THE FUTURE OF PUBLIC SERVICES

NAVIGATING THE STORM

Navigating the Storm: Public Attitudes and Priorities for UK Public Services Ahead of the 2024 Election

At Ipsos Public Affairs, we partner with government, public sector, academic, and third sector clients to provide bespoke research and evaluation solutions that inform sound, evidence-based decision-making.

Our team of over 300 skilled social researchers, evaluators, and policy specialists bring deep expertise across diverse public policy domains. This sector-specific knowledge, combined with our cutting-edge methodologies and impactful communications strategies, enables us to deliver actionable insights that equip decision-makers with vital intelligence to benefit communities.

With every project, we strive to use robust research to improve public policy and create positive change for society. As part of this commitment, we actively share our data, insights, and thought leadership to stimulate informed debates and drive progress on the most pressing issues facing society today. By making our research publicly available and engaging with a wide range of stakeholders, we aim to enhance transparency, broaden understanding, and inspire evidence-based solutions to complex societal challenges.

We hope you find this report informative and insightful. For more information or to further discuss the findings and implications, please contact me at Trinh.Tu@ipsos.com

Trinh Tu, Managing Director

Ipsos Public Affairs UK

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Introduction

The future of Britain's public services will help define the upcoming election, as the public grows increasingly concerned about declining quality, access and inequalities following years of economic difficulty, demographic and technological change, climate change, pandemics and international instability.

The fiscal context remains challenging. The Institute for Fiscal Studies (IFS) warns the March budget's tax cuts could severely impact post-election public service spending, with a projected £20 billion fall in day-to-day spending outside health, defence and education.

No new government would want to face further painful public service cuts. But so far there are still questions over how any of the parties would square this circle, perhaps unsurprisingly, as there's no magic bullet.

This report provides data-driven analysis of the public mood and priorities for public services, based on extensive Ipsos research and expert discussions on potential solutions.

Findings reveal a pessimistic public with little confidence things will improve, expecting further deterioration in services, especially the NHS. Confidence in government policy is at record lows. While more optimistic about Labour, the public are still to be convinced they can deliver real change.

Regionally, perceptions of inequality are high, particularly in the North and devolved nations, with strong desire for local decision-making. Across services, the public wants improved access, quality, accountability and outcomes. On future technologies like AI, views vary by application.

By listening to these issues, policymakers and public service leaders can develop a workable long-term plan to manage difficult budgets while going some way to meet public expectations.

These findings point to five key implications for policymakers and public service leaders, set out on the following page.

Implications

This points to five key implications for policymakers and public service leaders:

1. Fairness in access and outcomes is essential for public trust
2. Locally-led solutions could help if the framework is right
3. Careful deployment of tech like AI is needed to balance benefits and risks
4. Tackling complex issues like health inequalities requires new cross-sector collaboration
5. The public should be engaged as partners in service redesign

By taking account of these findings, policy-makers and public service leaders can start finding a workable long-term plan to manage the difficult budget situation while still meeting public needs and expectations.

2. Public Sentiment Overview

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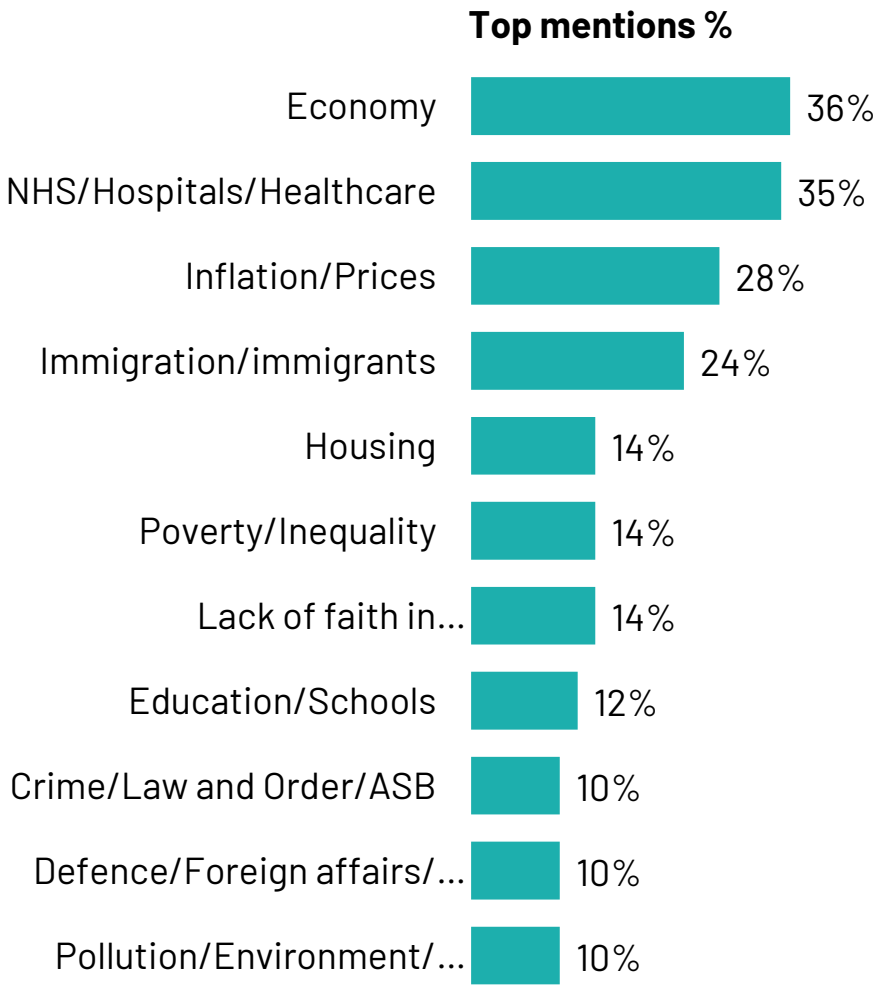
The British public is deeply pessimistic about the direction of the country, with little confidence in the economy and a gloomy outlook for the future.

The public's top four issues are the economy, NHS, inflation and immigration

What do you see as the most/other important issues facing Britain today?



Change since March 2023:

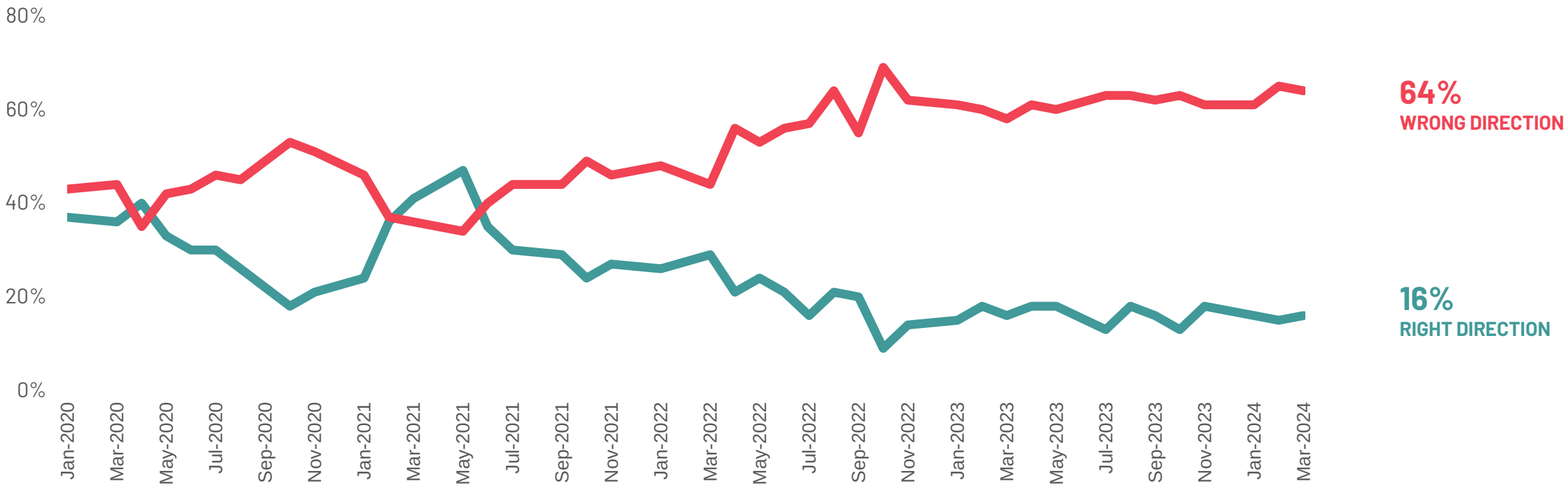
%	Position
-1	+1 ▲
+14	+1 ▲
-11	-2 ▼
+4	—
+5	+4 ▲
+3	+2 ▲
-3	—
+4	+3 ▲
+5	+4 ▲
+1	—
nc	-3 ▼

Base: 1,010 British adults 18+, 13 – 21 March 2024

Source: Ipsos Issues Index

Britons believe the country is heading in the wrong direction

Generally speaking, do you think things in Great Britain are heading in the right direction or wrong direction?

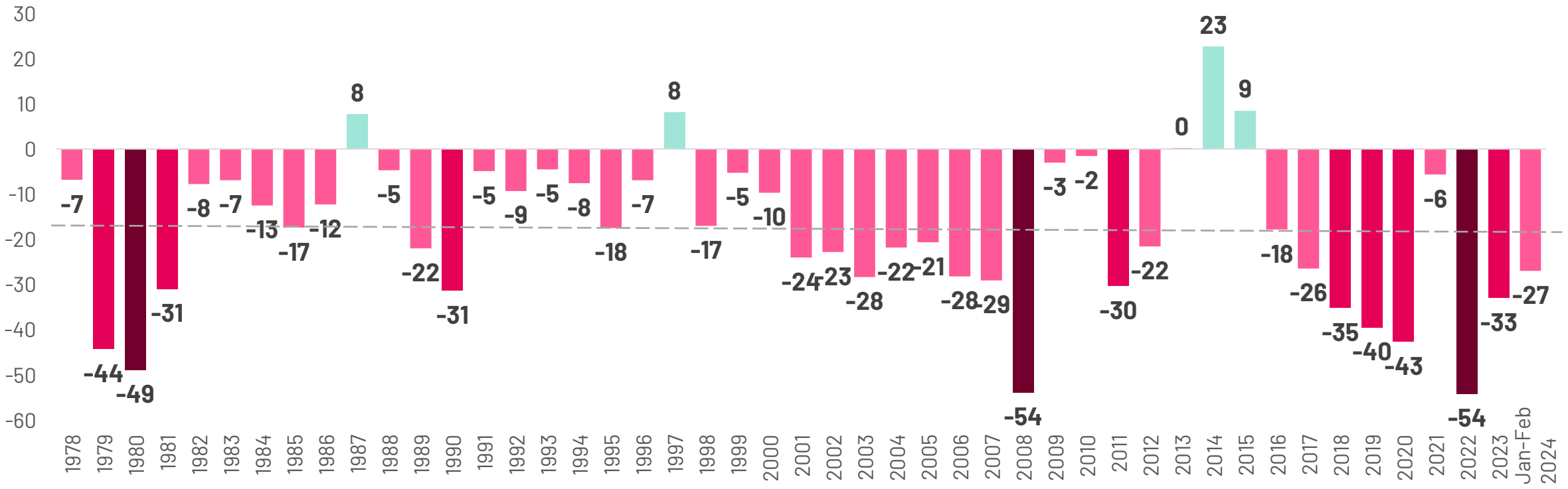


Base: 1,111 Online British adults aged 18+, 15-18 March 2024

Source: Ipsos Political Pulse

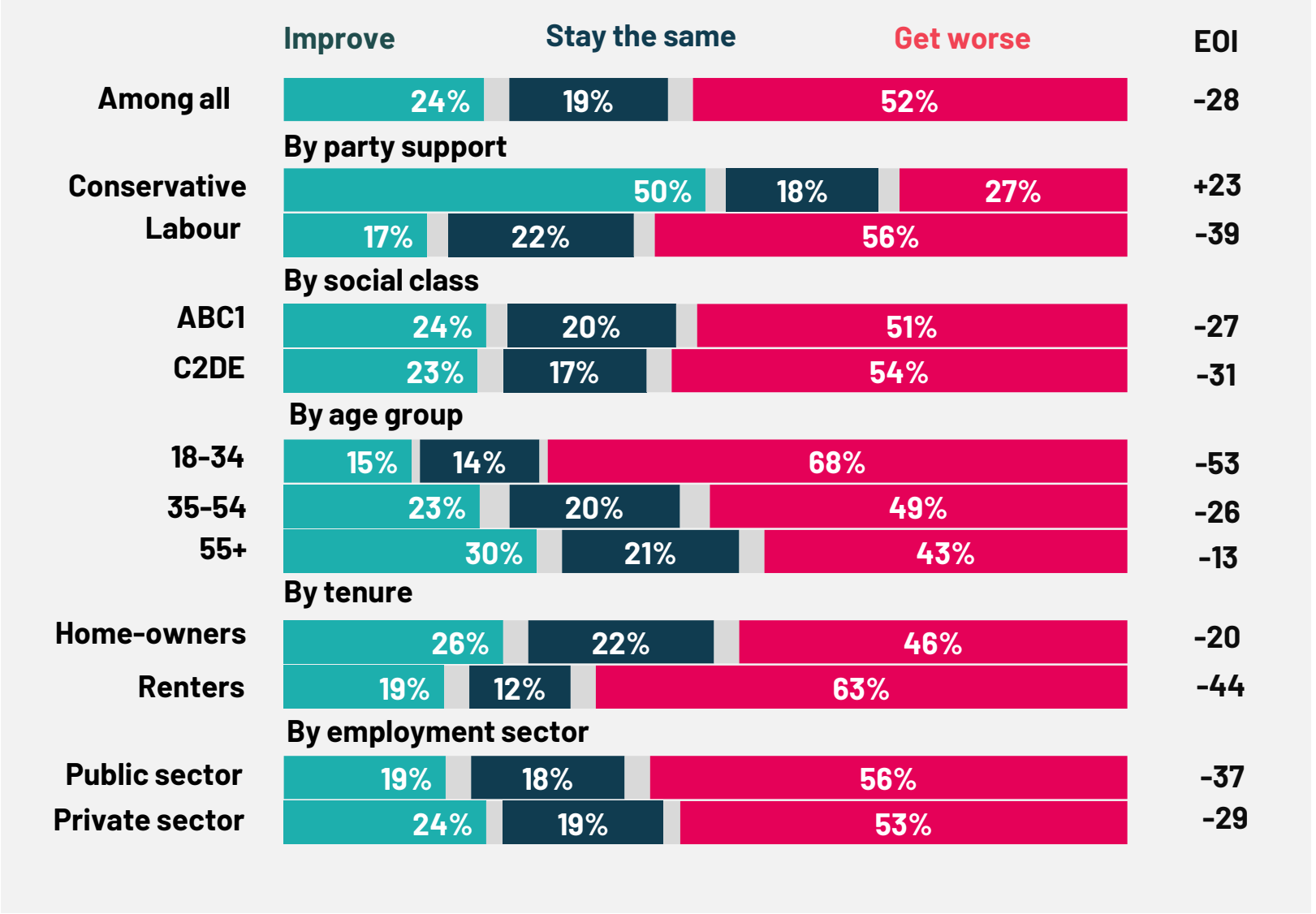
Economic optimism still historically low – though improving since 2022

Average yearly Ipsos Economic Optimism Index



Young people are most pessimistic about the economy

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Base: 1,004 British adults 18+, 21-28 February 2024, including Conservative supporters (176), Labour supporters (327), ABC1 (635), C2DE (369), 18-34 (237), 35-54 (323), 55+ (444), Home owners (691), Renters (288).

