



Australian  
Leadership  
Index  
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# AUSTRALIAN LEADERSHIP INDEX

## 2019 NATIONAL SURVEY REPORT

Towards Leadership for the Greater Good

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**Authors:** Samuel Wilson, Jason Pallant, Tim Bednall, and Sylvia Gray.

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Australian Leadership Index  
Swinburne University of Technology  
John Street, Hawthorn Victoria 3122 Australia

**Email:** [sgwilson@swin.edu.au](mailto:sgwilson@swin.edu.au)

**Web:** <https://www.australianleadershipindex.org/>

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## EXECUTIVE SUMMARY

Against a backdrop of unethical conduct, irresponsible leadership and distrust of institutions, there is a growing expectation that leaders and institutions should create value not just for themselves but for society as a whole. There is a yearning for a culture of leadership in politics, business, and elsewhere that serves, and is seen to serve, the greater good.

The Australian Leadership Index (ALI) is a new measure of public perceptions and expectations of leadership for the greater good from institutions across the government, public, private and not-for-profit sectors.

The purpose of the ALI is threefold:

1. To serve as a representative measure of public **perceptions** of leadership for the greater good.
2. To describe and track public **expectations** of leadership for the greater good.
3. To provide insight into what different institutions and sectors **should do** in order to improve public perceptions of their practice of leadership for the greater good.

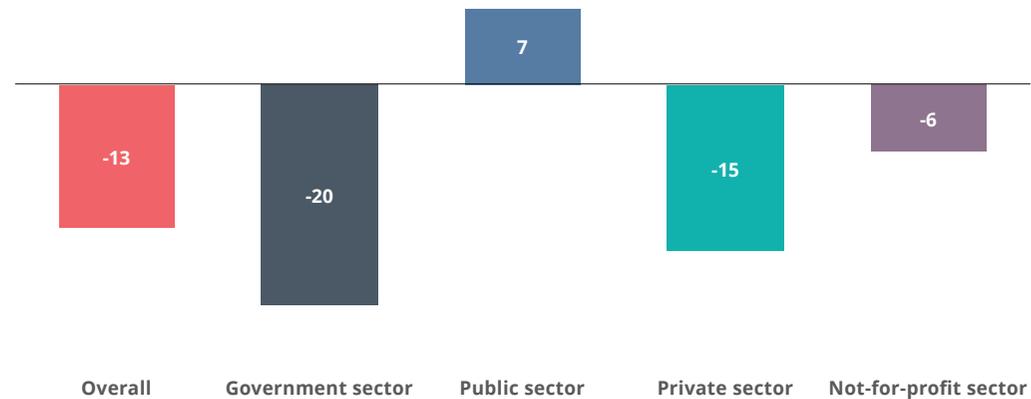


FIGURE 1. ALI BY SECTOR, 2019

## Key findings from the Australian Leadership Index

1. Overall, the public takes a dim view of the state of leadership for the greater good in Australia. The majority of Australians feel that institutions and sectors do not do enough to lead for the greater good.
2. There is a significant gap between public perceptions and expectations across all indicators of leadership for the greater good across all sectors. Australian institutions are not living up to the expectations of the general public.
3. At the sector-level, the government sector is perceived as the worst performer in terms of leadership for the greater good, followed closely by the private sector. By contrast, the public sector is seen as showing the most leadership for the greater good.
4. At the institution-level, charitable organisations are perceived as showing the most leadership for the greater good. In stark contrast, the Federal Government is perceived as showing the least leadership for the greater good.
5. Community expectations of leadership for the greater good are highest for the government sector, and especially of the Federal Government. By contrast, community expectations are lowest for the private sector, especially of Small and Medium-sized Enterprises.
6. The most pronounced gaps between perceptions and expectations of leadership relate to the accountability, transparency and ethicality of institutional leadership. This finding is consistent across the government, public, private and not-for-profit sectors alike.
7. The strongest predictors of public perceptions of leadership for the greater good are related to perceptions of how institutional leaders create value for their stakeholders. The more institutional leaders appear to demonstrate accountability, transparency and ethicality, the more they are perceived to show leadership for the greater good.
8. Being informed matters. The more knowledgeable people are about an institution, the more favourable their perceptions of that institution's leadership for the greater good.
9. Local is better. Small-medium enterprises (SMEs) are more positively perceived than national businesses, which are more positively perceived than multinationals. Local governments are more positively perceived than state governments, which are more positively perceived than the Federal Government.
10. Men and women perceive some institutions differently. Men tend to provide much more favourable ratings for the public health system and the Federal Government. Women tend to provide more favourable ratings for SMEs.

## ABOUT THIS REPORT

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The Australian Leadership Index is a new national survey that provides a comprehensive picture of leadership for the greater good in Australia. To better understand public perceptions and expectations of leadership for the greater good, as well as the key predictors of public perceptions of leadership for the greater good, the Australian Leadership Index surveys 1,000 people across Australia on a quarterly basis. This report reflects the views of 4,000 Australians surveyed through 2019.

This report has five sections:

**SECTION 1** introduces the Australian Leadership Index and provides an overview of the design of the study and the survey process.

**SECTION 2** introduces the concept of 'leadership for the greater good' and presents the model of institutional leadership for the greater good which forms the Australian Leadership Index.

**SECTION 3** presents the results of the Australian Leadership Index.

**Part 1** presents the headline results for sectors and institutions and identifies the key predictors of public perceptions of leadership for the greater good at the macro-level.

**Part 2** presents a detailed breakdown of perceptions and expectations of leadership for the greater good at the sector- and institution-level and identifies the key predictors of perceptions of leadership for the greater good for specific sectors and institutions.

**Part 3** presents public perceptions and expectations of the extent to which institutional leaders focus on the creation of social, environmental, and economic value.

**Part 4** presents public perceptions and expectations of the extent to which institutional leaders demonstrate accountability, transparency and ethicality.

**Part 5** presents public perceptions and expectations of the extent to which institutional leaders are responsive to the needs and interests of the people they serve and society, as well as the extent to which leaders balance the interests of different groups.

**SECTION 4** segments the results to examine the interaction between demographic factors on public perceptions of leadership for the greater good in different sectors and institutions.

**SECTION 5** makes recommendations about what leaders in the government, public, private and not-for-profit sectors can do to improve public perceptions of leadership for the greater good.



# SECTION 1

## THE AUSTRALIAN LEADERSHIP INDEX

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## SECTION 1. THE AUSTRALIAN LEADERSHIP INDEX

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### OVERVIEW

The Australian Leadership Index (ALI) is a new national survey that provides a detailed picture of leadership for the greater good in Australia.

The ALI is the largest ongoing national survey of leadership for the greater good. Each quarter, the ALI surveys 1,000 people across Australia regarding their beliefs about leadership for the greater good by Australian across a range of institutions and sectors. The size of this study means that, for the first time, there is a nationally representative and ongoing picture of public perceptions and expectations of leadership for the greater good in Australia.

The ALI addresses three basic aspects of leadership for the greater good in Australia: its perceived state in institutions across a variety of sectors; expectations about what it should be; and the factors that drive public perceptions of leadership for the greater good.

The study is funded by the Graham Foundation and designed by researchers from Swinburne University of Technology. The research firm, Dynata, collect the data on behalf of the Swinburne research team. The custom dashboard reporting firm, Dassier, designed, built and maintain the interactive data portal through which all results are freely available ([www.australianleadershipindex.org](http://www.australianleadershipindex.org)).

## THE SURVEY PROCESS

The study uses a nationally representative sample of Australian adults, consisting of over 1,000 participants per quarter. Throughout 2019, 4,000 people were surveyed about their perceptions of leadership for the greater good in Australia. Respondents were recruited via an online panel by Dynata. The recruitment was designed to ensure that the sample was nationally representative in terms of locality (i.e., States and Territories), gender and age.

The ALI comprises general questions about the practice of leadership for the greater good and targeted questions about leadership for the greater good by twelve institutions across the government, public, private and non-for-profit sectors.

To minimise survey fatigue, respondents are only asked to rate one randomly-selected institution per sector, for a total of four institutions overall. For example, one respondent might rate the Federal Government, public education, multinational corporations and trade unions, whereas another respondent might be assigned their state government, justice institutions, Small and Medium enterprises and charities. Respondents who rated State and Local Governments were asked to rate the governments who govern where they reside.

For each institution, respondents rate their perceptions and expectations of nine indicators of leadership for the greater good. These indicators reflect assessments of the *type* of value that leaders seek to create, *how* leaders create value, and *for whom* leaders create value. A five-point rating scale is used for all items, where 1 = 'not at all', 2 = 'to some extent', 3 = 'to a moderate extent', 4 = 'to a fairly large extent' and 5 = 'to an extremely large extent'.

Once respondents have provided their perceptions and expectations of these nine indicators of leadership for the greater good for a given institution, respondents are then asked to provide their overall impressions of that institution's leadership for the greater good.

Finally, respondents are asked to provide their overall impressions of leadership for the greater good by Australian organisations and institutions, in general (see *Figure 2*).

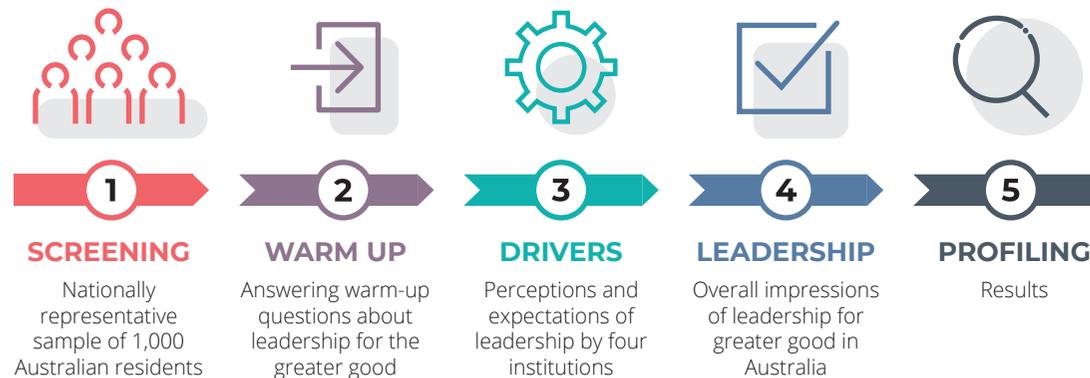


FIGURE 2. OVERVIEW OF THE SURVEY PROCESS

## CALCULATION OF THE ALI

The ALI comprises seventeen indices, providing high-level insights into the state of leadership for the greater good within and across sectors over time (see Figure 3).

Each ALI index score is calculated in a similar way to the Net Promoter Score, which is a well-known and easily understood index ranging from -100 to 100. Each index is calculated as the proportion of people who believe that a given institution shows leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' minus those who believe that the institution shows leadership for the greater good to 'some extent' or 'not at all'.

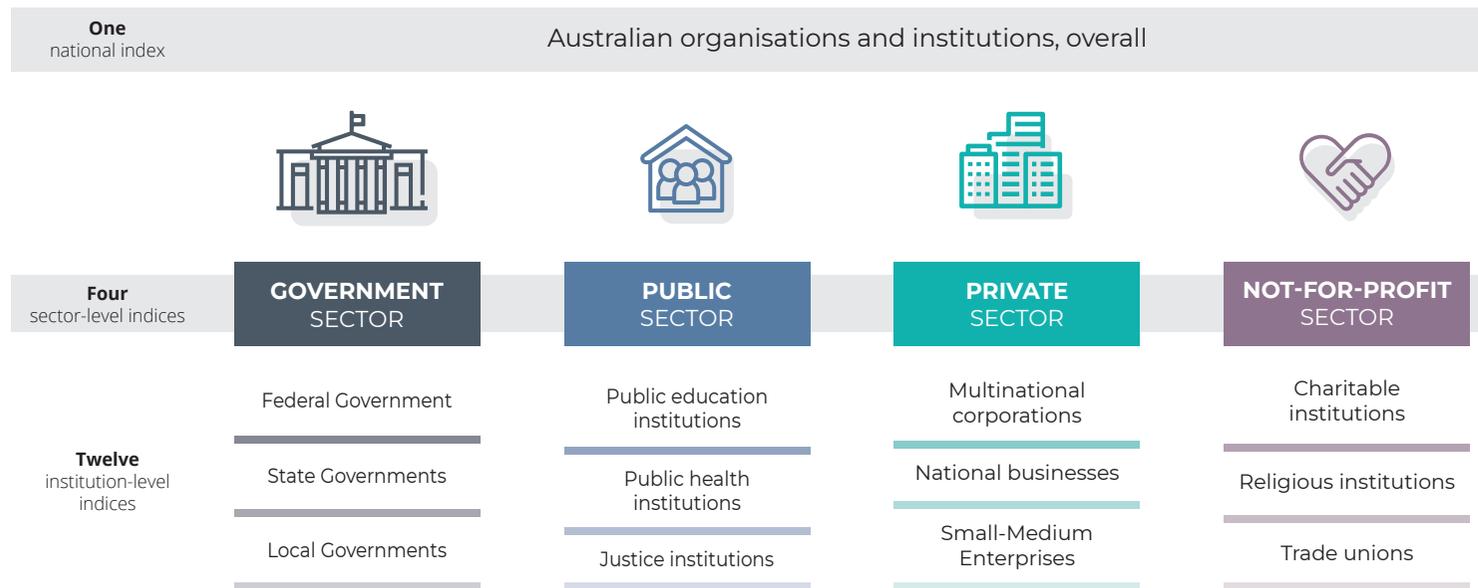


FIGURE 3. THE INDICES OF THE AUSTRALIAN LEADERSHIP INDEX

For example, if 18 percent of people surveyed believe that the Federal Government shows leadership for the greater good to a 'fairly large extent' or an 'extremely large extent', but 42 percent of people believe that the federal government shows leadership for the greater good 'to some extent' or 'not at all', then the Federal Government is awarded an ALI score of -24 (see Figure 4).

Similarly, if 56 percent of people believe that charities show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent', but 25 percent of people believe that charities show leadership for the greater good 'to some extent' or 'not at all', then charities are awarded an ALI score of 31.

Interpretation of ALI scores are straightforward: positive scores indicate that an institution is perceived, on balance, as showing leadership for the greater good and negative scores indicate that, on balance, an institution is not perceived as showing leadership for the greater good.

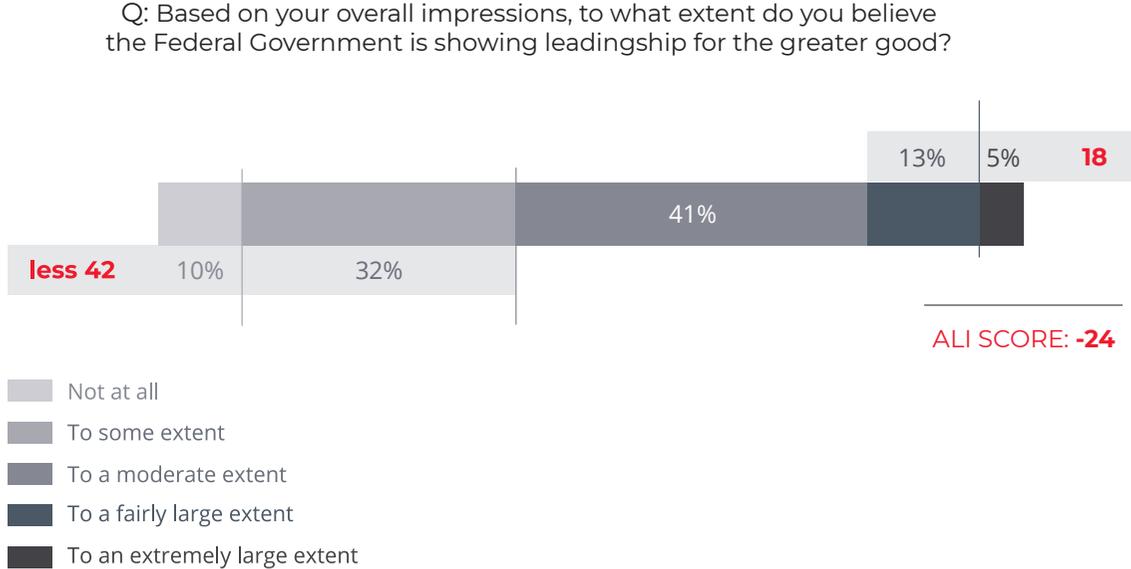


FIGURE 4. CALCULATING THE AUSTRALIAN LEADERSHIP INDEX



## **SECTION 2**

**WHAT IS LEADERSHIP FOR THE GREATER GOOD?**

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## SECTION 2. WHAT IS LEADERSHIP FOR THE GREATER GOOD?

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### OVERVIEW

Against a backdrop of unethical conduct, irresponsible leadership and distrust of authorities and institutions, there is a pervasive sense that we are not well served by our leaders.

There is a sense that, too often, leaders are disposed to serve a narrow group of interests before the public interest. As a result, there is a yearning for a culture of leadership that serves the greater good.

However, a range of key questions persist. What is the greater good? What is leadership for the greater good? What are the collective responsibilities of those who manage, govern and lead the institutions of the government, public, private, and not-for-profit sectors? How should authorities behave in order to be perceived by the community as showing leadership for the greater good?

Despite the difficulty of defining the greater good and leadership for the greater good, it is critical to think and talk about these ideas and practices in the public domain as clearly as we possibly can. Only then will institutions, leaders, and the public be able to imagine, practice and sustain the leadership needed to ensure the long-term welfare and well-being of the general population.

### WHAT IS THE GREATER GOOD?

The concept of the 'greater good'—and its synonyms, the 'public good' and 'common good'—has the quality of being familiar and commonplace. Yet, these concepts are difficult to define or articulate in a precise or comprehensive way.

Moreover, as recently observed by the philosopher Hans Sluga, the diverse conceptions of the good—such as justice, happiness, security, order, prosperity—and the variety of local, national or global communities for which the 'good' is sought militates against the identification of a single good.

However, a promising candidate for the greater good, apt in the context of our increasingly complex societies and wicked social, economic and ecological challenges, is the well-being of the whole.

Understood in this way, the greater good is more an umbrella term for several interlocking concepts and conditions that underpin the survival and flourishing of life.

Despite the complexity of the concept of the greater good, it is critical that the discussion about the greater good and leadership for the greater good moves into the public domain.

It is also important that the discussion of these ideas, as well as our expectations of leadership for the greater good, are characterised by a degree of compassion in relation to the difficulty of actually practising leadership for the greater good, riven as it is with incompatible goals and tensions. Leadership for the greater good is essential, but paradoxical, and therefore not easy.

Moreover, leadership for the greater good takes many forms and its meaning and manifestation varies across contexts. Leadership for the greater good in the context of a crisis or disaster looks very different from leadership for the greater good in more peaceful times.



## WHAT IS LEADERSHIP FOR THE GREATER GOOD?

To render the concept of the greater good and leadership for the greater good less abstract, it is helpful to frame these ideas in more familiar terms.

Specifically, it is useful to think about the greater good, and leadership in its service, in terms of 'value'; namely, the types of value that needs to be created, regenerated and sustained in order to promote the survival and flourishing of life and to sustain the well-being of the whole.

This approach calls to mind the common, public and private goods that sustain collective well-being, as well as norms of distribution, pertaining to the stakeholders for whom value is created, and notions of ethics, which refers to the principles that inform value creation and distribution. In other

words, this approach to thinking about the greater good calls attention to the *types* of value that we seek to create, *how* we create value, and *for whom* we create value.

Framed in terms of leadership, specifically institutional leadership, this approach to thinking about the greater good and leadership in its service draws attention to the *types* of value that institutional leaders seek to create, *how* institutional leaders create value, and *for whom* institutional leaders create value (see Figure 5).



FIGURE 5. LEADERSHIP FOR THE GREATER GOOD REFLECTS WHAT VALUE IS CREATED, HOW AND FOR WHOM

Understood in this way, the value-relevant outcomes of institutional behaviour allow inferences to be made about institutional leaders' concern for, and stewardship of, the greater good.

Moreover, because concern for, and stewardship of, the greater good is not the sole responsibility of any single institution, but all institutions whose actions have some bearing on it, leadership for the greater good transcends specific institutions and sectors.

The model of institutional leadership for the greater good used in the Australian Leadership Index delineates these three aspects of leadership for the greater good and measures public beliefs about these aspects across the institutions of the government, public, private and not-for-profit sectors.

Regarding the *type* of value, the ALI assesses public perceptions and expectations regarding the extent to which institutional leaders should create positive social, environmental and economic outcomes. Creating positive social outcomes includes preventing discrimination and creating equal opportunities for all. Creating positive environmental outcomes includes protecting the environment and improving environmental sustainability. Creating positive economic outcomes includes fostering innovation and providing job opportunities.

Regarding *how* institutional leaders create value, the ALI assesses public perceptions of the extent to which institutions are, and should be, accountable, transparent and ethical in their conduct. Accountability refers to the extent to which institutions accept responsibility for the positive and negative consequences of their actions. Transparency refers to the extent to which institutions disclose information that is relevant to the public interest. Ethicality refers to the extent to which institutions behave in accord with relevant moral and ethical standards of professional conduct.

Finally, with regard to the stakeholders *for whom* leaders create value, the ALI assesses perceptions and expectations of the extent to which institutions are responsive to the needs and interests of the people they serve (e.g., internal stakeholders like employees and external stakeholders like customers) and responsive to the interests of society-at-large. The ALI also assess perceptions and expectations of the degree to which institutions balance the interests of different stakeholders.

In sum, leadership for the greater good occurs when institutional leaders endeavour to create value for their stakeholders and society in a manner that is transparent, accountable and ethical.





# SECTION 3

## RESULTS

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## **PART 1: OVERVIEW OF FINDINGS**

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## SECTION 3. RESULTS

### Part 1. Overview of findings

#### OVERALL PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Throughout 2019, overall ALI scores ranged from -18 to -11 (see Figure 6), producing an average ALI score of -13 for the year. This means most people believe that Australian organisations and institutions, in general, do not show leadership for the greater good.



FIGURE 6. OVERALL ALI SCORE, MARCH-DECEMBER 2019

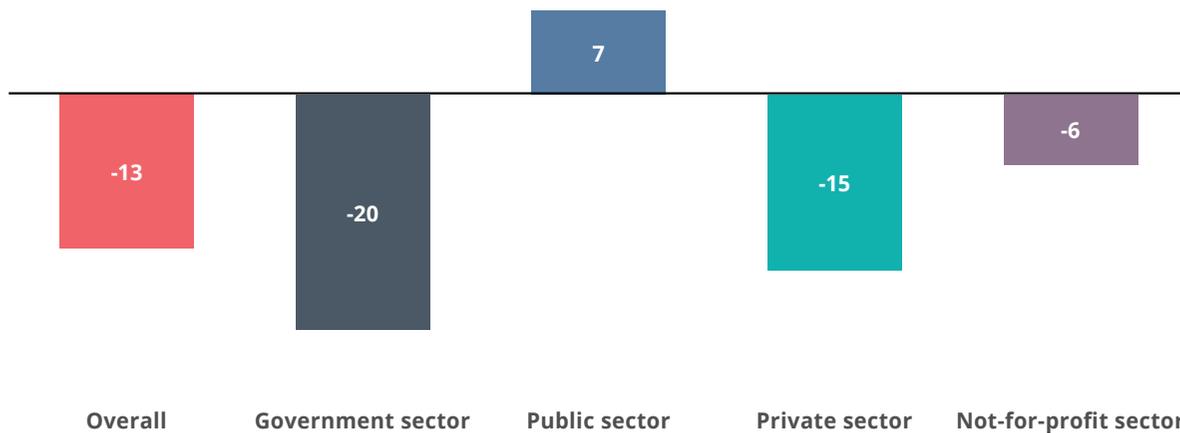


FIGURE 7. ALI SCORES OVERALL AND ACROSS SECTORS, 2019

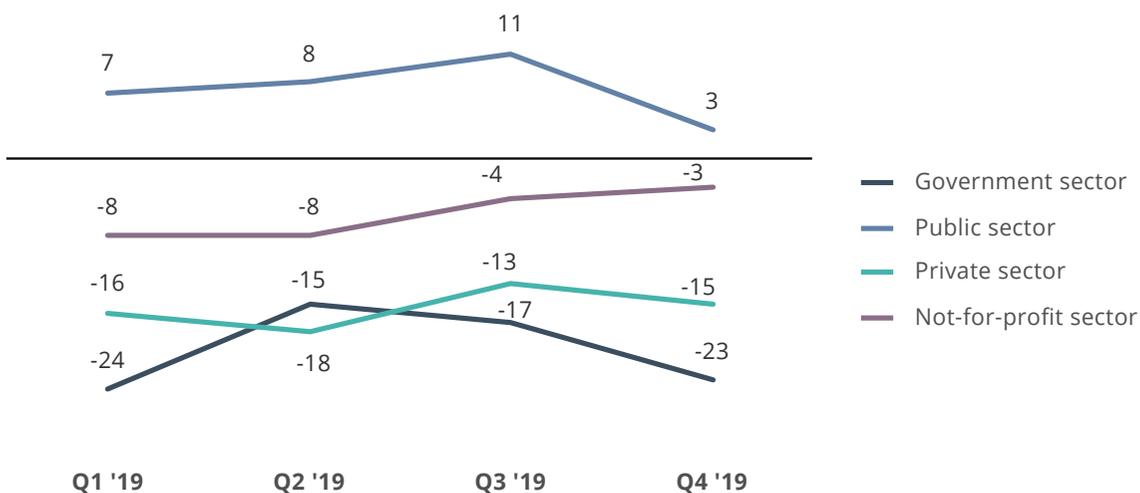


FIGURE 8. QUARTERLY ALI SCORES ACROSS SECTORS

## SECTOR-LEVEL LEADERSHIP

**Government sector.** The government sector is perceived as showing the least leadership for the greater good. Throughout 2019, ALI scores for this sector ranged from -24 to -15 (see Figure 8), producing an average ALI score of -20 for the year. Notably, the annual ALI score for the government sector (-20) is significantly lower than the overall ALI score of -13 (see Figure 7).

**Public sector.** The public sector is perceived as the best performer in terms of leadership for the greater good. Throughout 2019, ALI scores for this sector ranged from +3 to +11 (see Figure 8), producing an average ALI score of +7 for the year (see Figure 7). This is the only sector which recorded a positive ALI score in 2019.

**Private sector.** The private sector is perceived as a poor performer in terms of leadership for the greater good. Throughout 2019, the ALI scores for this sector ranged from -18 to -13 (see Figure 8), producing an average ALI score of -15 for the year (see Figure 7).

**Not-for-profit sector.** Overall, the not-for-profit sector is seen as a moderately poor performer in terms of leadership for the greater good. Throughout 2019, ALI scores for this sector ranged from -8 to -3 (see Figure 8), producing an average ALI score of -6 for the year (see Figure 7).

Further details on the performance of each sector can be found in part 2 of the results.

### INSTITUTION-LEVEL LEADERSHIP

As depicted in *Figure 9*, the Federal Government (-26) is perceived as showing the lowest degree of leadership for the greater good of all government institutions, with State (-19) and Local (-15) Governments not far behind.

Of the three private sector institutions measured, multinational corporations (-24) are viewed as showing the poorest leadership for the greater good, with national businesses (-17) perceived only somewhat less poorly. Small and medium enterprises also record a negative score (-6) but are closer to neutral than larger private sector institutions.

Notably, there are important differences within sectors, which is evident in the results obtained for the public sector and the not-for-profit sector.

Whereas public health (+12) and education (+10) institutions are viewed as showing a moderate degree of leadership for the greater good, justice institutions are held in much lower esteem (-1).

Similarly, in the not-for-profit sector, charities (+32) are perceived most favourably, but trade unions (-23) and religious institutions (-25) are perceived negatively, highlighting the sharp differences between the institutions of this sector.

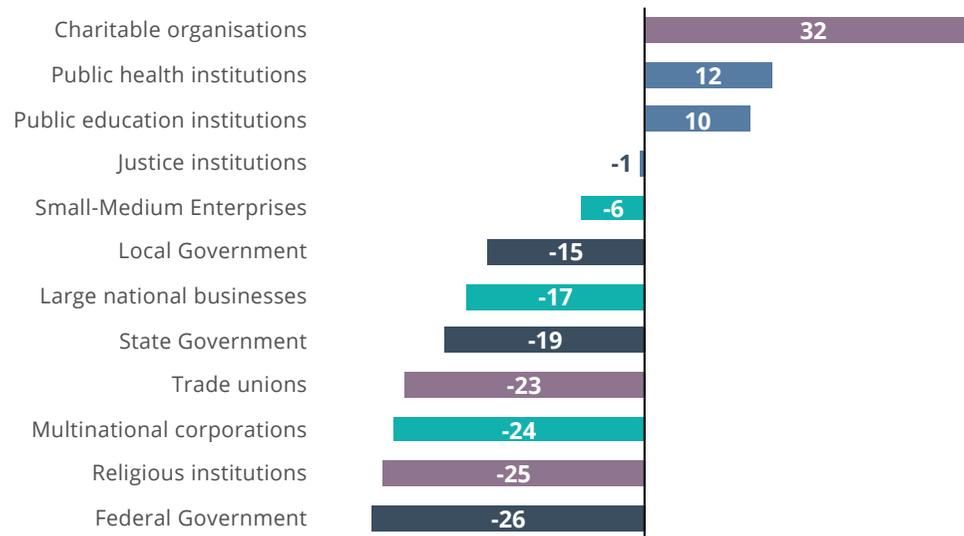
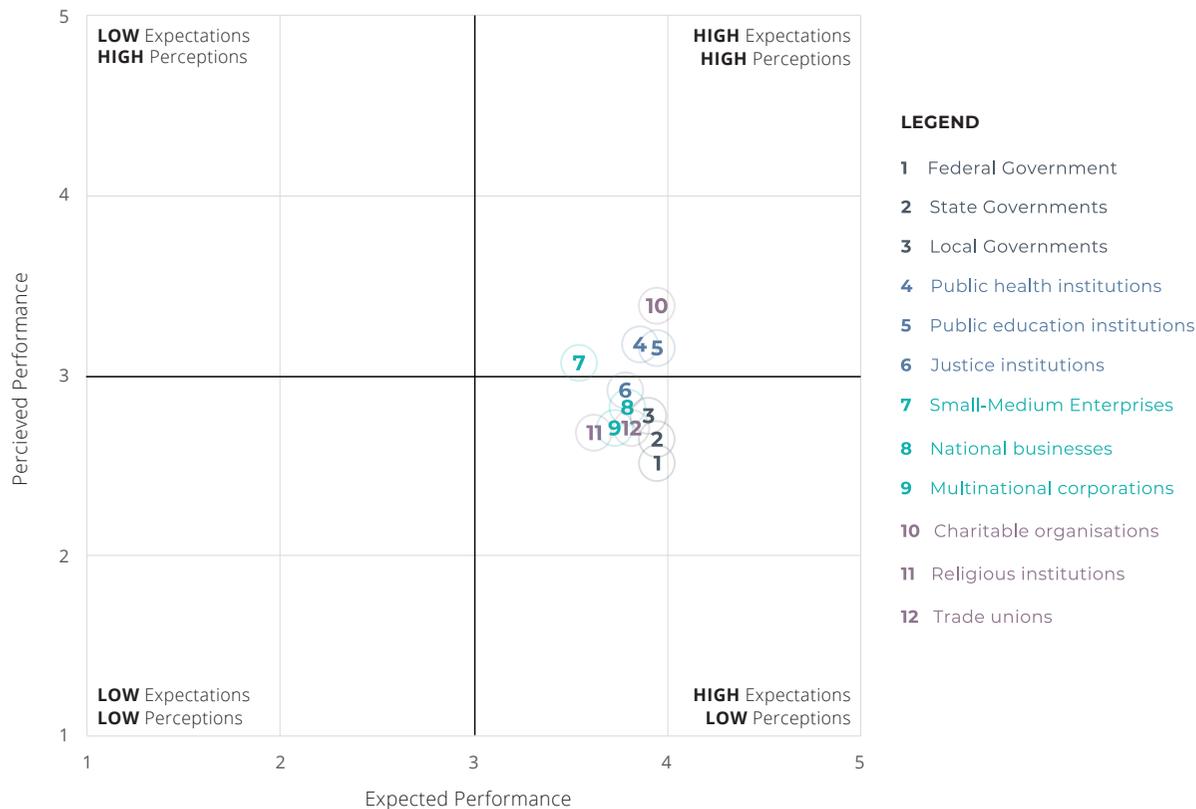


FIGURE 9. ALI SCORES FOR ALL INSTITUTIONS, RANKED FROM HIGHEST TO LOWEST



**LEGEND**

- 1 Federal Government
- 2 State Governments
- 3 Local Governments
- 4 Public health institutions
- 5 Public education institutions
- 6 Justice institutions
- 7 Small-Medium Enterprises
- 8 National businesses
- 9 Multinational corporations
- 10 Charitable organisations
- 11 Religious institutions
- 12 Trade unions

**THE GAP BETWEEN PERCEPTIONS AND EXPECTATIONS**

Although measuring perceptions of leadership is necessary to establish the perceived state of leadership for the greater good in Australian institutions, it is just as important to understand what the general public **expect** of different institutions and sectors.

To visualise the match, or mis-match, between public perceptions and expectations, *Figure 10* displays a perceived performance-expected performance matrix using the average score for perceptions and expectations on the nine aforementioned indicators of leadership for the greater good.

