Public Opinion Polling Project

Report for the New Democracy Foundation

Question: Can high quality public opinion polls make a useful contribution to public policy making?

Executive Summary

It is often assumed that modern public policy and political decision making is overly driven by opinion polls, and that opinion poll driven decision making can have a negative effect on the willingness of political leaders to make decisions in the public interest.

However, less opinion polling is conducted by governments and political parties than is often assumed, and where it is done, it is subject to significant limitations that reduce its effectiveness as a tool for understanding public sentiment and the acceptability of different policy options.

Despite public perception, decision-makers, media and stakeholders have limited access to information and tools to help them understand public opinion on a particular topic. Understanding of public opinion is often based on anecdotal evidence; incomplete, poor quality and advocacy-based opinion polls, or the views of people who claim to understand, or speak for, public opinion.

This creates the risk of a significant gap between perceived and actual public opinion. It can privilege the loud voices over representative voices. It can make decision makers overconfident in some decisions and risk averse in others. It can mean decisions benefit a small minority who claim to represent the public interest over the interests of others.

Overall, a poor understanding by governments, parliamentarians, media and other stakeholders of public opinion makes it harder to assess and determine the public interest. While public opinion should not be used to determine public policy decisions alone, a more in-depth and nuanced understanding of public opinion, and the motivations and drivers of that opinion, can assist in making the case for economic or social reform and improving the quality of public debate. Better understanding of public opinion would also provide a useful evidence base that might feed into other methods of supporting public decision making, such as citizens' juries.

This project was designed to test the proposition that high quality, non-partisan, non-advocacy based opinion polling could become a useful asset in policy making.

To test this proposition, a research project was designed to:

- Identify three key policy issues at different stages in the policy development process,
- Interview stakeholders on where they thought a better understanding of public opinion would be valuable,
- Commission three high quality public opinion polls from respected public opinion firms to gain insight into these topics,
- Present the results of the opinion polls to policymakers, and
- Assess whether the insights from the opinion polling were valued by policy makers.

The polling research was designed to be higher quality that is usually undertaken and test the depth and strength of public opinion on the chosen topics, rather than just superficial views that may be held. This included testing both strength of views and trade-offs as part of the design of the opinion polling. This differentiated the research from much publicly available public opinion research, which is often limited in budget and scope and often designed for advocacy purposes or media consumption.

The results of the opinion poll research were analysed and shared with policy makers and influencers – Ministers and Shadow Ministers, ministerial staff, public service leaders and relevant stakeholder and interest groups.

Through this process, we both informed the stakeholders of where public opinion sat on the relevant issue, sought feedback on the value of the research itself, and on the overall concept and its ability to make a contribution to public policy making.

Topics chosen for this research project were:

- Road safety: Road safety issues were subject to upcoming policy decisions and generate strong interest in the media making it difficult to assess actual public opinion.
- Social Media: Social media was identified as an emerging public policy issue, where it was hard to identify where public opinion was at, and development of policy responses were in their early stages.
- Government fiscal policy after COVID: Government debt and deficits after the pandemic were seen as a longer-term policy issue, that was likely to define policy debates in the coming decade. As such, understanding public opinion had the potential to shape wider policy debates over the medium term.

Key Findings

In summary, there was strong support for the kind of research conducted as part of this project, and strong sentiment that it filled a gap that was not met by anyone else. Most importantly, the insights were valuable in both giving policy makers a stronger sense of public opinion, and in informing policy making in our three chosen areas of inquiry.

Key lessons were:

1. There was a keen response stakeholders, showing that there is interest in what we are providing, and that it fills a gap not addressed by others.

2. The research is valued by political leaders, political staff, government agencies and wider stakeholders. It is seen as a very useful input into policymaking and acts as a counterpoint to media and other factors that shape perceptions.

3. The positioning of the project as non-advocacy, and non-partisan added to the credibility of the research, and allowed for honest conversations.

4. Most valued types of insights were into how people think about real world trade offs and constraints, and which groups and demographics had different views. Least valued were insights into which communications messages were most effective, and the political affiliation of particular perspectives.

5. Topics of most interest were in areas where there were strong views from the community. Areas with large amounts of "don't knows" and questions where views were evenly divided were of lesser interest. There was strong interest in demographic factors - understanding who held which views and why. Generally, research that was actionable, with a clear connection to a policy concern was valued, but not where a decision is immediately imminent.

6. Planning and early conversations are important to execute well. The process is of conducting the research is complex and effort has to go into ensuring the polling is focused on the right question.