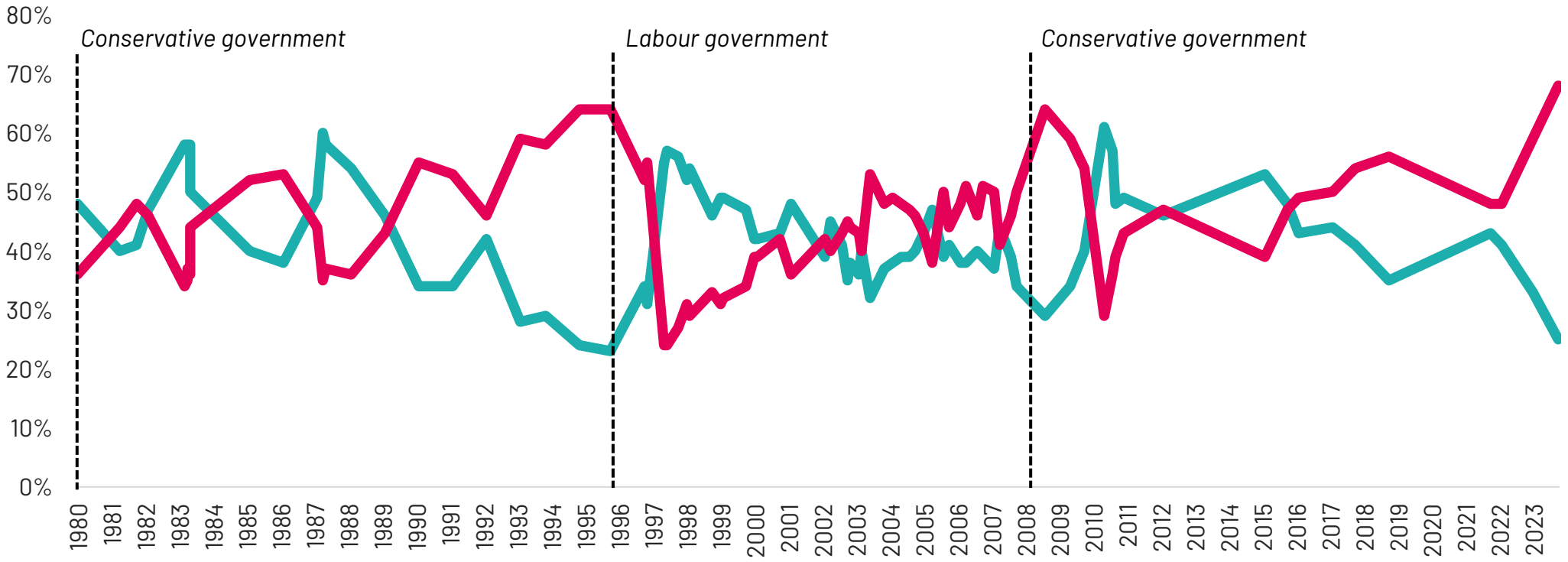
* Economic optimism (EOI) is calculated by subtracting the percentage who say the economy will get worse, from the percentage who say it will improve.

Record low confidence in government economic policy

On balance, do you agree or disagree with the following statement?

"In the long term, this government's policies will improve the state of Britain's economy"

July 1980 – November 2023



68% Disagree

25% Agree

Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

3. The state of public services

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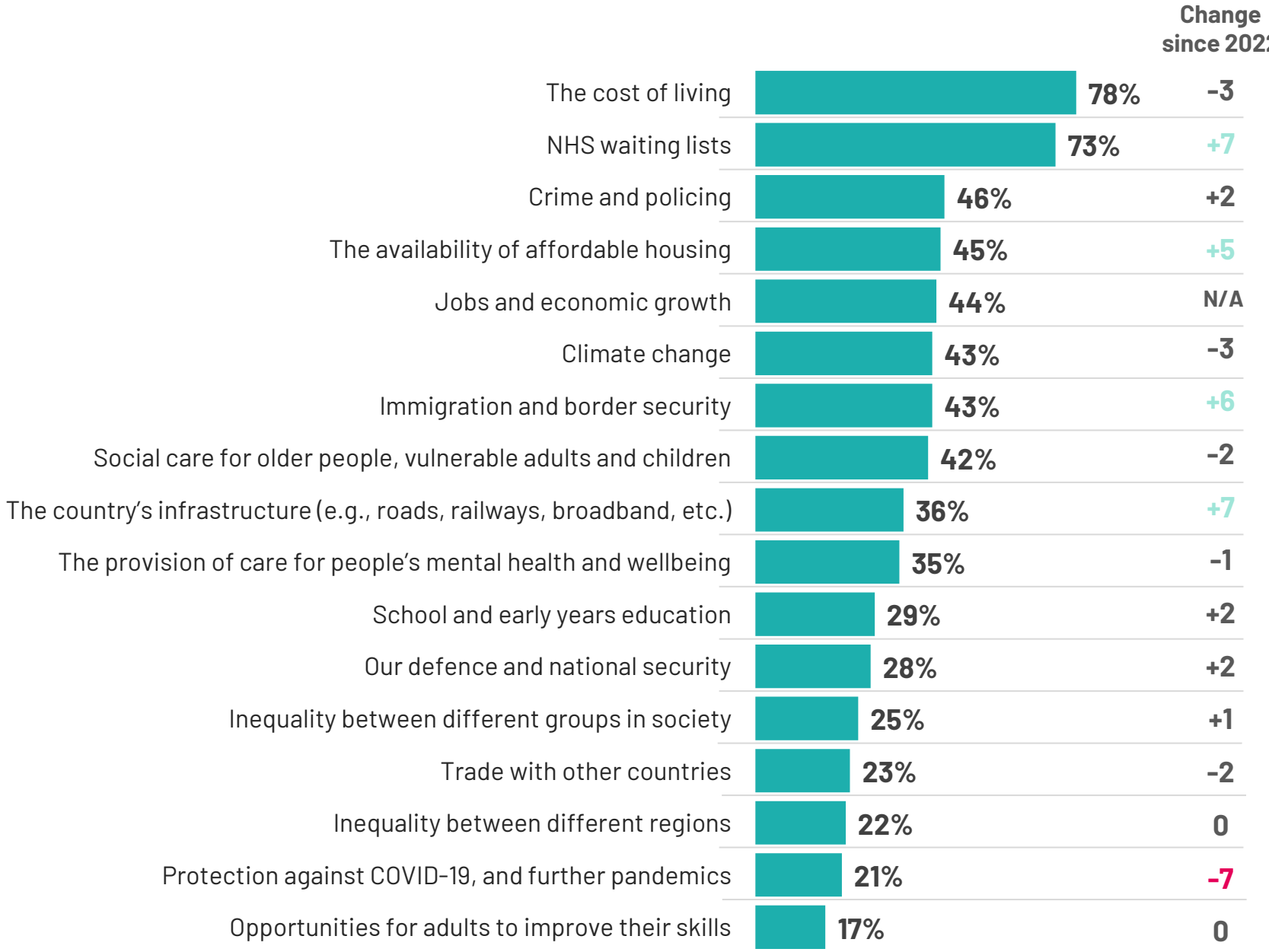
Public services are high on the national agenda (especially when thinking about the long-term challenges the country faces), as the public perceives a long-term deterioration in quality and has low expectations for improvement.

Trust in government policies for public services has hit record lows.

After cost of living, the public's longer-term concerns focus on core public policy issues

Which of the following issues, if any, do you think should be the top priorities for improvement in the UK over the next few years or so?

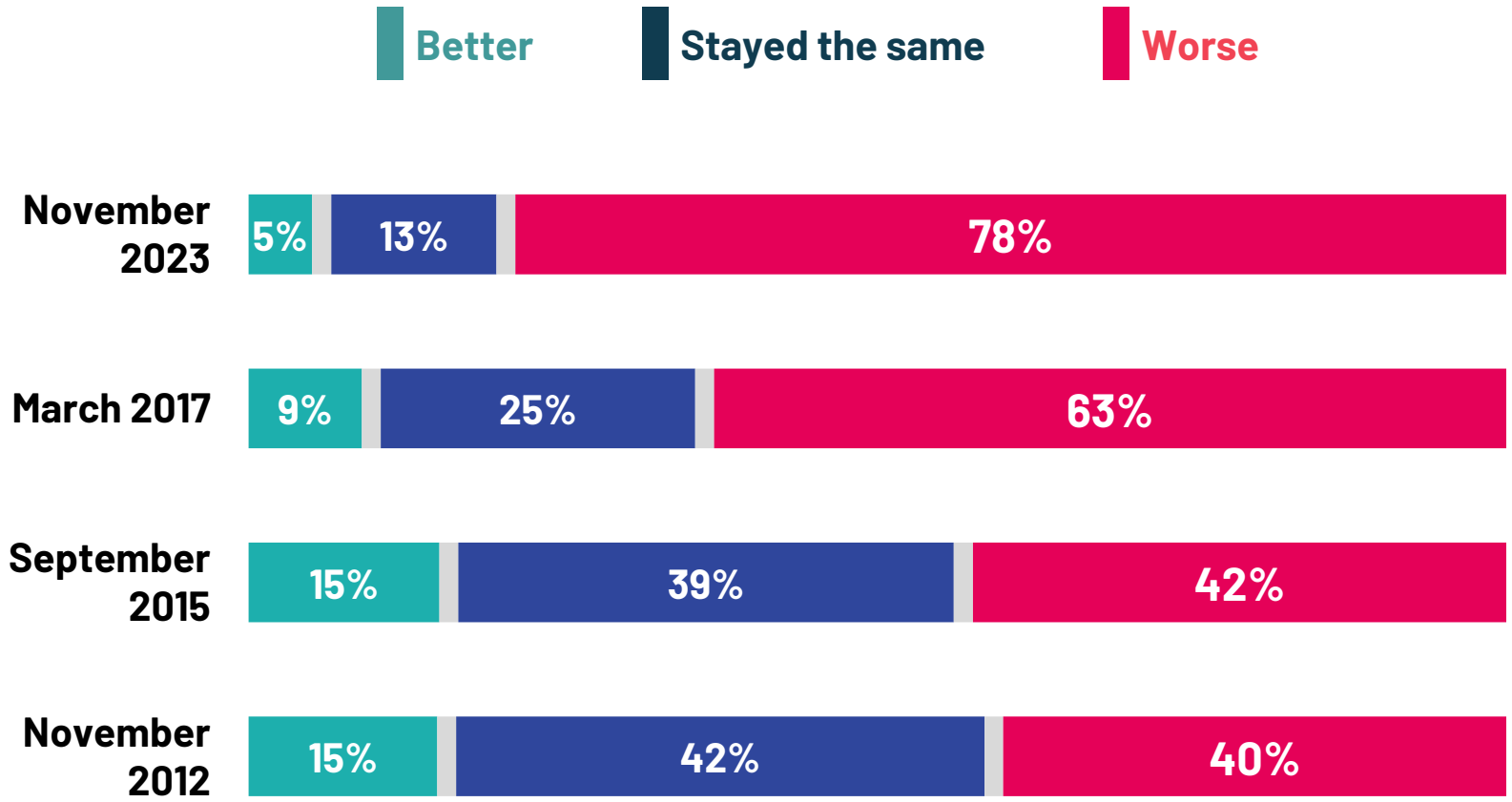


Please note trends between waves with a small change should be treated with caution due to the addition of "jobs and economic growth" which may have had an impact on responses.

Base: 5,815 Online UK adults 16-75, 27th October-1st November 2023. Source Ipsos/Deloitte State of the State

Perceived deterioration in public services

Thinking about public services overall, do you think the quality of public services has got better or worse in the last five years, or has it stayed the same?



Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

Pessimism about future of services: anticipated deterioration across the board, with NHS topping the list

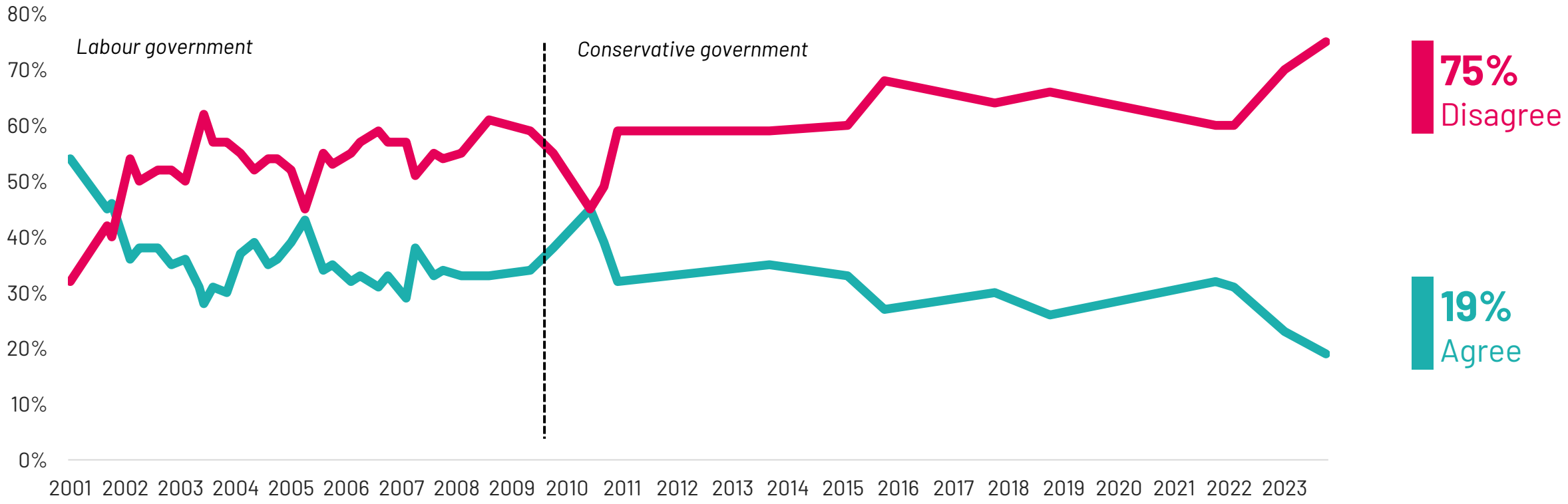
Thinking about ... over the next few years do you expect it to?

Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

Record low trust in government to improve public services

On balance, do you agree or disagree with the following statement.
"In the long term, this government's policies will improve the state of Britain's public services"

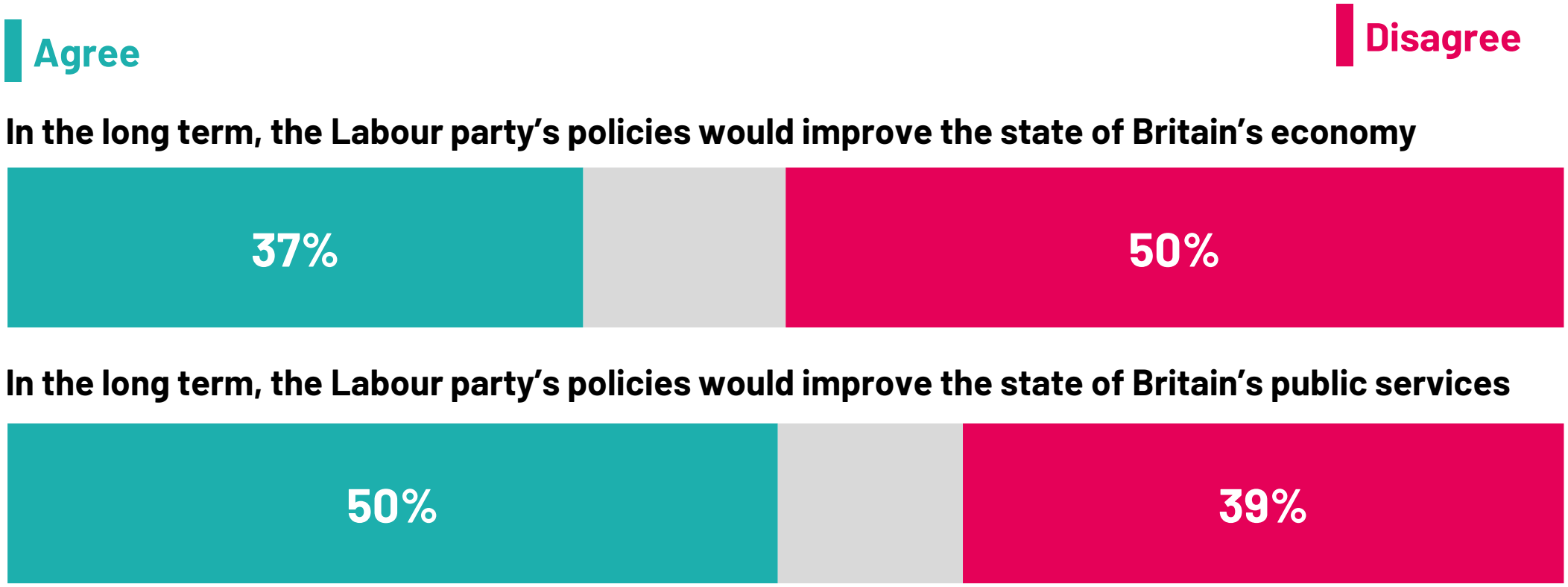


Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

Public trusts Labour more on public services and *slightly* more on the economy

Now imagine that there was a Labour government led by Keir Starmer as Prime Minister. On balance do you agree or disagree with the following statements?

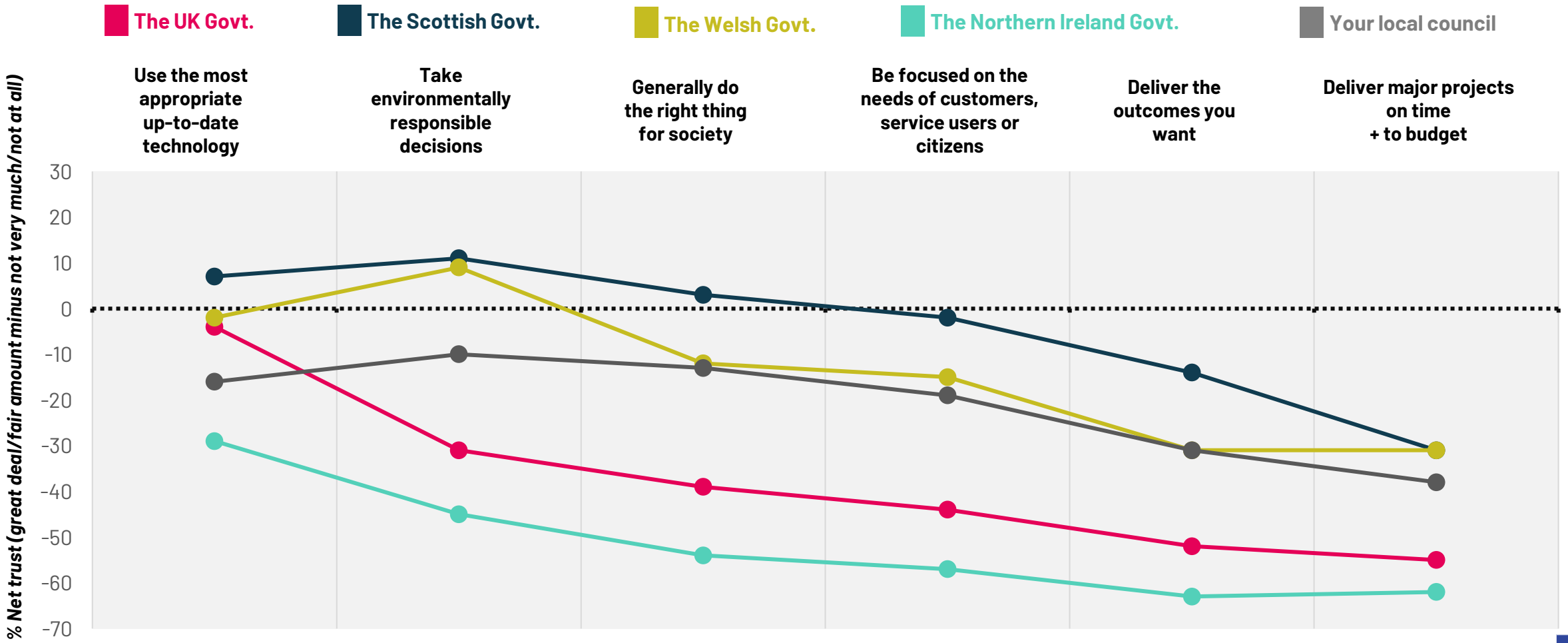


Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

Declining trust in UK and NI governments, especially to deliver desired outcomes and major projects; Scottish and Welsh administrations, and local councils fare better

To what extent, if at all, do you trust .... to...?

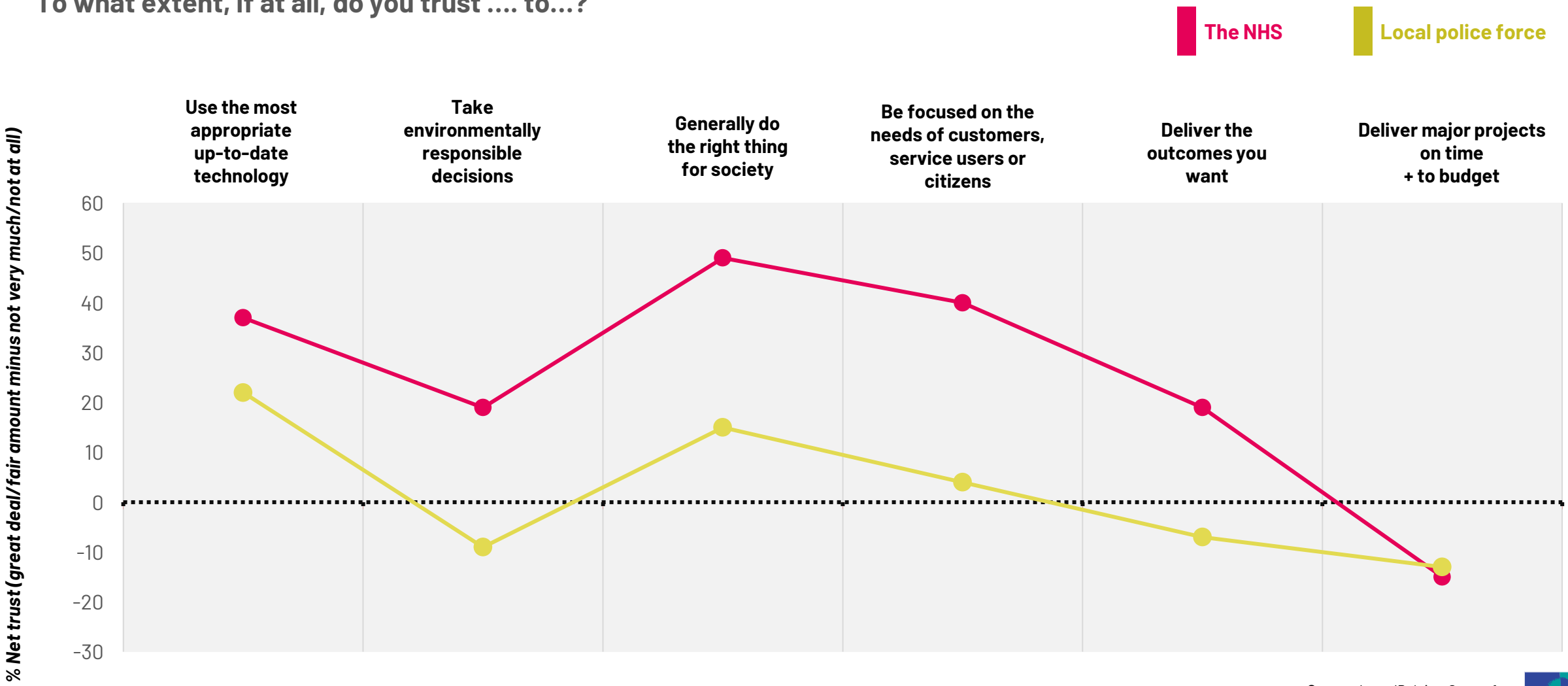


Base: 5,815 Online UK adults 16-75, 27th October-1st November 2023. Scottish/Welsh/NI Govts only asked in those nations (base sizes 821, 713, 420 respectively)

Source: Ipsos/Deloitte State of the State

Mixed trust in NHS and police; growing concerns despite higher ratings than UK government

To what extent, if at all, do you trust .... to...?

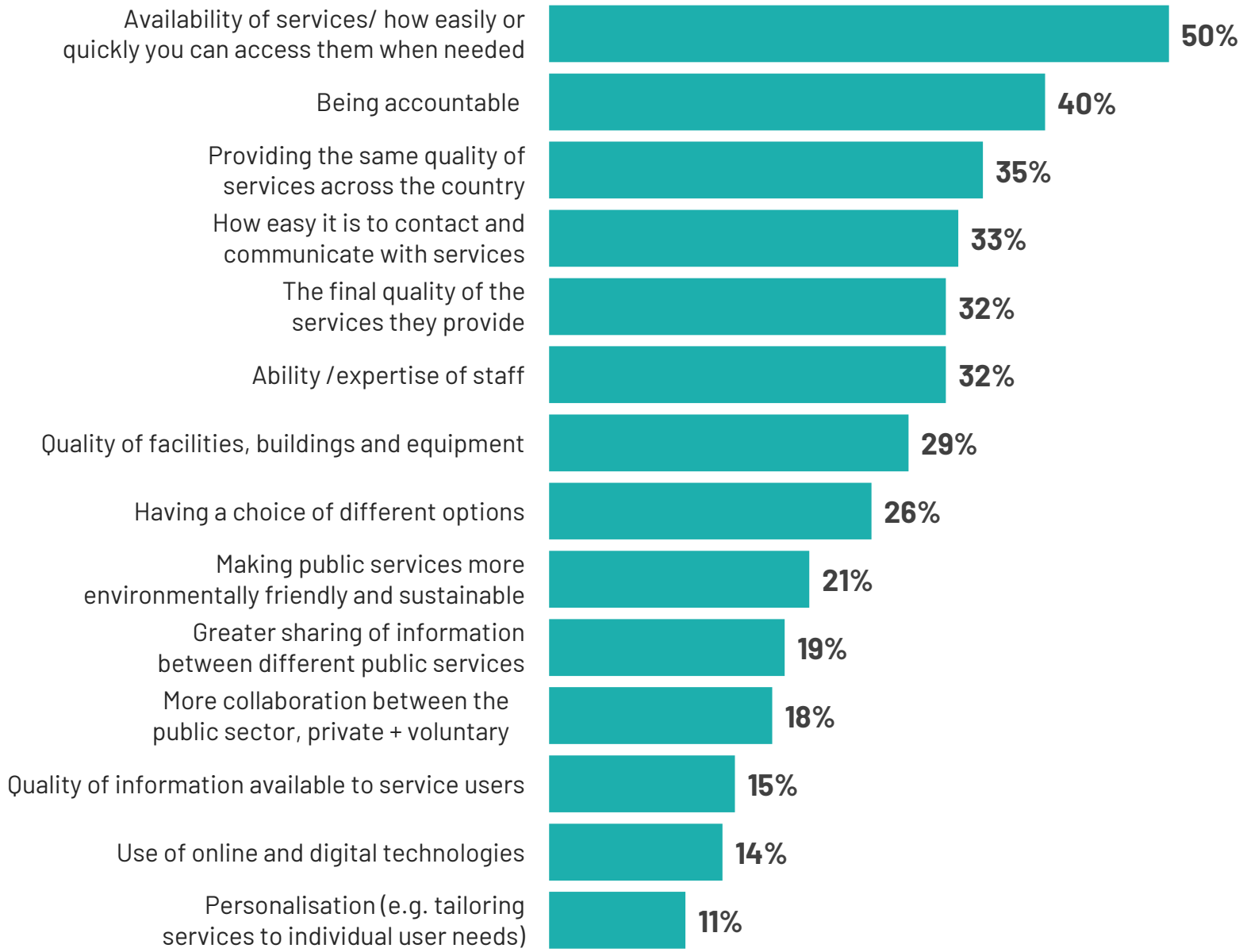


Base: 5,815 Online UK adults 16-75, 27th October-1st November 2023.