Although all sectors failed to meet public expectations of leadership of the greater good, there are important differences between institutions (*see Figure 10*).

Of all institutions measured, charitable organisations and public health and public education institutions came the closest to meeting public expectations. By contrast, government institutions are most discrepant with community standards.

**FIGURE 10. PERCEIVED PERFORMANCE-EXPECTED PERFORMANCE MATRIX (OVERALL) \***  
 \* A five-point scale is used for ratings of perceptions and expectations of the *type* of value that institutions seek to create, *how* institutions create value, and *for whom* institutions create value, where 1 = 'not at all', 2 = 'to some extent', 3 = 'to a moderate extent', 4 = 'to a fairly large extent' and 5 = 'to an extremely large extent'.

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

The next important question to consider is what are the predictors of public perceptions of leadership for the greater good? To answer this question, the extent to which the nine indicators of leadership for the greater good predict public perceptions of leadership for the greater good is analysed.

In this section, the results for the predictors of perceptions of leadership for the greater good are reported, aggregating across the twelve institutions of the government, public, private and not-for-profit sectors. Sector and institution-specific results are presented in Section 4.

As depicted in *Figure 11*, the strongest predictors of public perceptions of leadership for the greater good are related to perceptions of *how* institutional leaders create value for their stakeholders. This result means that the more

institutional leaders are seen to demonstrate accountability, transparency and ethicality, the more they are judged to show leadership for the greater good.

Other strong predictors of public perceptions of leadership for the greater good are institutional leaders' apparent focus on creating positive social outcomes and their apparent responsiveness to the interests of society. This result means that the more institutional leaders are thought to be alive and responsive to needs of society-at-large, evidenced by a focus on creating social value, the more they are perceived as showing leadership for the greater good. It is important to note that focusing on creating positive economic outcomes has no significant impact on overall perceptions of leadership for the greater good. This implies that the greater good goes beyond simple economics to broader societal benefits.

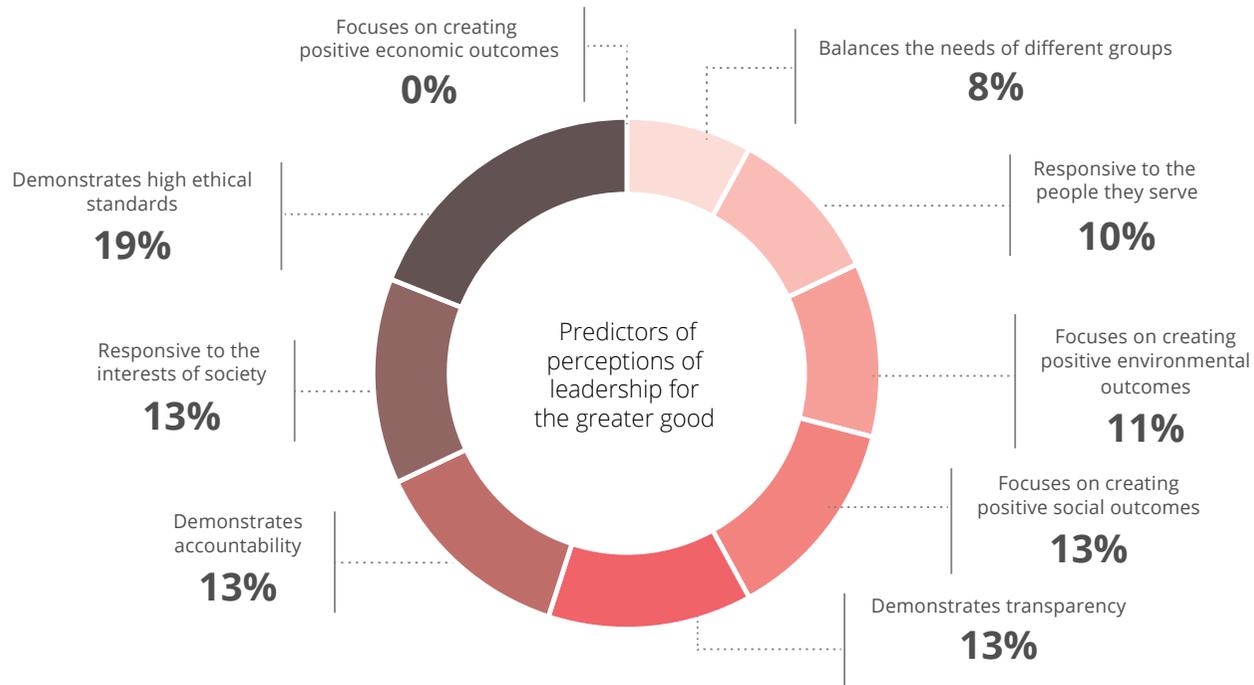


FIGURE 11. PREDICTORS OF PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD ACROSS ALL SECTORS



## **PART 2: SECTOR AND INSTITUTION BREAKDOWN**

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# GOVERNMENT SECTOR



## OVERVIEW

2019 was an eventful year for the government sector. Key events included:

- The Coalition secured victories in the NSW and Federal elections.
- The Federal Government was dogged by controversy, particularly regarding its response to the bushfire crisis at the end of the year.
- In NSW, abortion law reform was the biggest story in the middle of the year, and the government was strongly criticised for cost-cutting measures related to bushfire services.
- In Victoria, heads of government departments were referred to the anticorruption body for breaching advertising guidelines.
- In Queensland, controversy surrounded the sacking of the Logan City Council.
- In South Australia, the Murray-Darling basin royal commission revealed negligence and unlawful actions.
- In Western Australia, John Holland launched legal action against the State Government over unpaid work over the Perth Children's Hospital project.

## PERCEPTIONS OF THE GOVERNMENT SECTOR

All government institutions received negative ALI scores, resulting in a negative score of -20 for the government sector (see Figure 12). Within the sector, Local Governments are viewed most positively (or, more accurately, least negatively), while the Federal Government is viewed most unfavourably. Notably, the Federal Government is perceived as showing the lowest degree of leadership for the greater good of all institutions across any sector measured.

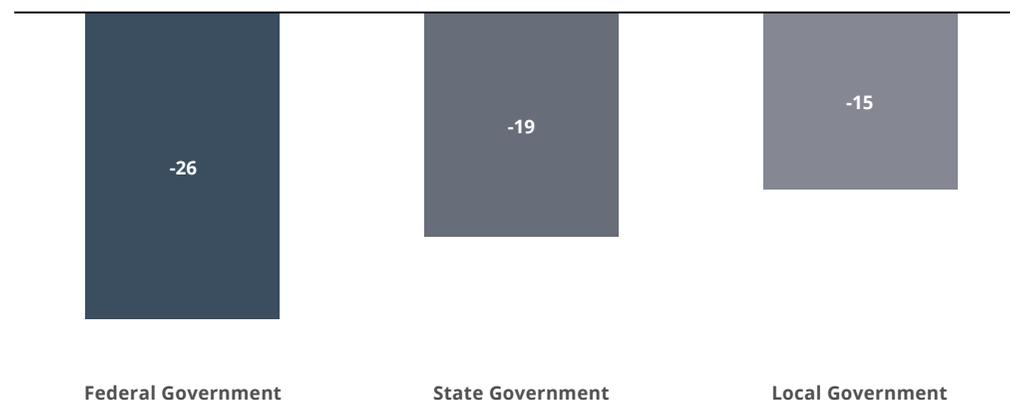


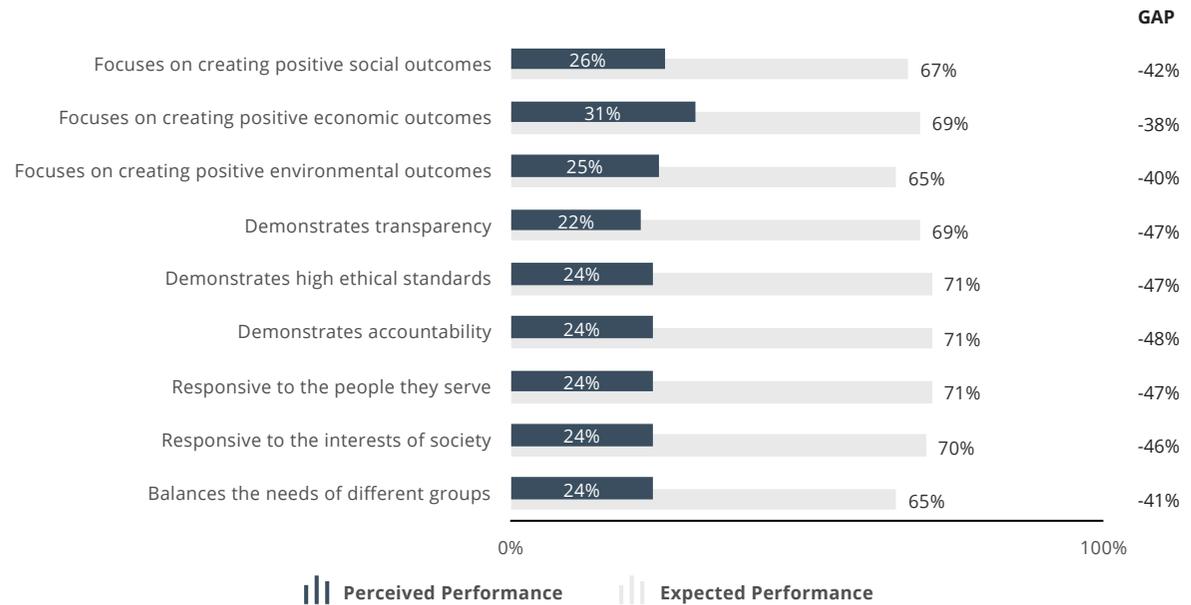
FIGURE 12. ALI SCORES FOR FEDERAL, STATE AND LOCAL GOVERNMENTS

## EXPECTATIONS OF THE GOVERNMENT SECTOR

The public has the highest expectations about *how* the government sector should create value (i.e., accountability, ethicality, and transparency), as well as its responsiveness to the interests of the people it serves and society-at-large (see *Figure 13*). Expectations are lowest regarding how much the government sector should focus on creating positive environmental outcomes (e.g., protecting the environment and improving environmental sustainability) and the extent to which it should balance the needs of different groups.

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gap is found for the government sector's focus on creating positive economic outcomes. The largest gaps are found for accountability, ethicality and transparency, as well as its responsiveness to the people it serves. However, across all areas there is a large gap between what the public expects, and what they perceive from the government sector.



**FIGURE 13. PERCEPTIONS, EXPECTATIONS AND THE PERFORMANCE-EXPECTATION GAP IN THE GOVERNMENT SECTOR**

### PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 14*, the top predictors of public perceptions of leadership for the greater good in the government sector are:

1. demonstrates high ethical standards;
2. responsive to the people they serve; and
3. responsive to the interests of society.

These findings suggest that the government sector can improve public perceptions by demonstrating stronger adherence to high ethical standards and by improving their apparent responsiveness to the needs and interests of the people they serve and the society-at-large.

The government sector comprises the local, state and federal governments. Included within this category are political parties (if they represent the incumbent government), and elected representatives.

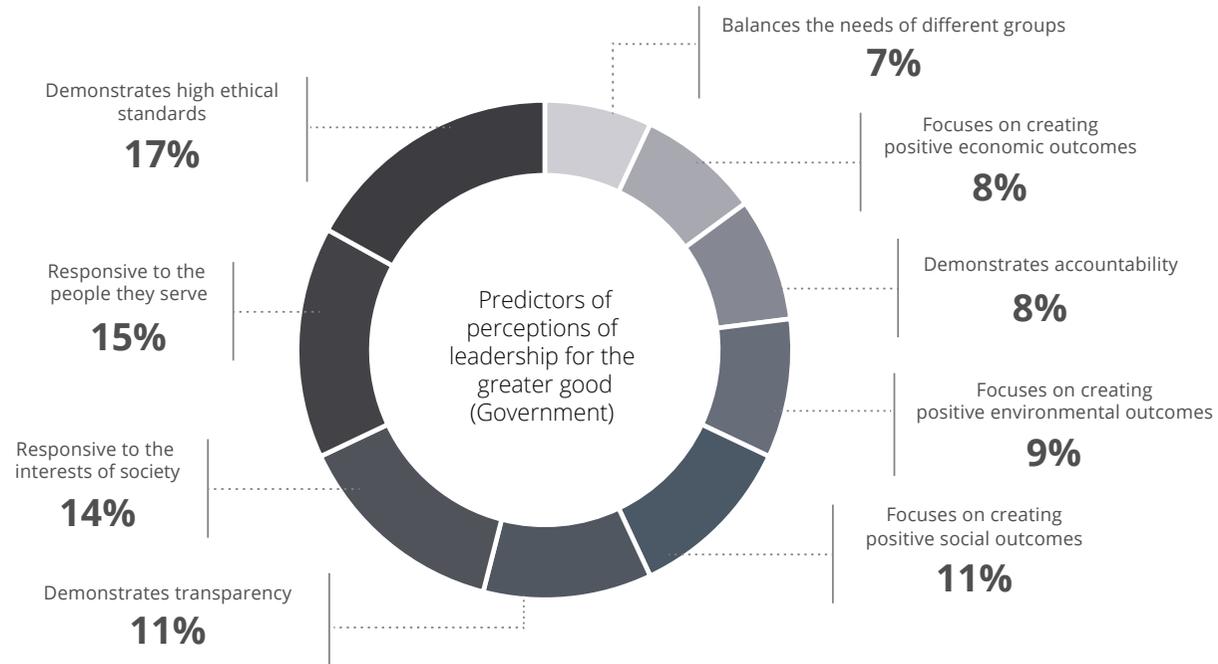


FIGURE 14. PREDICTORS OF PERCEPTIONS OF GOVERNMENT SECTOR LEADERSHIP FOR THE GREATER GOOD

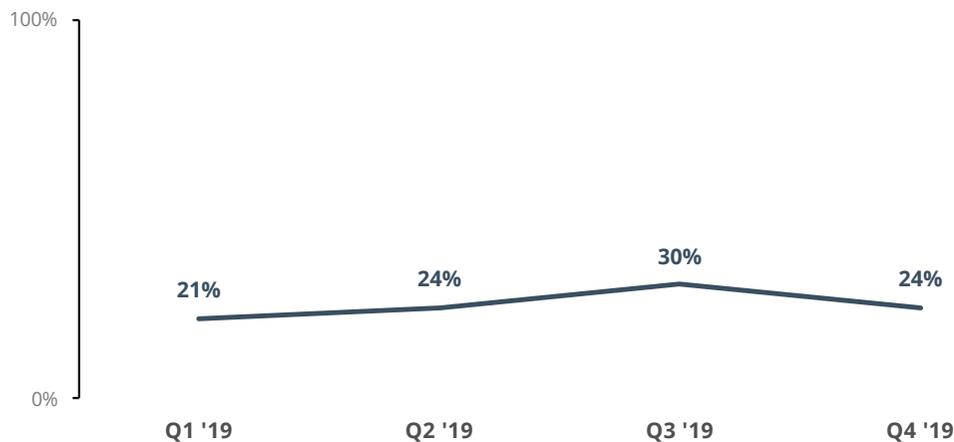


FIGURE 15. PERCEPTIONS OF FEDERAL GOVERNMENT LEADERSHIP FOR THE GREATER GOOD

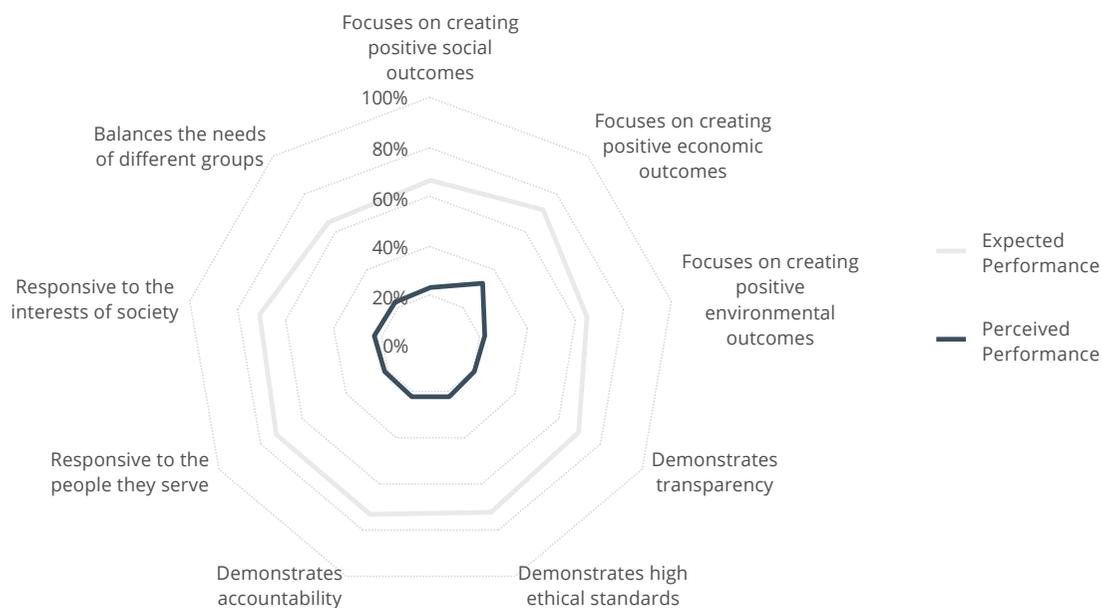


FIGURE 16. EXPECTATIONS AND PERCEPTIONS OF THE FEDERAL GOVERNMENT

## FEDERAL GOVERNMENT



SCORE  
**-26**

### PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by the Federal Government are low. On average, 25% of respondents judged the Federal Government to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 15).

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

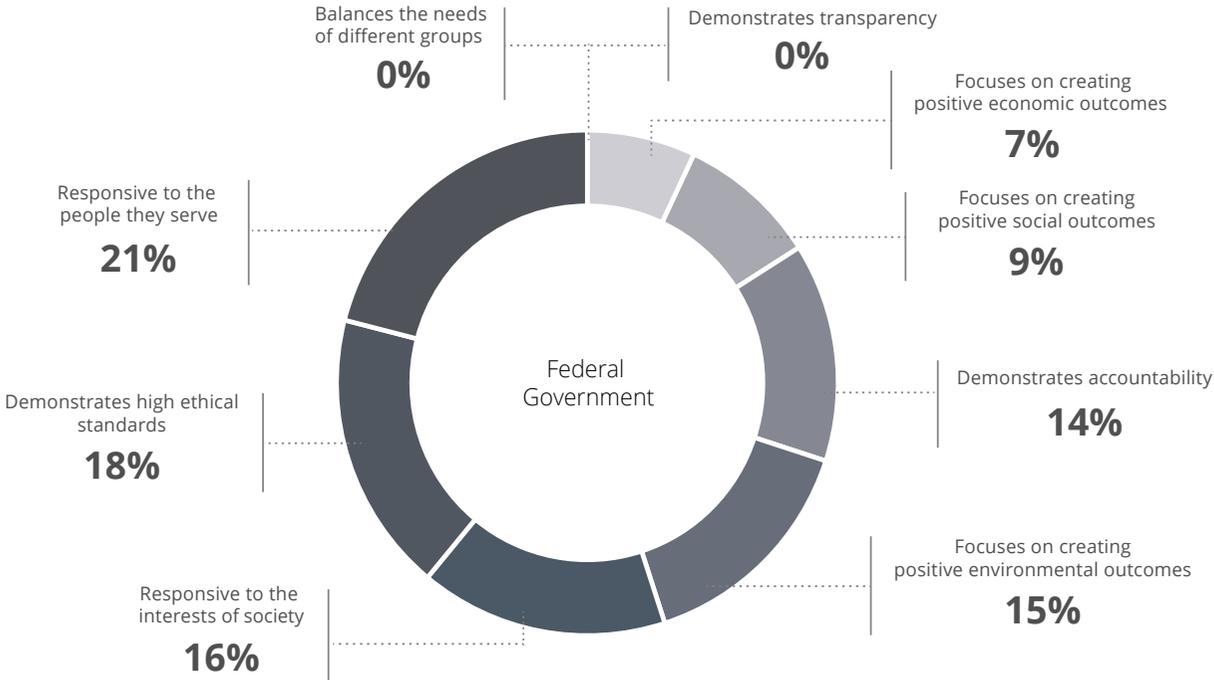
The smallest expectation-perception gaps are found for the Federal Government's focus on creating positive economic and environmental outcomes. The largest gaps are found for accountability, ethicality and transparency, and responsiveness to the people it serves (see Figure 16).

**PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD**

As depicted in *Figure 17*, the top predictors of public perceptions of leadership for the greater good by the Federal Government are:

- 1. responsive to the people they serve;
- 2. demonstrates high ethical standards; and
- 3. responsive to the needs and interests of society.

These findings suggest that the Federal Government can improve public perceptions by demonstrating stronger adherence to high ethical standards and by improving their apparent responsiveness to the needs and interests of the people they serve and the wider society.



**FIGURE 17. PREDICTORS OF PERCEPTIONS OF FEDERAL GOVERNMENT LEADERSHIP FOR THE GREATER GOOD**

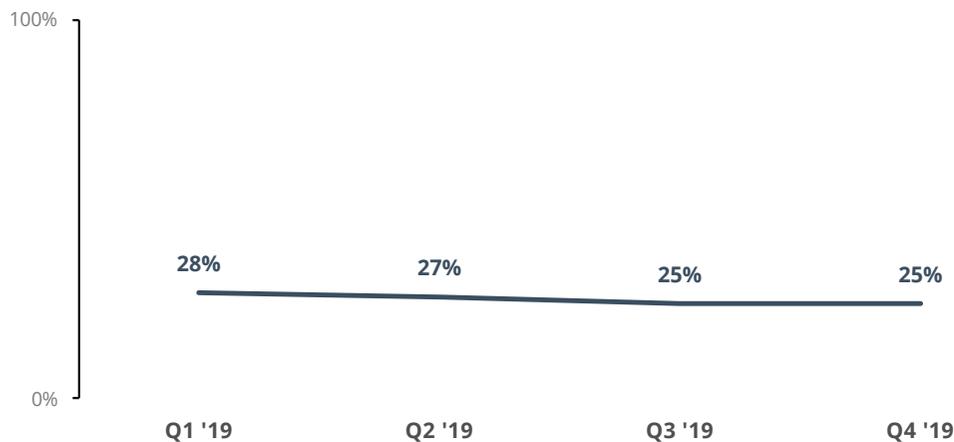


FIGURE 18. PERCEPTIONS OF STATE GOVERNMENTS' LEADERSHIP FOR THE GREATER GOOD

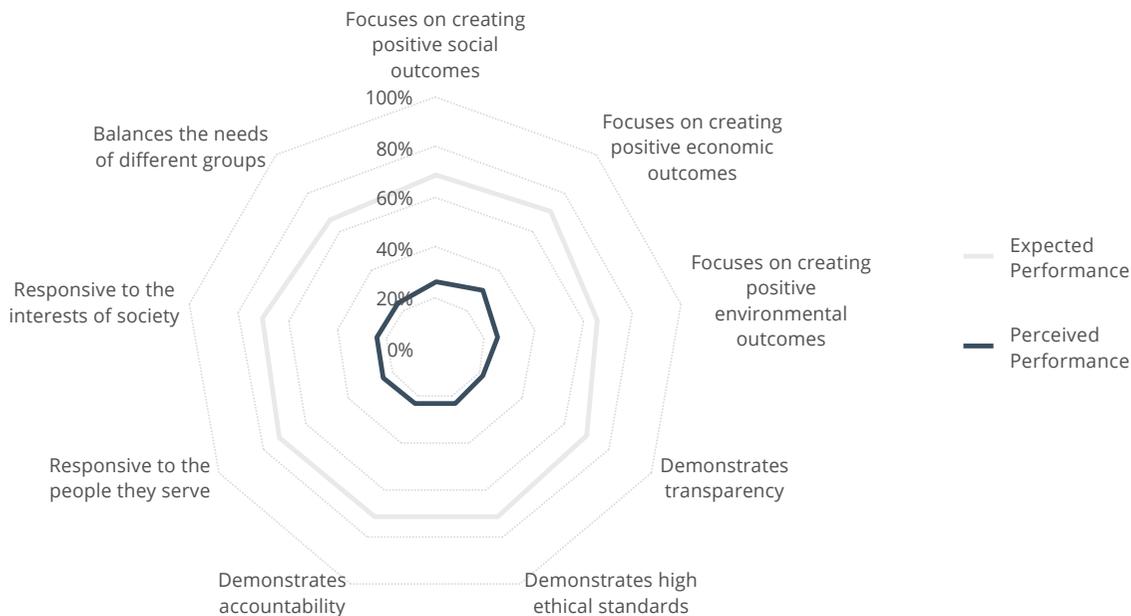


FIGURE 19. EXPECTATIONS AND PERCEPTIONS OF STATE GOVERNMENTS

## STATE GOVERNMENT



SCORE  
**-19**

### PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by State Governments are low. On average, 26% of respondents judged State Governments as showing leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 18).

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gap is found for State Governments' focus on creating positive social, economic and environmental outcomes. The largest gaps are found for accountability, ethicality and transparency.

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 20*, the top predictors of public perceptions of leadership for the greater good in State Governments are:

1. demonstrates transparency;
2. responsive to the interests of society; and
3. demonstrates high ethical standards.

These findings suggest that State Governments can improve public perceptions by demonstrating greater transparency and stronger adherence to high ethical standards and by improving their apparent responsiveness to the interests of the wider society.

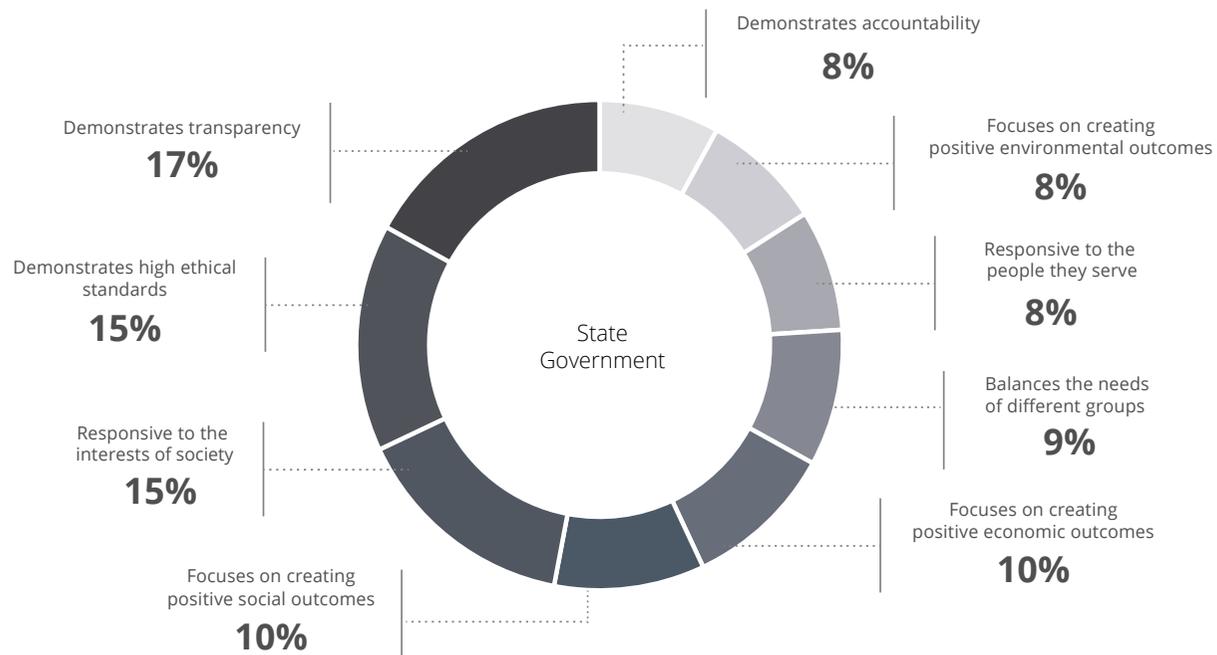
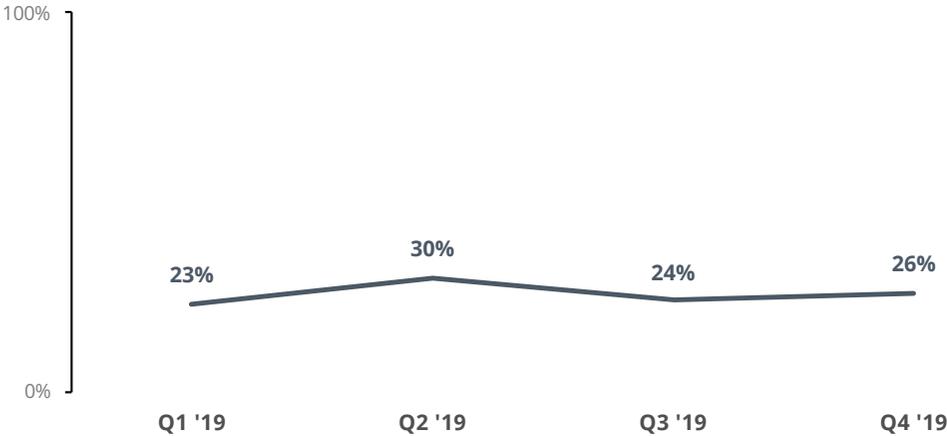


FIGURE 20. PREDICTORS OF PERCEPTIONS OF STATE GOVERNMENTS' LEADERSHIP FOR THE GREATER GOOD

# LOCAL GOVERNMENT



**SCORE**  
**-15**



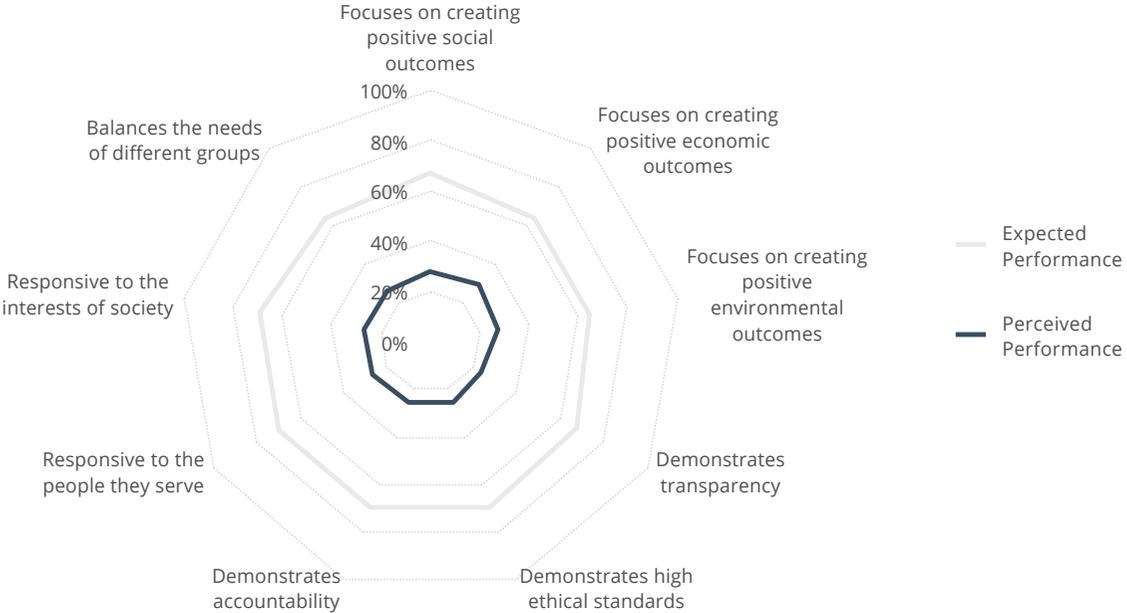
**FIGURE 21. PERCEPTIONS OF LOCAL GOVERNMENT LEADERSHIP FOR THE GREATER GOOD**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by Local Governments are low. On average, 26% of respondents judged Local Governments to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 21).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for Local Governments' focus on creating positive economic and environmental outcomes. The largest gaps are found for accountability, ethicality and transparency (see Figure 22).



**FIGURE 22. EXPECTATIONS AND PERCEPTIONS OF LOCAL GOVERNMENT**

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 23*, the top predictors of public perceptions of leadership for the greater good in Local Governments are:

1. demonstrates high ethical standards;
2. responsive to the people they serve; and
3. focuses on the creation of positive social outcomes.

These findings suggest that Local Governments can improve public perceptions by demonstrating stronger adherence to high ethical standards, improving their apparent responsiveness to the needs and interests of the people they serve, and focusing more on the creation of social value for these stakeholders.