While the research was valued by stakeholders and the project can be considered a success, there are some areas that could be improved if the project was extended into a more systematic process of understanding public opinion. *These areas for improvement include:*

1. Overlap of polling projects: Each of the topics involves a significant research, development, communications, and dissemination program. Reasonably doing three polls concurrently made it challenging to communicate the results well. There is clearly an opportunity to overlap elements of the program but provide time to communicate each project well as well as possible to the widest possible group of stakeholders.

2. Data analytics: The polls created a rich dataset of related public opinions. The research firms conducted some regression analysis to show the most compelling correlations. However, there are more specific slices of data that are of interest for different groups and other correlations that may be able to be identified to provide deeper insight. In future, there is the potential to do more data breakdowns and data analytics.

3. Stakeholder engagement: This project took a direct engagement approach with policymakers who were identified as relevant. While this was effective, it meant that the audience for the research was limited. If further work was to be done on this approach, there is the potential to build on this network and take a more structured approach to stakeholder identification and engagement to improve impact. This might include a more strategic approach that includes building a list of interested stakeholders in the overall research program, rather than just people identified on a topic-by-topic basis. It might also include strategic consideration of media or broader communications tools to achieve maximum value out of the research investment.

Part 1: Background and Project Design

It is a regular criticism of governments and political leaders that they are too 'poll driven', and that a reliance on opinion polls leads to governments failing to make difficult but necessary policy decisions.

However, in the lead up to the development of this project, it became clear that there was less opinion polling conducted than is often assumed, and that this polling is often not accessible to decision makers when they need it and is limited in a variety of ways.

Limitations on understanding public opinion include:

- *Financial:* High quality, reliable public opinion polling is expensive, which limits the ability of polling to be commissioned. For political parties, with limited resources, it is hard to justify the expense of opinion polling outside election campaigns particularly where it doesn't directly relate to the ability of the political party to win elections. Other advocacy groups and interest groups are often limited in their financial capacity to invest in opinion polling.

- *Incentives not to share results:* Where opinion polling is conducted, there are strong incentives for the results not to be shared widely. For a political party, a better understanding of public opinion can be seen as giving a political edge, and therefore there is an incentive to protect it. Another reason Governments are reticent to share results is that it can lead to public criticism and scrutiny.

- *Wrong time in the process:* Often polling or other forms of understanding of public opinion doesn't happen early enough in the policy development process when policy makers are seeking to understand a problem and consider potential solutions. Often government polling is conducted as part of a communications strategy after a policy decision has been made, or to track acceptance and support of a policy decision over time. As this understanding of public opinion is not done early enough in the process, policy options may be ruled out due to an assumed public unacceptability, or particular options may be promoted on the assumption of strong public support.

- *Inability to fully explore the topic:* Particularly in government funded public opinion research, questions which might be seen as too political, or are awkward for a public agency to be seen asking are excluded from surveys, even though they may be valuable to decision makers.

- *Agendas and advocacy:* Polling is commonly commissioned by industry or community groups, private companies, or stakeholder organisations, as part of their policy advocacy activities. While they can be useful in this advocacy context, they are often not trusted by policymakers, as they are often seen as one sided, or slanted to ask questions to support a particular case.

- *Concerns about quality:* There is wide distrust of lower quality opinion polls. This is particularly the case following concerns about some polling not being effective in predicting election results.
- *Access:* Polling conducted by governments is not often shared widely or published. This can mean where opinion research is done, it is not accessible to all policymakers, and therefore is limited in its impact.

Combined, these factors mean that it often difficult for policy makers to have a reliable gauge of public opinion on a particular topic. As a result, decisions can be influenced by anecdote, the opinions of policymakers and their social circles, advocacy that claims to represent public opinion, or loud voices that claim to speak for the public, yet may not actually represent public opinion.

Project and Impact

The problems identified would suggest that there is a gap for high quality, non-advocacy public opinion research on topics that are of significant policy debate. In an international context, there are a number of not-for-profit organisations that conduct this kind of research, such as the Pew Research Centre in the US.

In an Australian context, this kind of public opinion research is more limited, with relevant Australian examples including the Lowy Poll conducted annually by the Lowy Research Institute, generally focused on international affairs, and the social cohesion work of the Scanlan Foundation Research Institute. While both of these research projects are highly valuable, they are focused on particular issues, rather than being a broader platform to understand Australian public opinion.