Source: Ipsos/Deloitte State of the State

Service availability and quick access are key areas for improvement, along with accountability, service quality, communications and outcomes

Thinking about your experiences of public services, which of the following, if any, do you think should be the top priorities for improvement over the next couple of years or so?

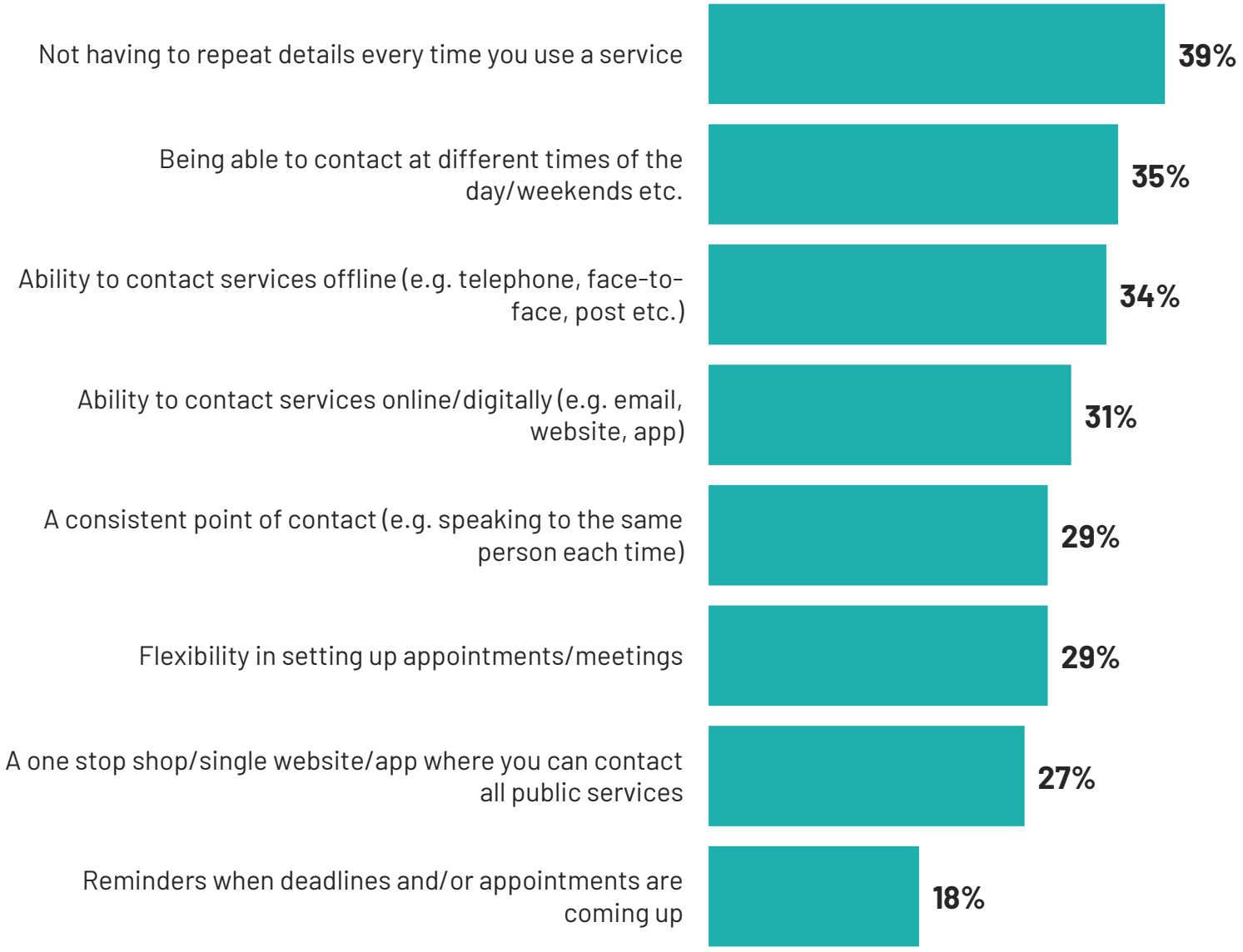


Base: 5,815 Online UK adults 16-75, October-1st November 2023.

Source: Ipsos/Deloitte State of the State

The public also want improvements in public service contact, notably less repetition and more diverse contact times and methods

And thinking about when you contact public services, which of the following, if any, do you think should be the top priorities for improvement over the next couple of years or so?



Base: 5,815 Online UK adults 16-75, October-1st November 2023.

Source: Ipsos/Deloitte State of the State

4. Views on tax and spend

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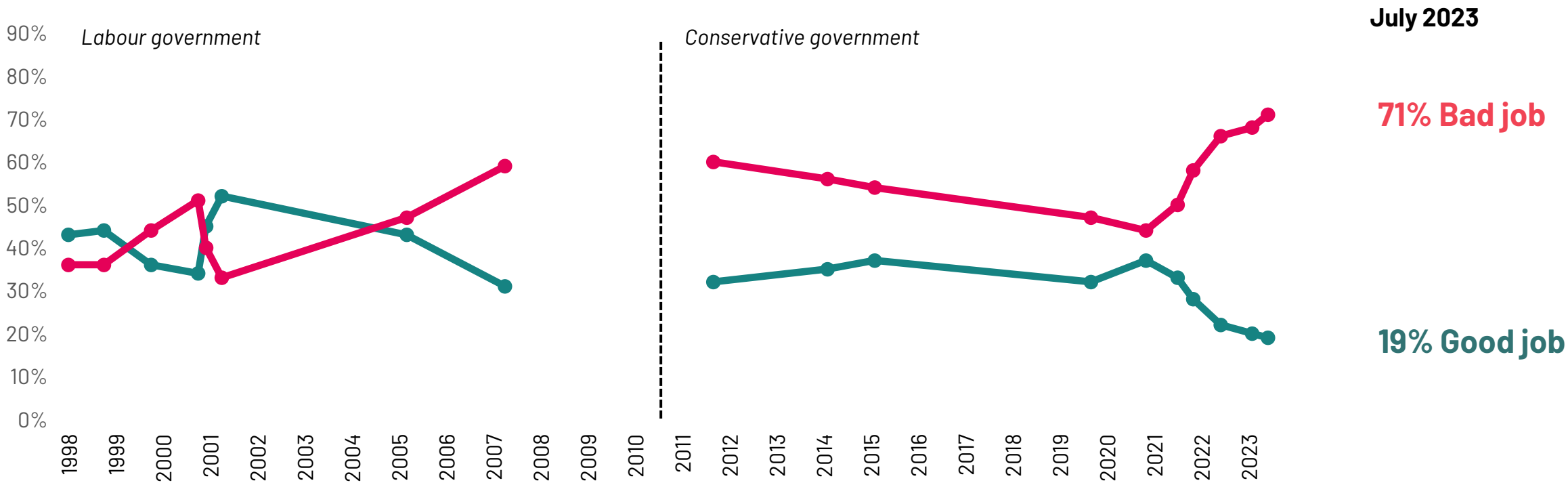
The public is divided on prioritising tax cuts versus public spending increases, with a preference for reducing the tax burden on lower and middle-income earners but strong opposition to any further cuts in public spending.

Public disapproves of government's approach to taxes and spending

Since Rishi Sunak's government was formed in October 2022 do you think the government has done a good or bad job at ...? handling taxation and public expenditure

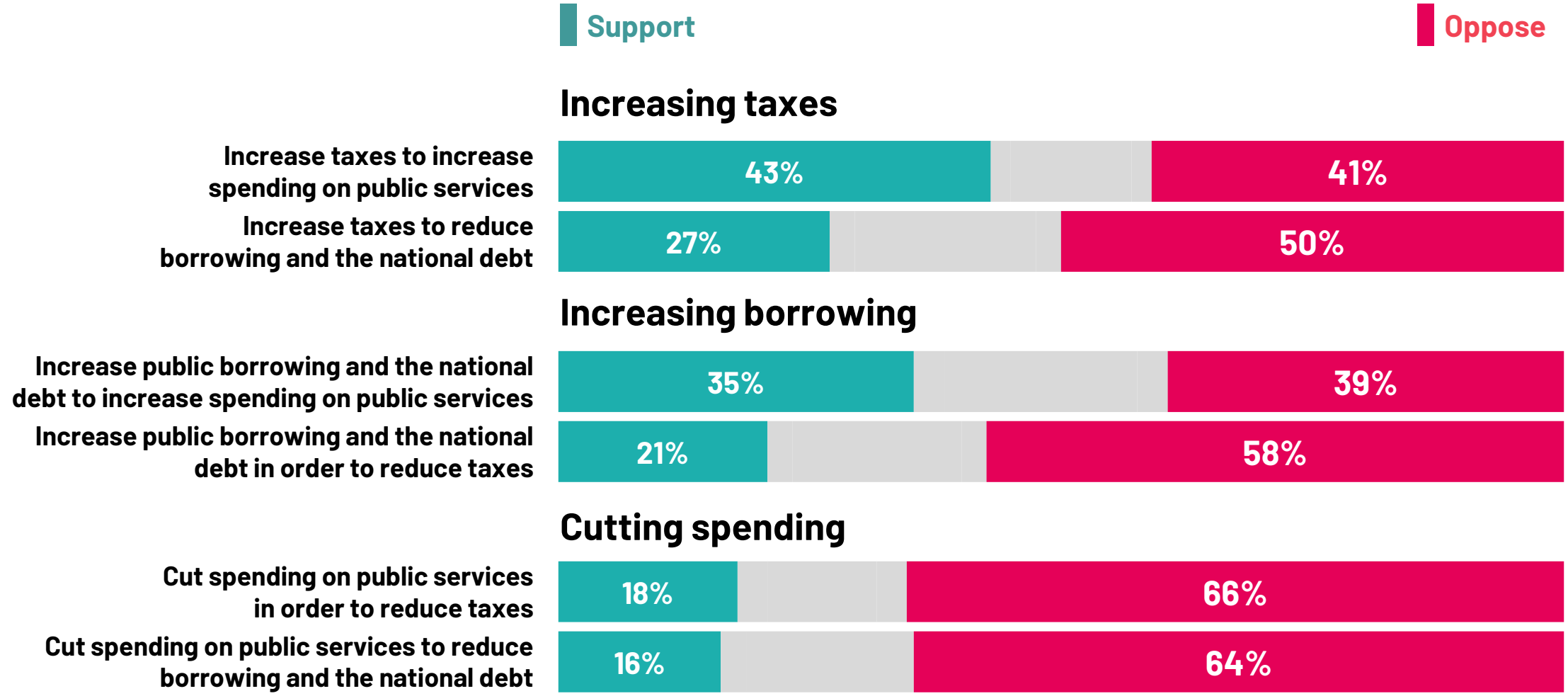


Base: c.1,000 British adults 18+ each month

Source: Ipsos Political Monitor

No easy answers on cutting spending, more taxes or more borrowing

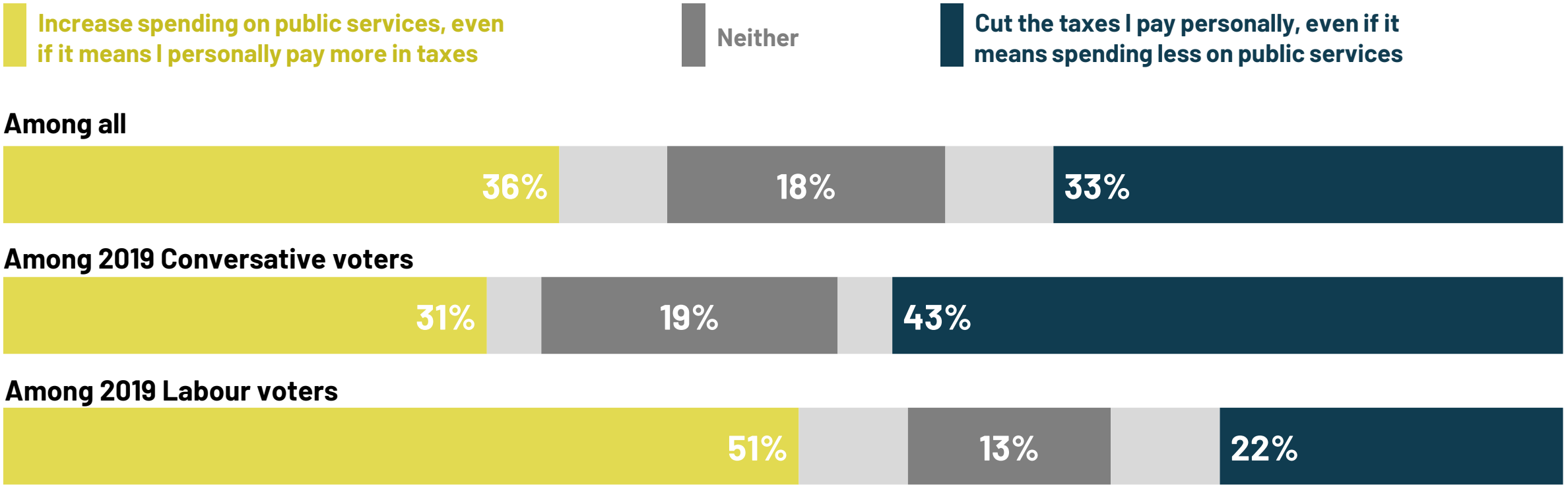
Would you support or oppose each of the following options for public spending, taxes and borrowing?