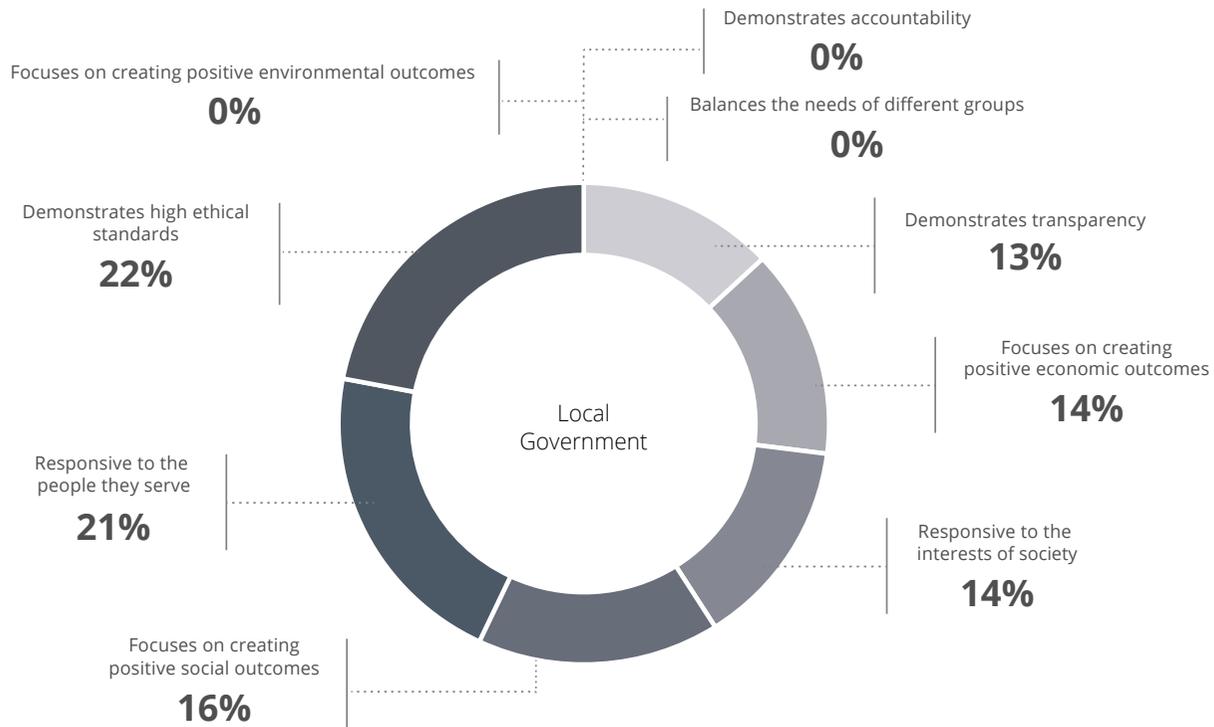


FIGURE 23. PREDICTORS OF PERCEPTIONS OF LOCAL GOVERNMENT LEADERSHIP FOR THE GREATER GOOD

# PUBLIC SECTOR



SCORE  
**7**

## PERCEPTIONS OF THE PUBLIC SECTOR

Public health institutions are viewed most favourably, followed by public education institutions. Justice institutions received the only negative ALI score of the public sector institutions measured (see Figure 24).

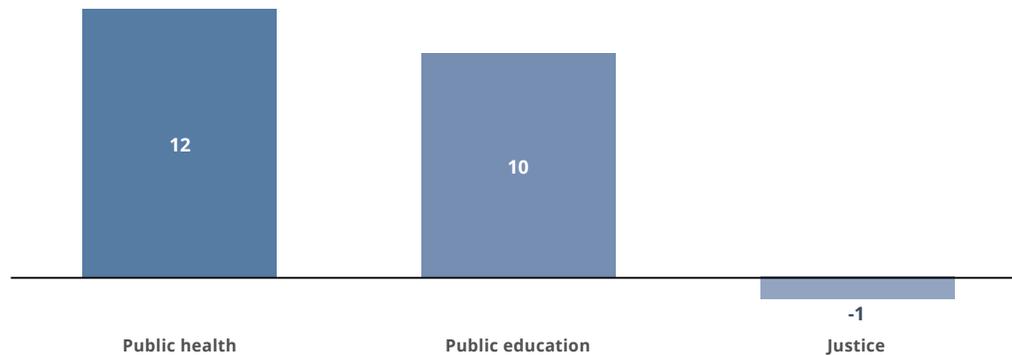


FIGURE 24. ALI SCORES FOR PUBLIC HEALTH, PUBLIC EDUCATION AND JUSTICE INSTITUTIONS

## Overview

Each part of the public sector was marred by negative stories in the media in 2019. Key news events included:

- Universities were criticised for their lenient standards of English proficiency for international students.
- PISA reading, mathematics and science scores for Australian secondary students continued to decline, raising concerns that Australian students were falling behind their international peers.
- The Victorian Royal Commission into the mental health system identified the need for major reforms.
- The justice sector was generally well regarded, although there was significant controversy surrounding police raids of journalists, the verdict of George Pell's trial and appeal, and the police's treatment of Extinction Rebellion protestors.

### EXPECTATIONS OF THE PUBLIC SECTOR

The public has the highest expectations with respect to *how* the public sector creates value (i.e., accountability, ethical standards), as well as about their responsiveness to the people they serve (see Figure 25). Expectations are lowest regarding the extent to which the public sector should focus on creating positive economic and environmental outcomes.

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for the public sector’s focus on creating positive economic and environmental outcomes. The largest gaps are related to accountability and transparency.

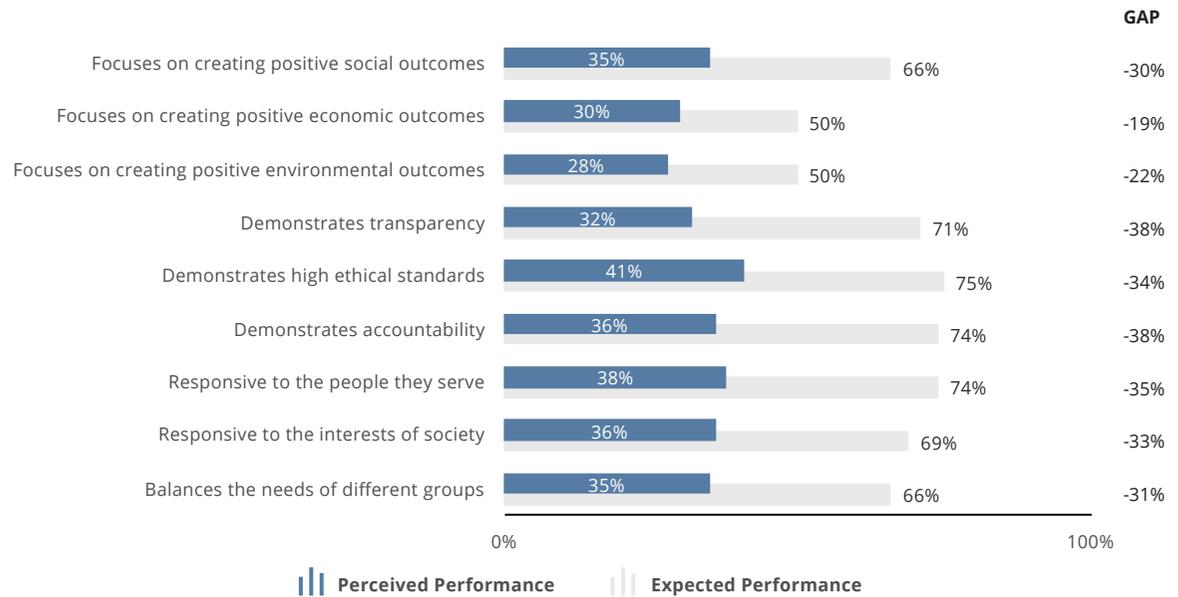


FIGURE 25. PERCEPTIONS, EXPECTATIONS AND THE PERFORMANCE-EXPECTATION GAP IN THE PUBLIC SECTOR

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 26*, the top predictors of public perceptions of leadership for the greater good in the public sector are:

1. demonstrates high ethical standards;
2. responsive to the people they serve; and
3. responsive to the interests of society.

These findings suggest that the institutional leaders in the public sector can improve public perceptions of their leadership by demonstrating stronger adherence to high ethical standards and by improving their apparent responsiveness to the needs and interests of the people they serve and the wider society.

The public sector is represented by public health institutions (e.g., public hospitals), public education institutions (e.g., public primary and secondary schools, TAFE, public universities) and justice institutions, which refers to those institutions that deliver legal, judicial and custodial services to the Australian community by managing courts, correctional services and justice services (e.g., the courts, the police).

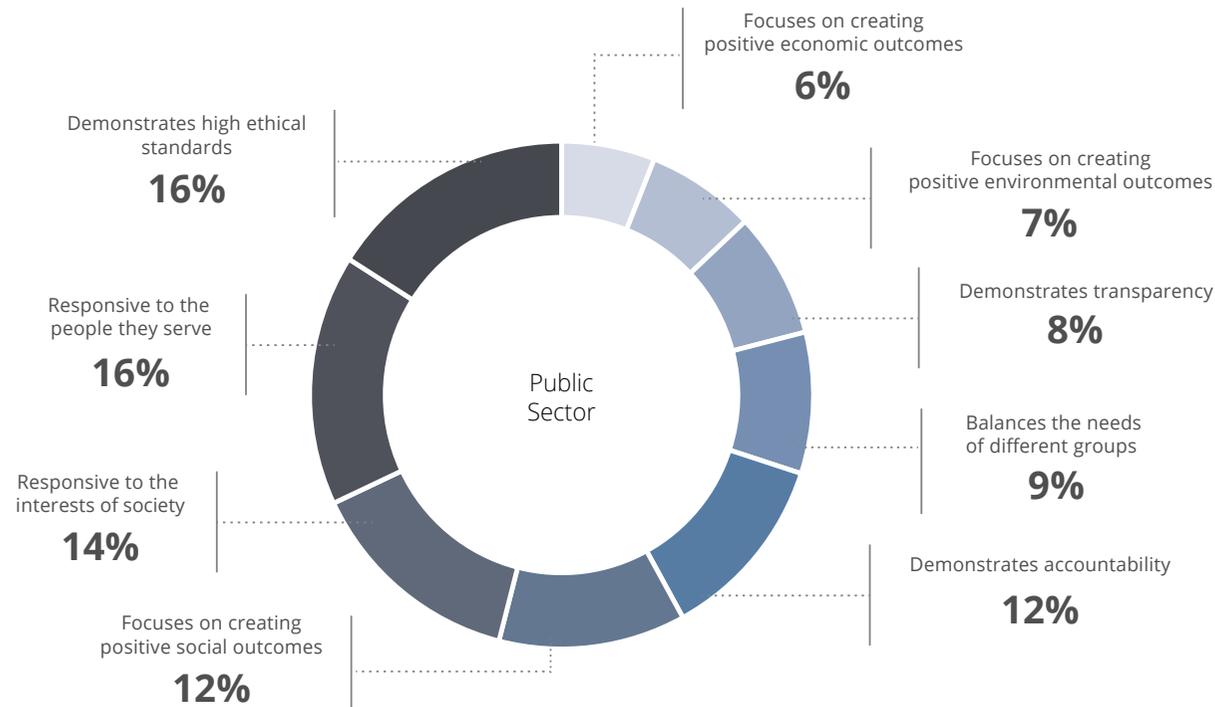


FIGURE 26. PREDICTORS OF PERCEPTIONS OF PUBLIC SECTOR LEADERSHIP FOR THE GREATER GOOD

# PUBLIC HEALTH



**SCORE**  
**12**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by public health institutions are moderate. On average, 39% of respondents judged public health institutions to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 27).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for public health institutions' focus on creating positive economic and environmental outcomes. The largest gaps are found for public health institutions' transparency and accountability (see Figure 28).

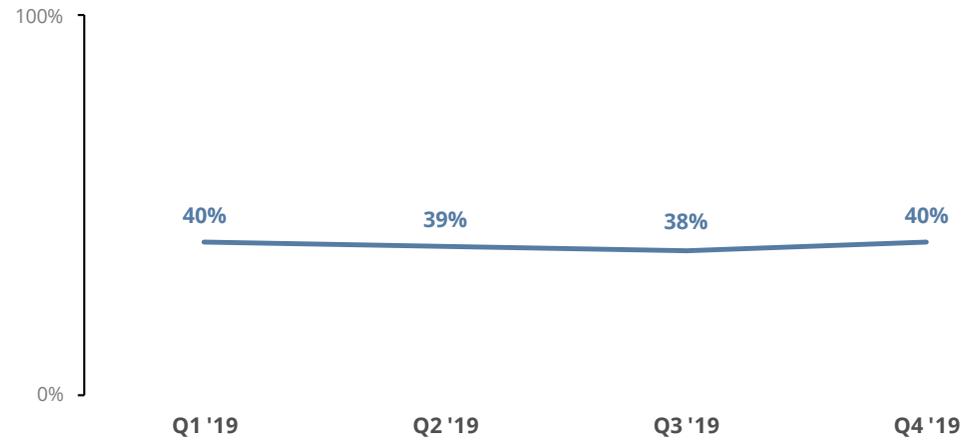


FIGURE 27. PERCEPTIONS OF PUBLIC HEALTH INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

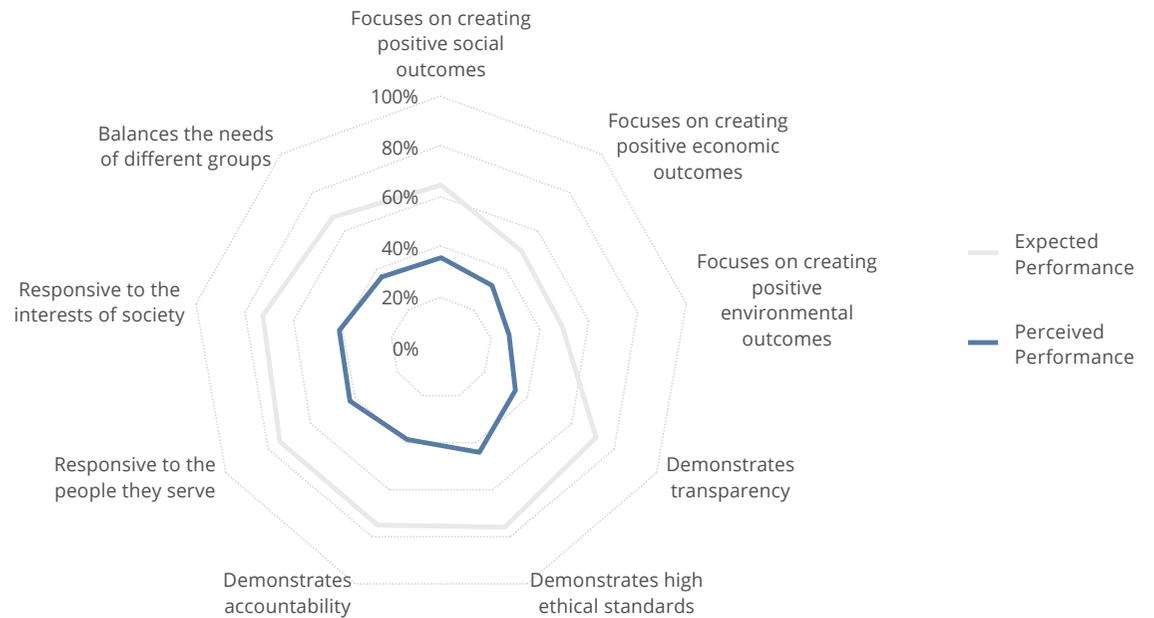


FIGURE 28. EXPECTATIONS AND PERCEPTIONS OF PUBLIC HEALTH INSTITUTIONS

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 29*, the top predictors of public perceptions of leadership for the greater good in public health institutions are:

1. responsive to the interests of society;
2. responsive to the people they serve;
3. demonstrates transparency;
4. focuses on the creation of positive social outcomes; and
5. balances the needs of different groups.

These findings suggest that public health institutions can improve public perceptions by improving their responsiveness to the needs and interests of the people they serve and the wider society, balancing these needs and interests, and focusing more on their transparency and creation of social value for their stakeholders.

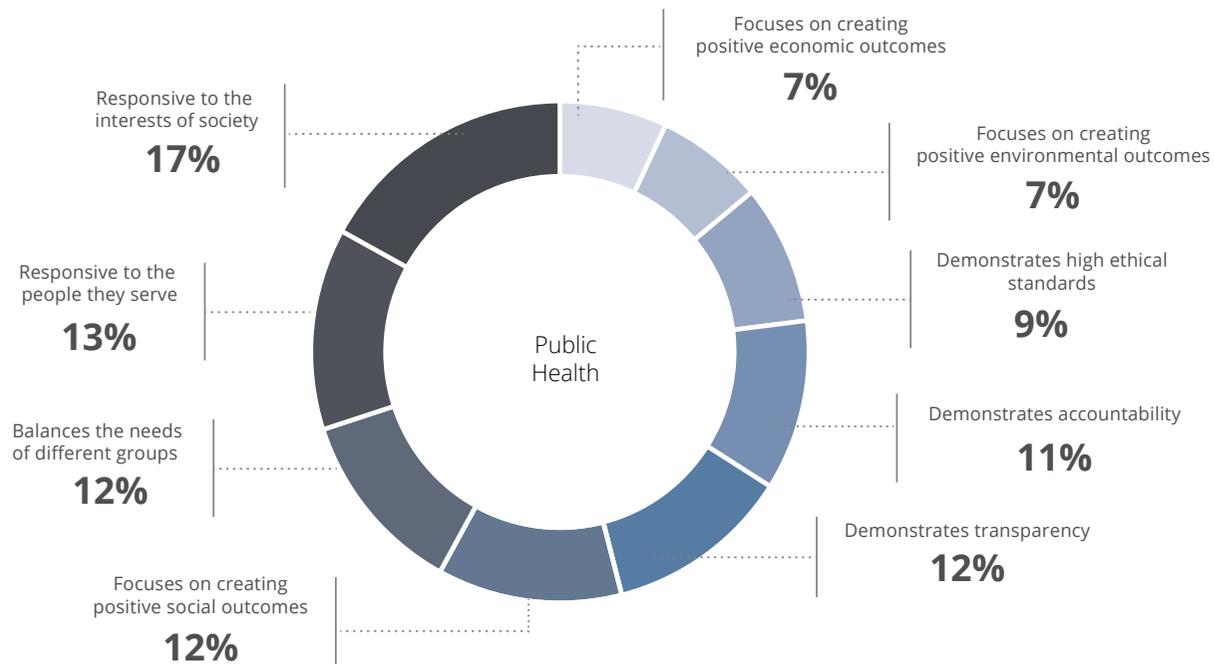


FIGURE 29. PREDICTORS OF PERCEPTIONS OF PUBLIC HEALTH INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

# PUBLIC EDUCATION



**SCORE**  
**10**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by public education institutions are moderate. On average, 38% of respondents judged public education institutions to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 30).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for public education institutions' focus on creating positive economic and environmental outcomes. The largest gaps are found for transparency and accountability (see Figure 31).

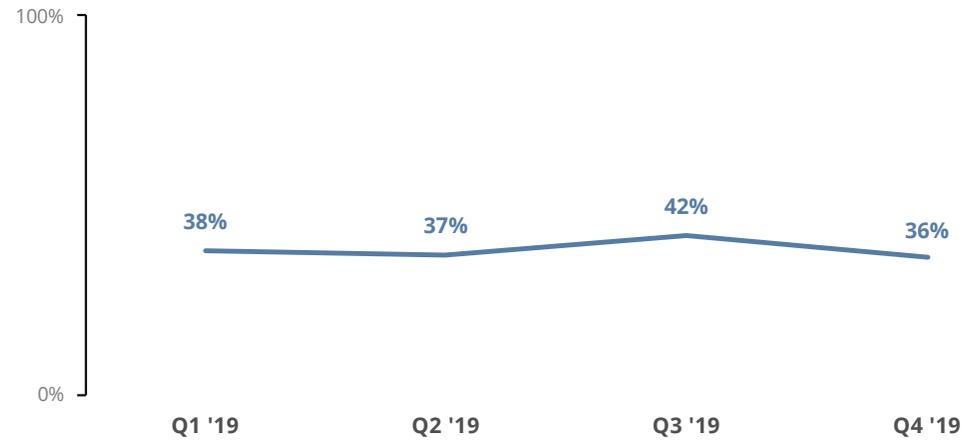


FIGURE 30. PERCEPTIONS OF PUBLIC EDUCATION INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

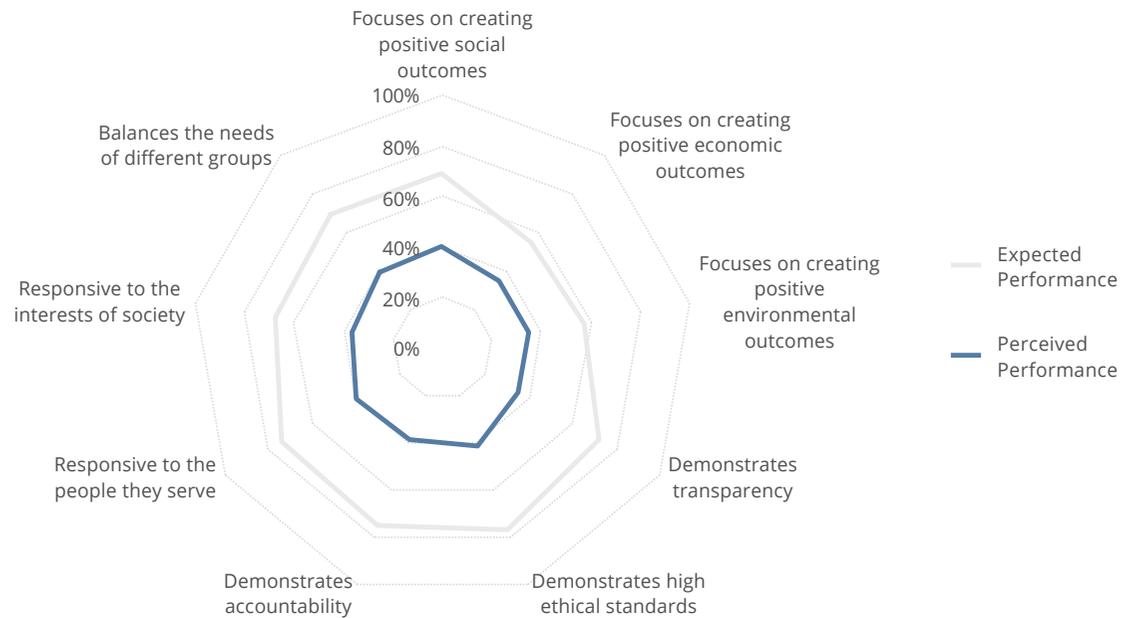


FIGURE 31. EXPECTATIONS AND PERCEPTIONS OF PUBLIC EDUCATION INSTITUTIONS

### PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 32*, the top predictors of public perceptions of leadership for the greater good in public education institutions are:

1. responsive to the people they serve;
2. focuses on the creation of positive social outcomes;
3. demonstrates high ethical standards; and
4. demonstrates accountability.

These findings suggest that public education institutions can improve public perceptions by improving their apparent responsiveness to the needs and interests of the people they serve, focusing on the creation of social value for their stakeholders, and demonstrating stronger adherence to ethical standards and accountability.

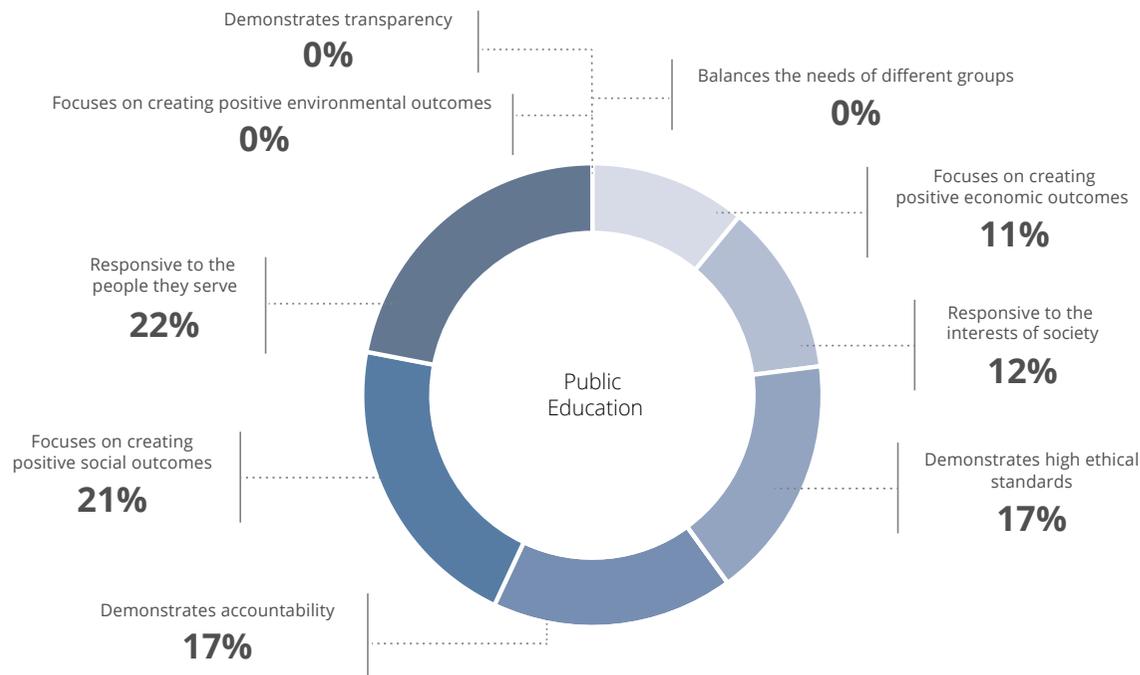


FIGURE 32. PREDICTORS OF PERCEPTIONS OF PUBLIC EDUCATION INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

# JUSTICE



**SCORE**  
**-1**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by justice institutions are moderate. On average, 35% of respondents judged justice institutions to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 33).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for the justice sector's focus on creating positive economic and environmental outcomes. The largest gaps are found for accountability, transparency, and its responsiveness to the people it serves (see Figure 34).

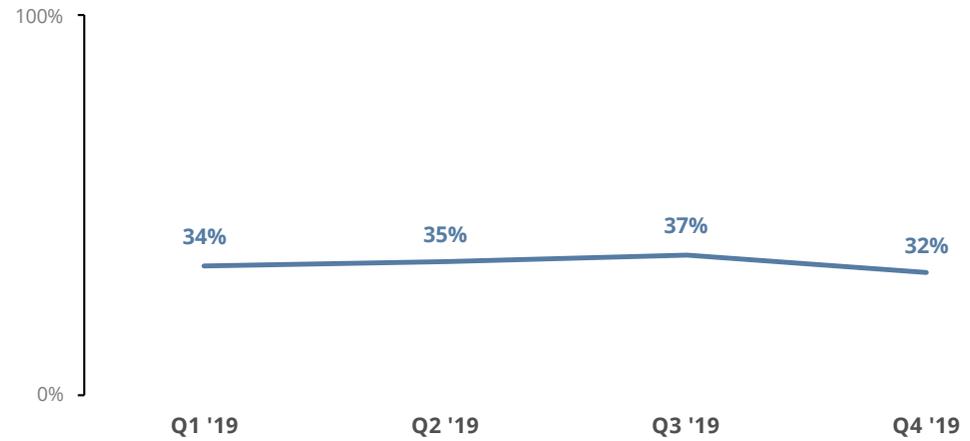


FIGURE 33. PERCEPTIONS OF JUSTICE INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

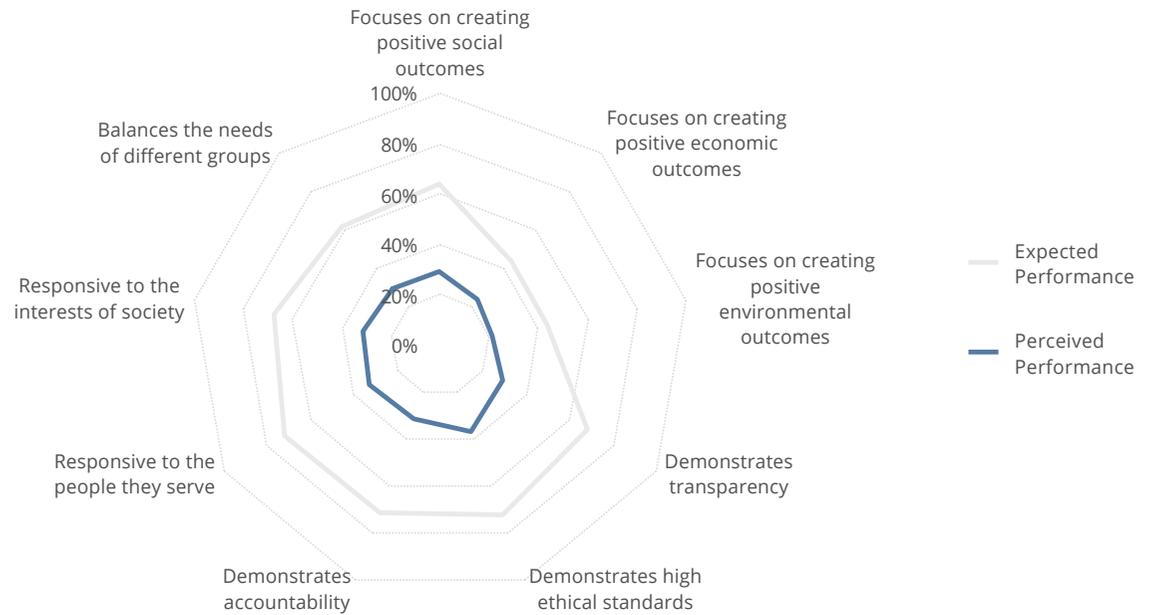


FIGURE 34. EXPECTATIONS AND PERCEPTIONS OF JUSTICE INSTITUTIONS

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 35*, the top predictors of public perceptions of leadership for the greater good in the institutions of the justice system are:

1. demonstrates high ethical standards;
2. responsive to the interests of society; and
3. responsive to the people they serve.

These findings suggest that justice institutions can improve public perceptions by demonstrating stronger adherence to high ethical standards and by improving their apparent responsiveness to the needs and interests of the people they serve and the wider society.

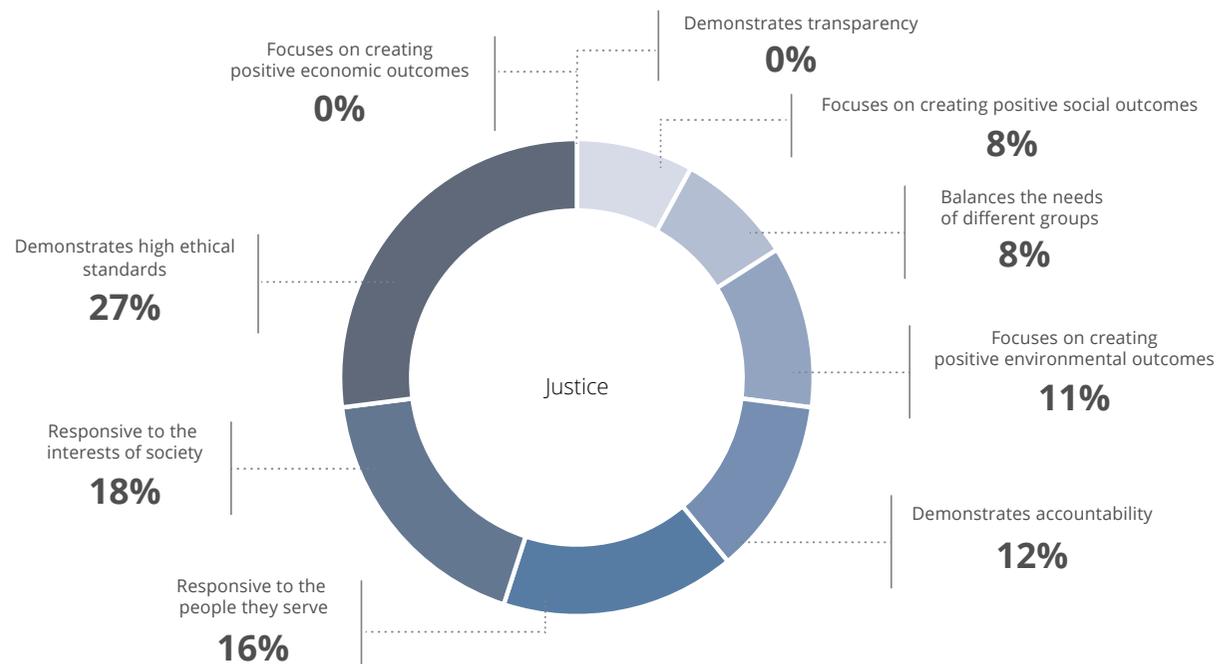


FIGURE 35. PREDICTORS OF PERCEPTIONS OF JUSTICE INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

# PRIVATE SECTOR



SCORE  
**-15**

## OVERVIEW

The private sector was subject to a great deal of controversy in 2019. Key events covered in the news media included:

- There was a great deal of coverage over the issue of wage theft. This was highlighted in the middle of the year with the fall of George Calombaris' restaurant empire, with many other large businesses in the spotlight. In December, a class action lawsuit was launched against Woolworths for the same issue.
- Controversy regarding the Adani mine dominated the media in the first half of the year, which was continued through the Extinction Rebellion protests.
- Controversy surrounded the role of corporations (such as Qantas) in advocating for social causes, such as stronger action on climate change, same sex marriage, and supporting indigenous communities. In September, the Federal Government and the Business Council of Australia urged corporates to minimise their involvement in such issues and focus on building a stronger economy.

## PUBLIC PERCEPTIONS OF THE PRIVATE SECTOR

While all private sector institutions received negative ALI scores, SMEs are viewed least unfavourably and multinational corporations most unfavourably. Notably, multinational corporations are second only to the Federal Government in terms of the low extent to which they are seen to show leadership for the greater good.