This project was designed to test the potential for broad-based high quality public opinion research. *The impact of the project is likely to be seen in the following ways:*
- *Valued by stakeholders:* Most directly, impact will be policymakers and stakeholders understanding the research and implicitly or explicitly using the research in the policy making process.
- *Agenda setting:* Impact will also be able to be shown though shaping the issue agenda and which issues are prioritised for policymaking and public discussion. A better understanding of public opinion should shape this process.
- *Less misinformation on public opinion:* Good quality polling should reduce the scope from poorly informed commentators to claim an understanding of public opinion. This should lead to a better and more civil public debate.
- *Policy change:* While there is unlikely to be a direct connection between the polling and specific policy change (particularly as the polling is not advocacy based), in the longer term, it could be expected that the research will result in better informed policy and contribute to positive change in government policy.

Methodology

The research project was designed to address three questions:
- Does a gap between public opinion as perceived by decision makers and actual public opinion exist in practice?
- What are the best and most effective methods to address areas where this gap is likely to exist? and
- Can this gap be addressed by an independent, non-advocacy based body measuring the drivers of public opinion through a new approach to in-depth, high quality polling methods?

To conduct the research project, the project was divided into 5 stages, which are described below, and elaborated on in the remainder of the report:

1. *Selection of topics:* The selection of topics was balanced between economic policy, social policy and community interest issues, to test whether there are areas where this approach would be more effective.

2. *Selection of polling firms:* Expert opinion poll researchers were engaged. Three different polling firms were be used to assess differences in approaches and methodology and whether this had an impact on insights gained and acceptance of results.

3. *Initial interviews:* Decision makers were interviewed to identify potential areas of interest and initial perceptions. Ministers, Shadow Ministers, and their offices, as well as senior public servants were interviewed to confirm areas of interest and test preconceptions.

4. *Conduct public opinion research:* Background interviews and desktop research were undertaken in each of the topic areas, to understand the context to the issues, and the policy views advocated on each topic. Following this, in partnership with the opinion poll researcher, a small number of focus groups were conducted to refine opinion poll questions and understand public perceptions on the chosen topic.

    Detailed opinion polls were then conducted with a significant sample size to allow analysis of different demographics and correlations. Polling approaches were designed to take behavioural approaches, test the strength of views, as well as trade-offs where possible. Each of the three polls were varied in terms of polling methodology and sample size to test the utility of different approaches.

5. *Communicate research*: Relevant decision makers and stakeholders were informed of the poll results and interviewed to seek their views on the value of the process, and the extent to which the polling was useful.

While the project seeks to understand public opinion on issues of public interest, the project is intended to be non-political, and there were no specific issue or policy outcomes that the research was promoting or advocating. While there may be different ideological or political perspectives on issues canvassed in this research, topics chosen to be investigated for this research project were intended to be broad and non-partisan where possible.

Part 2: Project Delivery

Selection of Topics

To choose the topics for the project, a long list was developed, and a set of criteria was used to rank potential topics. The 'long list' of suggested topics came forward from interviews in the initial stages of the project. As such, topics came from relevant stakeholders on areas where they considered that there was a lack of understanding of public opinion, or that there was significant long term policy challenges which would require long term public policy making.

In order to prioritise topics for polling, a set of criteria was developed. These criteria can be used to rank potential topics, and be used to refine the topic to make sure that it would be a good candidate to invest time and effort into better understanding public opinion.

1. *Important:* The topic is non-trivial and policy change in the area has the potential to have a significant impact at a state or national level.

2. *Relevant:* The topic is something that Ministers, Governments, and the public are interested in, and would be keen to better understand public opinion on.

3. *Current:* There are upcoming policy decisions that Government are likely to consider in the next 6-12 months.

4. *Influenceable:* There are not entrenched positions, or locked in commitments that would limit the ability for a poll to change the outcome.

5. *Public opinion is not well understood:* It's a topic that is hard to ascertain public views. This may be for a number of reasons, either because the issue is complex or the issue is new.

6. *Presence of a vocal stakeholders:* It's a topic where political or public policy perceptions of public opinion may be distorted, because of the impact of a stakeholders who are promoting a particular position.

7. *Dynamic:* It's an area where new information or events are likely to have had an impact on public opinion, so prior perceptions of public opinion are likely to be less accurate

8. *Little or no credible prior research:* There are no credible measures of public opinion that already exist, so there is a gap for a new poll to fill.

9. *Not a live political issue:* The issue was not subject to current political debate, risking the research project being politicised.

10. *Non-partisan:* Ideally, subjects would not be seen as favouring particular political parties or ideology.