Base: 1,001 British adults 18+, 1-8 November 2023

Public divided along party lines on tax cuts versus spending

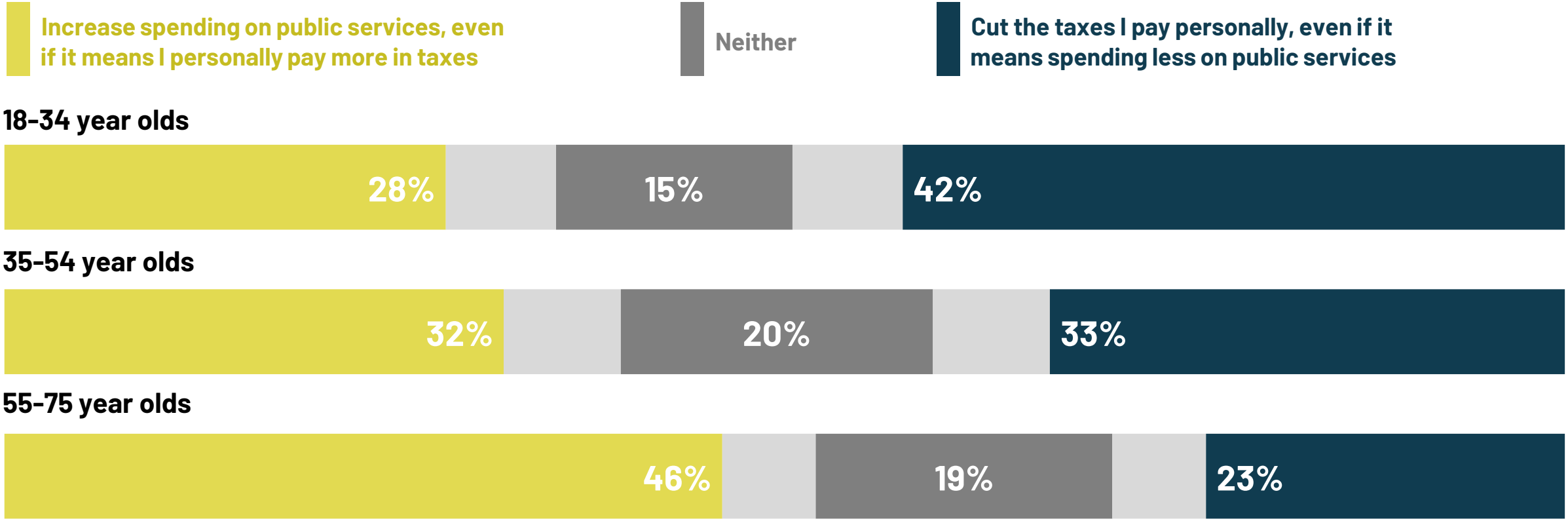
As you may know, Chancellor Jeremy Hunt will be announcing the next budget on Wednesday 6th March. Imagine the Chancellor had the choice between cutting taxes for individuals, meaning you personally pay less tax even if it means spending less on public services, or spending more money on public services, even if it means you personally paying more in taxes. Which of the following would you prefer?



Base: 2,155 Online British adults 18-75, 16 - 19 February 2024, including 2019 Conservative voters (622) and 2019 Labour voters (606)

Even though they are more likely to be Conservative supporters, older people prefer increased spending. Young people are most supportive of tax cuts

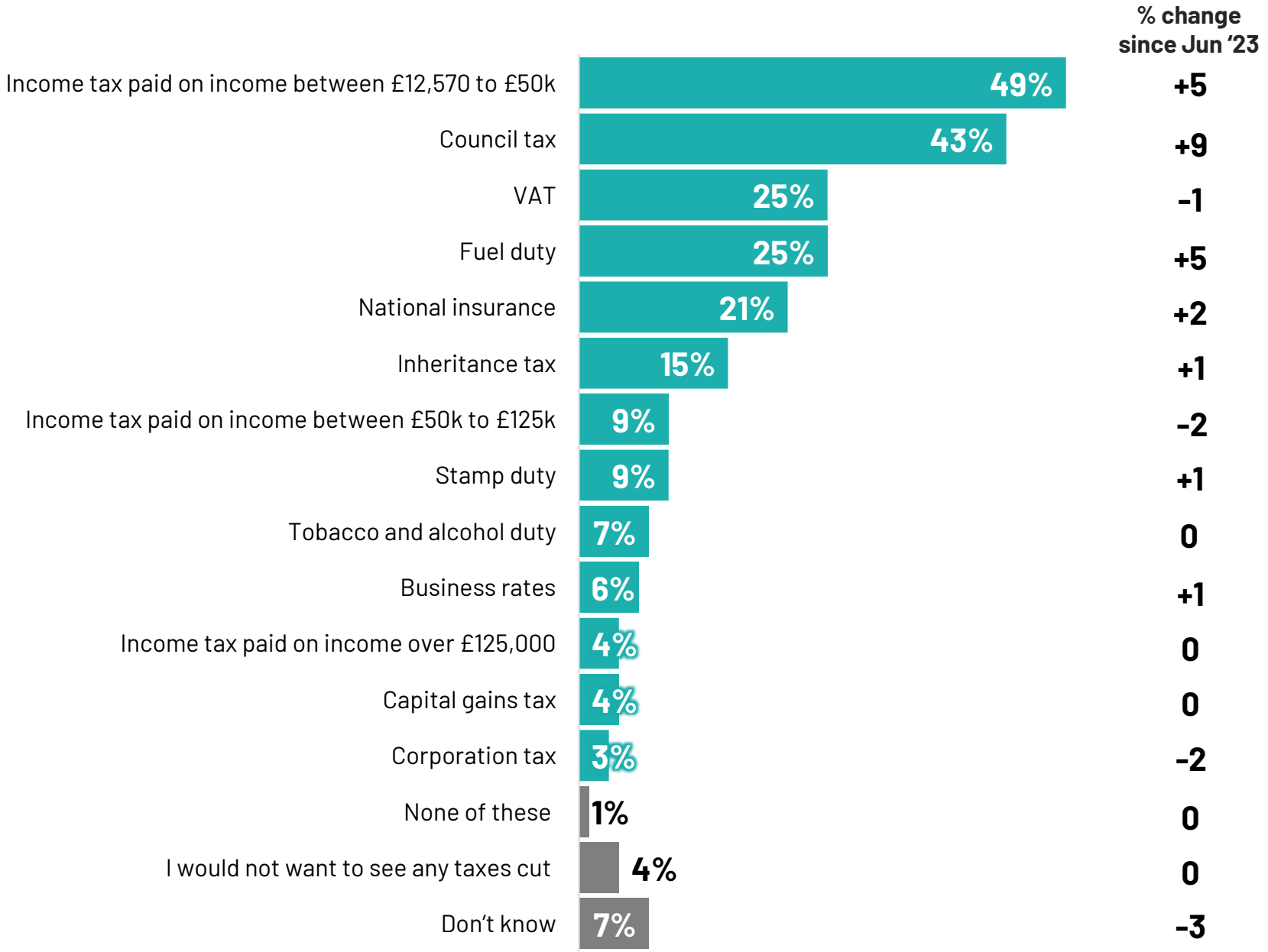
As you may know, Chancellor Jeremy Hunt will be announcing the next budget on Wednesday 6th March. Imagine the Chancellor had the choice between cutting taxes for individuals, meaning you personally pay less tax even if it means spending less on public services, or spending more money on public services, even if it means you personally paying more in taxes. Which of the following would you prefer?



Base: 2,155 Online British adults 18-75, 16 - 19 February 2024, including 2019 Conservative voters (622) and 2019 Labour voters (606)

Income tax cuts for lower earners preferred, followed by council tax cuts

Imagine that the government was in a position where it felt it could cut taxes. Which, if any, of the following types of tax would you most prefer to see cut? Please choose up to three from the list below.



Base: 2,155 Online British adults 18-75, 16 - 19 February 2024

5. Views on AI in public services

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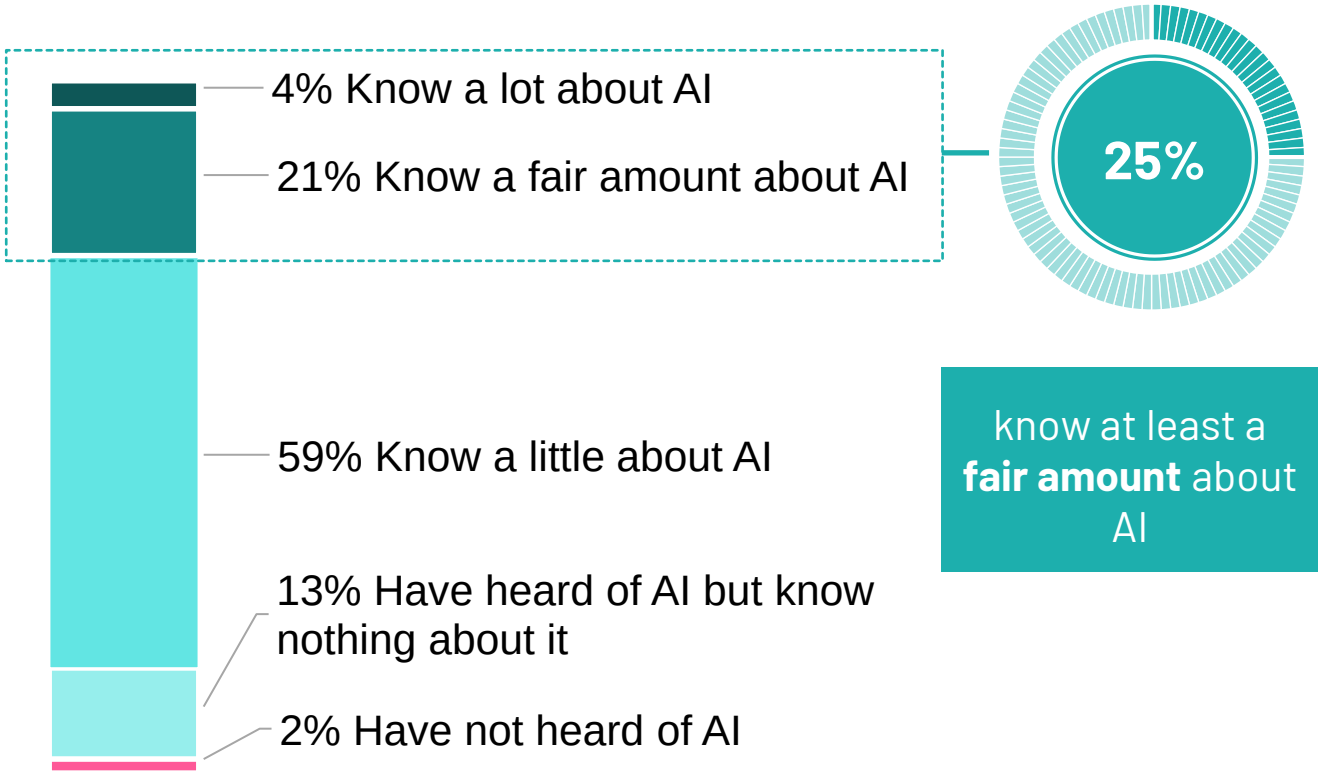
Public knowledge of AI is low, although people expect its impact to grow, leading to apprehension about the risks.

However, there is openness to specific applications that could enhance public services, though less support for use cases involving automated decision-making or resource allocation.

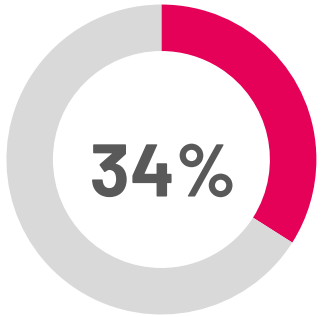
Most of the UK public don't know much about AI – though they expect its impact to increase

Which of the following best describes your knowledge of AI?

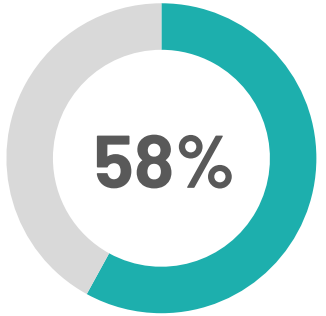


know at least a **fair amount** about AI

% agree (GB)



Products and services using artificial intelligence **have** profoundly **changed** my daily life in the **past** 3-5 years



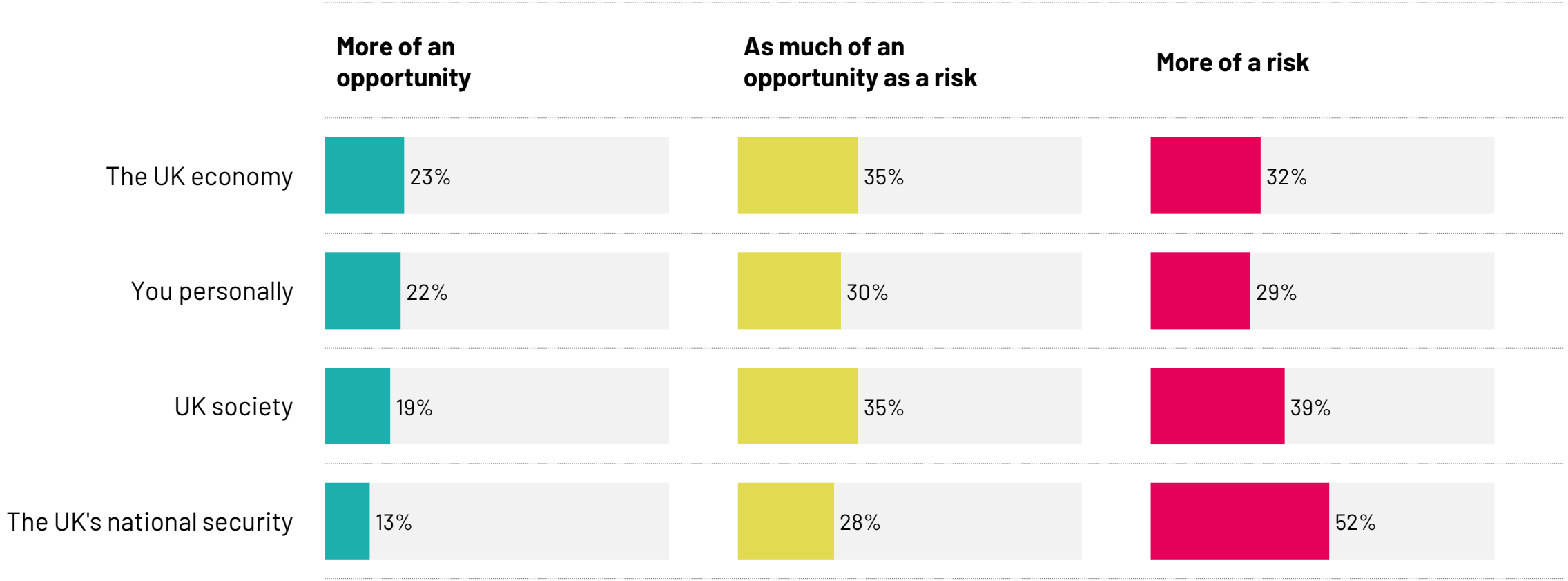
Products and services using artificial intelligence **will** profoundly **change** my daily life in the **next** 3-5 years

Base: 5,098 UK adults aged 16+, 14-20 September 2023

Base: 1,002 Online British adults, 7,010 Online adults in G-7 countries, and 7,508 Online adults in the EU, interviewed May 26 - June 9, 2023.