FIGURE 36. ALI SCORES FOR SMES, LARGE NATIONAL BUSINESSES AND MULTINATIONAL CORPORATIONS

## PUBLIC EXPECTATIONS OF THE PRIVATE SECTOR

The public has the highest expectations with respect to *how* the private sector creates value (i.e., accountability, ethical standards, and transparency). Expectations are lowest regarding the private sector's focus on creating social outcomes and balancing the needs of different groups (see Figure 37).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The narrowest gaps between expectations and perceptions relate to the private sector's focus on creating positive economic and social outcomes. The largest gaps are related to accountability, ethicality and transparency.

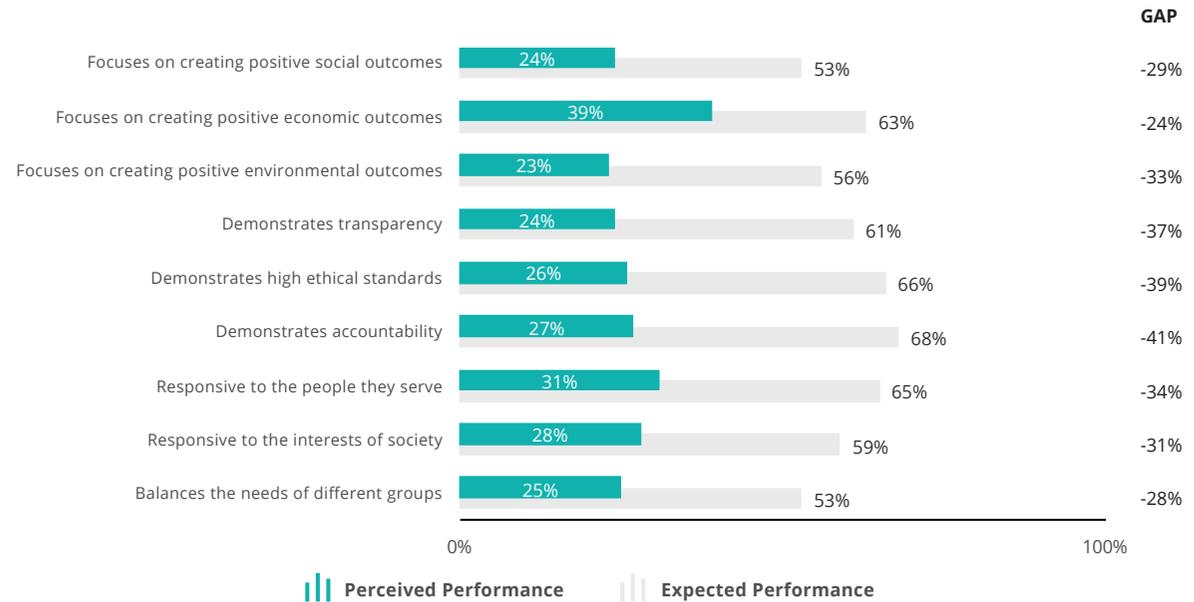


FIGURE 37. PERCEPTIONS, EXPECTATIONS AND THE PERFORMANCE-EXPECTATION GAP IN THE PRIVATE SECTOR

### PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 38*, the top predictors of public perceptions of leadership for the greater good in the private sector are:

1. demonstrates transparency;
2. demonstrates high ethical standards; and
3. focuses on the creation of positive social outcomes.

These findings suggest that the private sector can improve public perceptions by demonstrating greater transparency, stronger adherence to high ethical standards, and focusing to a greater extent on the creation of social value.

The private sector is represented by small and medium enterprises (e.g., local businesses with fewer than 200 employees, such as restaurants, services, or independent stores), large national businesses, by which we mean Australian businesses with over 200 employees that operate across Australia (e.g., Woolworths, Telstra, Harvey Norman), and multinational corporations, by which we mean very large companies with thousands of employees that operate across multiple countries, including Australia (e.g., Google, Hilton, Airbus).

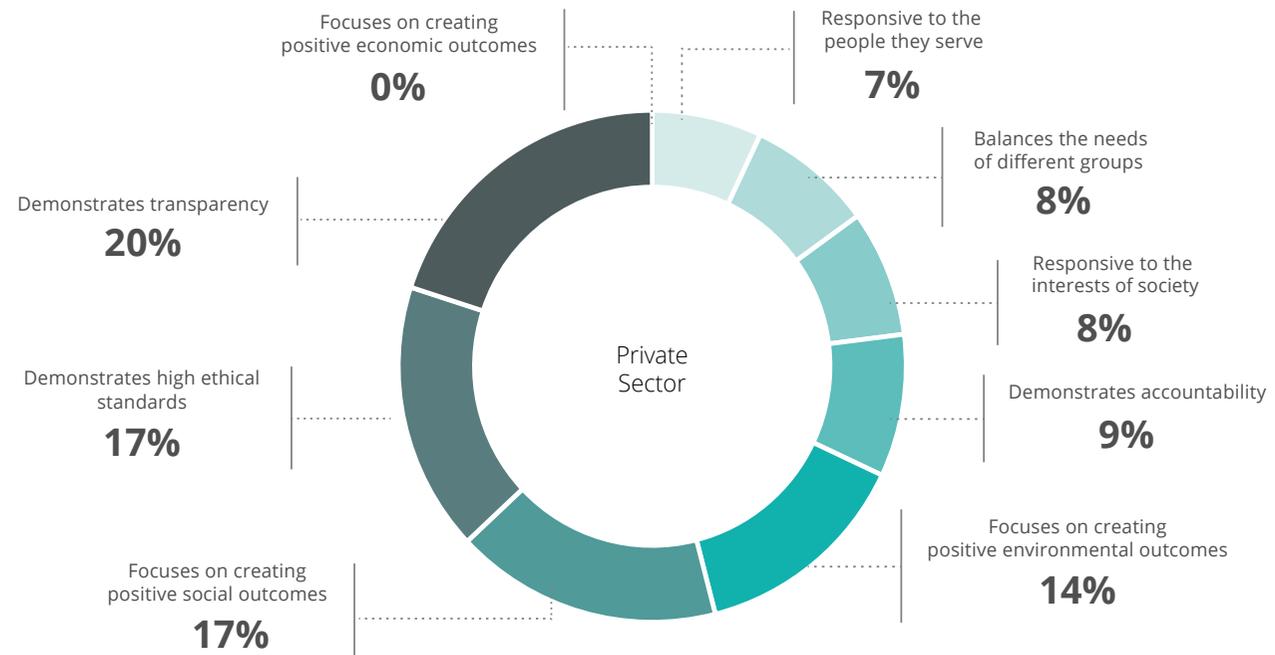


FIGURE 38. PREDICTORS OF PERCEPTIONS OF PRIVATE SECTOR LEADERSHIP FOR THE GREATER GOOD

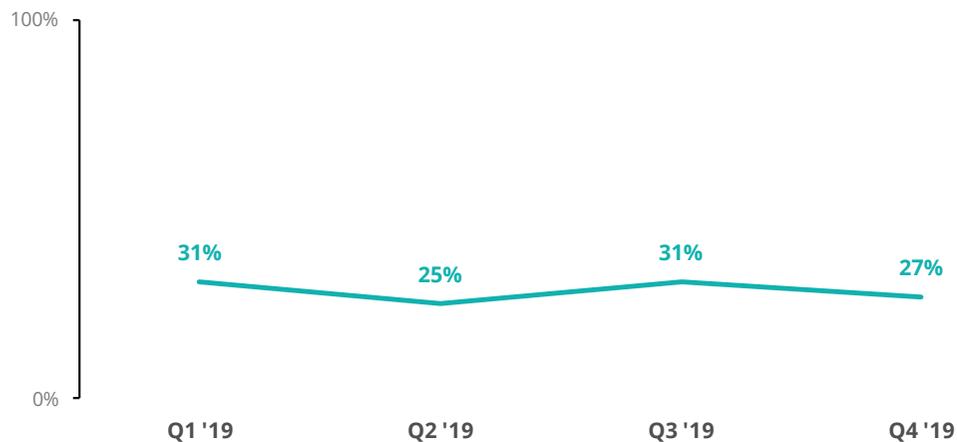


FIGURE 39. PERCEPTIONS OF SME LEADERSHIP FOR THE GREATER GOOD

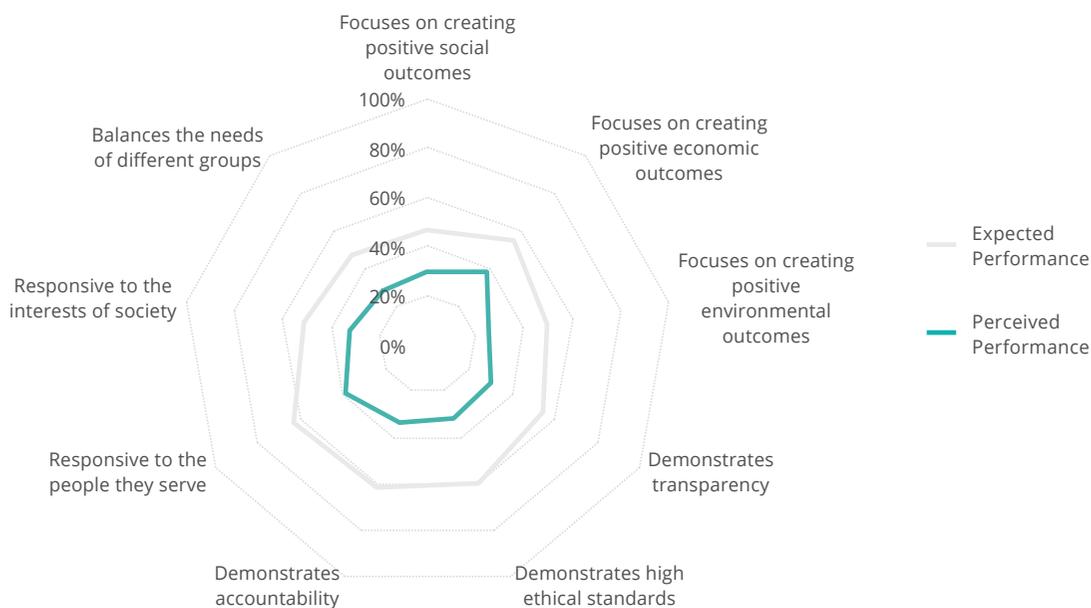


FIGURE 40. EXPECTATIONS AND PERCEPTIONS OF SMES

## SMALL-MEDIUM ENTERPRISES



**SCORE**  
**-6**

### PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by small-medium enterprises (SMEs) are low. On average, 29% of respondents judged small-medium enterprises to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 39).

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

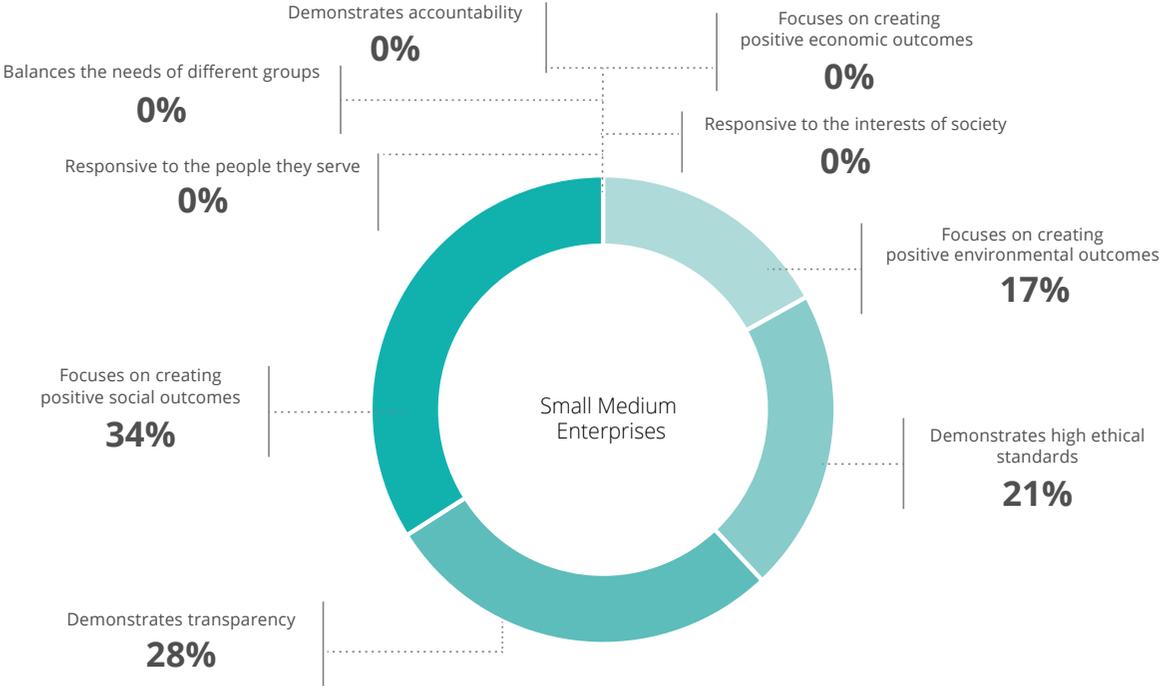
The smallest expectation-perception gaps are found for Small-Medium Enterprises' focus on creating positive social and economic outcomes. The largest gaps are found for ethicality and accountability (see Figure 40).

**PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD**

As depicted in *Figure 41*, the top predictors of public perceptions of leadership for the greater good in small and medium-sized businesses are:

- 1. focuses on the creation of positive social outcomes;
- 2. demonstrates transparency; and
- 3. demonstrates high ethical standards.

These findings suggest that SMEs can improve public perceptions by demonstrating greater transparency, stronger adherence to ethical standards, and focusing to a greater extent on the creation of social value.



**FIGURE 41. PREDICTORS OF PERCEPTIONS OF SMES' LEADERSHIP FOR THE GREATER GOOD**

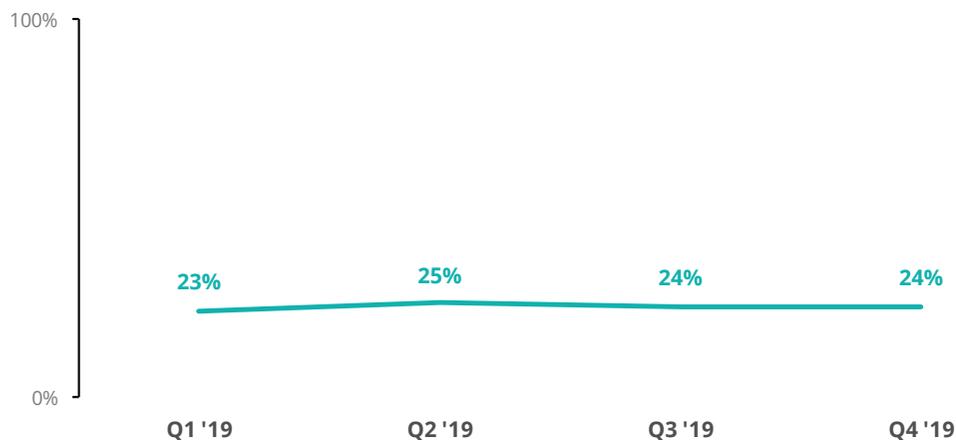


FIGURE 42. PERCEPTIONS OF NATIONAL BUSINESSES' LEADERSHIP FOR THE GREATER GOOD

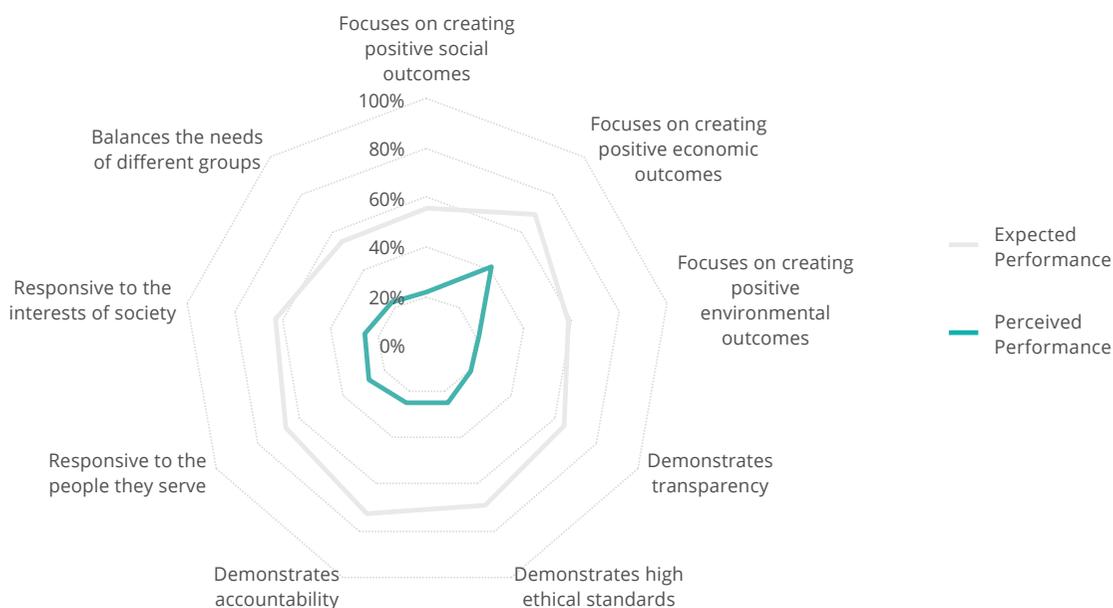


FIGURE 43. EXPECTATIONS AND PERCEPTIONS OF NATIONAL BUSINESSES

## NATIONAL BUSINESSES



**SCORE**  
**-17**

### PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by large national businesses was low. On average, 24% of respondents judged large national businesses to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 42).

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for national business' focus on creating positive economic outcomes and the extent to which they balance the needs of different groups. The largest gaps are found for accountability, ethicality and transparency (see Figure 43).

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 44*, the top predictors of public perceptions of leadership for the greater good in large national businesses are:

1. demonstrates transparency;
2. responsive to the people they serve; and
3. demonstrates high ethical standards.

These findings suggest that large national businesses can improve public perceptions by demonstrating greater transparency, stronger adherence to high ethical standards, and being more responsive to the needs of the people they serve.

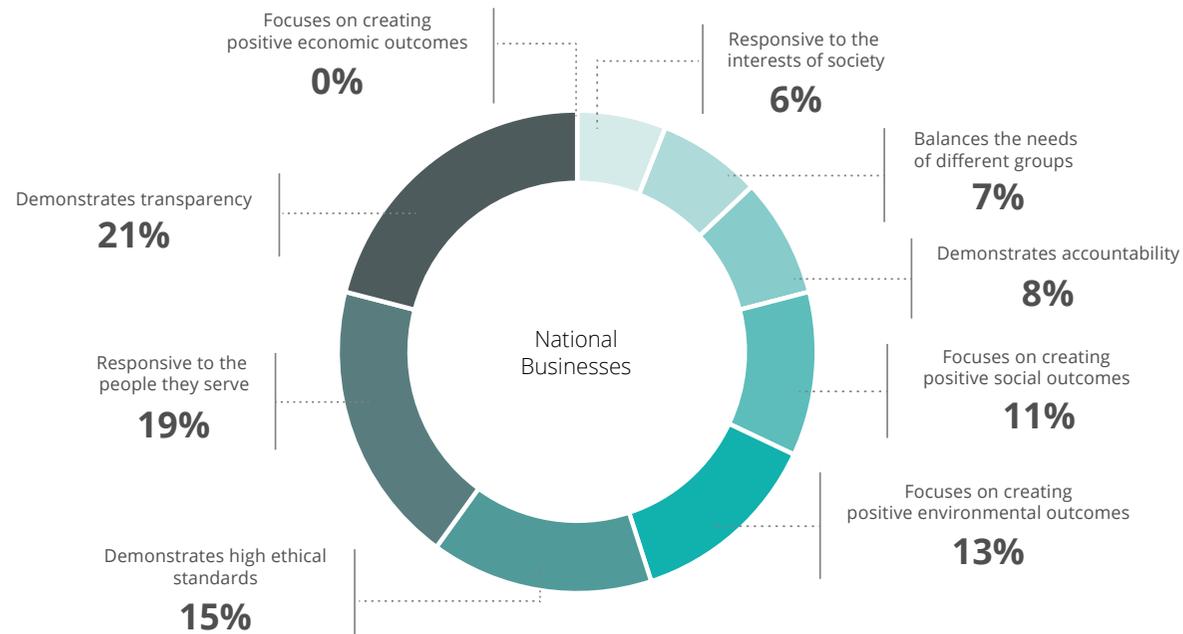


FIGURE 44. PREDICTORS OF PERCEPTIONS OF NATIONAL BUSINESSES' LEADERSHIP FOR THE GREATER GOOD

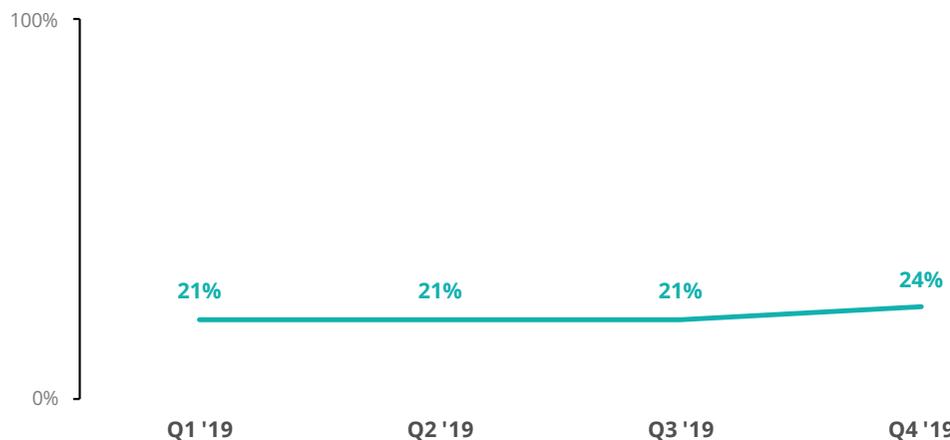


FIGURE 45. PERCEPTIONS OF MULTINATIONAL CORPORATIONS' LEADERSHIP FOR THE GREATER GOOD

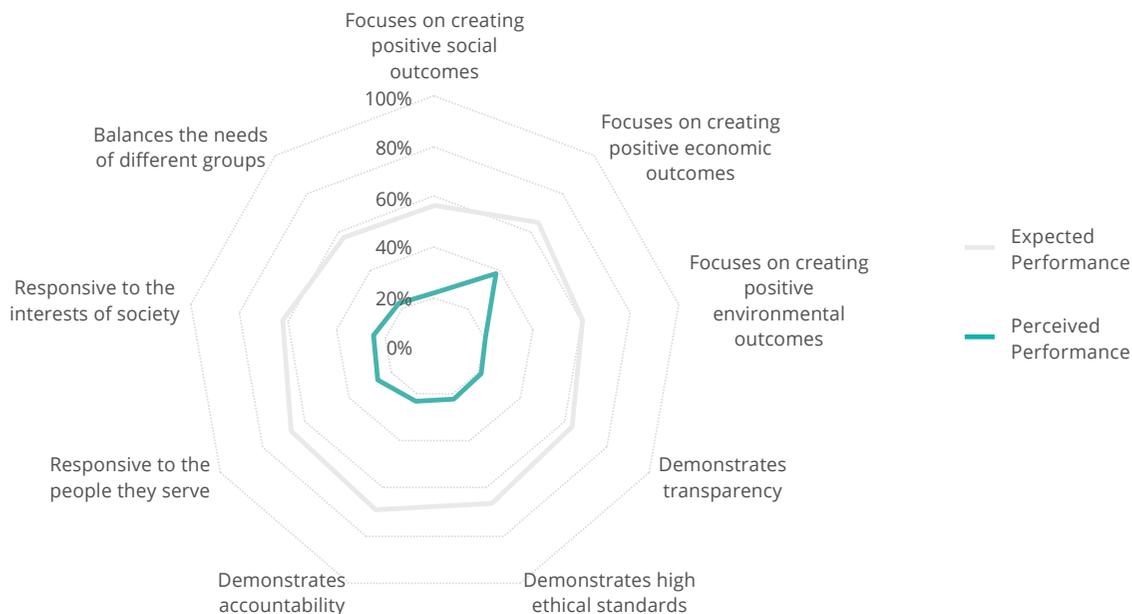


FIGURE 46. EXPECTATIONS AND PERCEPTIONS OF MULTINATIONAL CORPORATIONS

## MULTINATIONAL CORPORATIONS



SCORE  
**-24**

### PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by multinational corporations are low. On average, 22% of respondents judged the multinational corporations to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 45).

### GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

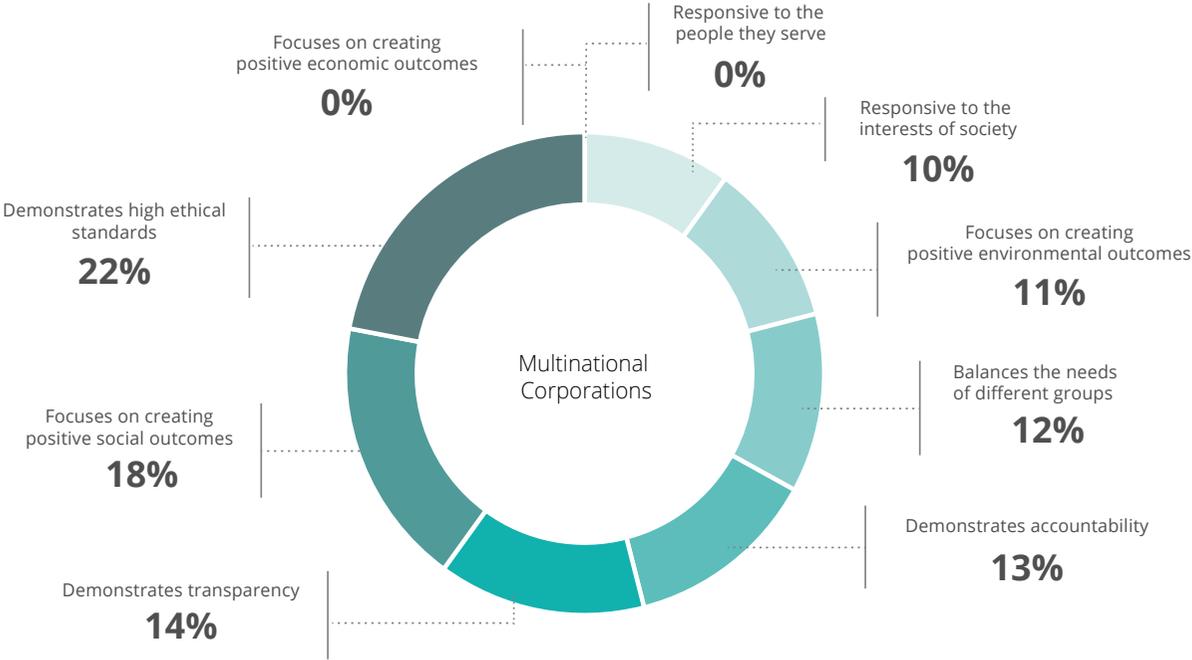
The smallest expectation-perception gaps are found for multinational corporations' focus on creating positive economic outcomes and the extent to which they balance the needs of different groups. The largest gaps are found for accountability, ethicality and transparency (see Figure 46).

**PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD**

As depicted in *Figure 47*, the top predictors of public perceptions of leadership for the greater good in multinational corporations are:

1. demonstrates high ethical standards;
2. focuses on the creation of positive social outcomes; and
3. demonstrates transparency.

These findings suggest that multinational corporations can improve public perceptions by demonstrating greater transparency, stronger adherence to ethical standards, and focusing to a greater extent on the creation of social value.



**FIGURE 47. PREDICTORS OF PERCEPTIONS OF MULTINATIONAL CORPORATIONS' LEADERSHIP FOR THE GREATER GOOD**

# NOT-FOR-PROFIT SECTOR



SCORE  
**-6**

### PUBLIC PERCEPTIONS OF THE NOT-FOR-PROFIT SECTOR

Charitable organisations are viewed most favourably among the institutions of the not-for-profit sector (see Figure 48). Notably, charities are viewed most favourably of all institutions measured across all sectors. By contrast, trade unions and religious institutions are viewed quite differently, receiving strong negative evaluations of their leadership for the greater good. The negative ALI score for the sector as a whole is driven by perceptions of these institutions.

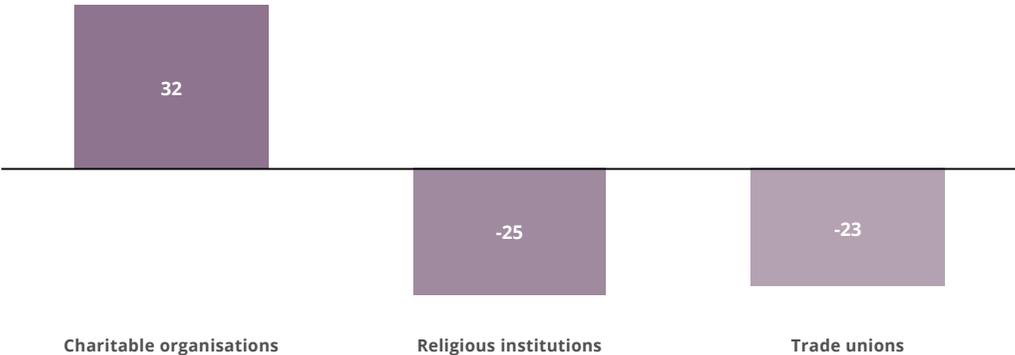


FIGURE 48. ALI SCORES FOR CHARITABLE ORGANISATIONS, RELIGIOUS INSTITUTIONS AND TRADE UNIONS

### OVERVIEW

Much of the work of not-for-profit organisations was not reported on in the mainstream media. However, there were several major news stories related to each institution.

- Charitable organisations, such as FoodBank, played a strong role in advocating for Australians who could not afford to buy food.
- For trade unions, the biggest stories included the large-scale protests against wage stagnation, as well as the pressure applied to CFMEU secretary John Sekta to resign after harassment charges and comments about anti-violence campaigner Rosie Batty.
- Religious organisations were discussed most frequently in the context of the George Pell case, the sacking of Israel Folau from Rugby Australia, and sexual assault within the Church.

## PUBLIC EXPECTATIONS OF THE NOT-FOR-PROFIT SECTOR

The public has the highest expectations with respect to *how* not-for-profit institutions create value (i.e., accountability, ethical standards, and transparency), as well as regarding their responsiveness to the people they serve (see Figure 49). Expectations are lowest regarding the extent to which the sector should focus on creating environmental and economic value.

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps for the not-for-profit sector are related to its focus on creating positive economic and environmental outcomes. The largest gaps are related to the not-for-profit sector's transparency, accountability and ethicality.



FIGURE 49. PERCEPTIONS, EXPECTATIONS AND THE PERFORMANCE-EXPECTATION GAP IN THE NOT-FOR-PROFIT SECTOR

### PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 50*, the top predictors of public perceptions of leadership for the greater good in the not-for-profit sector are:

1. demonstrates high ethical standards;
2. focuses on the creation of positive social outcomes; and
3. demonstrates accountability.

These findings suggest that the not-for-profit sector can improve public perceptions by demonstrating greater accountability and ethicality, as well as focusing more on the creation of social value.

The not-for-profit sector is represented by charitable organisations (i.e., organisations with a mission dedicated to creating a social good), trade unions (i.e., organisations of workers in a trade, or group of trades, formed to protect and further their rights and interests) and religious institutions, by which we mean organisations whose purpose is to advance religion, which may also provide services to religious communities (e.g., places of worship).