Using this approach, topics were narrowed, before judgement was used to determine the final three topics. The project deliberately aimed for topics that were in different stages of the policy process to make sure that there was variety in approach and to test how effective that the approach would be with issues at different stages.

Selected topics were:
- Road Safety
- Social Media
- COVID Recovery and Budget Repair

Selection of Research Firms

A request for proposal was issued to six polling firms, seeking quotations to deliver opinion poll based research on the three selected topics. Responses were received from four firms. Two further providers were not able to respond in the required timeframe. They were however supportive of the project and keen to be kept informed and involved in the future.

Given the quality of the proposals and the differences in approach, three different suppliers were engaged for the three different topics. This allowed the project to assess different approaches offered by different providers, polling quality, and whether the identity of the polling firm has an impact on decision makers:

1. Newgate Research were engaged on the COVID recovery and budget repair topic. The Newgate approach included an online community forum to discuss views on the topic and a survey of 3,000 participants.

2. Resolve Strategic were engaged on the road safety topic. Resolve proposed a very high sample size of 6,100 respondents, which allowed the project to test the impact and effectiveness of high sample numbers and the ability to break down specific demographics.

3. JWS Research were engaged on the social media topic. JWS conducted 5 in depth expert interviews to support the research, and conducted 6 focus groups before and 4 focus groups after the opinion survey of 2500 people.

Interviews with stakeholders

Across each of the three topics, stakeholders and experts were interviewed to understand each of the topics in depth, what the policy issues were that were subject to debate and the areas where public opinion was considered to be not widely understood.

On the social media topic, representatives were interviewed from the Office of the e-Safety Commissioner, as well as Reset, a not for profit focused on social media, as well as academic experts. On the road safety topic, interviewees included the road safety policy advisors at the NRMA and the

Director of the NSW Government's Centre for Road Safety. On fiscal policy, interviewees were sourced from NSW Treasury as well as NSW Shadow Treasurer Daniel Mookhey.

Part 3: Polling and Results

All three research topics delivered high quality insights and results. A summary of the key findings of each of the research findings are below.

Road Safety

Changes to road rules can be highly controversial, and road safety and the road toll is a regular topic of public conversation. There are debates about the effectiveness or fairness of various road rules and enforcement methods, and the trade- offs that people are prepared to make to achieve safety benefits.

Understanding public opinion on road safety, the causes of road fatalities, the kinds of changes that the community would accept, and the areas where more community debate is needed would be valuable to understand. It would also be useful to identify how road safety messages might be justified and framed most effectively and who are trusted sources of advice on road safety.

The research would consider perceptions of the causes of road injuries, the popularity and acceptability of different types of road safety measures, the trade-offs that the public are prepared to make to accept particular interventions and diverging views between different demographics, or geographic locations.

The road safety topic employed a series of six focus groups of road users in early August 2021, and a very large 6,107 nationally representative survey in mid-September 2021. The large and varied samples were used to allow reporting at a state level, but attitudes, experiences and behaviours are surprisingly similar across jurisdictions, metropolitan and regional / rural areas.

The research noted that road safety is a long-term issue where the low-hanging fruit of basic vehicle and road design, seat belt and helmet use, education campaigns and enforcement have been addressed to reduce road accidents and deaths significantly. The measures left to government tend to be the least palatable publicly (with greatest cost or impact).

The car is also the most important and default transport mode for most. Australians value them as an asset, but love them for the convenience, freedom and control they provide. Anything that impinges on this freedom and control, such as higher costs, less choice of vehicle, the inability to drive where and how they want, can be deeply unpopular.

Many road users do not naturally think about safety, with an over-estimate of their own ability and an under-estimate of their likelihood of being in an accident. As such, road safety is not a salient consideration for many road users in the same way that congestion, traffic lights, or the behaviour of other drivers is.

Road users see a variety of other factors contributing to accidents, such as distractions and reckless behaviour, but speed is rarely mentioned or seen to be at play. Key to this finding is that most road users believe that there is such a thing as safe or 'acceptable speeding', often viewed at going 10% above the stated limit.

In this context, measures that seek to restrict 'acceptable speeding' are less popular than policies that reward good behaviour, but there is a tendency to support, or at least accept, most new road safety measures. In particular, those that appear to catch people obviously doing the wrong thing, or have little to no cost get clear support. It is really only measures such as decreasing country road speed limits and, to a lesser extent, mandating new car technologies or additional speed cameras that are opposed by significant minorities. Even in these cases, activism in opposition is expected to be low.

