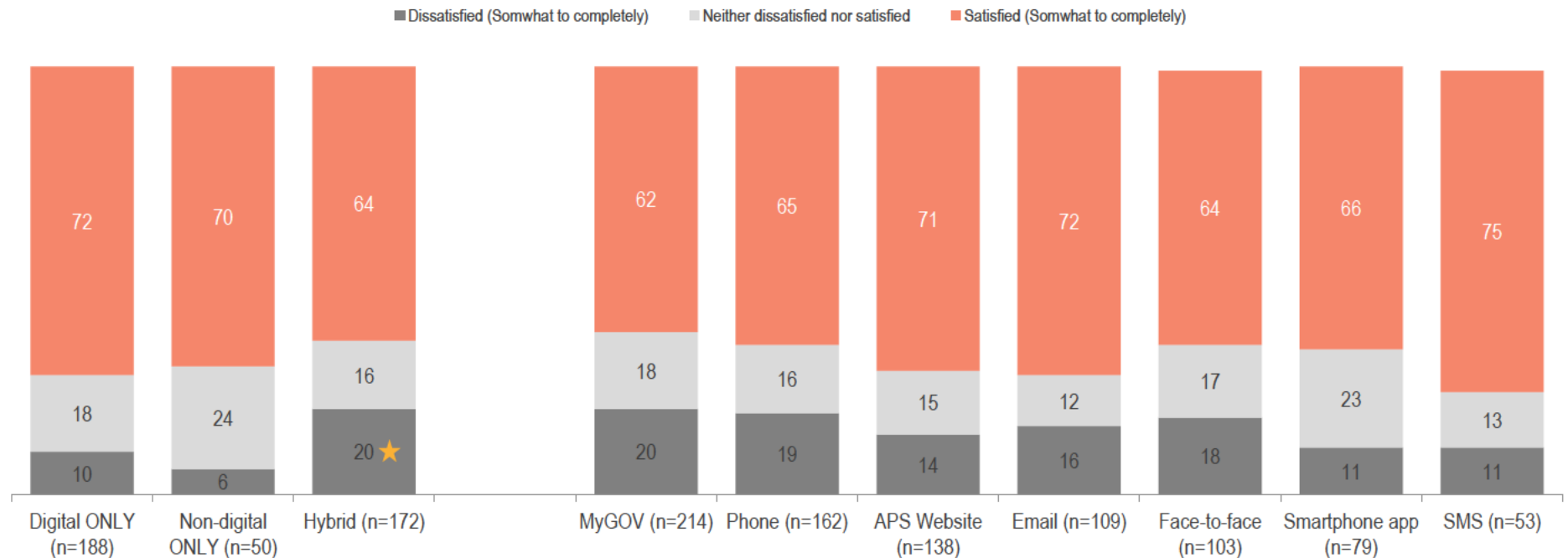
% used channel types, over time



Likely due to increased customer effort, dissatisfaction is higher among those using hybrid / mixed channels.

- 62% of those who use hybrid channels are satisfied, compared to 70% for non-digital only and 72% for digital-only.
- Of the channels used, SMS (75%), email (72%) and APS website (71%) are highest, while Mygov is lowest at 62%.

Satisfaction levels by channel type and top used channels



Hybrid / mixed channel sees highest level of complaints and greatest expectation of future service improvements.

- 28% of those who accessed DESE through hybrid channels made a suggestion or complaint, significantly higher than those who used digital only channels at 14%.
- Three in five (60%) who used hybrid channels expect their future interactions with DESE to improve.



Digital Only



Non-Digital Only



Hybrid / Mixed

Made suggestion or complaint
(n=50-188)

14 ★

16

28 ★

Expect interaction to get better
(n=14-50)