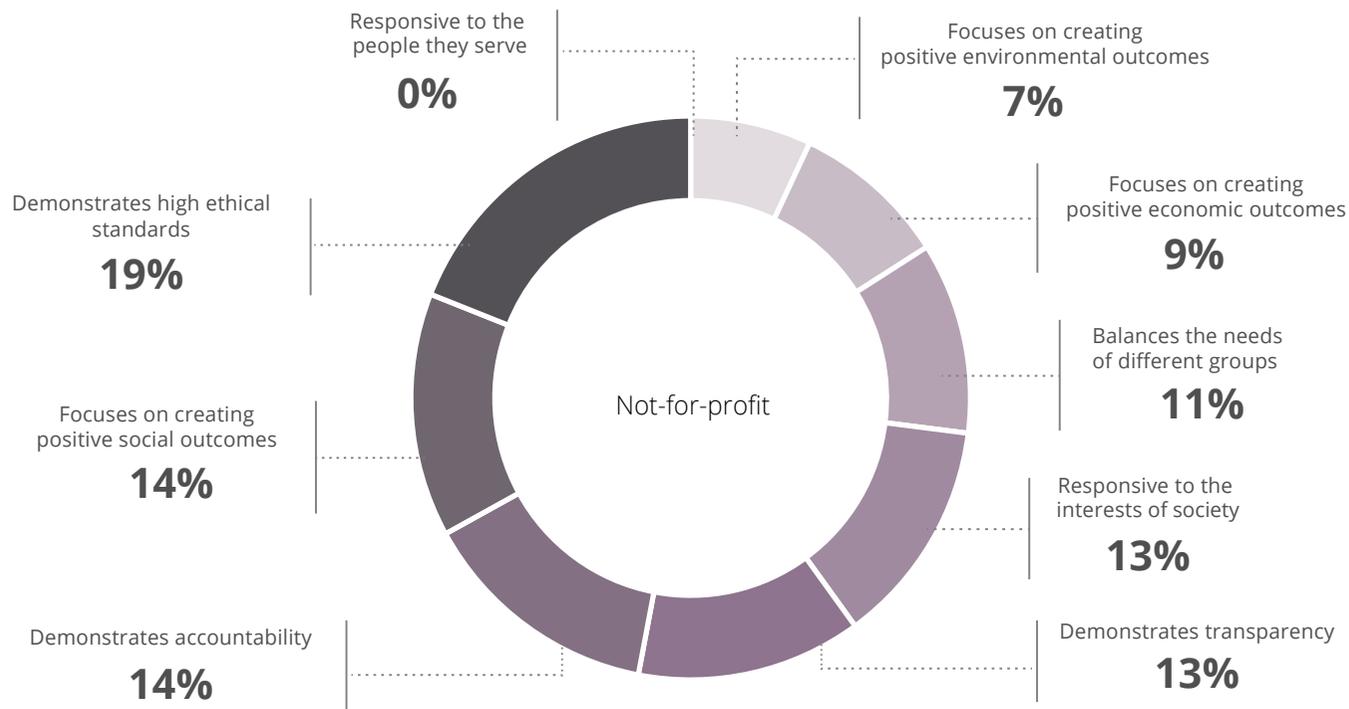


FIGURE 50. PREDICTORS OF PERCEPTIONS OF NOT-FOR-PROFIT SECTOR LEADERSHIP FOR THE GREATER GOOD

# CHARITABLE ORGANISATIONS



**SCORE**  
**32**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by charitable organisations is moderate. On average, 51% of respondents judged charities to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 51).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for charitable organisations' focus on creating positive economic and environmental outcomes. The largest gaps are found for transparency, accountability and ethicality (see Figure 52).

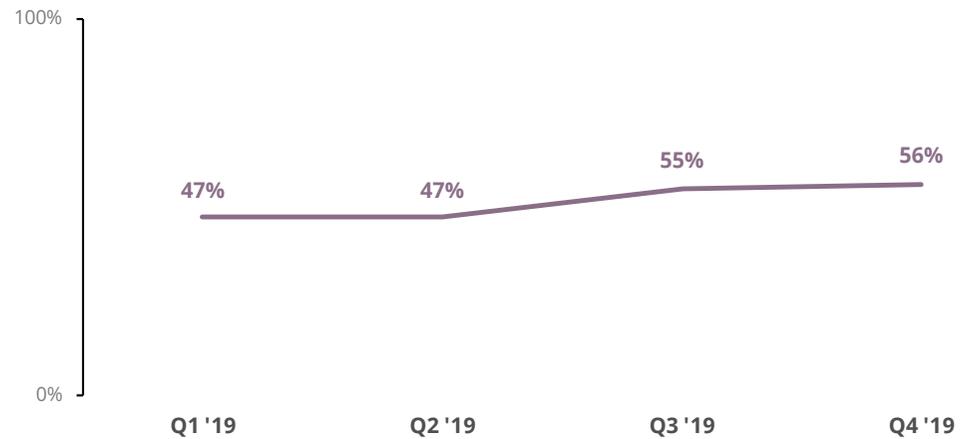


FIGURE 51. PERCEPTIONS OF CHARITIES' LEADERSHIP FOR THE GREATER GOOD

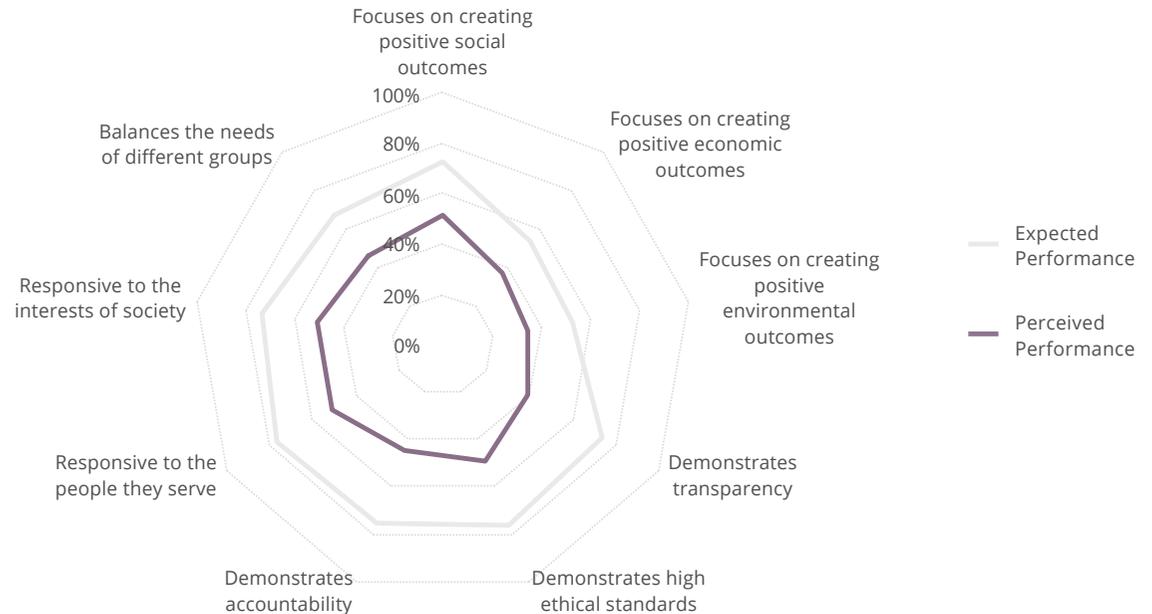


FIGURE 52. EXPECTATIONS AND PERCEPTIONS OF CHARITIES

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 53*, the top predictors of public perceptions of leadership for the greater good in charitable organisations are:

1. focuses on the creation of positive social outcomes;
2. demonstrates high ethical standards;
3. demonstrates accountability; and
4. demonstrates transparency.

These findings suggest that charitable organisations can improve public perceptions by demonstrating greater accountability, transparency and stronger adherence to high ethical standards, as well as improving their focus on the creation of social value.

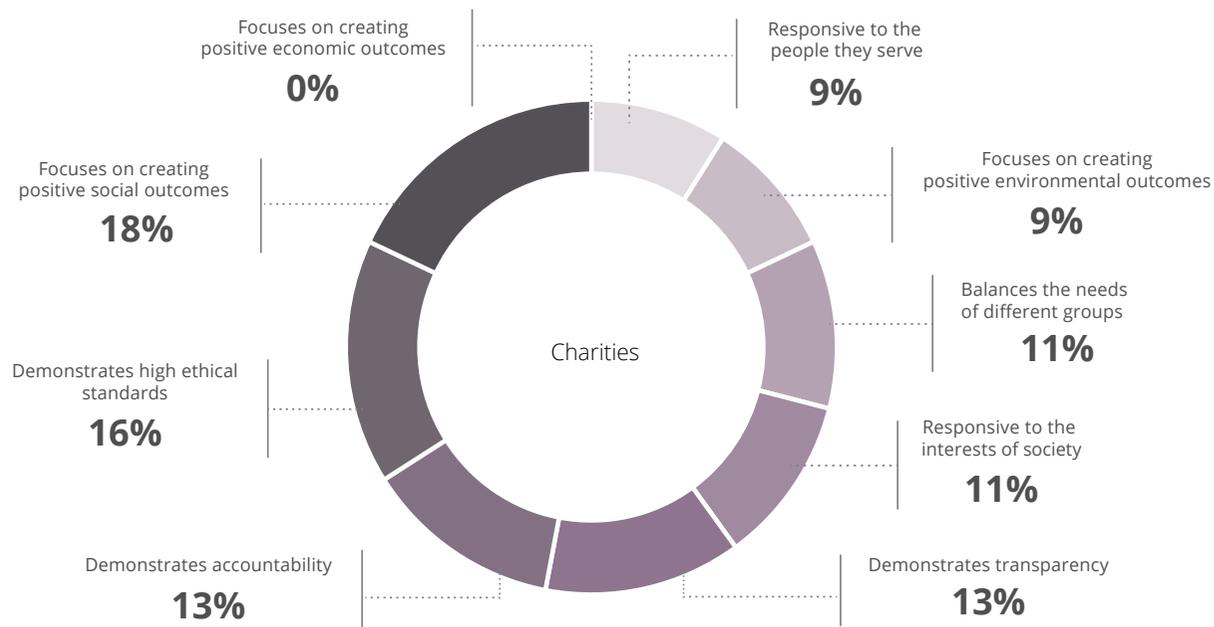


FIGURE 53. PREDICTORS OF PERCEPTIONS OF CHARITIES' LEADERSHIP FOR THE GREATER GOOD

# TRADE UNIONS



**SCORE**  
**-23**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by trade unions are low. On average, 23% of respondents judged trade unions to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 54).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for trade unions' focus on creating positive environmental and economic outcomes (see Figure 55). The largest gaps are found for accountability, transparency and ethicality.

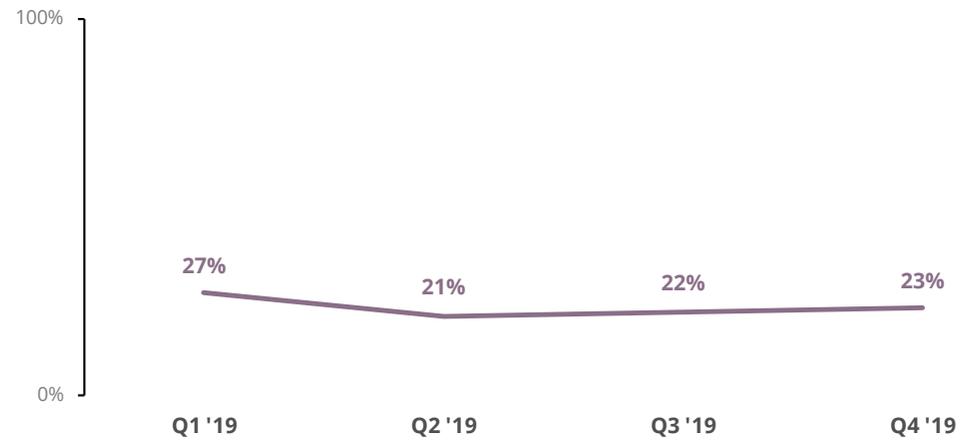


FIGURE 54. PERCEPTIONS OF TRADE UNIONS' LEADERSHIP FOR THE GREATER GOOD

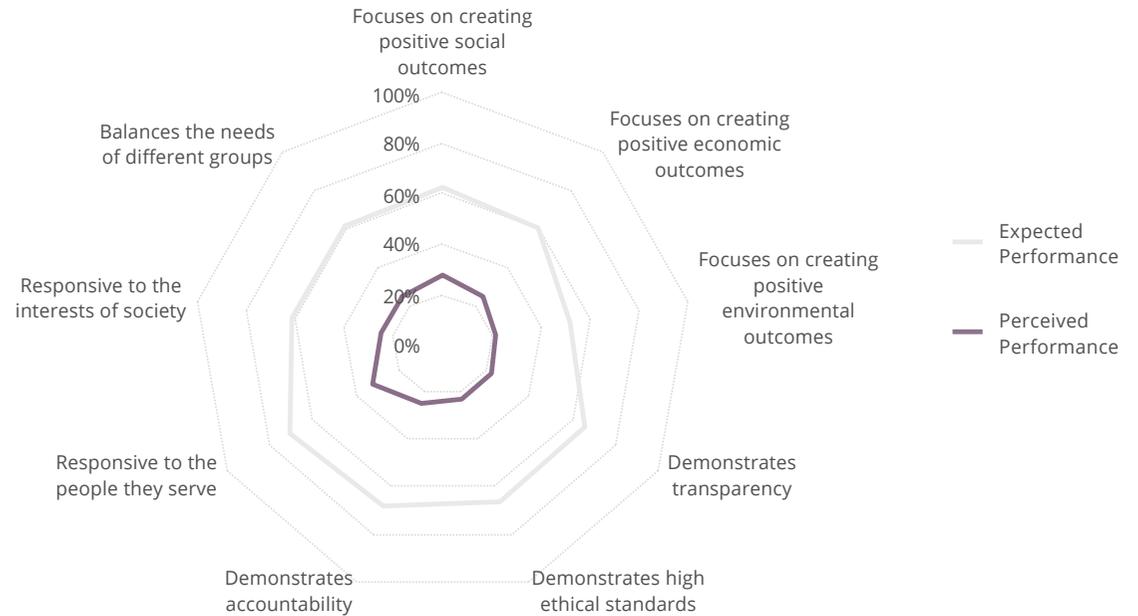


FIGURE 55. EXPECTATIONS AND PERCEPTIONS OF TRADE UNIONS

## PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 56*, the top predictors of public perceptions of leadership for the greater good in trade unions are:

1. focuses on creation of positive economic outcomes;
2. balances the needs of different groups; and
3. demonstrates transparency.

These findings suggest that trade unions can improve public perceptions by focusing more on the creation of economic value, seeking to better balance the needs of different groups of stakeholders, and demonstrating greater transparency.

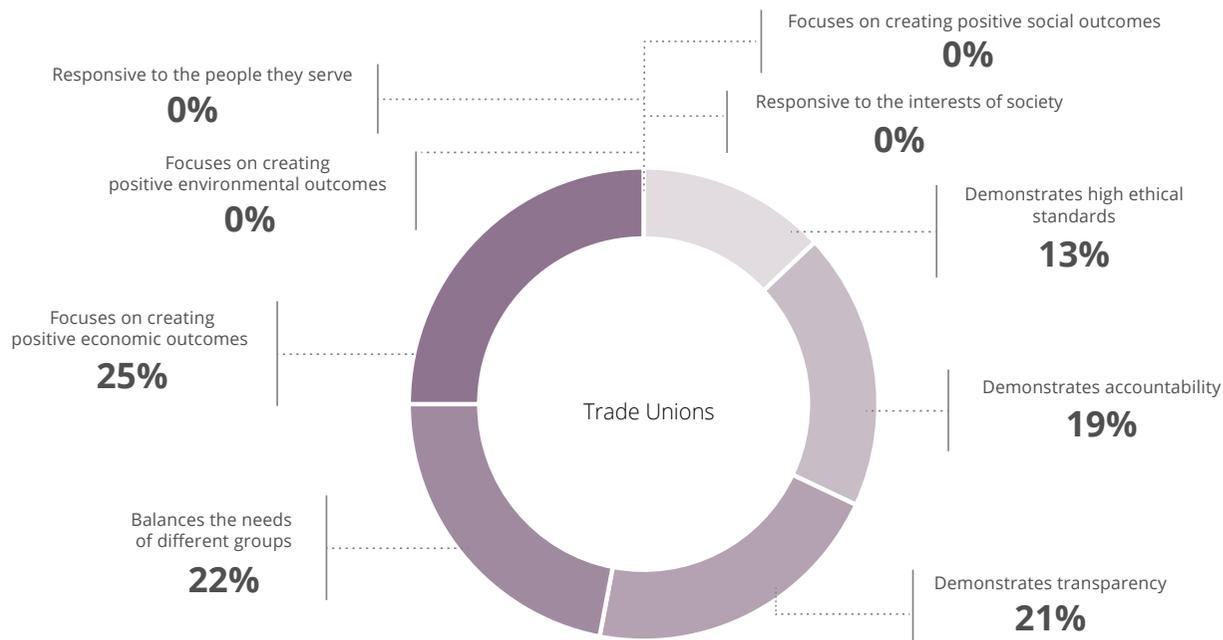


FIGURE 56. PREDICTORS OF PERCEPTIONS OF TRADE UNIONS' LEADERSHIP FOR THE GREATER GOOD

# RELIGIOUS INSTITUTIONS



**SCORE**  
**-25**

## PERCEPTIONS OF LEADERSHIP FOR THE GREATER GOOD

Public perceptions of leadership for the greater good by religious institutions are low. On average, 25% of respondents judged religious institutions to show leadership for the greater good to a 'fairly large extent' or an 'extremely large extent' in 2019 (see Figure 57).

## GAPS BETWEEN EXPECTATIONS AND PERCEPTIONS

The smallest expectation-perception gaps are found for religious institutions' focus on creating positive economic and environmental outcomes (see Figure 58). The largest gaps are found for transparency, accountability and ethicality.

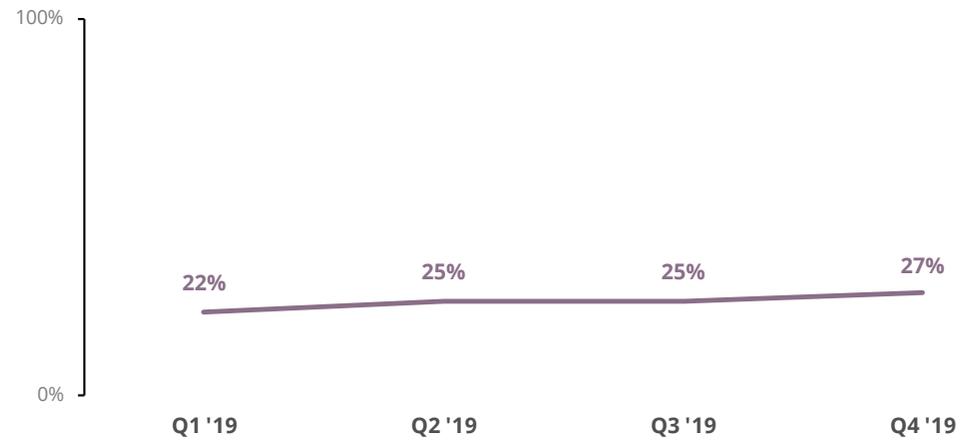


FIGURE 57. PERCEPTIONS OF RELIGIOUS INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD

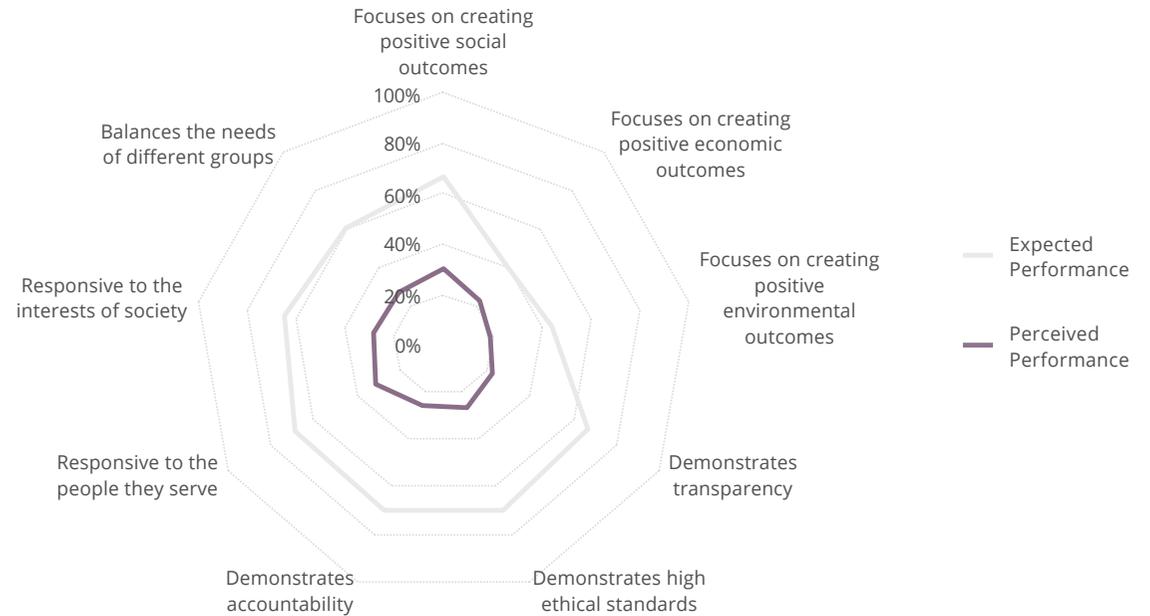


FIGURE 58. EXPECTATIONS AND PERCEPTIONS OF RELIGIOUS INSTITUTIONS

### PREDICTORS OF LEADERSHIP FOR THE GREATER GOOD

As depicted in *Figure 59*, the top predictors of public perceptions of leadership for the greater good in religious institutions are:

1. demonstrates accountability;
2. demonstrates transparency;
3. demonstrates high ethical standards; and
4. responsive to the interests of society.

These findings suggest that religious institutions can improve public perceptions by demonstrating greater accountability, transparency and ethicality, as well as improving their responsiveness to society-at-large.

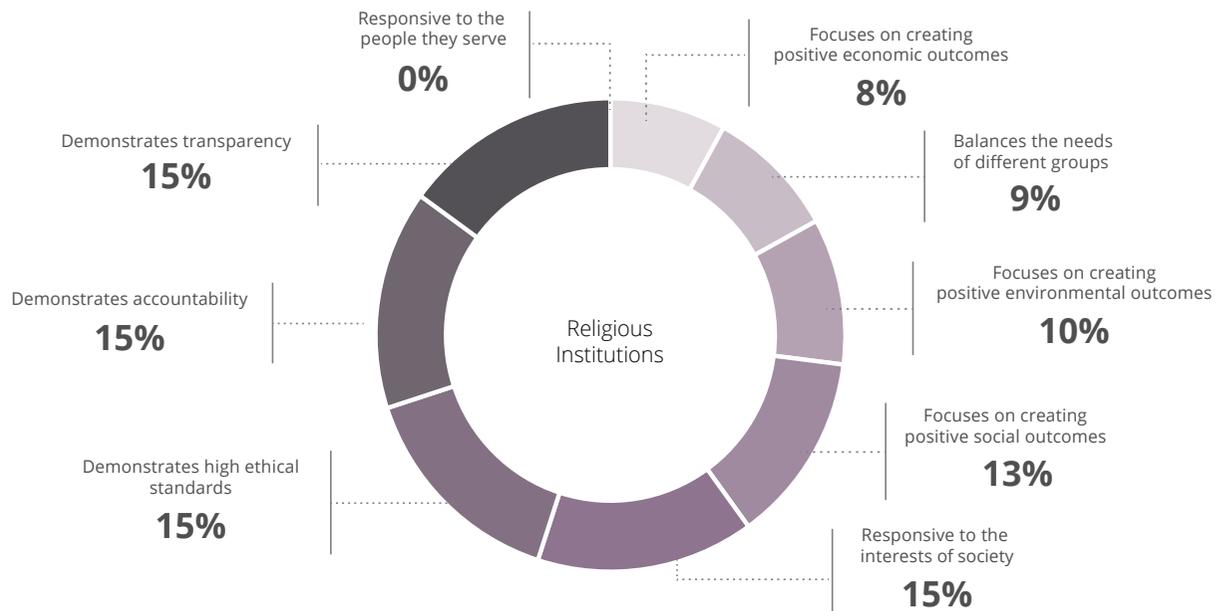


FIGURE 59. PREDICTORS OF PERCEPTIONS OF RELIGIOUS INSTITUTIONS' LEADERSHIP FOR THE GREATER GOOD



**PART 3: WHAT TYPE OF VALUE DO  
INSTITUTIONAL LEADERS CREATE?**

---



**FIGURE 60. PERCEIVED PERFORMANCE-EXPECTED PERFORMANCE MATRIX (TYPE OF VALUE CREATED) \***

\* A five-point scale is used for ratings of perceptions and expectations of the type of value that institutions seek to create, where 1 = 'not at all', 2 = 'to some extent', 3 = 'to a moderate extent', 4 = 'to a fairly large extent' and 5 = 'to an extremely large extent'.

## OVERVIEW

The ALI model of institutional leadership for the greater good delineates three sets of indicators of leadership for the greater good that pertain to the *type* of value that institutional leaders seek to create, *how* institutional leaders create value, and *for whom* institutional leaders create value.

The focus of this sector is on public beliefs about the extent to which institutions appear to, and ought to, focus on the creation of social, environmental, and economic value. To create these insights, the results display the proportion of respondents who answered 'to a fairly large extent' or 'to an extremely large extent' on items pertaining to the types of value that institutional leaders create. This illuminates key aspects of public perceptions and expectations and reveals the strongest and weakest performers on this aspect of leadership for the greater good.

## PERCEIVED VERSUS EXPECTED PERFORMANCE

With the exception of charitable organisations and public education institutions, which nearly meet public expectations regarding their focus on creating economic, social and environmental value, all institutions all across sectors failed to meet public expectations.



## FOCUS ON SOCIAL VALUE CREATION

The not-for-profit sector is regarded as the strongest performer in terms of focus on social value creation and the private sector is seen the weakest performer, although this sector is also associated with the weakest community expectations of social value creation. The government sector is also perceived as a weak performer on this metric and is associated with the biggest gap between perceived and expected focus on the creation of social value.

Charities are regarded as the strongest performer in terms of focus on social value creation, while large national businesses and multinational corporations are seen the weakest performers. However, these businesses, along with small and medium-sized enterprises, also have the lowest public expectations of social value creation. The Federal Government and State Governments are also perceived as weak performers on this metric and are associated with the biggest gap between perceived and expected focus on the creation of social value.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

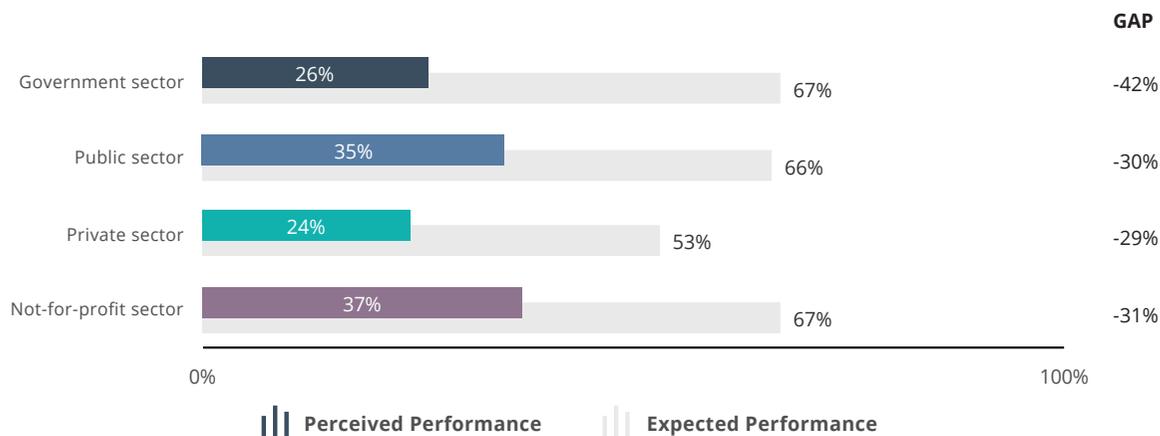


FIGURE 61. FOCUS ON CREATING SOCIAL VALUE (SECTORS)

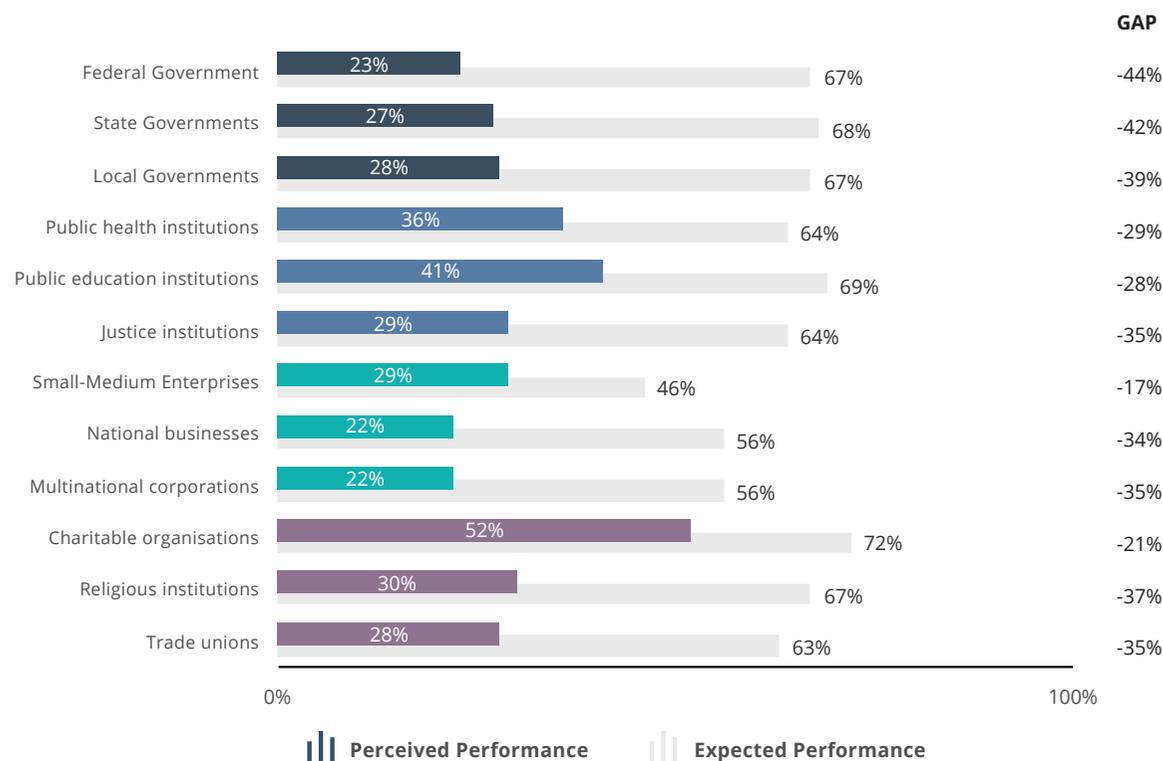
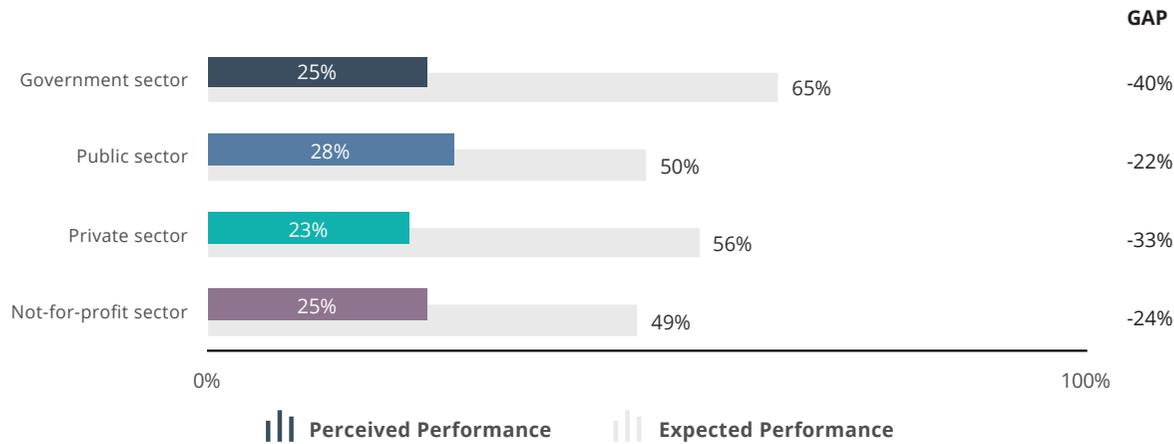


FIGURE 62. FOCUS ON CREATING SOCIAL VALUE (INSTITUTIONS)



### FOCUS ON ENVIRONMENTAL VALUE CREATION

The public sector is regarded as the strongest performer in terms of focus on environmental value creation and is also associated with the smallest gap between public perceptions and expectations, owing to moderate community expectations that the public sector focuses on the creation of environmental value. The government sector is also perceived as a weak performer on this metric and is associated with the biggest gap between perception-expectation gap owing to moderate-high community expectations about the extent to which governments should focus on creating environmental value.