Two safety areas were explored in detail:

- *Improving new vehicle safety standards:* Improving the safety standards of new vehicles either through restricting the sale of the least safe cars or the introduction of new vehicle technologies

such as Intelligent Speed Assist (ISA). Raising the bar for new cars imported and sold in Australia was seen as appealing as it was about making the cars on our roads safer, with no perceived cost to the buyer or taxpayer. However, attempts to build in less well-known AEB (Autonomous Emergency Braking) or ISA systems required more explanation, created uncertainty and there was a perceived cost in choice and dollars.

- *Point to Point Speed Cameras:* These cameras have been introduced in multiple states as a means to track speed over a journey, rather than at a single point in the road. From the community perspective, this does make sense, but requires explanation and description of road types, distances, etc. Its stand-out positive is efficacy. Simply, it catches more people doing the wrong thing because they are unable to game a single camera, but this must be done 'fairly' with signage, sensible leeway and distances. The more people see that they may be caught the more they will oppose it, but testing of actual activism shows that it is low and at the same level as traditional cameras.

Briefings on results

Briefings were conducted with 14 organisations on the road safety research in 7 briefings, across Ministers and their offices, as well as national motoring organisations in every state.

The research was well received and valued, particularly given the high number of survey participants, which allowed the survey to have statistically significant populations of smaller groups that had policy salience – for example state based cohorts, regional people, older people.

The timing for the research was in advance of policy decisions in NSW on a new road safety strategy, as well as prior to a renewal of the national road safety strategy. A number of the topics explored in the research, such as public opinion on point to point speed cameras, were directly relevant to consideration in these policies. However, the timing of the imminent government decision on the road safety strategy may have limited the ability of the research to have impact.

Despite government road safety organisations undertaking significant amounts of research, stakeholders stated they valued this research highly because:

- Some stakeholders did not have access to similar research. Research commissioned by road safety organisations is not often publicly shared, so was not generally available to stakeholders.
- The independence of the research, and particularly that the research did not have a policy agenda that it was promoting. Some stakeholders felt that often research can have an advocacy or policy outcome lens, and therefore their research was not perceived as trustworthy.
- The quality of the research, its comprehensiveness and the large data sample.
- The timeliness of the research, the fact that it was new and current and provided an insight into current public opinion on these issues. For organisations that had access to their own membership research, it could confirm other findings or where access to other research was unavailable.

Social Media

Social media platforms have become a ubiquitous method of communication and conversation in Australia. A number of issues of potential concern have been raised in relation to social media. These include:

- The ability of social media platforms to police inappropriate content, including violence, cyber-bullying, child abuse, or antivax material;
- Fake news and the reliability of information presented on social media platforms;
- The impact and role of algorithms in determining what users see, and the effect this may have on reinforcing existing views, polarising political debate or raising the profile of extreme views;
- The practices of social media platforms in tracking user data and how this data is then used;
- The impact of social media on children and young people;
- The impact on mental health of social media use.

How to address issues of concern with social media, while supporting the positive uses of social media platforms, is likely to be an issue of significant public and political debate over coming years. There will be major questions about trade-offs, and whether and how to regulate social media platforms. Perceptions on the role of government in social media, and its responsibility for regulation are also important to the policy debate.

The methodology for this research included 5 depth interviews with experts to inform the scope and focus of the research program, followed by 6 focus group discussions and a 2,500 sample survey conducted between 20 to 28 October 2021. This was followed by 4 deep dive group discussions conducted online, conducted 3 to 8 November 2021.

The research found most Australian adults use social media, even among older age groups, and many report the children in their household are also users, particularly teenagers. Facebook, Google and YouTube are the leading platforms used by a majority of Australians, followed closely by Messenger and Instagram. Snapchat and TikTok have a smaller overall user base but are key platforms among young adults and teens.

Overall sentiment toward social media platforms is most favourable for Google (net favourable rating of +53) and YouTube (+48), in stark contrast to TikTok (-36), Twitter (-21) and Snapchat (-20). In fact, with the exception of Google, YouTube, LinkedIn and Instagram, sentiment towards all platforms is more negative than positive.

Not surprisingly, sentiment is much more favourable among actual users of each platform. On average, social media users rate the positives of their social media experience as only slightly outweighing the negatives, with key concerns being in relation to mis / disinformation, safety issues, user data and algorithms.

While not a priority concern relative to key national issues such as the economy, healthcare and the environment, the issue of social media impacts and regulation is on the public radar, particularly among younger age groups. Most Australians are concerned about the lack of regulation of social media companies.