Public sees AI as more of a risk than an opportunity overall

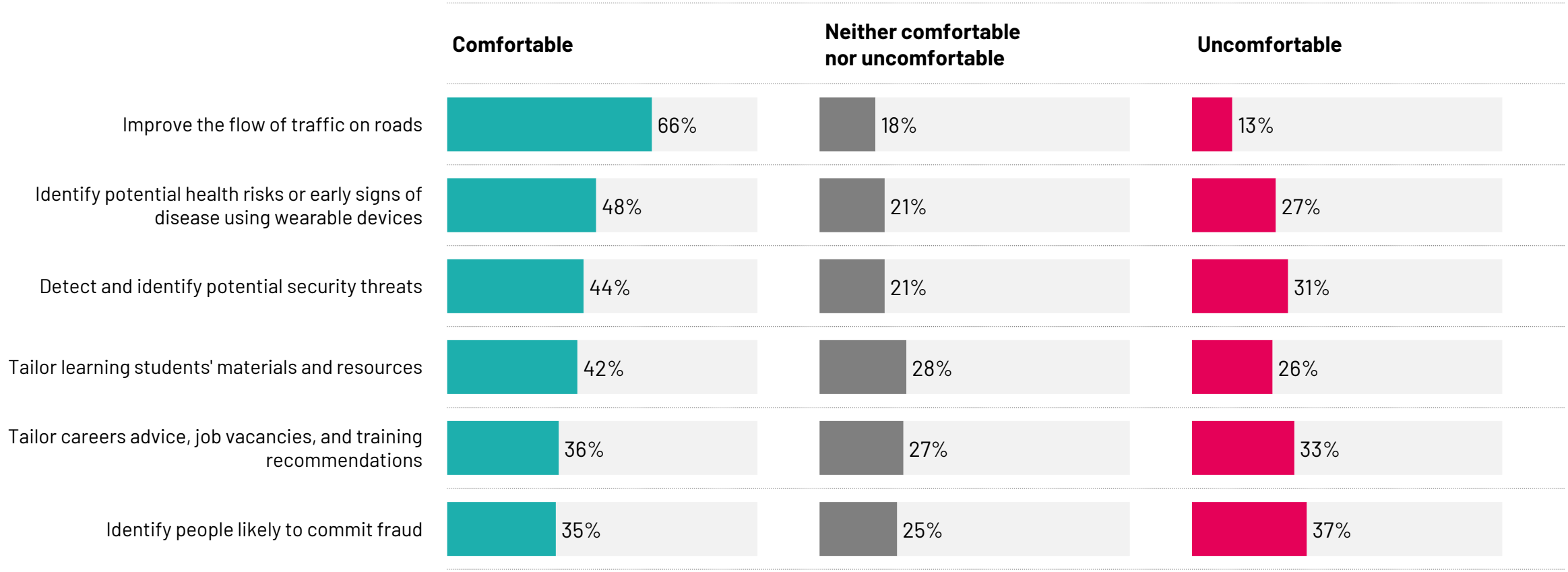
Extent to which the public think AI is an opportunity or a risk to ...?



Base: All UK adults 16+ (n=5,098)

Support for AI varies by application

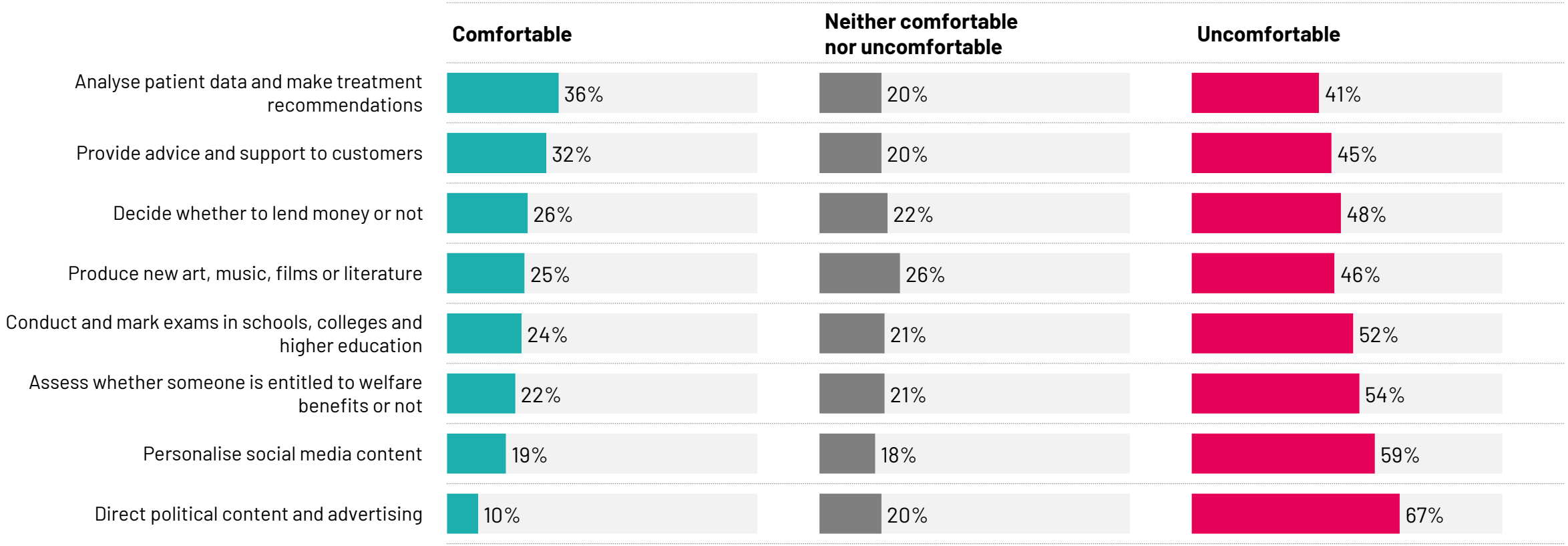
How comfortable the public are with the use of AI to ... ?



Base: All adults 16+ (n=5,098)

Public is less comfortable with AI replacing humans for key decisions – or directing media and political content

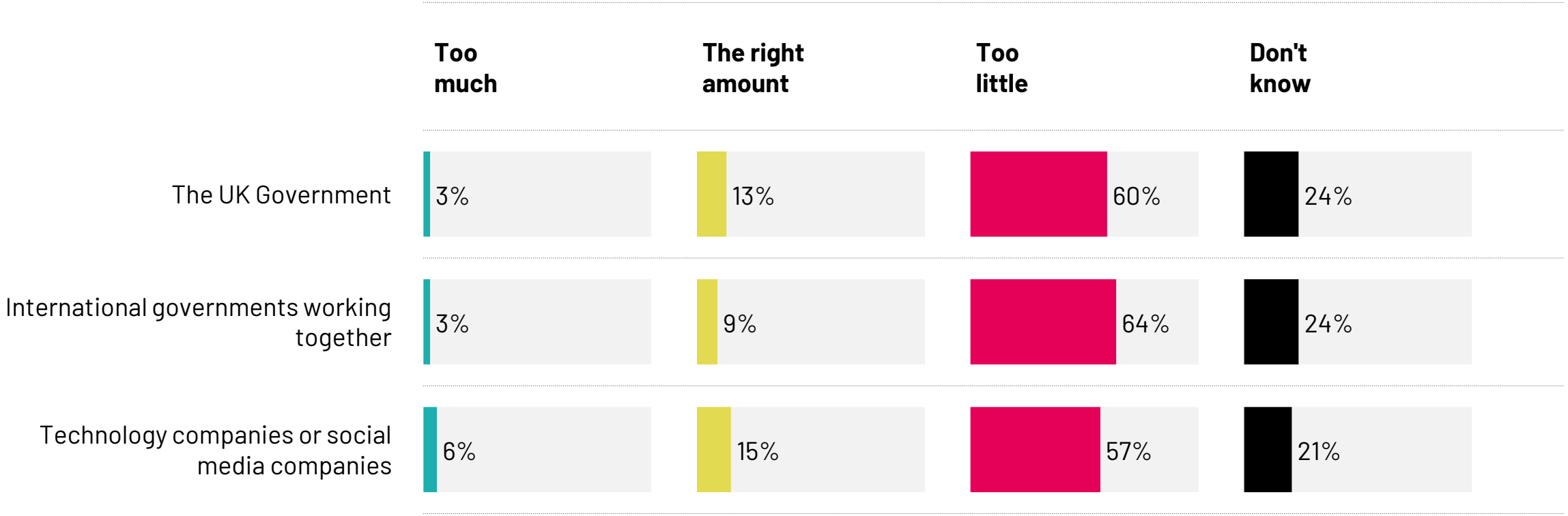
How comfortable the public are with the use of AI to ... ?



Base: All adults 16+ (n=5,098)

Most think too little is being done to regulate AI – by governments and tech companies

Thinking about actions to regulate the development and use of AI, do you think too much, too little or the right amount is being done by...?



Base: All adults 16+ (n=5,098)

6. Focus on regional inequality

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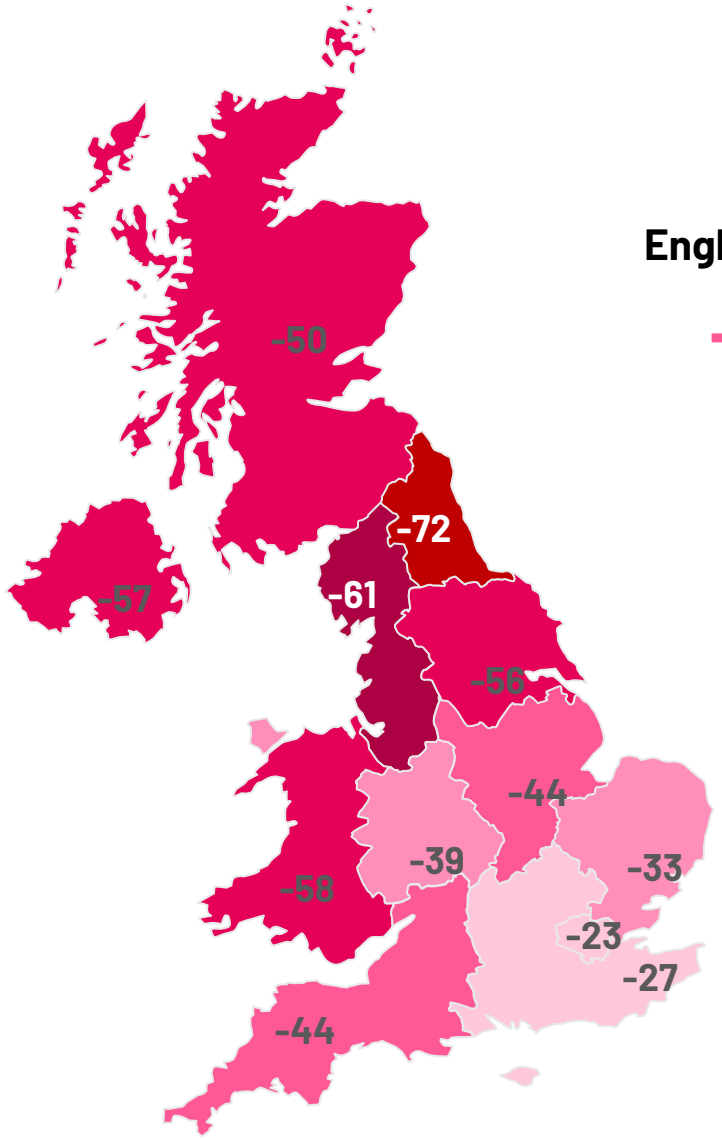
Perceived regional inequalities are a key priority for the public, particularly in the North and devolved nations.

Priorities often differ across different areas, leading to a strong appetite for locally-led solutions and decision-making to level up economic outcomes and quality of life.