Public education institutions are regarded as the strongest performer in terms of focus on environmental value creation and religious institutions, which are associated with low public expectations about their focus on the creation of positive environmental outcomes, are seen the weakest performers. The Federal Government and State Governments, as well as multinational corporations, are perceived as among the weakest performers on this metric and are associated with the biggest perception-expectation gaps.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

FIGURE 63. FOCUS ON CREATING ENVIRONMENTAL VALUE (SECTORS)

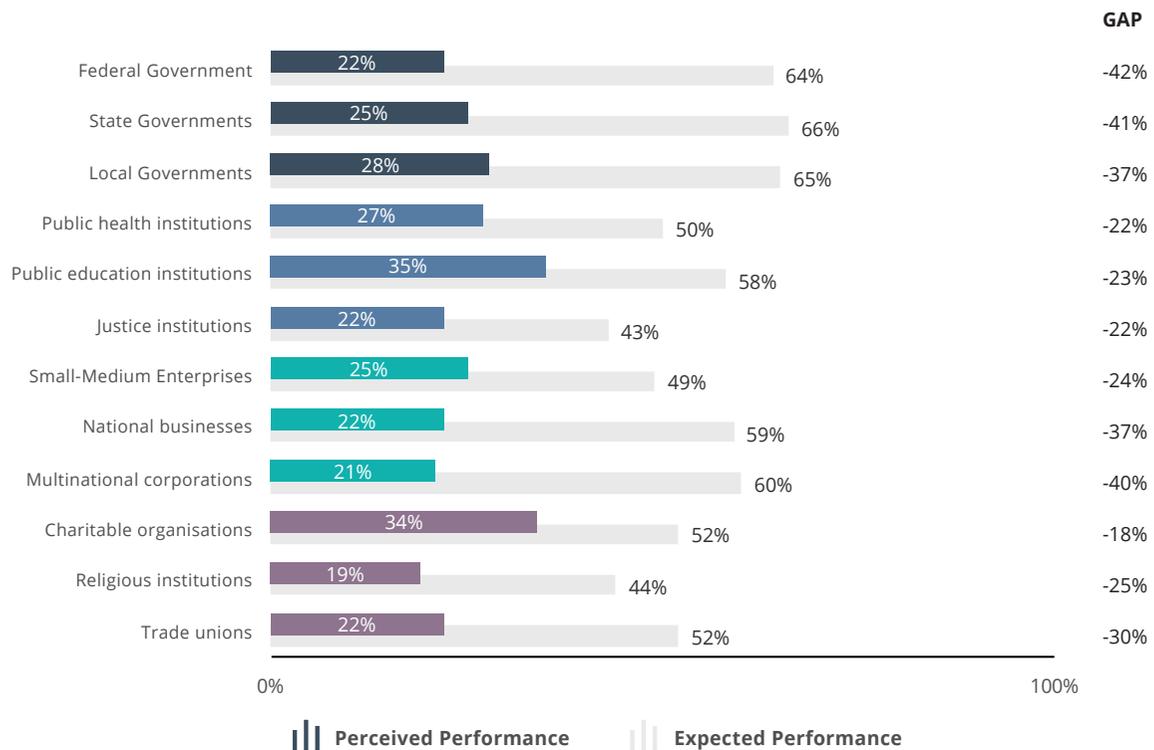


FIGURE 64. FOCUS ON CREATING ENVIRONMENTAL VALUE (INSTITUTIONS)



### FOCUS ON ECONOMIC VALUE CREATION

The private sector is regarded as the strongest performer in terms of focus on economic value creation and the public sector is seen the weakest performer, although this sector is also associated with the weakest community expectations of economic value creation. The government sector is also perceived as a weak performer on this metric and is associated with the biggest gap between perceived and expected focus on the creation of economic value.

Large national businesses are regarded as the strongest performer in terms of focus on economic value creation and religious and justice institutions, which are associated with low expectations of economic value creation, are seen the weakest performers. The Federal Government and State Governments are perceived as a weak-moderate performers on this metric and are associated with the biggest gaps between perceived and expected focus on the creation of economic value.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

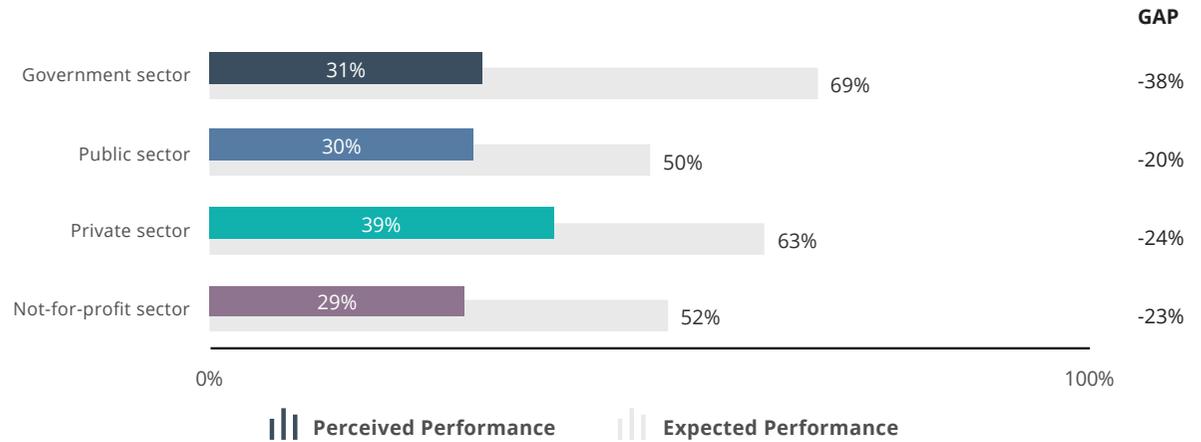


FIGURE 65. FOCUS ON CREATING ECONOMIC VALUE (SECTORS)

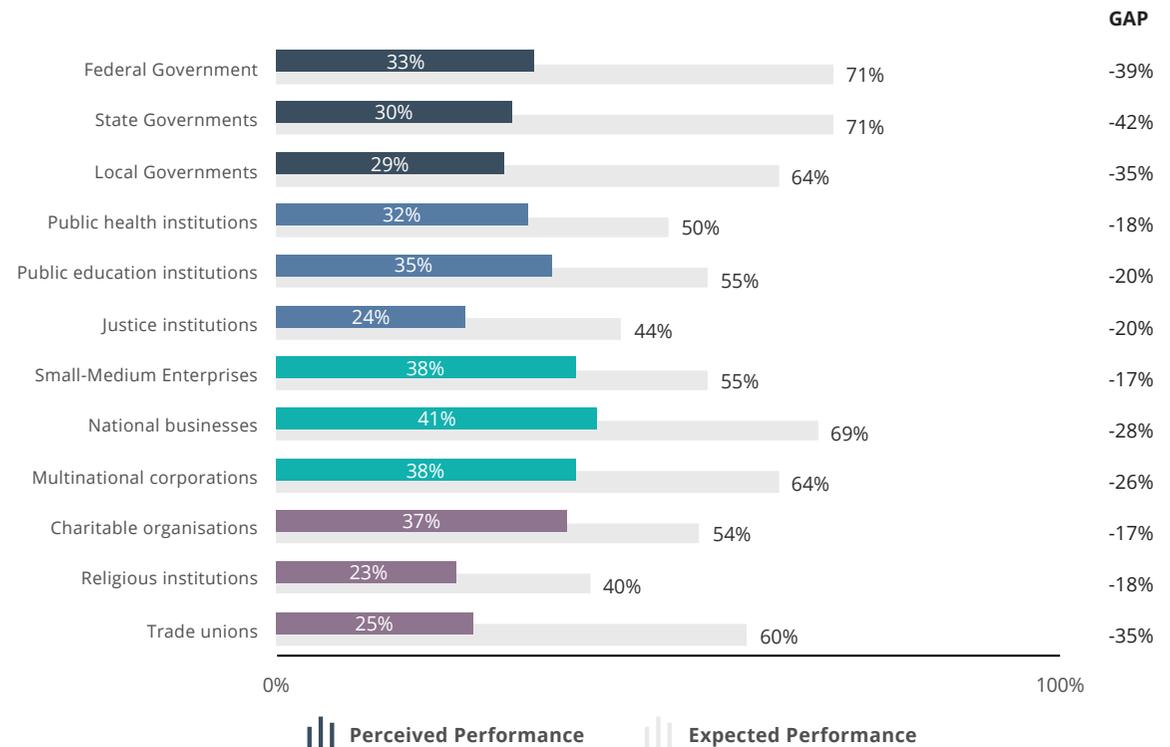


FIGURE 66. FOCUS ON CREATING ECONOMIC VALUE (INSTITUTIONS)



## **PART 4: HOW DO INSTITUTIONAL LEADERS CREATE VALUE?**

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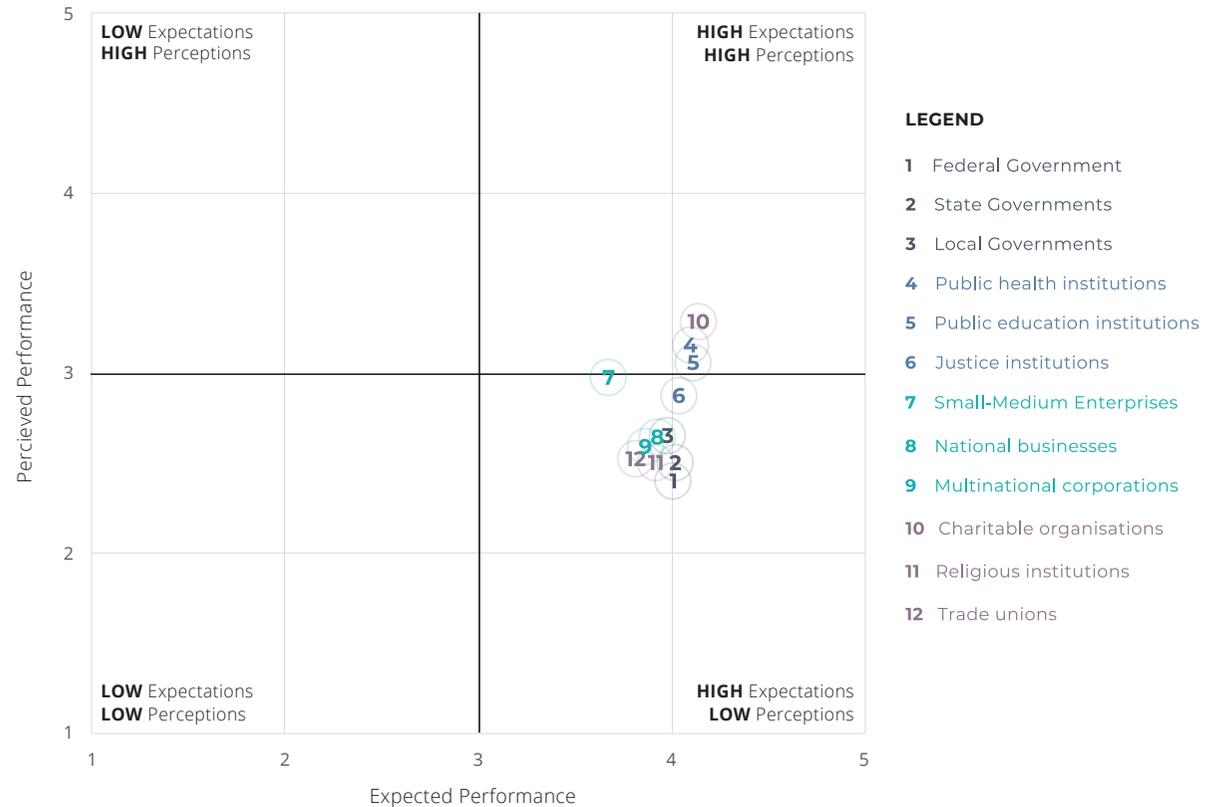
## OVERVIEW

The ALI model of institutional leadership for the greater good delineates three sets of indicators of leadership for the greater good that pertain to the *type* of value that institutional leaders seek to create, *how* institutional leaders create value, and *for whom* institutional leaders create value.

The focus of this section is on public beliefs about the extent to which institutions are, and ought to be, accountable, transparent and ethical in how they create value for the greater good. To create these insights, the results compare the proportion of respondents who answered 'to a fairly large extent' or 'to an extremely large extent' on items about how institutions create value. This illuminates key aspects of public perceptions and expectations and reveals the strongest and weakest performers on this aspect of leadership for the greater good.

## PERCEIVED VERSUS EXPECTED PERFORMANCE

With the exception of charitable organisations and public health and education institutions, which nearly meet public expectations regarding how value is created, all institutions all across sectors failed to meet public expectations in how they create value for the greater good.



**FIGURE 67. PERCEIVED PERFORMANCE-EXPECTED PERFORMANCE MATRIX (HOW VALUE IS CREATED) \***

\* A five-point scale is used for ratings of perceptions and expectations of *how* institutions create value, where 1 = 'not at all', 2 = 'to some extent', 3 = 'to a moderate extent', 4 = 'to a fairly large extent' and 5 = 'to an extremely large extent'.

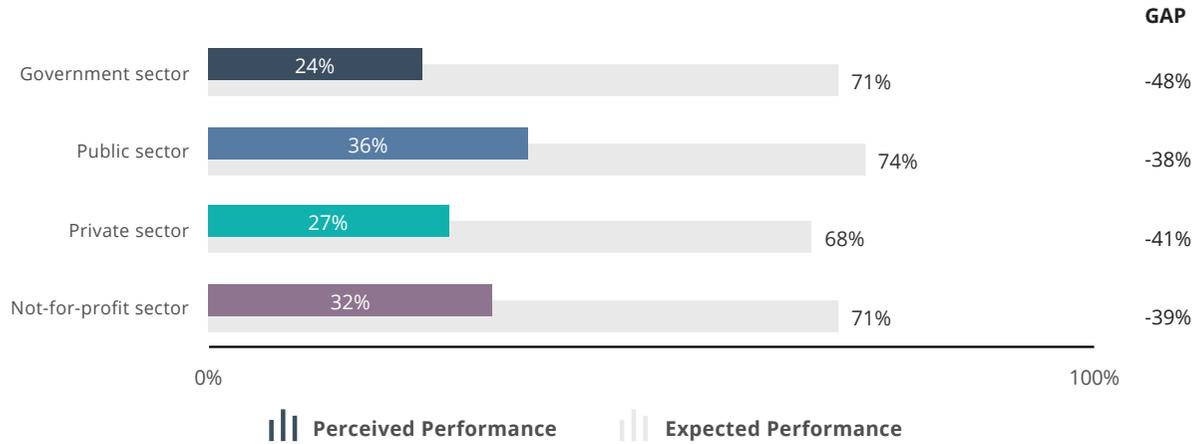


FIGURE 68. ACCOUNTABILITY (SECTORS)

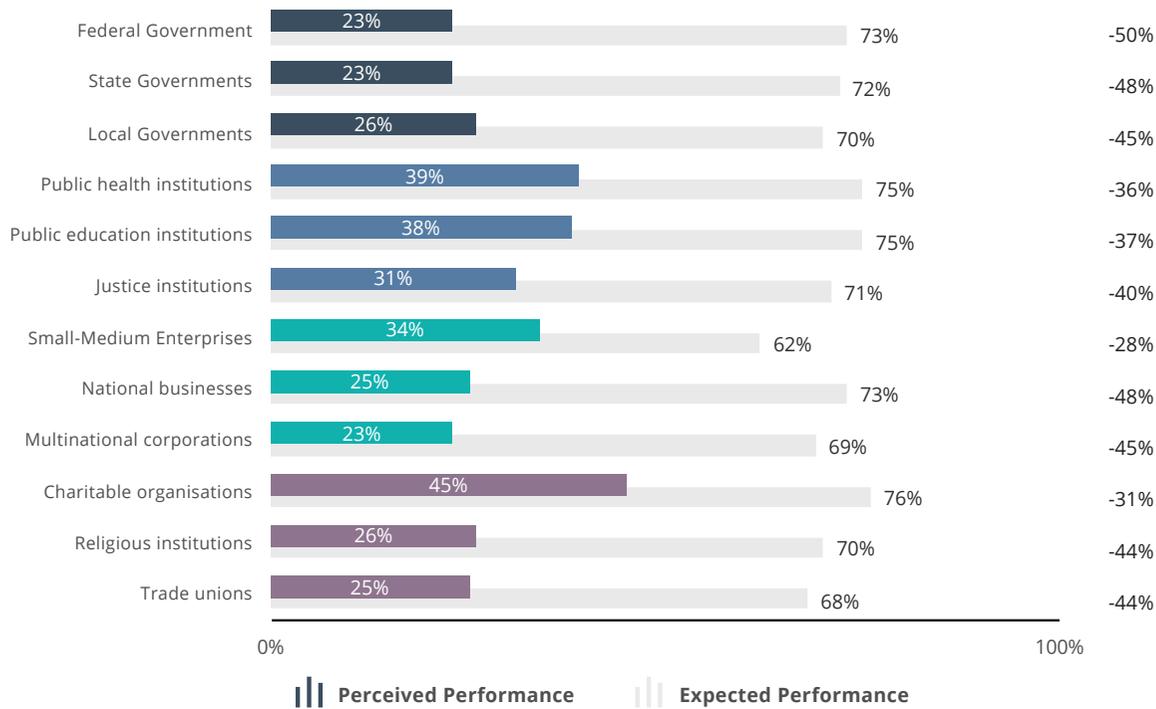


FIGURE 69. ACCOUNTABILITY (INSTITUTIONS)

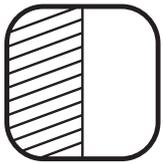


### ACCOUNTABILITY

The public sector is regarded as the strongest performer in terms of accountability, while the government and private sectors are seen the weakest performers. The government sector is associated with the biggest gap between perceived and expected accountability.

Charities are regarded as the strongest performer in terms of accountability, followed by public health and education institutions. The Federal Government and State Governments are perceived as weak performers on this metric and are also associated with the biggest gaps between perceived and expected accountability.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.



## TRANSPARENCY

The public sector is regarded as the strongest performer in terms of transparency, while the government and private sectors are seen the weakest performers. The government sector is associated with the biggest gap between perceived and expected transparency.

Charities are regarded as the strongest performer in terms of transparency, with public health and education institutions the next best performers. A number of institutions are judged as very poor performers on this metric; namely, all government institutions, national and multinational businesses, religious institutions and trade unions. The Federal Government and State Governments have the biggest perception-expectation gaps for transparency.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

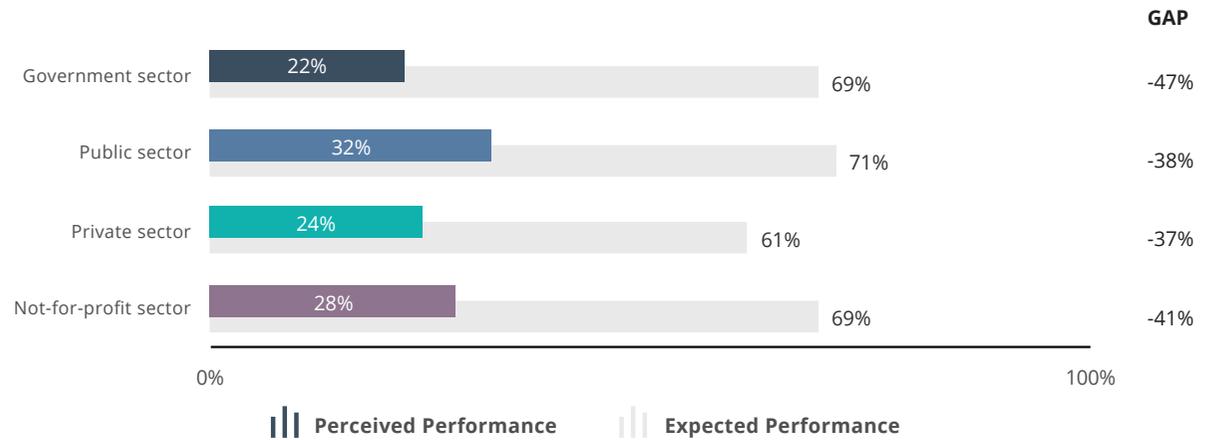


FIGURE 70. TRANSPARENCY (SECTORS)

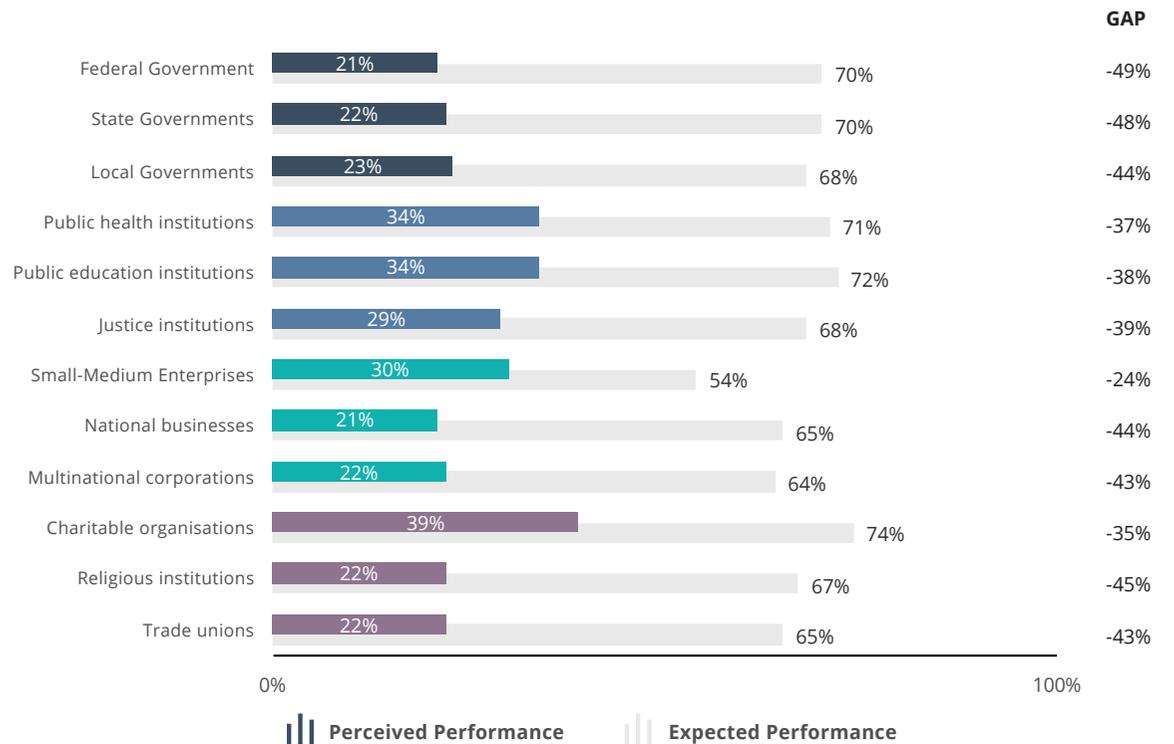


FIGURE 71. TRANSPARENCY (INSTITUTIONS)

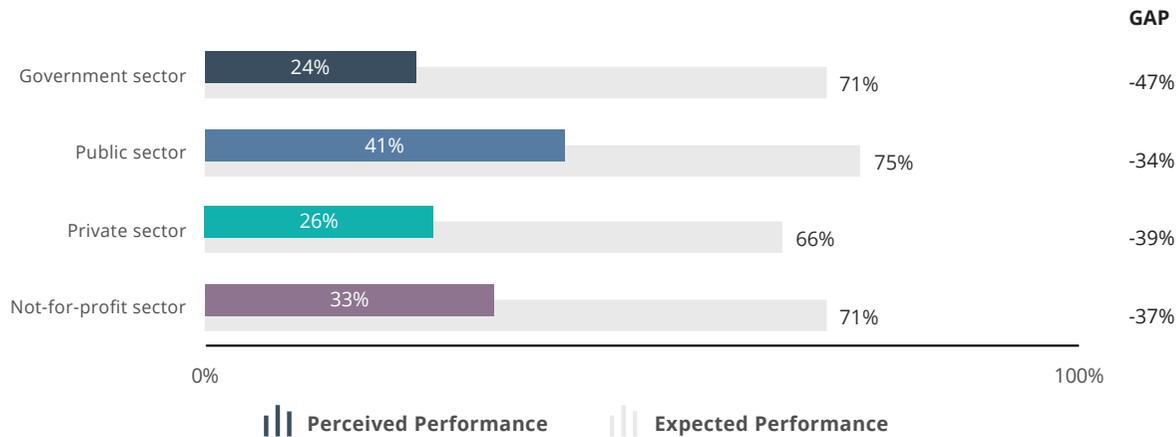


FIGURE 72. ETHICALITY (SECTORS)

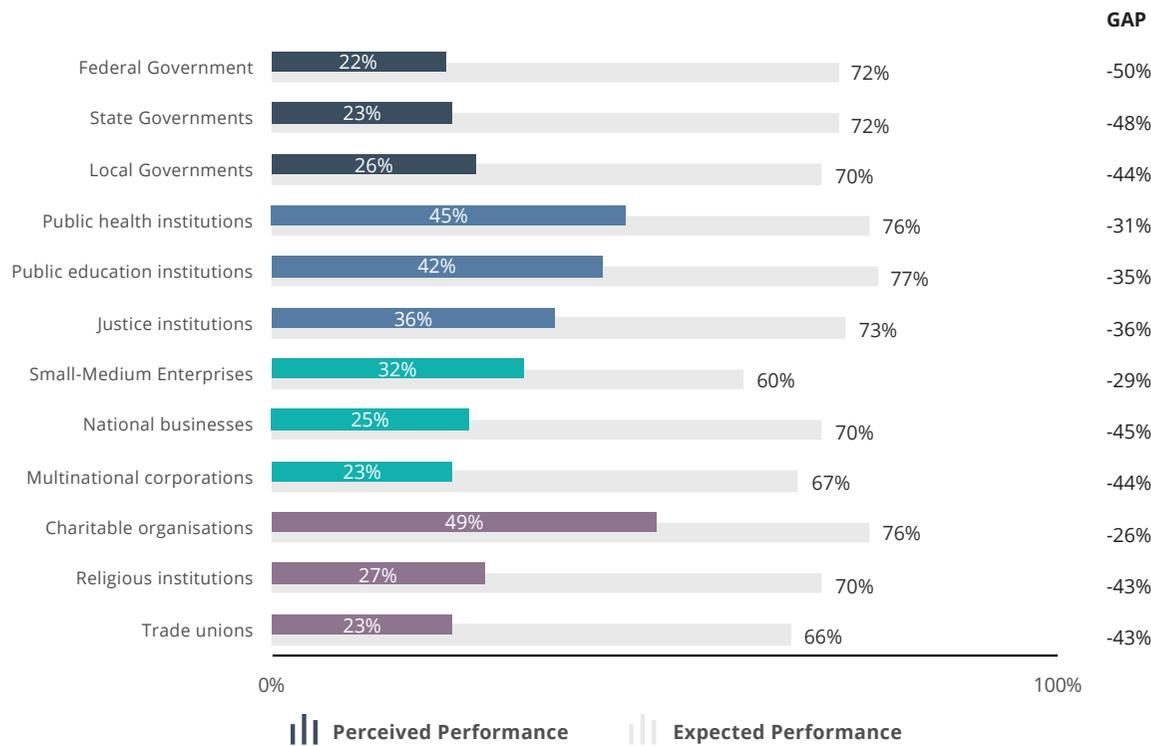


FIGURE 73. ETHICALITY (INSTITUTIONS)



### ETHICALITY

The public sector is regarded as the strongest performer in terms of ethicality, while the government and private sectors are seen the weakest performers. Once again, the government sector is associated with the biggest gap between perceived and expected ethicality.

Charities are regarded as the strongest performer in terms of ethicality, followed by public health and education institutions. As above, a number of institutions were judged as very poor performers on this metric, especially the Federal Government and State Governments, multinational corporations, and trade unions. Once again, Federal and State Governments have the biggest discrepancies between public perceptions and community standards of ethicality.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.



**OPEN**

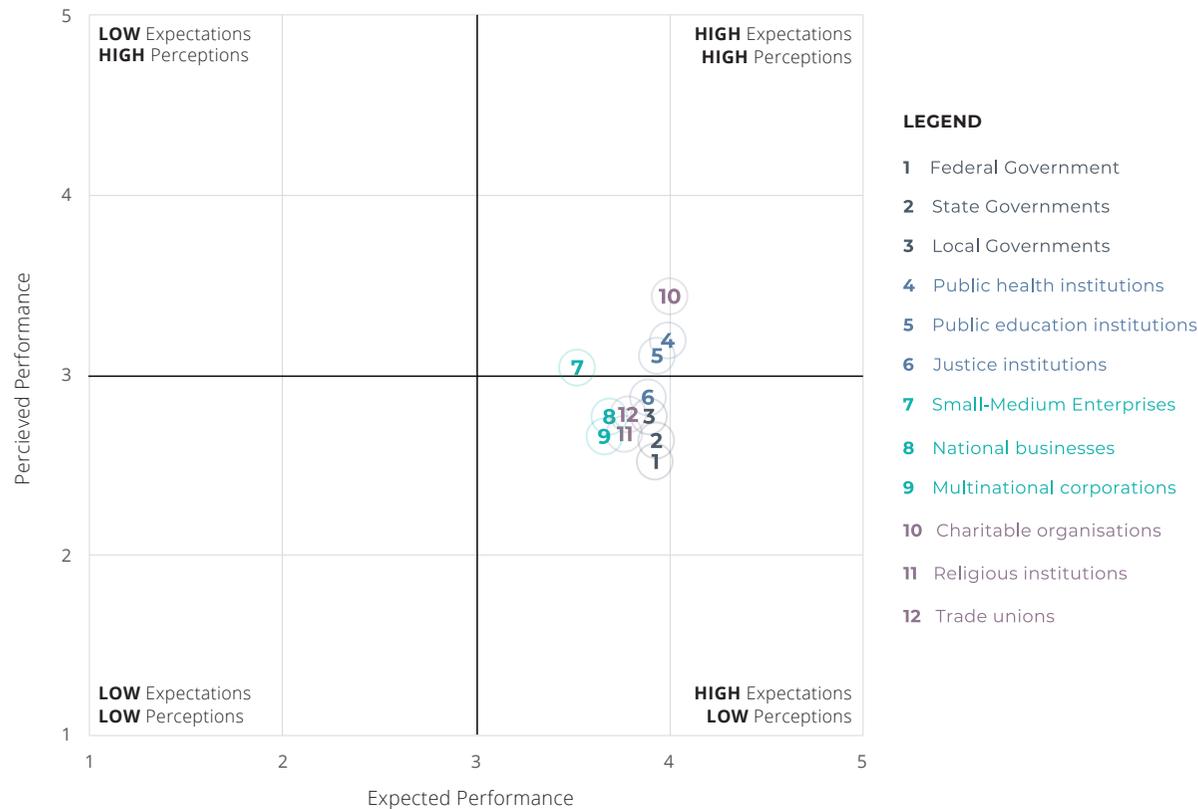
OPENING HOURS

MON-FRI am-3pm

SAT-SU 8am-4pm

**PART 5. FOR WHOM DO INSTITUTIONAL LEADERS CREATE VALUE?**

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**FIGURE 74. PERCEIVED PERFORMANCE-EXPECTED PERFORMANCE MATRIX (FOR WHOM VALUE IS CREATED) \***

\* A five-point scale is used for all ratings of perceptions and expectations of the stakeholders for whom institutions create value, where 1 = 'not at all', 2 = 'to some extent', 3 = 'to a moderate extent', 4 = 'to a fairly large extent' and 5 = 'to an extremely large extent'.

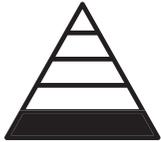
## OVERVIEW

The ALI model of institutional leadership for the greater good delineates three sets of indicators of leadership for the greater good that pertain to the *type* of value that institutional leaders seek to create, *how* institutional leaders create value, and *for whom* institutional leaders create value.

The focus of this chapter is on public beliefs about the extent to which institutions are, and ought to be, responsive to the needs and interests of the people they serve, responsive to the interests of society, and the extent to which they balance the needs of different groups. To create these insights, the results compare the proportion of respondents who answered 'to a fairly large extent' or 'to an extremely large extent' on items about the stakeholders for whom institutions create value. This illuminates key aspects of public perceptions and expectations and reveals the strongest and weakest performers on this aspect of leadership for the greater good.

## PERCEIVED VERSUS EXPECTED PERFORMANCE

With the exception of charities, public health and education institutions and small and medium-sized enterprises, which nearly meet public expectations regarding the stakeholders for whom they create value, all institutions all across sectors failed to meet public expectations.



## RESPONSIVE TO THE PEOPLE THEY SERVE

The public sector and the not-for-profit sector are regarded as the strongest performers in terms of responsiveness to the people they serve, with the government regarded as the least responsive to the people they serve. Consistent with this, the government sector is associated with the biggest gap between perceived and expected responsiveness.