While governments and social media platforms are both seen as responsible for addressing the impacts of social media on Australian society, there was a strong sentiment that government must step up and take responsibly because there is a perception that social media companies will not do so themselves.

There was majority support for more action by the Federal Government to regulate these impacts. This includes updating key privacy and anti-discrimination legislation to cover social media and expanding the responsibilities of the eSafety Commissioner and the Australian Communications and Media Authority (ACMA).

However, further promotion of the activities and public resources available from both eSafety and ACMA may be required, as these agencies, while more favourably regarded than unfavourable, have limited public awareness.

Social media is a key source of news and information for many Australians and false or misleading information ('fake news') is the leading community concern about social media. The issue is seen as requiring the most urgent attention.

Related to this, the promotion of extreme or fringe views is also extremely or very concerning to a majority of Australians. Social media is seen to create hype around and amplify factually incorrect information and fringe views, and to help feed self-validating 'echo chambers'.

Wider public debate around COVID 19 conspiracy theories and anti-vaccine content has contributed to increased public awareness of this as a problem. Anonymous and 'fake' user accounts are seen as facilitating the sharing of mis / disinformation, as is the speed at which information is able to be shared through networks of users.

In response to these issues, users claim to consult other media sources, including mainstream and international news, to 'fact check' or read more about topics they see in their social media news feeds. They also see themselves, rightly or wrongly, as having the ability to recognise and ignore mis / disinformation they encounter on social media.

Briefings on results

The social media research received very strong interest from stakeholders, particularly at a Commonwealth level.

It was clear that the topic was one that both government agencies, political leaders on both sides of politics, and businesses had identified as an issue of public concern However, they had trouble in understanding the extent of public concern, the depth of concern and which issues were specifically of highest concern.

As such, stakeholders were willing to be briefed on the research, and willingly suggested others that would benefit from the briefing.

The research had clear impact, with the project team briefing the Prime Minister's Office on the topic the week prior to the then Prime Minister Scott Morrison making a major policy announcement on social media. It is understood that the research both confirmed concerns and inclinations that the Prime Minister's Office had on the issue and was useful in shaping and positioning the announcement. A briefing was also conducted with the Leader of the Opposition's Office, who were also highly engaged in the topic.

The project team briefed Government and Opposition members of the Parliamentary Committee established to inquire into social media concerns. Senior levels of the public service were also briefed, including the executives of the Department of Prime Minister and Cabinet and the Department of Home Affairs. The Business Council of Australia also facilitated a briefing of a number of social media companies on the research. Overall, 11 briefings were conducted on this topic.

In each case, stakeholders were intently interested in the level of public concern on the issue, who was trusted, and what kinds of approaches were most acceptable to the public.

This research also most strongly demonstrated that the public was willing to engage in a discussion of trade-offs to achieve community goals – whether that was trading off anonymity to protect vulnerable users, or some changes to freedom of speech to allow for less mis- and dis-information. Policymakers found this probing of community attitudes to these trade-offs as highly valuable and engaging.

While the research was compelling and motivating in illustrating the level of public concern with the issue, and it was also clear that the policy debate and development of policy options to address these concerns were in their early stages. As such, much of the briefings focused on the different dimensions of the public concern, rather than a detailed assessment of policy options that might be successful in addressing these concerns.

Overall, this topic showed:

- A genuine gap in understanding of public opinion. It was clear that the research was new and necessary, and that little had been done to understand this issue in depth before.
- The value of timing this research early in the lifecycle of the issue. All stakeholders were grappling with the issue and did not appear to have strongly formed opinions on the subject. As such, this research was seen as highly valuable to them.
- The value in an independent approach. There was clear scepticism of social media companies and others in this space and the agenda that they may have.
- The value of doing the research outside of a public sector context. A number of stakeholders commented on the ability of the survey to ask questions on whether the issue would change votes, for example, which would not have been possible to ask in a publicly commissioned poll.

- The value of an engaging topic. Unlike the fiscal policy topic below, this was a subject where there were very strong opinions from the public at large, and there were very few people who did not have an opinion on the subject.

Fiscal Policy

The COVID-19 pandemic resulted in significant budget deficits for governments around the world. In Australia, all governments ran significant budget deficits. There is an assumption that post pandemic, government budget positions will return to previous levels, with temporary stimulus measures being withdrawn and significant fiscal consolidation occurring, through either a reduction in government spending or an increase in government revenues.

Repairing government budget positions is a significant medium term policy challenge, with a political dimension that is highly complex and contentious. There are concerns from stakeholders that if austerity measures are imposed, it may harm economic recovery.