This Photo by Unknown Author is licensed under CC BY

Perceptions of spending inequalities strongest in North of England and the devolved nations

In your opinion, does the national government in Westminster spend more, spend less or about the same on your area, as it does on other local areas? % Spend more – Spend less



England Average

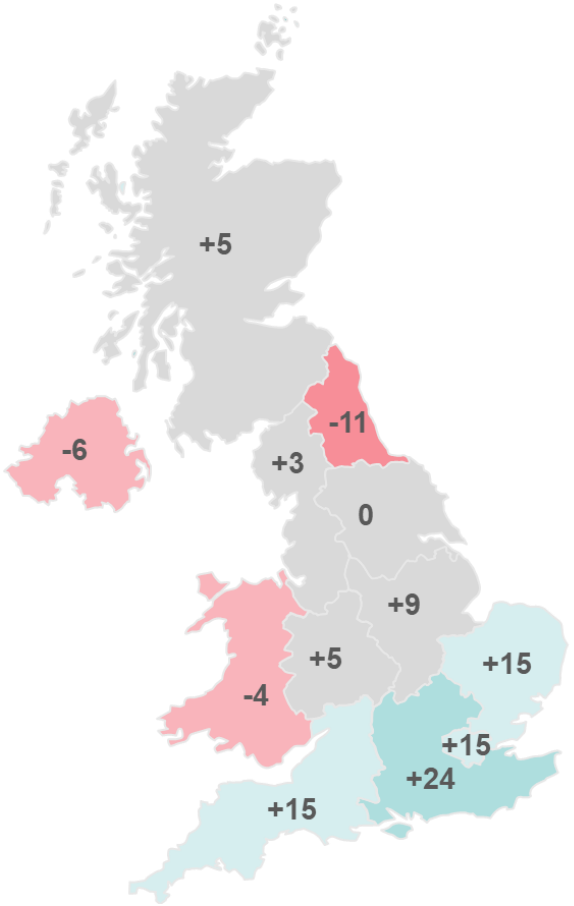
-41

Base: 6,189 British adults 16+ ; England (5177); Scotland (510); Wales (259); Northern Ireland (243)
Fieldwork dates: 2-8 February 2023

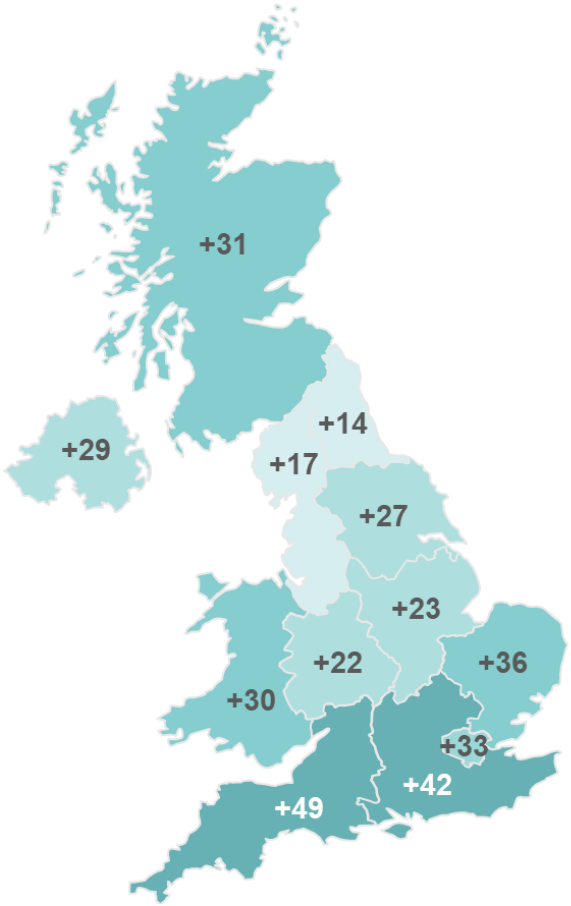
Source: Levelling Up Tracker

Many (but not all) inequalities are felt strongest away from South-East amid doubts about 'levelling up'

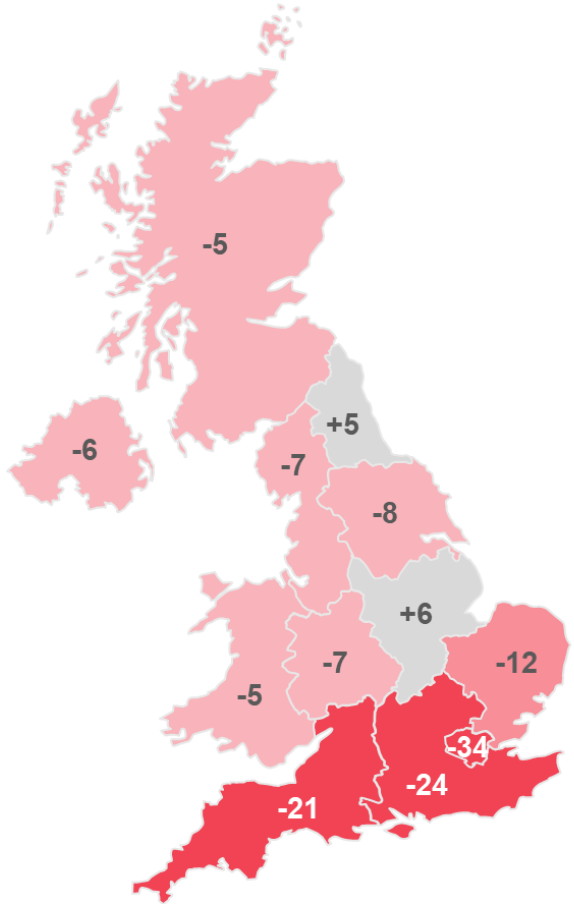
Pay, employment & productivity



Pride in place



Homes

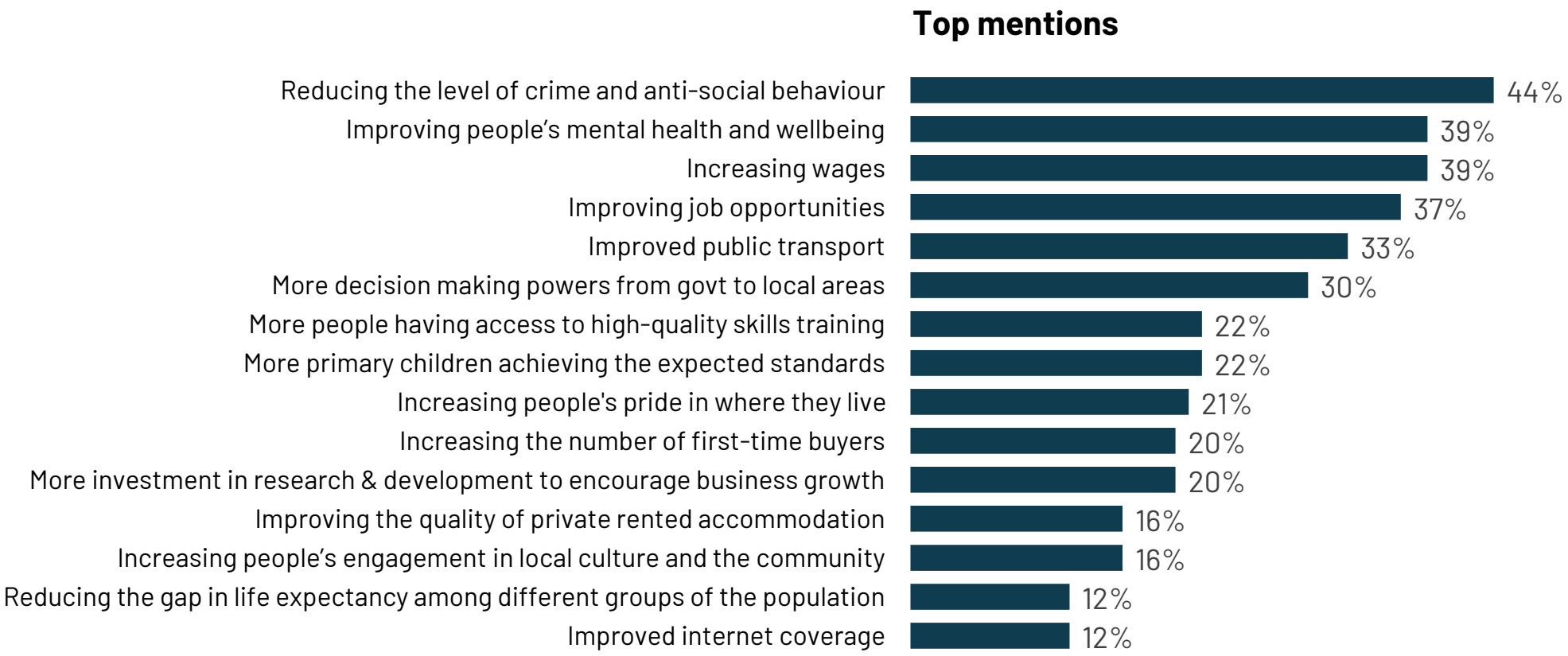


Base: All aged 16+ in England (6189); North East (262); North West (661); Yorkshire and the Humber (528); East Midlands (486); West Midlands (541); East of England (618); South East (861); South West (638); London (582); Scotland (510); Northern Ireland (243); Wales (259); Fieldwork dates: 2-8 February 2023

Source: Levelling Up Tracker

Crime reduction, mental health and economy top local wish-lists

The government's plans for reducing regional inequalities (or Levelling Up) includes a number of objectives. Which three or four of the following, if any, do you consider to be the main priorities for improvement in your local area?

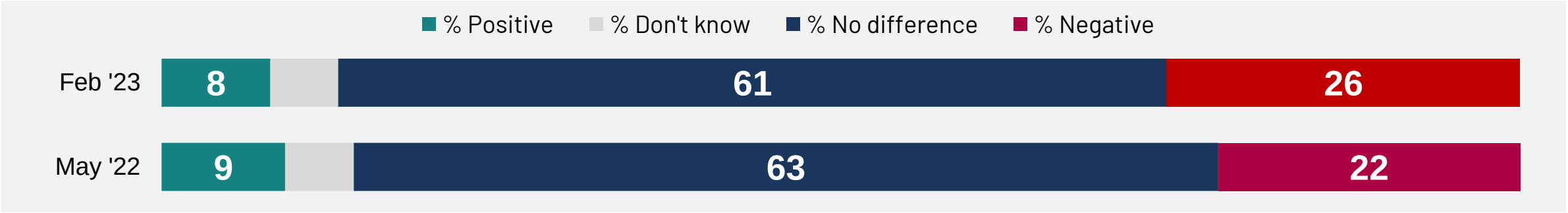


Base: 6,189 British adults 16+, 2-8 February 2023

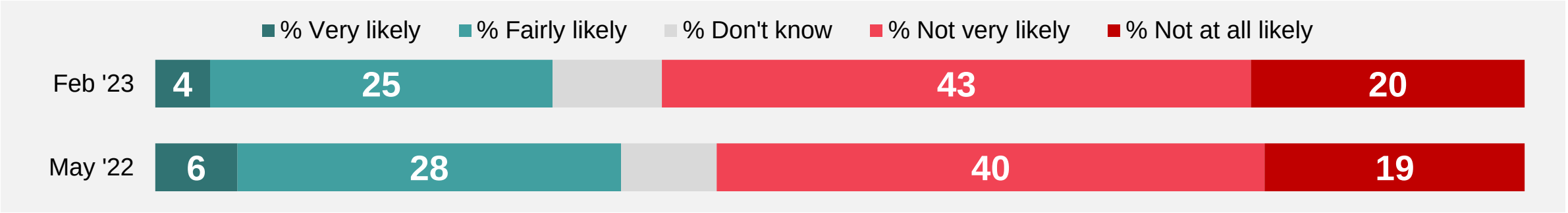
Source: Levelling Up Tracker

Doubts persist: public unconvinced by short and long-term 'Levelling Up' plans

Thinking about the next few years, do you think the government will make a positive difference to your local area, a negative difference, or will it make no difference?



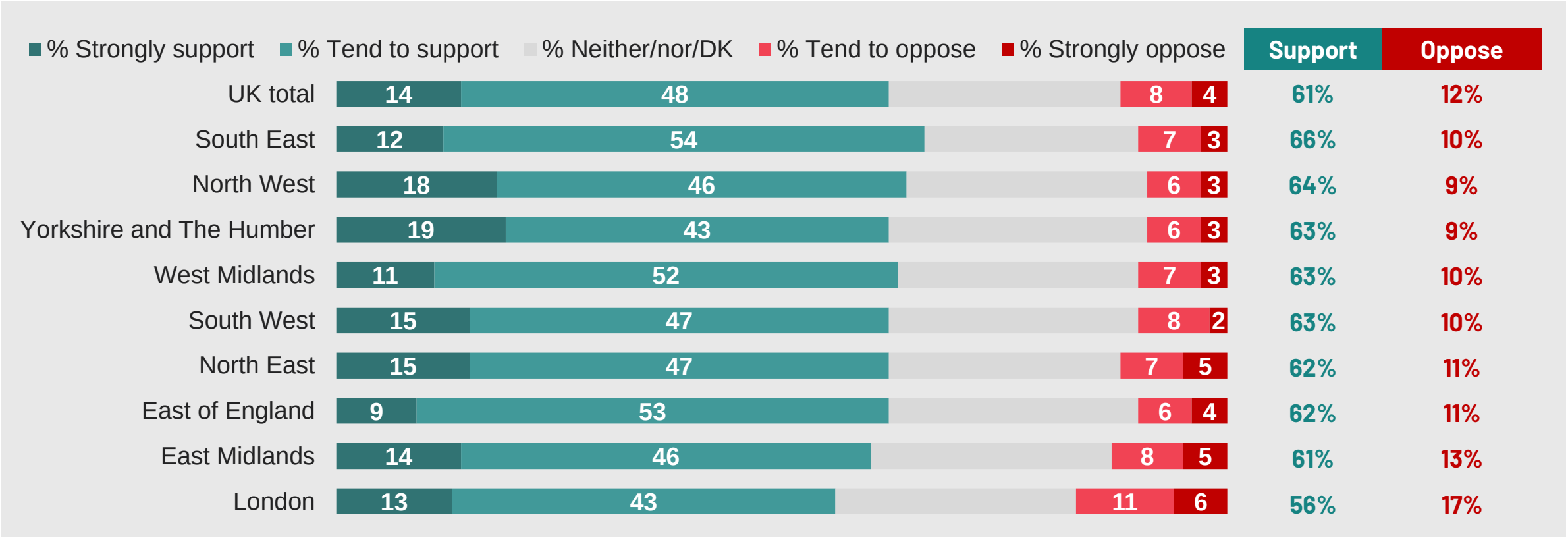
How likely, if at all, do you think that the current government's policies on reducing inequalities between different regions of the country will have a positive impact within the next 20 years?



Base: All UK adults 16+ (6189)
Fieldwork dates: 2-8 February 2023

Despite some declines in confidence in local councils, there is appetite for empowering local authorities to level-up local areas

To what extent, if at all, would you support or oppose each of the following?
Local authorities in your region being given more control over decisions



Base: All UK adults 16+ in England (6189); North East (262); North West (661); Yorkshire and the Humber (528); East Midlands (486); West Midlands (541); East of England (618); South East (861); South West (638); London (582)
Fieldwork dates: 2-8 February 2023

7. Implications for future public services

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To rebuild public trust and create sustainable public services, policymakers should focus on embedding fairness, empowering local leaders within a clear national framework, carefully deploying technology, breaking down silos to tackle complex inequalities, and directly engaging the public as partners in reform.