Charities are regarded as the strongest performer in terms of responsiveness to the people they serve by some margin, followed by public health and education institutions. The Federal Government and State Governments are seen as the least responsive and, consistent with this, have the biggest perception-expectation gaps for this metric.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

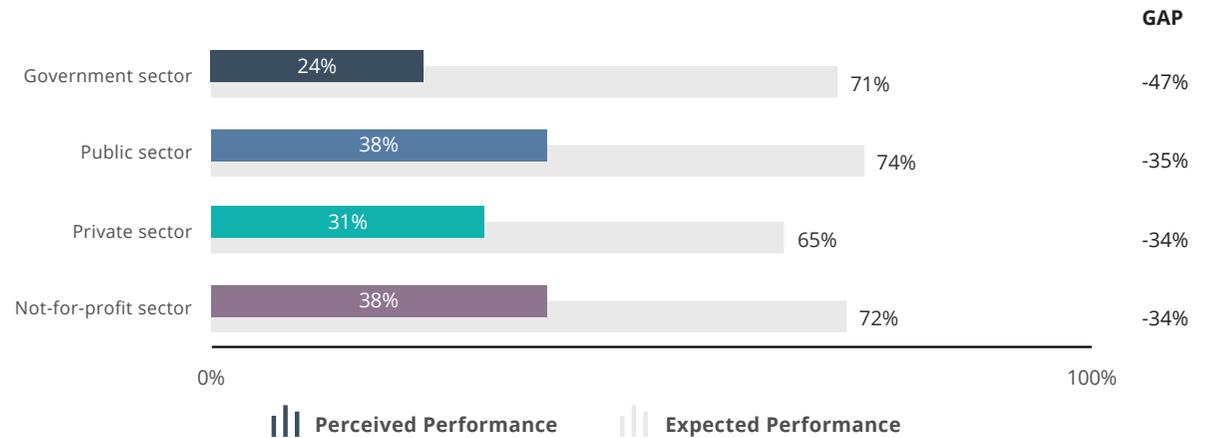


FIGURE 75. RESPONSIVE TO THE PEOPLE THEY SERVE (SECTORS)

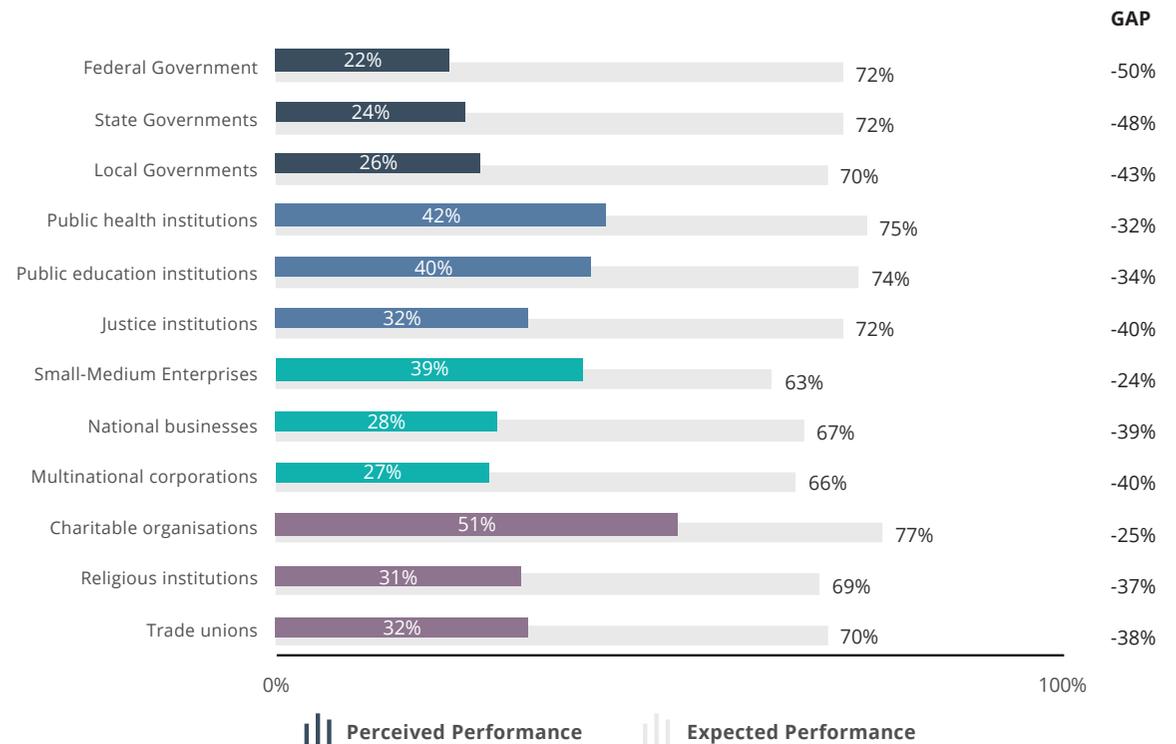
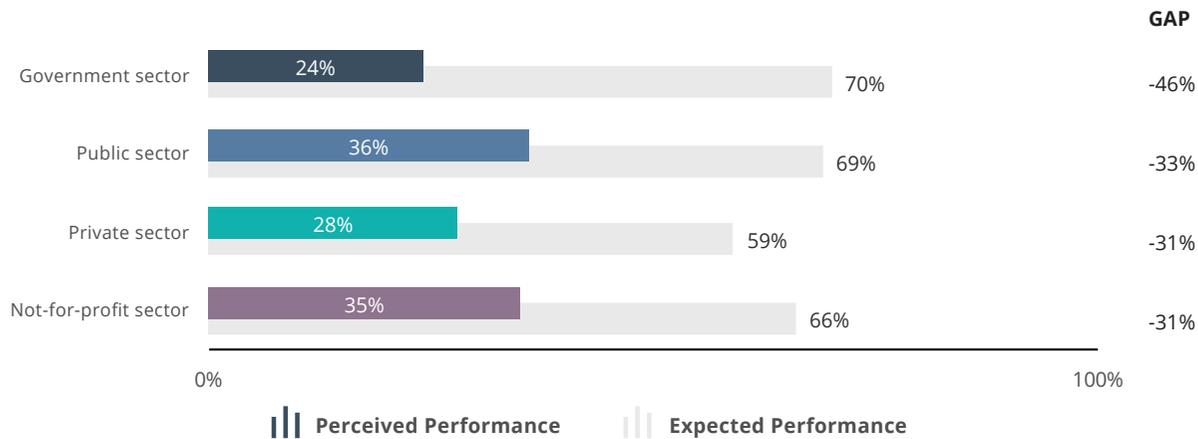


FIGURE 76. RESPONSIVE TO THE PEOPLE THEY SERVE (INSTITUTIONS)



### RESPONSIVE TO THE INTERESTS OF SOCIETY

The public sector and the not-for-profit sector are regarded as the strongest performers in terms of responsiveness to the interests of society, with the government regarded as the least responsive to society. Consistent with this, the government sector is associated with the biggest gap between perceived and expected responsiveness to society.

Charities are regarded as the strongest performer in terms of responsiveness to the interests of society, followed by public health institutions. The Federal Government and State Governments are seen as the least responsive to society. The combination of low perceptions and high expectations means these institutions also have the largest perception-expectation gaps for responsiveness to society.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

FIGURE 77. RESPONSIVENESS TO SOCIETY (SECTORS)

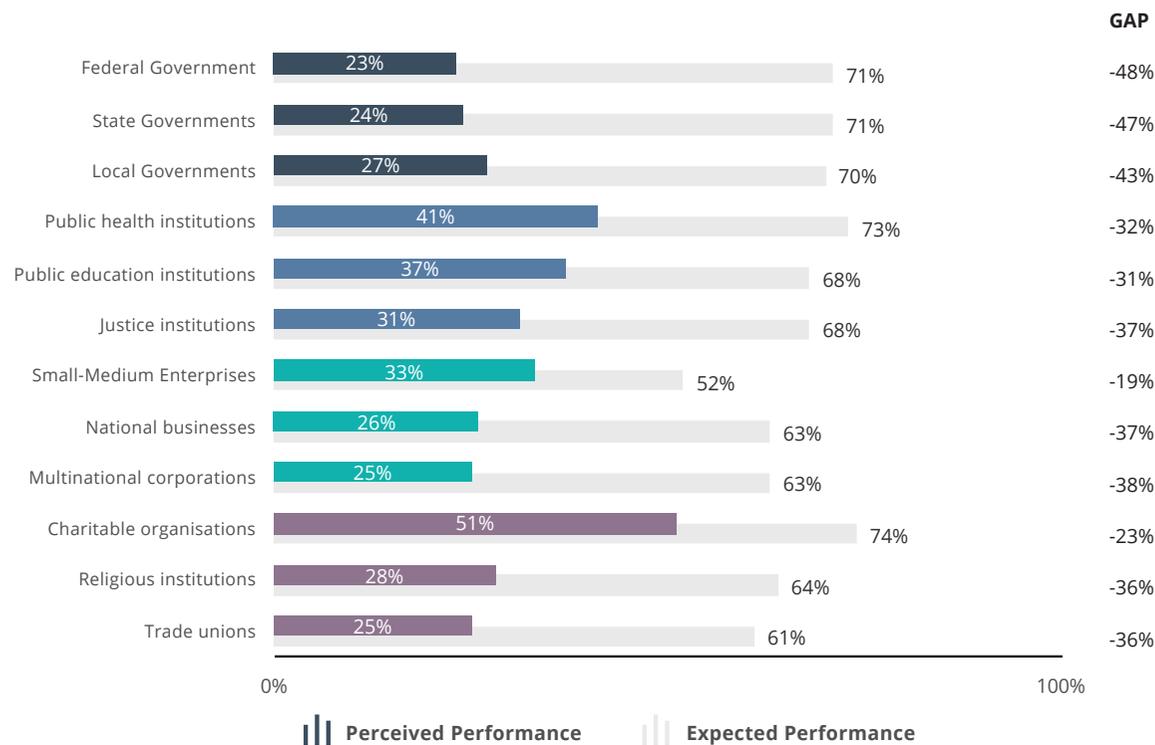
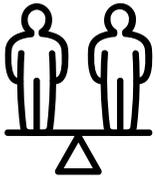


FIGURE 78. RESPONSIVENESS TO SOCIETY (INSTITUTIONS)



### BALANCES THE INTERESTS OF DIFFERENT GROUPS

The public sector and the not-for-profit sector are regarded as the strongest performers in terms of the extent to which they balance the interests of different groups of stakeholders. The government is regarded as the worst performer and, consistent with this, has the biggest gap between perceptions and expectations on this metric.

Charities are regarded as the strongest performer in terms of balancing the interests of different groups of stakeholders, followed by public education and health institutions. The Federal Government and State Governments are seen as the worst performers and have the largest perception-expectation gaps for this metric.

Note. Due to rounding, the reported gap between perceptions and expectations is not always identical to the difference between reported perceptions and expectations.

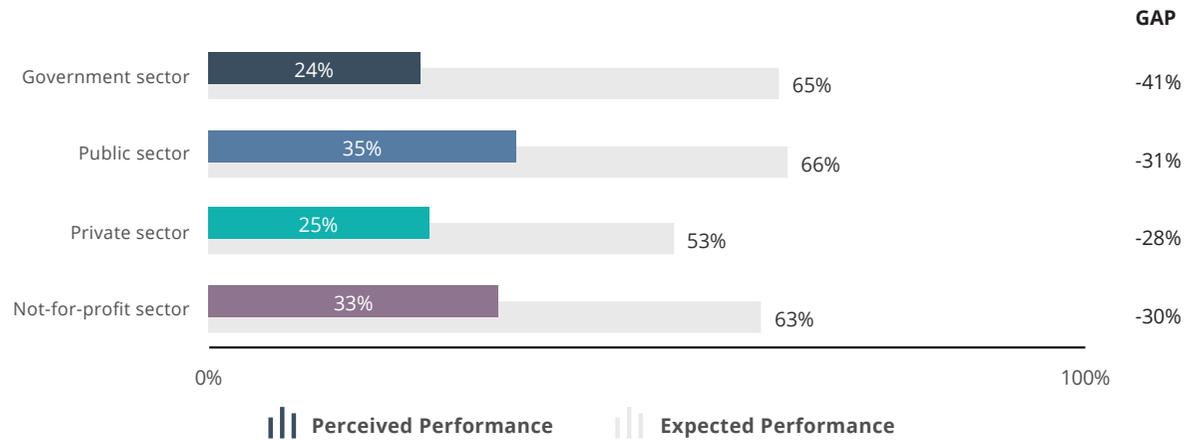


FIGURE 79. BALANCES DIFFERENT INTERESTS (SECTORS)

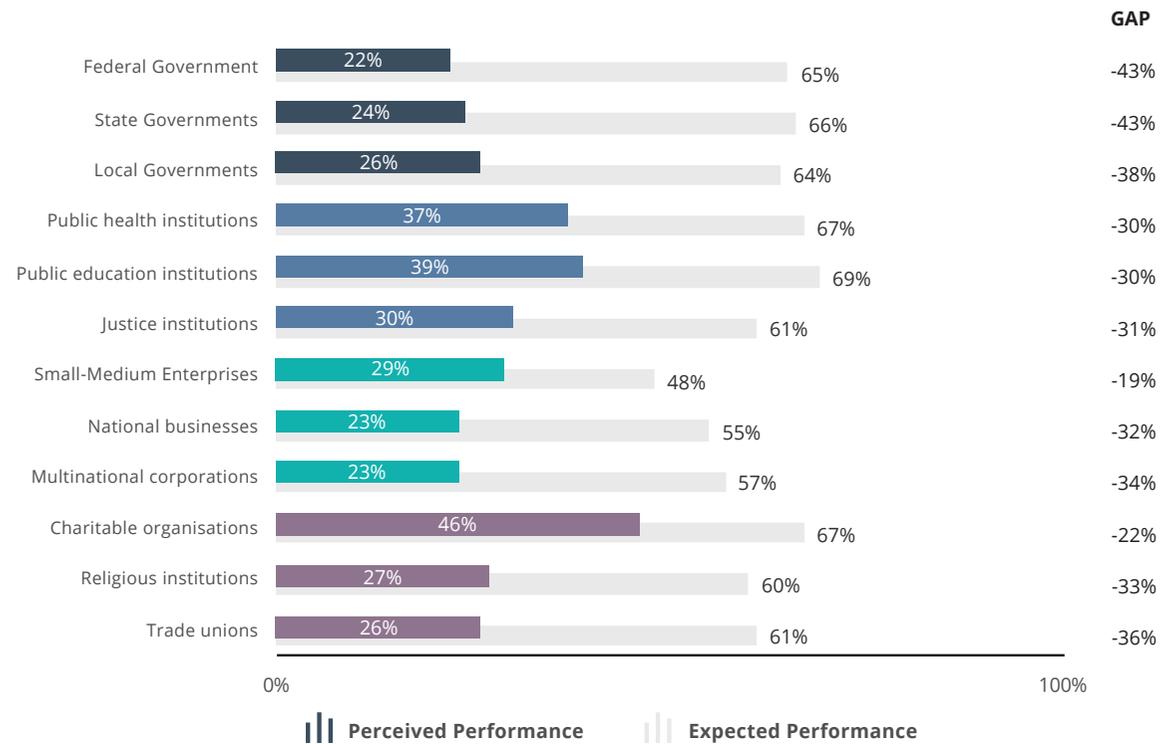


FIGURE 80. BALANCES DIFFERENT INTERESTS (INSTITUTIONS)





# SECTION 4

## DEMOGRAPHICS

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## SECTION 4. DEMOGRAPHICS

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Section 4 of this report compares the perceptions and expectations of the Australian public regarding leadership for the greater good across key demographic groups. Results are presented across gender, knowledge of rated sectors, income, country of birth, voting preference, and age.

## GENDER

The general patterns present throughout the ALI are present and consistent between genders. However, there are some small differences. Notably, men rate public health and all government institutions more favourably than women. However, women perceive SMEs and trade unions more favourably than men. Men and women both agree that charitable organisations demonstrate the highest degree of leadership for the greater good.

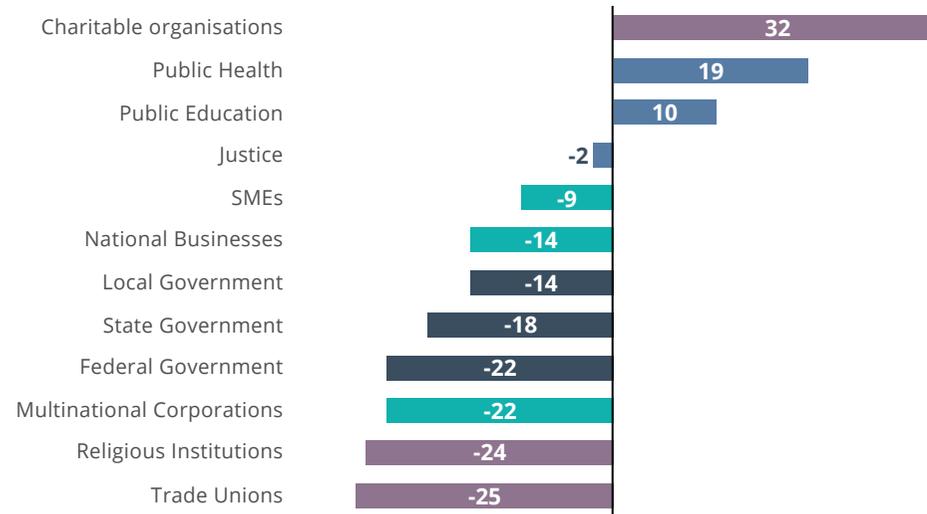


FIGURE 81. ALI BY INSTITUTION, MALE

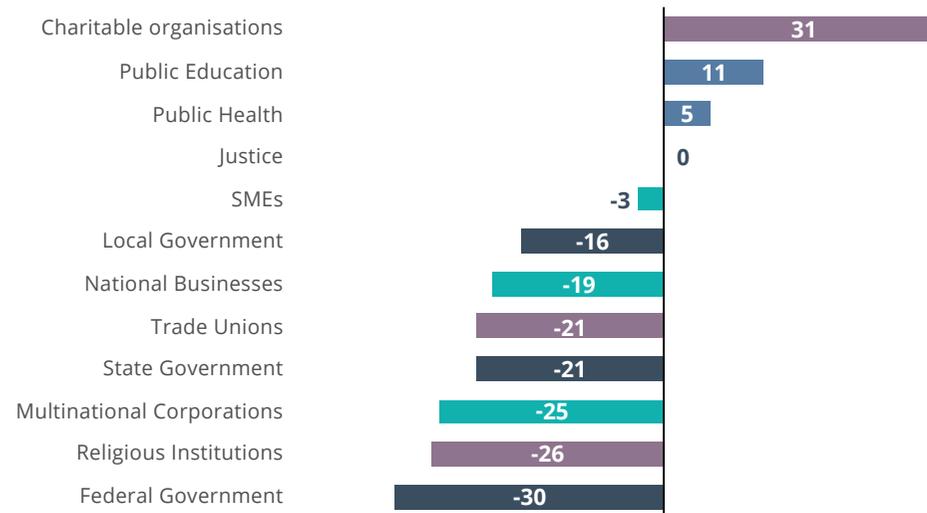


FIGURE 82. ALI BY INSTITUTION, FEMALE

## KNOWLEDGE OF THE SECTOR

Respondents were asked how knowledgeable they are about the institutions they assessed. Answers included *not at all knowledgeable*, *slightly knowledgeable*, *moderately knowledgeable*, *highly knowledgeable*, and *extremely knowledgeable*.

A consistent pattern was observed across all institutions and sectors; namely, the more knowledgeable someone is of a given institution, the more favourable their rating of that institution's leadership for the greater good.

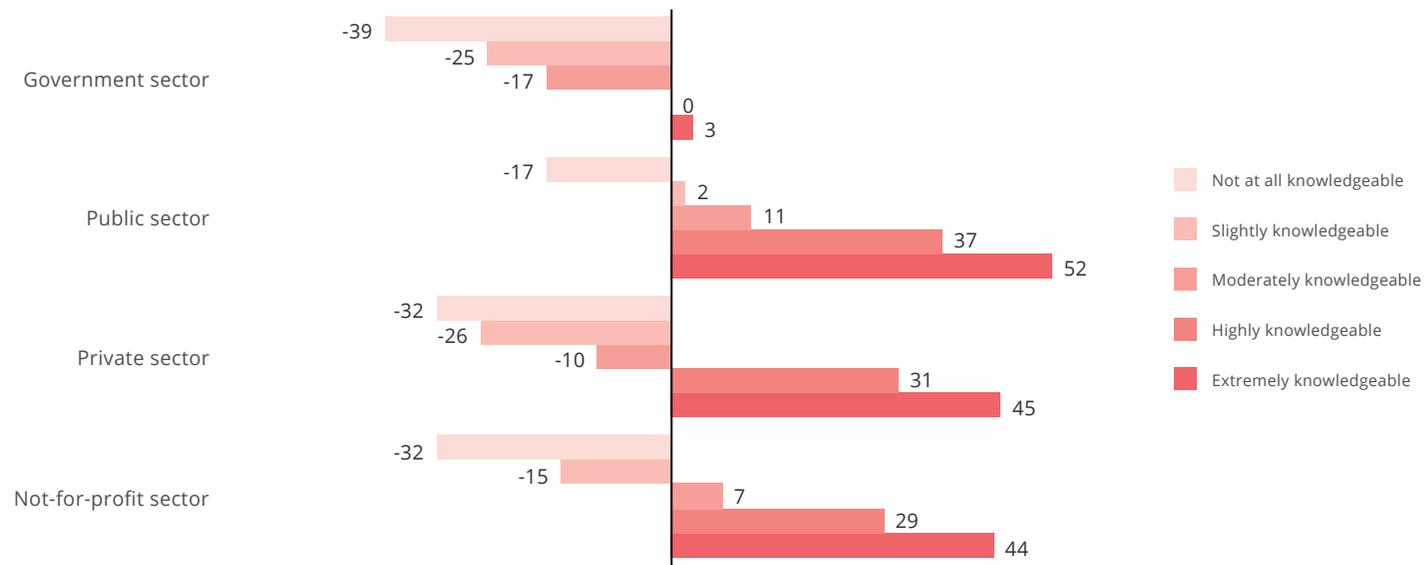


FIGURE 83. ALI BY SECTOR, DIFFERENCES BY KNOWLEDGE OF THE SECTOR

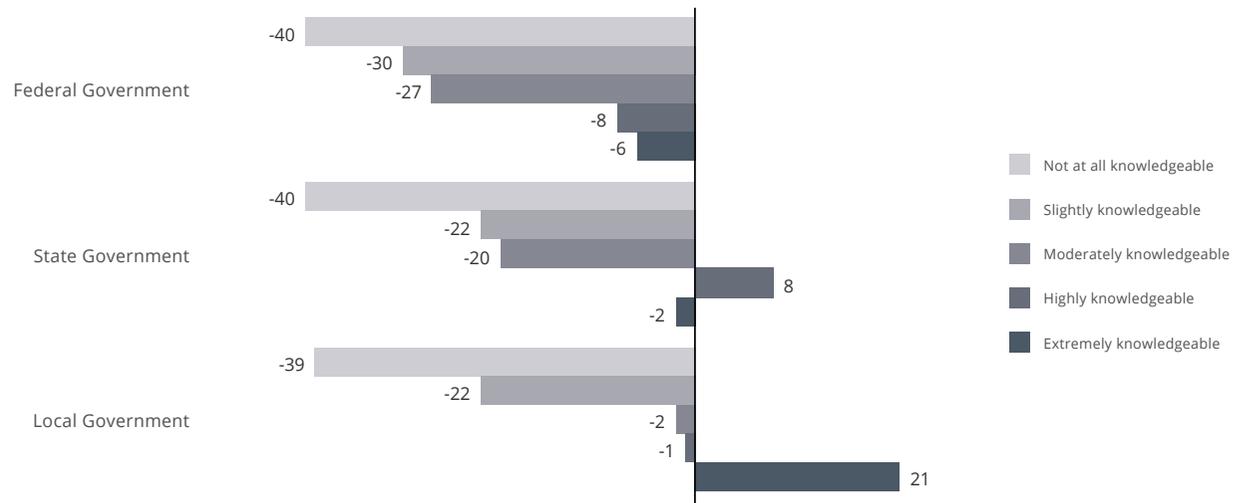


FIGURE 84. ALI BY INSTITUTION (GOVERNMENT SECTOR), DIFFERENCES BY KNOWLEDGE OF THE SECTOR

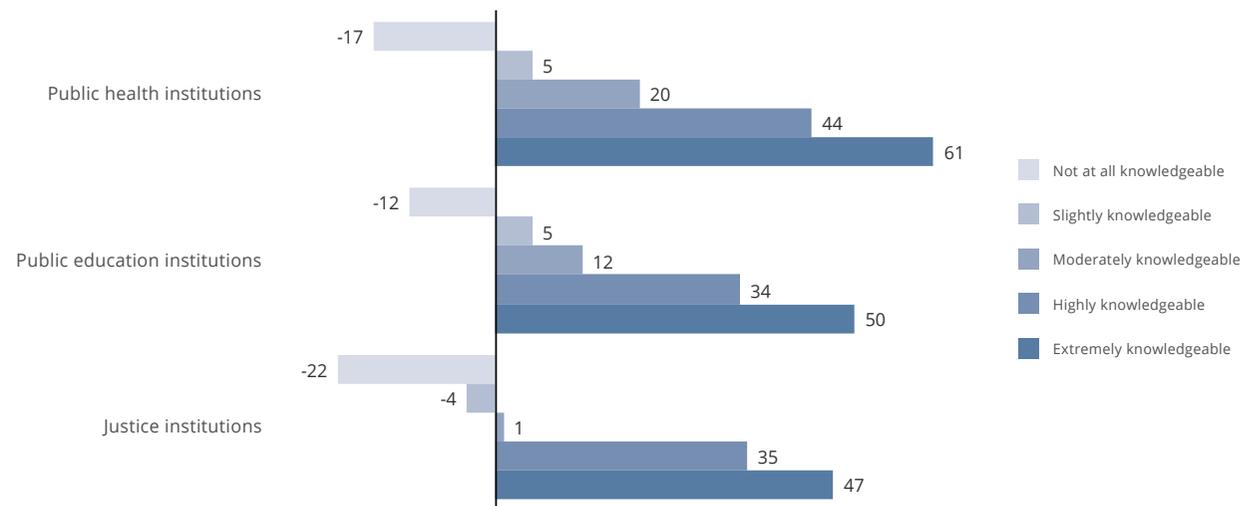


FIGURE 85. ALI BY INSTITUTION (PUBLIC SECTOR), DIFFERENCES BY KNOWLEDGE OF THE SECTOR

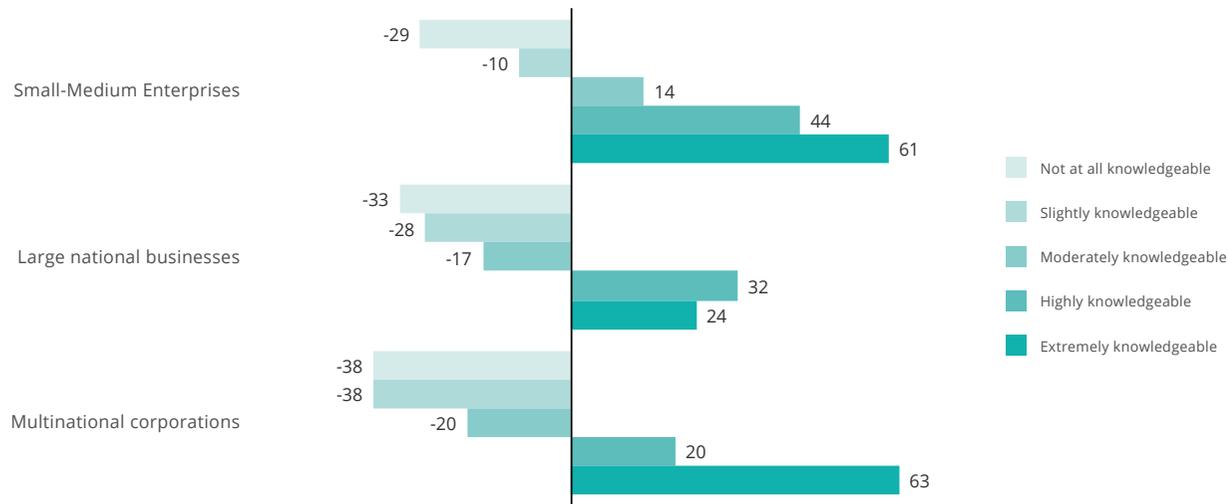


FIGURE 86. ALI BY INSTITUTION (PRIVATE SECTOR), DIFFERENCES BY KNOWLEDGE OF THE SECTOR

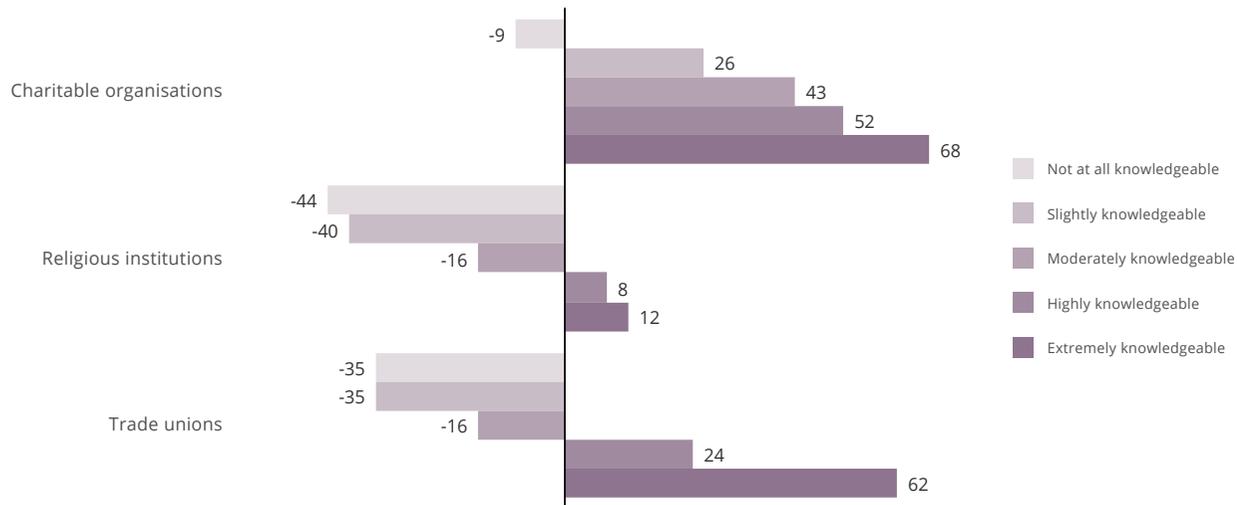


FIGURE 87. ALI BY INSTITUTION (NOT-FOR-PROFIT SECTOR), DIFFERENCES BY KNOWLEDGE OF THE SECTOR

## INCOME

In general, those earning less than \$18,200 p.a. are least likely to rate institutions as demonstrating leadership for the greater good, whereas those earning over \$180,000 p.a. rated institutions most favourably. The largest discrepancy between income levels was found when assessing the government.

Across all income groups, charities are rated most favourably. Numerous institutions are perceived negatively by all income groups, including national businesses, multinational businesses, religious institutions, trade unions, and all government institutions. The largest point of difference exists for the institutions of the justice system; those earning less than \$18,201 rated these institutions negatively while those earning over \$180,000 perceive them positively.