This topic was designed to test public opinion on government spending, debt and the budget balance after the pandemic, as a way of understanding how the public thinks about fiscal policy and what framing of issues would be effective in budget repair.

The research on attitudes to Covid-19 Budget repair commenced with an online community that ran from the 28th – 30th September 2021 with 42 participants who spent a minimum of 2.25 hours engaging with the discussion over three days. This approach was chosen due to the complexity of the topic. This was followed by a 15-minute survey with 3,036 participants conducted between 26th October – 3rd November 2021.

The research sought to understand what Australians think about government debt, which kinds of debt recovery measures are palatable, and what effective issue framing in budget repair would look like, including:

- Is there an understanding of the need for budget repair?
- Does a balanced budget still matter?
- Is there concern about the level of debt held by governments?
- What kind of trade-offs would be acceptable to achieve budget repair?
- Are there areas that are priorities for budget repair, and other areas that are not acceptable?

The research found that government debt is not a top-of-mind issue for most people. Australians are currently focused on the quality of health services and the cost of living, while government debt in and of itself is quite low on the prompted list of concerns.

When Australians think about what good economic management by government looks like, they tend to think of this in terms of maintaining employment, cost of living, availability of services and infrastructure.

Knowledge of economic issues is limited. While the performance of national and state economies and associated budgets are of interest, Australians' knowledge in this area is fairly limited and this has an impact on their ability to meaningfully engage in the topic. Some feel so out of their depth they simply switch off.

Most people know that government debt increased as a result of COVID-19 spend but nearly all felt it was the right thing to have done. Actual debt levels are unknown and very few had any sense of the dollar figures. Despite this, there are some questions around efficient management of the COVID-19 spend. There is a sense that a proportion of pandemic spending went to some "undeserving" segments of society.

In the qualitative research, people reacted with surprise to information that showed the actual quantum of current Federal Government debt and its steep upwards trajectory. The idea of a balanced budget

is supported however, not necessarily at the expense of citizen well-being or an increase in hardship as a result of harsh economic recovery measures.

Most feel Australia does not need to act too quickly, but do want to see action being taken:

- Pandemic-related stimulus spend to be completed within the next three years, with strong preference by 2022.

- Delivering a balanced budget within five years, although there was also strong support for a ten-year timeframe, and this increased slightly after exposure to messaging.

- The preferred approach to address the situation was to grow the economy. It is important to note that when this was explored with qualitative participants they found it difficult to articulate what this would look like in practice. They preferred it over increasing taxes or cutting government spend as it was less likely to impact them personally.

Opinions on other potential actions largely reflected underlying beliefs. For example, many preferred increased taxes on wealthy individuals and corporates or cuts to defence spending. Even though the community's opinions on these issues are lightly held, they are firmly anchored on existing beliefs and values and, as such, the messaging had a somewhat modest influence on support levels for budget repair.

SEC Newgate were of the view that research on a topic like government debt requires some kind of deliberative engagement to get more meaningful results. Comparison of results between the qualitative and quantitative phases showed that people engage more and feel more confident in expressing an opinion when they can discuss the issues, hear what others think and consider implications and trade-offs rather than when they simply read facts. This suggests that on complex issues like this, qualitative research potentially has more power than quantitative research in terms of building capacity to respond in a meaningful way.

The fiscal policy survey also received strong interest from stakeholders, although the nature and complexity of economic and budget issues limited the breadth of stakeholders who could be engaged on the topic. Eight briefings were held on this topic.

It was clear that there were differing levels of access to opinion polling on these issues, with research done regularly on these issues at a federal level, but at a state level this research appeared not to be done, and so was particularly valued by these stakeholders.

The topic was also one where public opinion had clearly changed significantly as a result of the pandemic, and one where public views were likely to shift more over time. The research was valued as insight into public opinion at a point in time But there was a view from some stakeholders that public opinion would likely change further as time passed and the pandemic did not loom quite so large in the mind of the public. This topic was the one that elicited the most suggestions of doing a further survey in the future to compare results and tracking opinion over time.

This research was the only of the three topics of research to ask about voting intention, as it was considered that this was a topic where opinions may split clearly along party lines. While there were some differences in views, with particularly older Liberal voters more concerned about high levels of debt and the need for fiscal repair. However, insights about voting intention were not particularly seen as valuable by stakeholders, who were generally more interested in overall trends and demographic factors that drive opinion.