Conclusions

The British public has had a pessimistic outlook for some time. Large majorities believe the country is heading in the wrong direction, are worried about the economy and cost of living, and feel the quality of public services has deteriorated in recent years.

Along with the economy, the NHS is shaping up to be a key issue in the upcoming election, and longer-term the public is concerned about issues across the public policy sphere. Looking ahead, Britons expect further declines in public services like the NHS, education, policing, skills, the environment and opportunities for young people.

While slightly more optimistic about the Labour Party's potential handling of the economy and public services, overall trust in government to improve the state of public services is quite low. And with concerns about both potential tax rises and spending cuts, whoever wins the election may have limited room for manoeuvre.

Across the country, perceptions of regional inequality remain high, especially in the North of England and devolved nations. The public is open to greater local decision-making powers to address this.

As government looks to the future of public service delivery, it will need to prioritise areas like healthcare, crime reduction, economic growth, housing affordability and climate change. Emerging technologies like AI offer opportunities to enhance services in areas like transportation and healthcare, but less so for replacing human judgement and interaction. Government and public services will need to be thoughtful about leveraging these new tools.

Implications

Based on the evidence from our research and expert discussions, we see five key implications for the future of public services:

1. The importance of fairness in access and outcomes, including across regions and devolved nations, is paramount for maintaining public trust.

2. Local, place-based policymaking and service delivery has public support and could enable tailored solutions - but needs to be backed by a more strategic, partnership approach to devolution and a clearer role for the centre to preserve accountability and learning.

3. Public services should harness new technologies like AI responsibly to improve efficiency and service quality, but in a transparent, ethical way that preserves human oversight and builds public confidence.

4. Tackling complex, interconnected challenges like health and wellbeing will require public services to break down silos and collaborate across traditional organisational boundaries.

5. Engaging the public (and staff) as partners in service design will be critical for creating responsive, community-driven solutions that people will embrace. Creative methods like deliberative engagement can help navigate difficult trade-offs.

By heeding these implications, policymakers and public service leaders can begin to map a path towards an effective, trusted and forward-looking model for serving Britain's communities and improving quality of life in the years ahead. An evidence-based, collaborative and inclusive approach to policy and delivery will be essential for making this vision a reality.

Deep dives

UNDERSTANDING SOCIETY

THE FUTURE OF PUBLIC SERVICES

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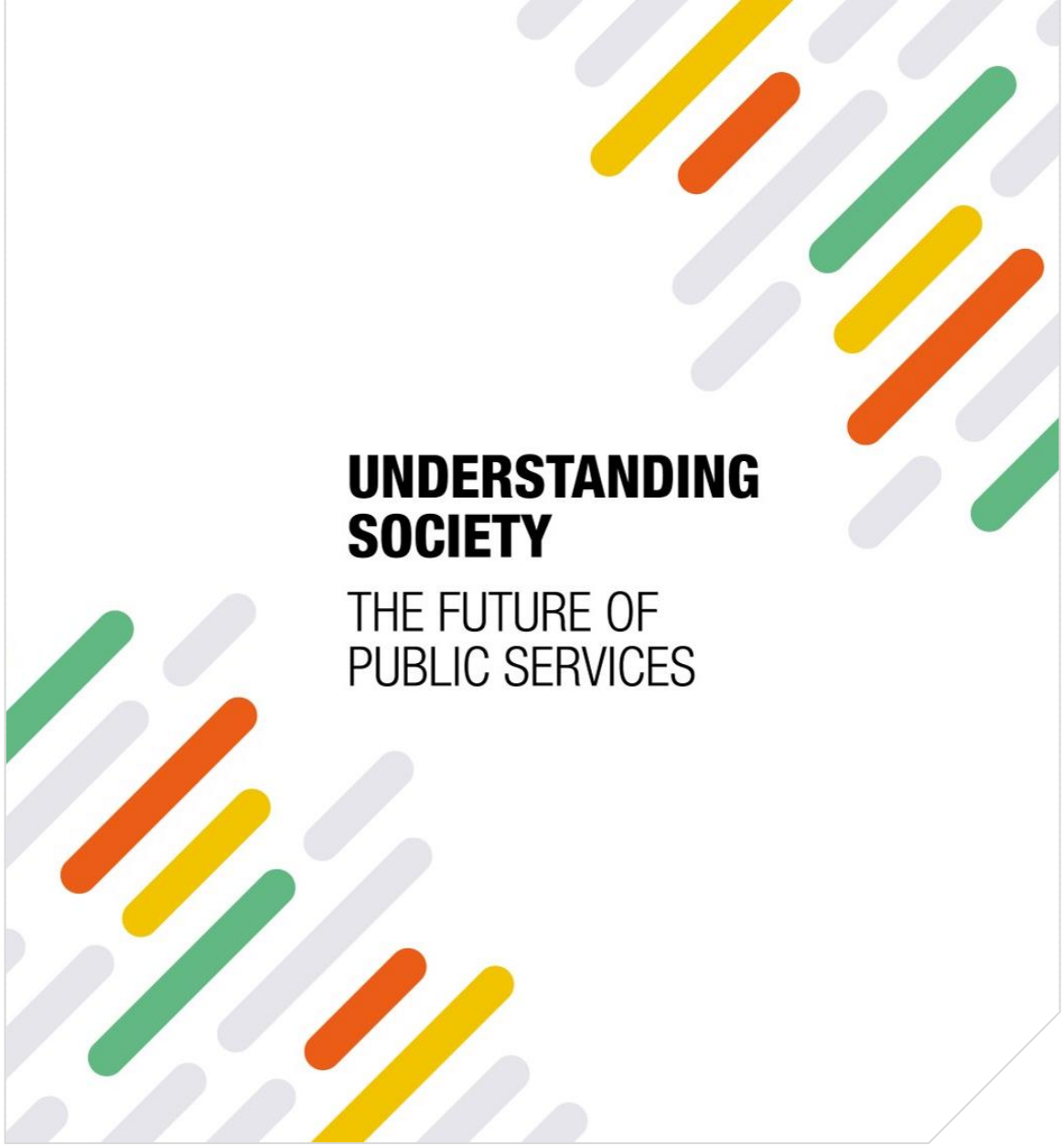
Ipsos' latest Understanding Society takes deep dives into the future issues facing key public policy areas, based on our research and interviews with experts in the field. Here we summarise the key findings for the future of the NHS, AI in public services, policing, climate adaptation, skills and place-based policy making.



The future of the NHS

The NHS is experiencing multiple pressures: an aging population means increased numbers require NHS services, and more people living with complex, long-term conditions; below historical-average funding left it in a vulnerable position when hit by the Covid-19 pandemic; and a workforce under immense pressure.

Read the full article and interview with Tim Gardner, Assistant Director of Policy at The Health Foundation at:

https://www.ipsos.com/en-uk/understanding-society/future-nhs

What does this mean for the future?

Improved use of technology, data and AI can help ease some of the pressures.
Technology has the potential to revolutionise the way our healthcare system works, not just through managing demand, but also in achieving productivity gains. Deliberative research has found potential support for innovative approaches, such as 'digital triage', in managing demand, as well as concern about implementation and accessibility. Generative AI used to reduce the burden of low skill tasks can help boost productivity and improve job satisfaction among healthcare professionals.

Some of the solutions don't lie within the gift of the NHS.
There are multiple cases where action elsewhere could help the NHS address its challenges, a key example being investing in social care services. A nation in which we all have access to things like good quality employment, housing, education and a high standard of living in general will lead to a healthier population with fewer demands on our health service.

Evidence-based and inclusive policy making.
Ipsos' research evaluation points to the need for policy makers to approach 'change' systematically to prepare the NHS for the future. Changes need to be made with due consideration for evidence, and it is vital to involve patients, the public and NHS staff in developing solutions.

The future of AI in public services

AI has the potential to automate repetitive tasks and enhance efficiency in our public services. However, it also brings challenges such as bias, lack of transparency, data privacy, and the broader social impacts facing the use of AI in this capacity.

Read the full article and interview with Dr Jonathan Bright, Head of AI for Public Services at The Alan Turing Institute at:

https://www.ipsos.com/en-uk/understanding-society/future-ai-public-services

What does this mean for the future?

Identify areas where AI can add value with minimal risks.
There are some areas where – with the right safeguards – AI can add significant value without the potential for significant negative impacts.

Ensure public acceptability and fairness at the outset by addressing concerns and being transparent about AI use.
Policymakers and regulators should engage with those affected by proposed AI use from the outset to understand the potential impact.

Be aware of bias in AI and take steps to understand and address it.
While AI has the potential to mitigate bias, it can also amplify it. Therefore, public services should proceed with care and ensure that bias is properly managed.

It is important to not rely solely on AI to take decisions due to the challenges related to bias and transparency.
While AI can offer ideas and suggestions based on patterns, the involvement of humans is crucial in the decision-making process..

Consider the readiness of your organisation or stakeholders.
This includes ensuring that the data environment is conducive to the use of AI, that the workforce have the necessary skills, and that relevant institutions and stakeholders are on board to ensure the successful implementation and adoption of AI systems.

The future of policing

Policing in the UK is based on 'policing by consent', but recent data shows a decrease in public approval and trust in the police in the UK. Against this backdrop, those who lead the police are facing significant questions about what they can do to win back public trust and shore up the future of policing in the UK.

Read the full article and interview with Rick Muir, Director, The Police Foundation at:

https://www.ipsos.com/en-uk/understanding-society/future-policing

What does this mean for the future?

Be seen.
While simply increasing the number of police officers is not a silver bullet to effectively tackle all crime, there is international evidence that strategic deployment of visible policing can have an impact on crime rates and bolster public trust.

Be fair.
Different communities, areas and groups continue to experience different interactions with the police. A greater focus on procedural justice training for new officers, as well as monitoring and accountability of the use of stop and search powers could help reduce some of this erosion of trust.

Be accountable.
Recent Ipsos polling shows that nearly three in five Britons think police misconduct is a problem. Although there have been some concerns over the capacity of vetting departments, communication of a successful "raising the floor" of standards could be pivotal in re-building public trust.

Work collaboratively and listen deliberatively.
Recent polling suggests that the public feel unheard and disengaged from policing. Deliberative engagement with the public undertaken by the Police Foundation shows that presenting people with the detailed context and challenges (including resources) faced by the police can alter people's expectations on what they think the police should prioritise.

The future of climate adaption

There have been many calls to ensure that the transition to net zero is "just" – that actions taken to reduce climate emissions do not have unfair detrimental impacts on any specific groups in society, and that opportunities created are available for all. We must also consider how we can adapt to climate change in a just way, too.

Read the full article and interview with Richard Millar, Head of Adaptation for the Climate Change Committee at:

https://www.ipsos.com/en-uk/understanding-society/future-energy-and-climate-adaptation

What does this mean for the future?

Recognise the differential impacts that climate change and adaptation measures may have on different groups.
Participants to deliberative research felt strongly that climate adaptation policies should prioritise protecting and supporting the most vulnerable in society, including those on low incomes or at most risk of climate impacts.

Public services must implement co-ordinated and joined-up approaches to adaptation.
Ipsos polling indicates that the public thinks that the cost of inaction regarding climate change will be higher than the cost of measures to mitigate it. It is crucial that public services take a holistic approach to this – for example, infrastructure operators and local authorities considering together the increasing likelihood of extreme events occurring to build this into their infrastructure planning and maintenance regimes.

Consider the co-benefits of taking action.
Investment in adaptation measures can have significant co-benefits in terms of cost savings, as well as benefits for biodiversity, health, and job creation. These co-benefits are also important as a tool to engage with the public. However, the issue of up-front costs remains, especially if they disproportionately affect certain groups.

The future of the UK workforce

The economy's future skills needs will be influenced by trends such as climate change, migration, and technological changes like artificial intelligence (AI). Even without significant future changes, there is already a gap between the skills of the UK workforce and employers' needs. How can devolution help achieve national policy objectives?

Read the full article and interview with Fiona Aldridge, Head of Insight at the West Midlands Combined Authority at:

https://www.ipsos.com/en-uk/understanding-society/future-uk-workforce

What does this mean for the future?

A long-term strategy is required, setting out a national vision for the skills system to complement devolution.
Changes driven by technology-enabled remote working, alongside skills requiring significant capital investment in training facilities and equipment, require a national skills strategy.

Devolution needs to extend beyond urban areas to ensure the opportunity and benefits can be shared by all places.
Nationally, consideration should be given to how to enable more equitable geographic opportunity and ensure institutional capability to collaborate and mobilise devolution to meet skills needs in all places.

Better communication of locally differentiated offers to employers and the public.
The focus should be on the outcome of meeting local skills needs. This though will create a differentiated offer where people may be able to access funded training for certain skills in some places and not others.

Testing, learning, and sharing what works to support people to retrain and change career to meet the economy's future skills needs.
While devolution has the potential to offer flexibility and tailored policies to address skills and employment gaps, it is important to monitor and evaluate its effectiveness.

The future of local delivery

The UK, like many similar nations, is grappling with a rising demand for public services and pressures to address complex social issues such as homelessness, poverty, and mental health. One particular area of concern in the UK is regional disparity, with regional imbalances ranking the highest among advanced economies.

Read the full article and interview with Dr Eleanor Carter, Research Director at the Government Outcomes Lab at:

https://www.ipsos.com/en-uk/understanding-society/future-local-delivery

What does this mean for the future?

Funding partnerships rather than relying on directives.
This means allowing local governments to have more flexibility with how they spend their money. By working together to develop, implement, and evaluate policies, central and local governments can better address the complex challenges faced by local areas.

Designing policy and measuring outcomes systematically.
Challenges that cut across organisational, policy and budgetary remits are particularly difficult, especially when there is a high upfront cost. To address this, there is growing interest in using systems thinking as part of policy design and evaluation to understand how different parts of a system interact and how interventions can achieve sustainable outcomes. These approaches offer useful techniques to grapple with complexity and identify how policy implementation affects wider system change.

Building capability for learning and innovation.
To resolve the tension between central accountability and local decision-making, it is important to provide more flexibility for local government to explore the problems, define solutions, and share good practice. This can be achieved by allowing local areas to hold themselves accountable for the process and to adapt to meet their targets, while also promoting learning and scaling up innovation, and more strategic accountability, through the use of central and regional government offices as a structure.

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Policy: Key Highlights