49 *

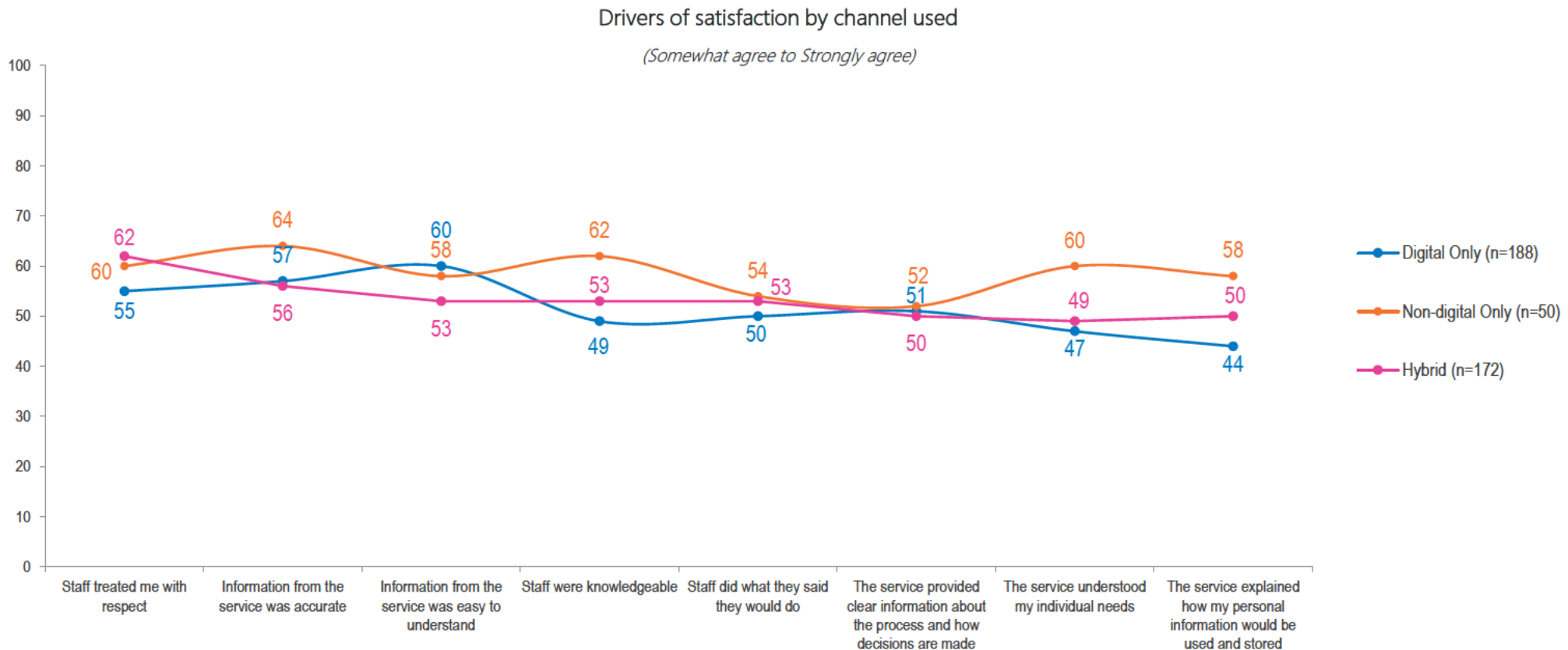
57 *

60

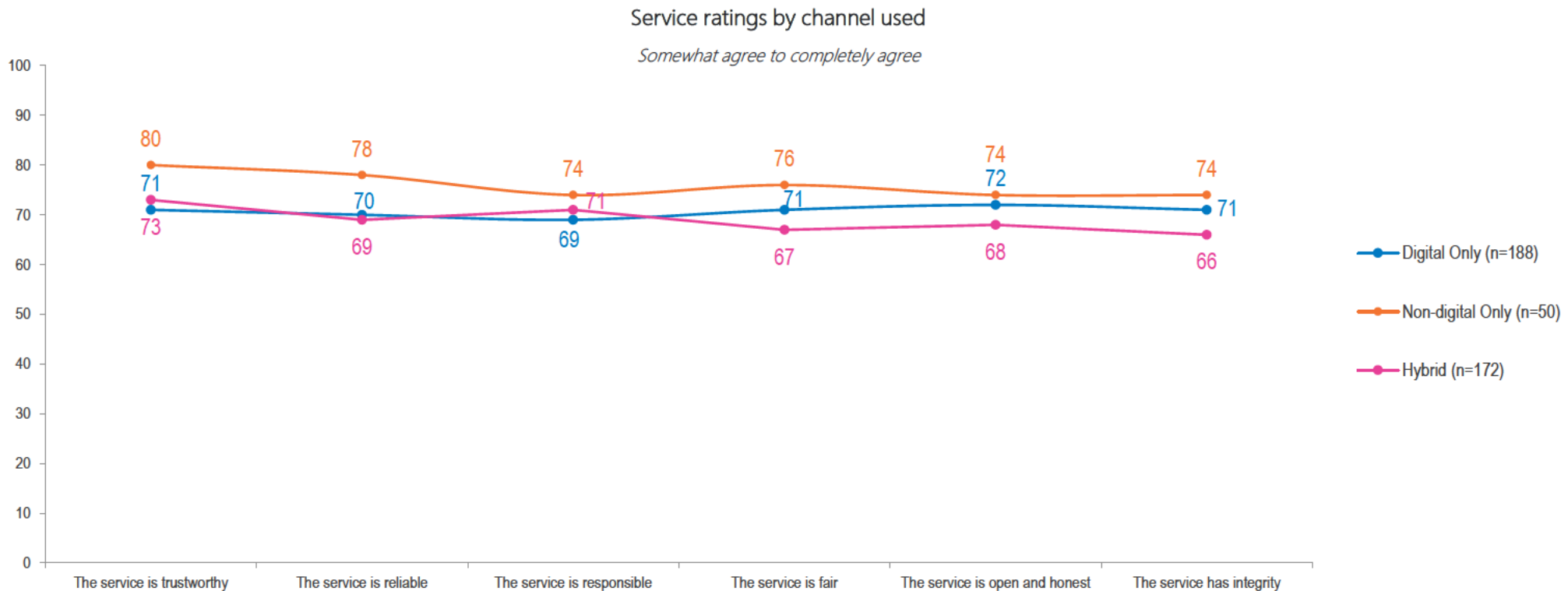
* Caution – small base size: less than n=50

Greatest room to improve digital-only experience across privacy information, personalised service, perceptions of staff knowledge and clear information on processes.

- Although not significant, those using hybrid channels rate lower *ease of understanding information* and greatest room to improve *personalised service*.



Compared to non-digital servicing, digital-only sees room to improve ratings of trustworthiness and reliability. Those who access hybrid score lower on ratings of fairness, transparency and integrity.



Hunt Smarter.