It was also the only one to employ detailed "message testing", in which the persuasiveness of different framings of the issue was tested, in support of faster, and slower budget repair. While it added some further insights into how people thought about these issues and their motivations, it was generally not seen to be as valuable by the stakeholders interviewed, compared to the more direct insights into public views on economic issues.

This topic showed:

- Some topics of major policy discussion have surprisingly little detailed public engagement, particularly on issues of detail or that are seen as complex. This provides opportunities for political leaders to engage, educate and lead a more informed public discussion on these issues.

- The challenges is engaging the public on an inherently complex topic, meaning that policy discussions need to be simplified, or time taken to explain issues in detail.

- In areas where the public doesn't feel strongly informed, views will often default back to deeply held values and biases, and a desire for other people to take responsibility for challenges.

- Timing is important and that views on issues are likely to change on this subject over time. While the topic of fiscal policy after the pandemic was seen as important, it was arguably less salient in late 2021 than it is mid-2022 and is likely to be into the future.

- Despite the centrality of the economic debate, there was a lack of access to good quality public opinion measures. While for some stakeholders, this research confirmed other research that they had access to, for many, particularly in the public service, the research was seen as highly valuable.

Part 4: Conclusions & Lessons Learned

Overall, the project was successful in achieving its aims. The intention of the research was to test the capacity of high-quality public opinion research to support more informed public policy debates and better decision making by government. It was clear that the research provided through this project met a need that wasn't being met by others, and that it did make a significant contribution to public policy.

Through explaining and testing public opinion on relevant public policy topics, the pilot has shown that policy makers both value and take account of public opinion, when they can access high quality information on what the public thinks about issues.

Topic selection was important to the success of the project, and each topic demonstrated the value that this kind of research can provide. . Social media is a good example of a topic where it has been hard for governments and political leaders to read public sentiment because the issue is relatively new, and so the strength and depth of feeling on the topic was underestimated.

The topic of road safety is one that is often well researched, but the research is not always trusted, and it isn't communicated to the right people at the right time. The topic of fiscal policy provided insight into one of the largest policy challenges that Australia faces. It also illustrated the challenges surrounding public engagement and understanding of the subject.

There was strong interest and engagement from stakeholders in the topics and the research, both at the level of political leaders and their offices, in the public service and among business and stakeholder groups.

The research provided information that otherwise stakeholders did not have access to, in the form of high-quality opinion research, the ability to explore topics in depth or ask questions that could be difficult to ask in a public sector context.

One of the objectives of the project was to use opinion polling to test trade-offs and the strength of views from the public. All three research topics were able to show these elements, and these were often the most valued parts of the research for stakeholders.

Key lessons were:

1.   Strong engagement with stakeholders showed that there is interest in what we are providing, and that it fills a gap not addressed by others.

2.	The research is valued by political leaders, political staff, government agencies and wider stakeholders. It is seen as a very useful input into policymaking and acts as a counterpoint to media and other factors that shape perceptions.

3.	The positioning of the project as non-advocacy, and non-partisan added to the credibility of the research, and allowed for honest conversations.

4.	The most valued types of insights were into how people think about real world trade offs and constraints, and which groups and demographics had different views. Least valued were insights into which communications messages were most effective.

5.	Topics of most interest were in areas where there were strong views from the community. Areas with large amounts of "don't knows" and questions where views were evenly divided were of lesser interest. There was strong interest in demographic factors - understanding who held which views and why. Generally, research that was actionable, with a clear connection to a policy concern was valued, but not where a decision is immediately imminent.

6.	Planning and early conversations are important to execute well. The process is of conducting the research is complex and effort has to go into ensuring the polling is focused on the right question.

While the research was valued by stakeholders and the project can be considered a success, there are some areas that could be improved if the project was extended into a more systematic process of understanding public opinion. *These areas for improvement include:*

1.	*Overlap of polling projects:* Each of the topics involves a significant research, development, communications and dissemination program. Doing three polls reasonably concurrently made the communications commitment challenging. There is clearly an opportunity to overlap elements of the program but provide time to communicate each project well as well as possible to the widest possible group of stakeholders.

2.	*Data analytics:* The polls created a rich dataset of related public opinions. The research firms conducted some regressions analysis to tell a story that they think is interesting and compelling. However, there are more specific slices of data that are of interest for different groups and other correlations that may be able to be identified to provide deeper insight. In future, there is the potential to do more data breakdowns and data analytics.

3.	*Stakeholder engagemen:.* As part of the project, significant effort was put into explaining the concept and building awareness. If further work was to be done on this approach, there is the potential to build on this network and take a more structured approach to stakeholder identification and engagement to improve impact.