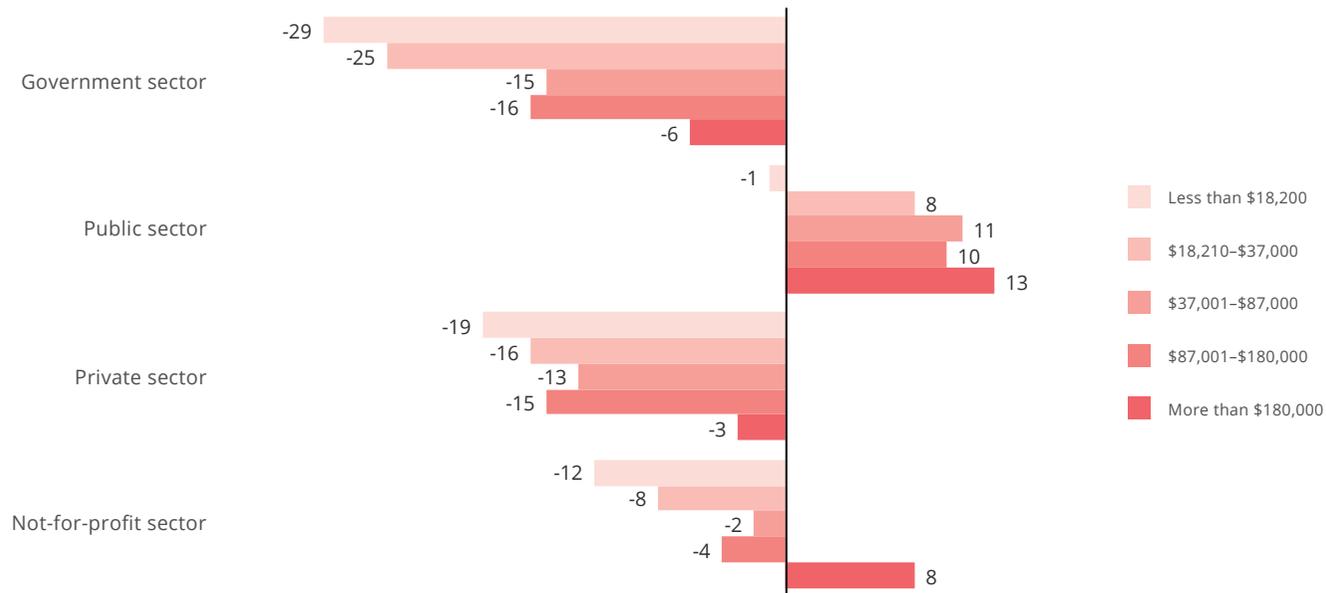


FIGURE 88. ALI BY SECTOR, DIFFERENCES BY INCOME

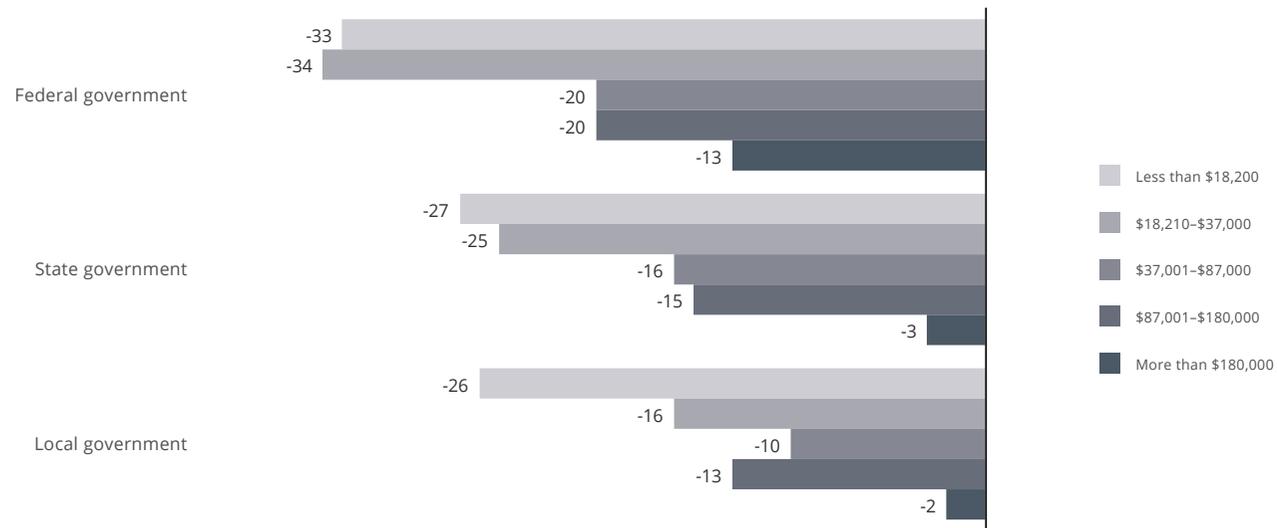


FIGURE 89. ALI BY INSTITUTION (GOVERNMENT SECTOR), DIFFERENCES BY INCOME

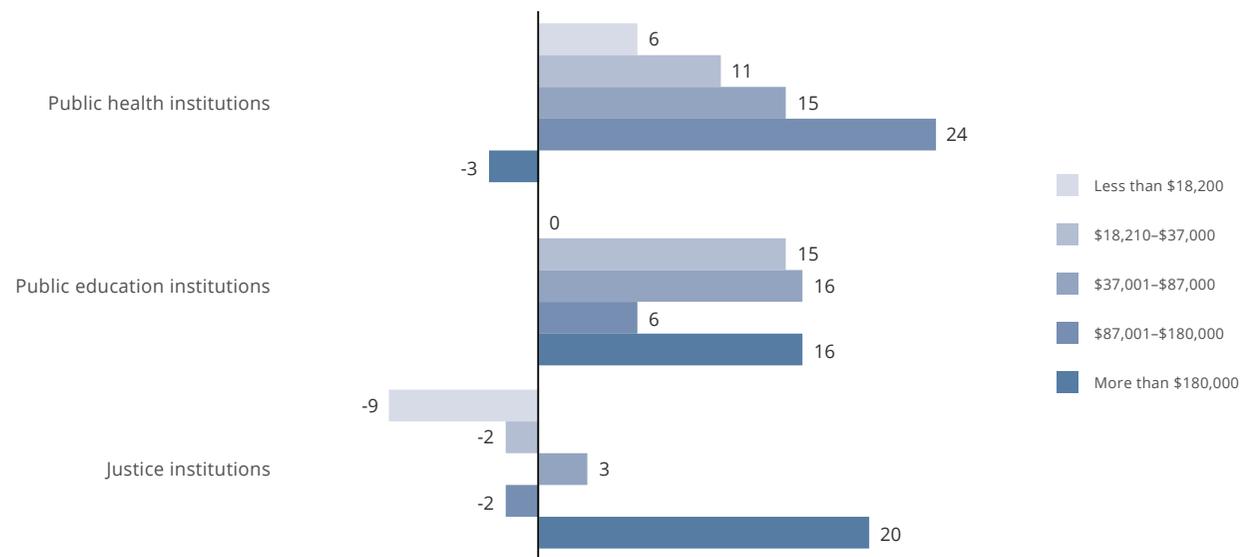


FIGURE 90. ALI BY INSTITUTION (PUBLIC SECTOR), DIFFERENCES BY INCOME

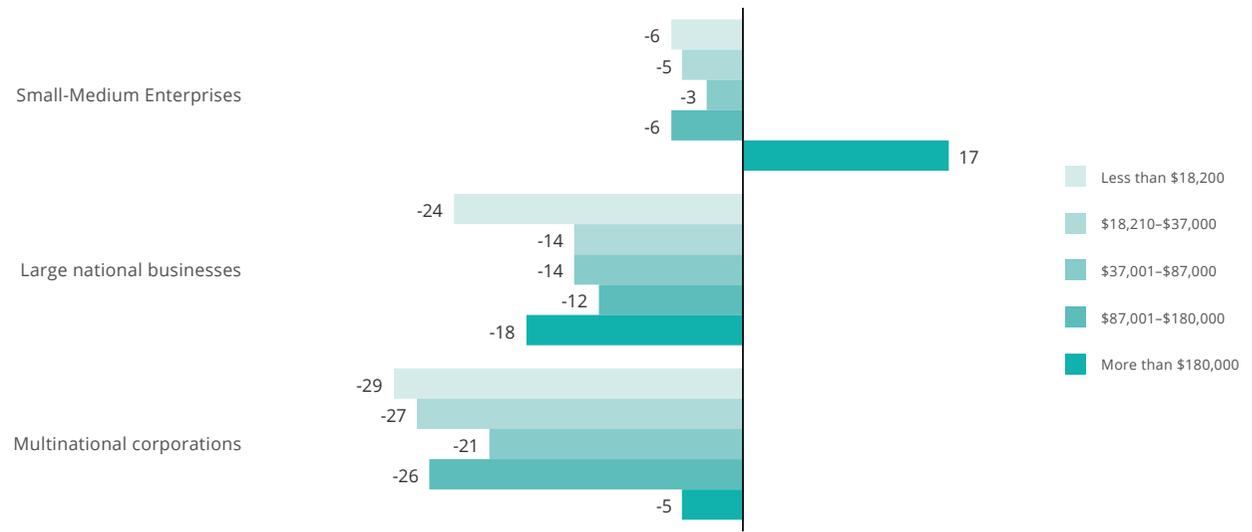


FIGURE 91. ALI BY INSTITUTION (PRIVATE SECTOR), DIFFERENCES BY INCOME

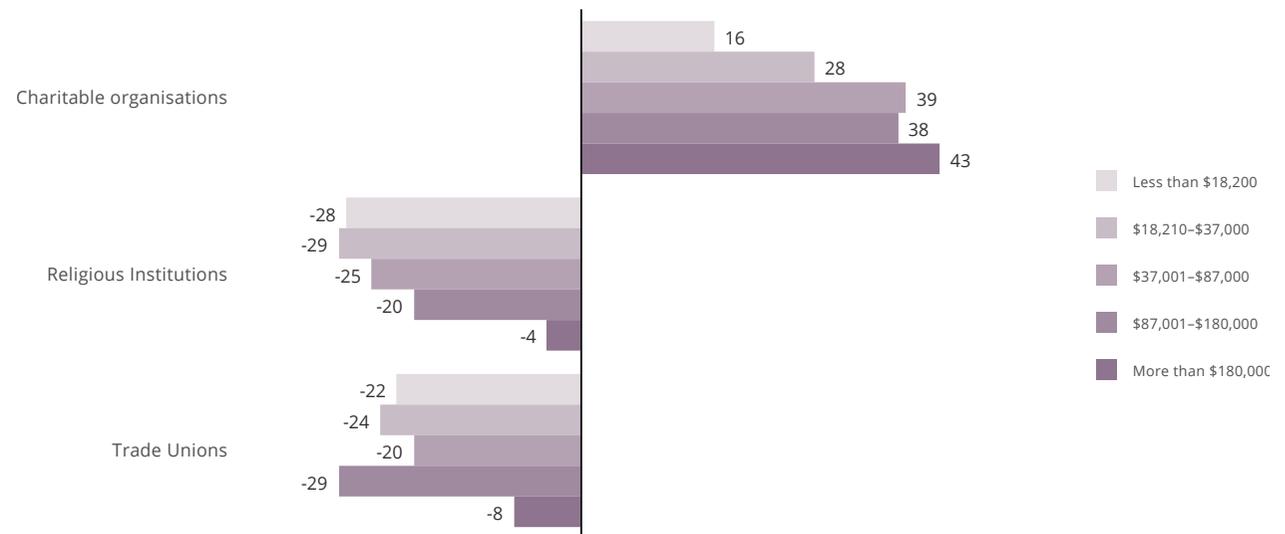


FIGURE 92. ALI BY INSTITUTION (NOT-FOR-PROFIT SECTOR), DIFFERENCES BY INCOME

## COUNTRY OF BIRTH

Perceptions of leadership for the greater good differ by a respondent's country of birth. Respondents who were born overseas in English-speaking countries rate institutions most negatively, whereas respondents born in non-English-speaking countries tend to rate institutions more favourably. The highest level of agreement between groups is found for justice institutions, while the most divergent opinions are found for religious institutions. Notably, those born overseas in non-English-speaking countries rate religious organisations more favourably than those born in English-speaking countries, including Australia.

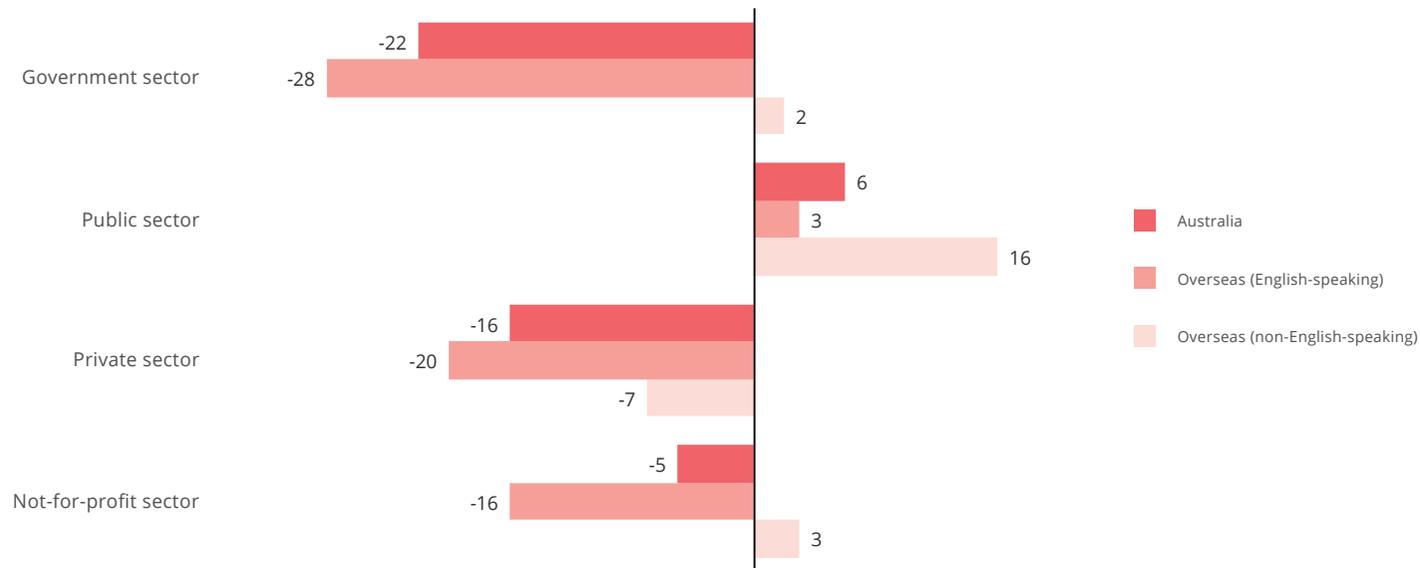


FIGURE 93. ALI BY SECTOR, DIFFERENCES BY COUNTRY OF BIRTH

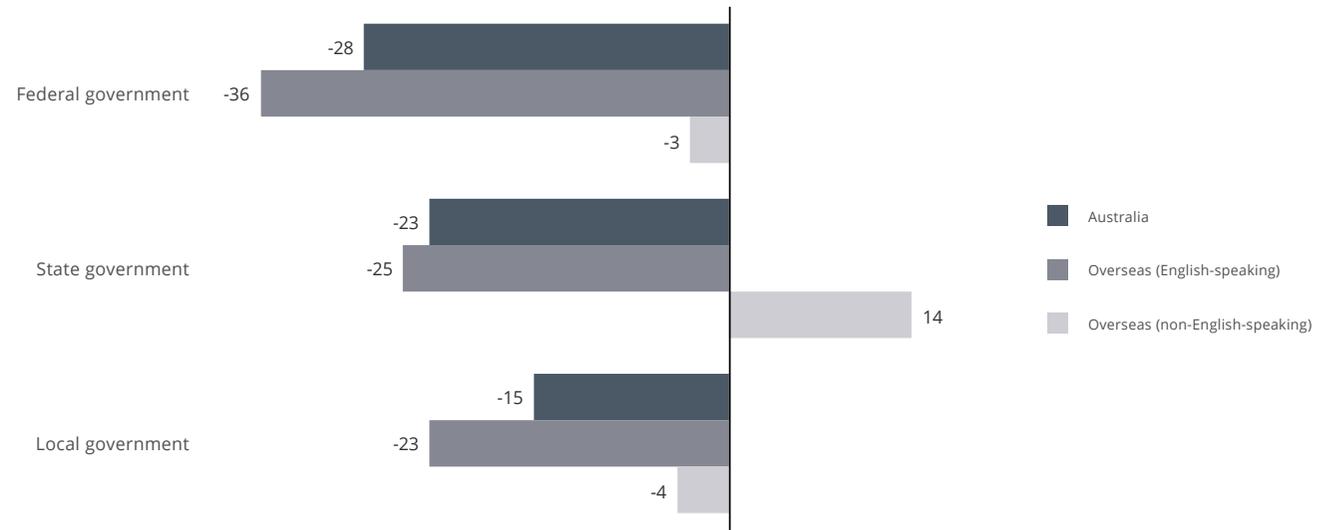


FIGURE 94. ALI BY INSTITUTION (GOVERNMENT), DIFFERENCES BY COUNTRY OF BIRTH

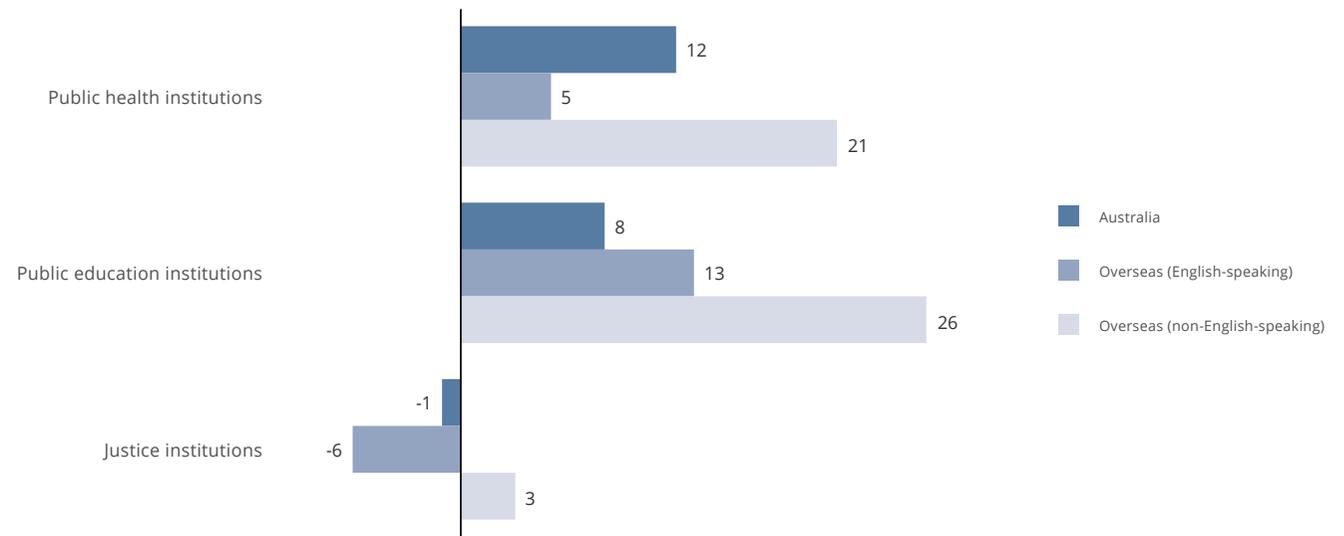


FIGURE 95. ALI BY INSTITUTION (PUBLIC), DIFFERENCES BY COUNTRY OF BIRTH

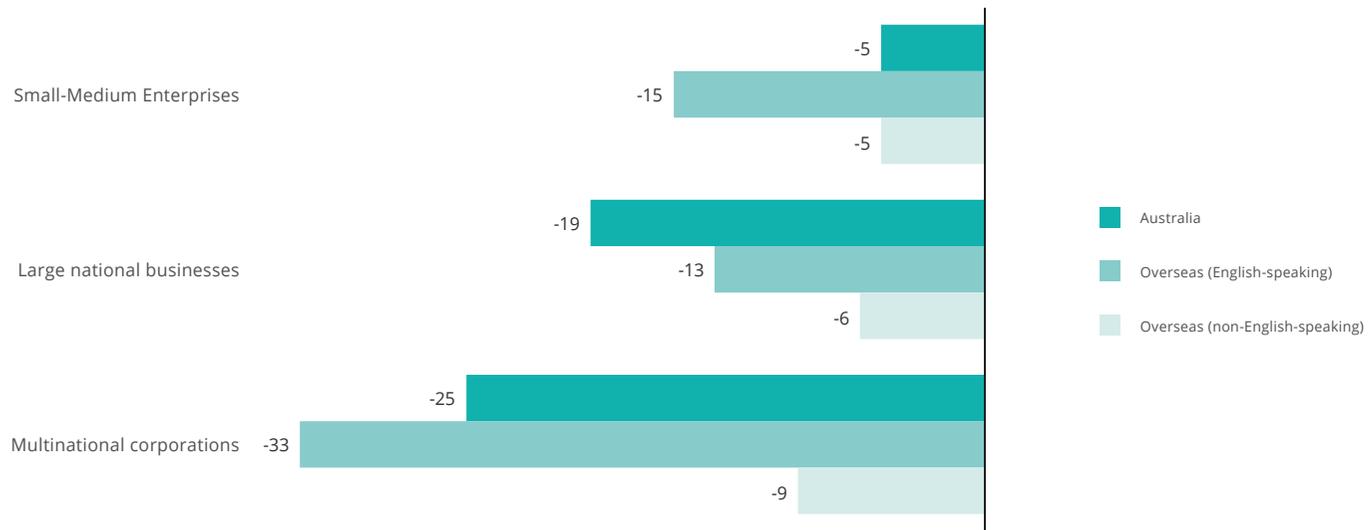


FIGURE 96. ALI BY INSTITUTION (PRIVATE), DIFFERENCES BY COUNTRY OF BIRTH

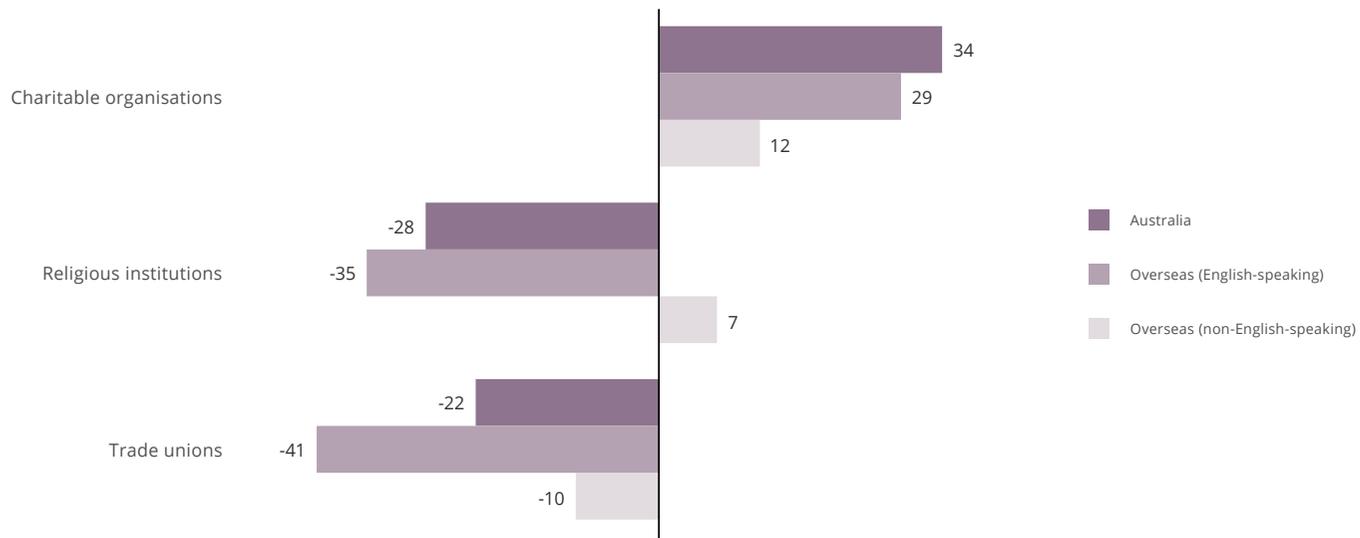


FIGURE 97. ALI BY INSTITUTION (NOT-FOR-PROFIT), DIFFERENCES BY COUNTRY OF BIRTH

## VOTING PREFERENCE

Participants were asked which party they would likely vote for, if an election were held the day they completed the survey. Response options were *Labor party, Liberal party, National party, Greens, One Nation, Independents, or Other*.

Liberal and National voters rate the leadership of the government sector most favourably, with respondents of other political persuasions rating the government sector unfavourably. Labor and coalition voters rated the public sector favourably, with all other voters rating this sector unfavourably. National party voters are the only respondents to rate the private sector's leadership favourably, while Labor party voters are the only respondents to rate the not-for-profit sector favourably.

At the institution level, Liberal voters are the only respondents to rate the Federal Government's leadership for the greater good favourably. Respondents of all political views rated charitable organisations as demonstrating the highest degree of leadership for the greater good. Unsurprisingly, only Labor voters rated the leadership of trade unions favourably. Similarly, only Liberal and National party voters rate National businesses positively. The greatest difference between voters is found for SMEs, with National voters rating them most favourably and all other voters, with the slight exception of Labor supporters, rating them negatively.

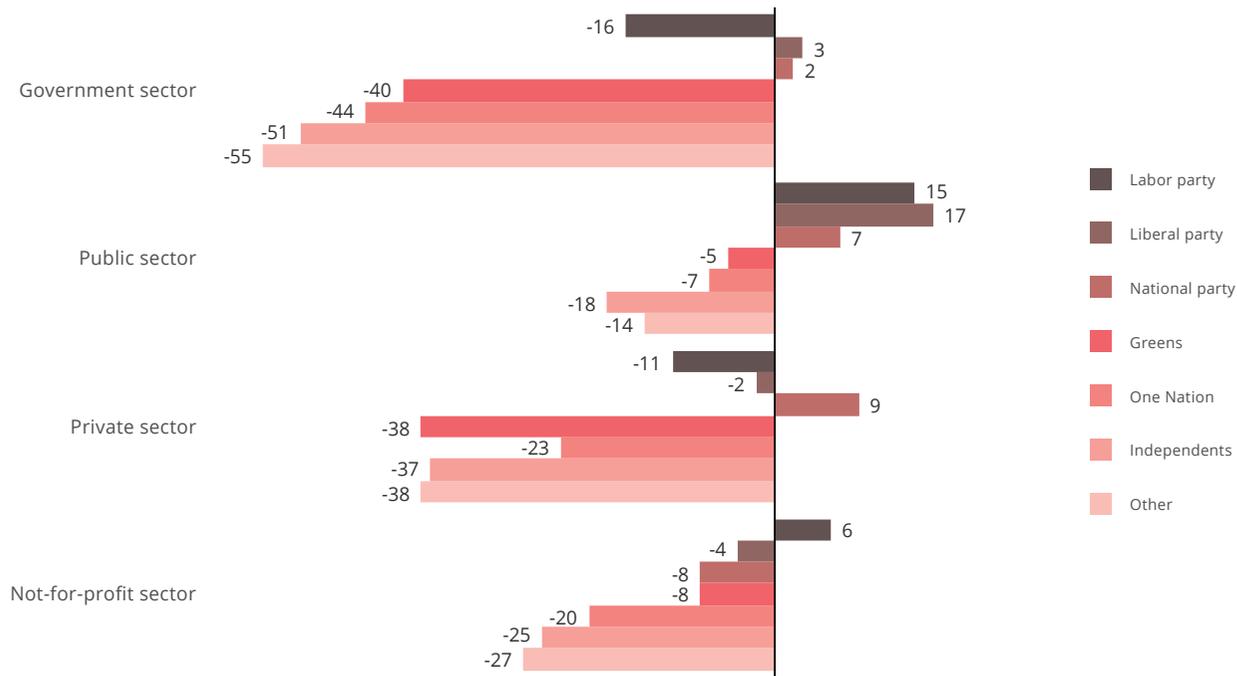


FIGURE 98. ALI BY SECTOR, DIFFERENCES BY VOTING PREFERENCE

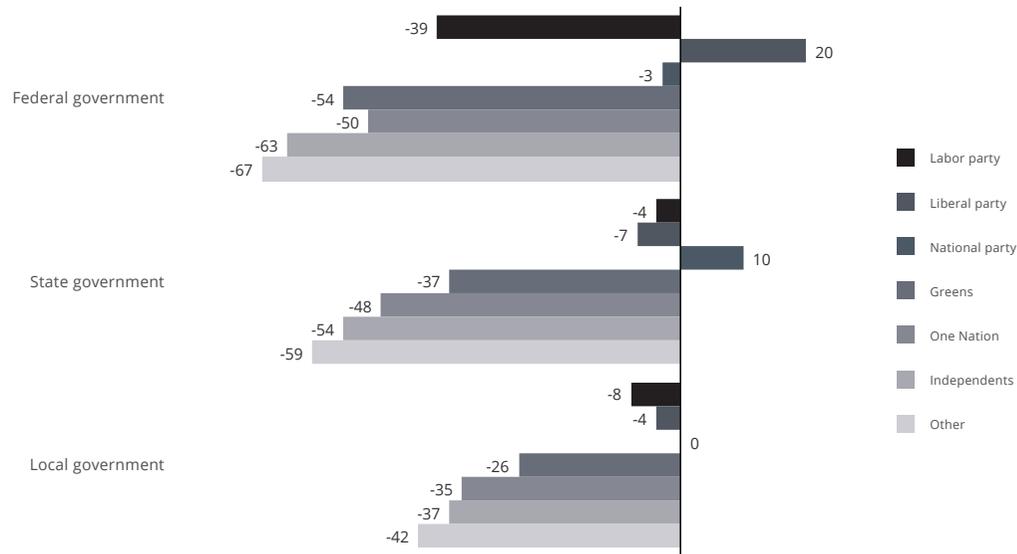


FIGURE 99. ALI BY INSTITUTION (GOVERNMENT SECTOR), DIFFERENCES BY VOTING PREFERENCE

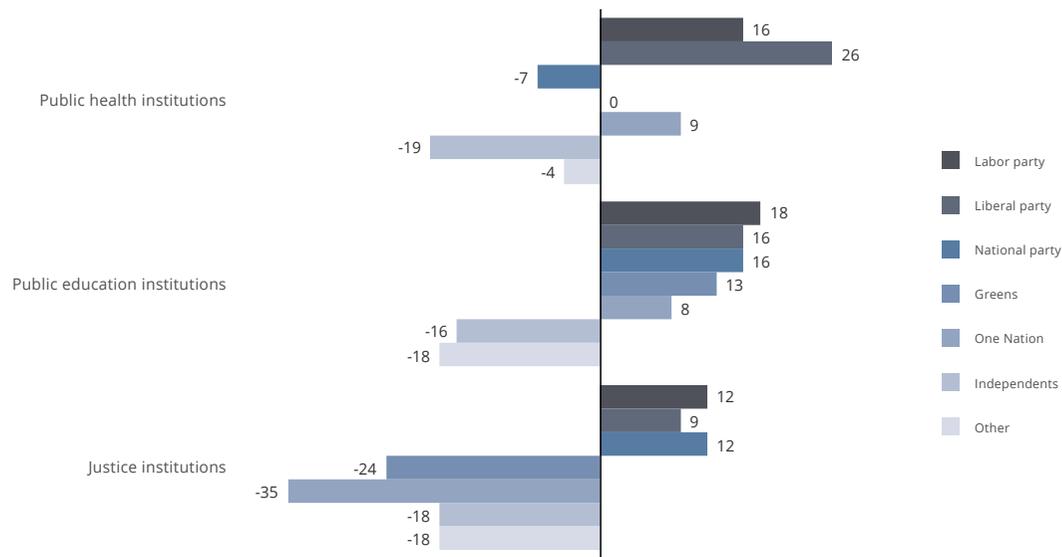


FIGURE 100. ALI BY INSTITUTION (PUBLIC SECTOR), DIFFERENCES BY VOTING PREFERENCE



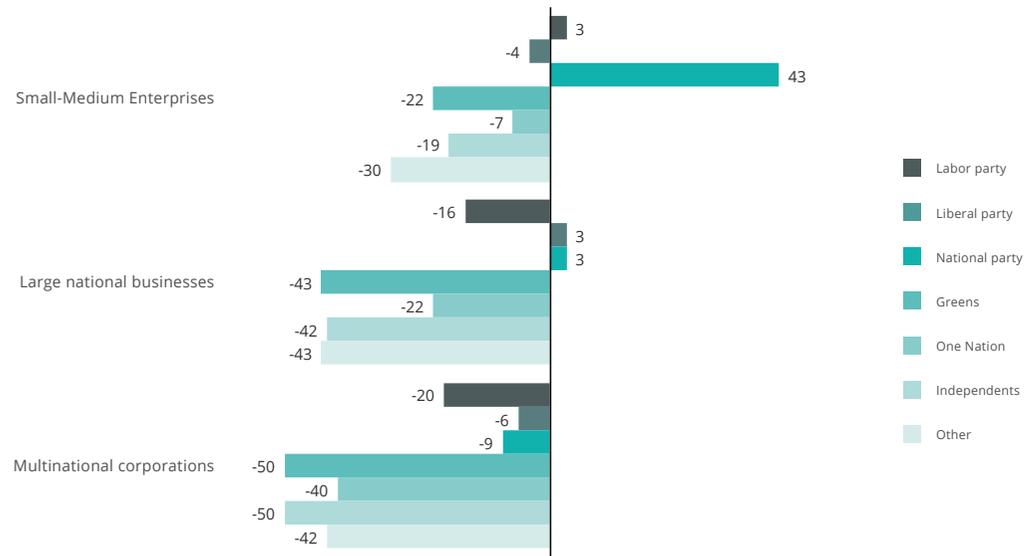


FIGURE 101. ALI BY INSTITUTION (PRIVATE SECTOR), DIFFERENCES BY VOTING PREFERENCE

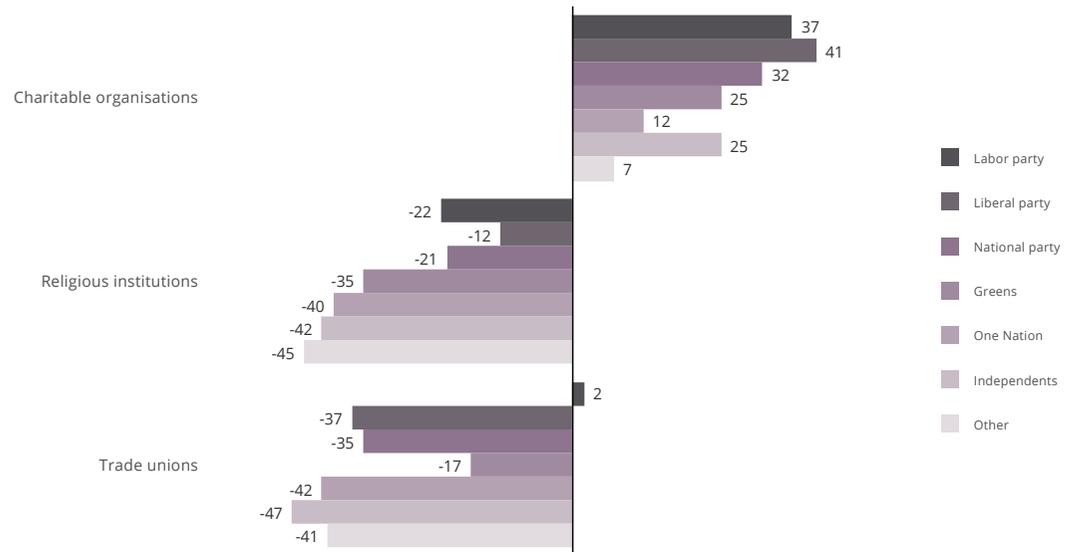


FIGURE 102. ALI BY INSTITUTION (NOT-FOR-PROFIT SECTOR), DIFFERENCES BY VOTING PREFERENCE

## GENERATIONS

Perceptions of leadership for the greater good are also found to be a function of age. For the purposes of this report, the Silent Generation are defined as those born between 1925 and 1945 (aged 74-94), Baby Boomers were born between 1946 and 1964 (aged 55-73), Generation X were born between 1965-1979 (aged 40-54), Millennials were born 1980-1994 (aged 25-39) and Generation Z includes individuals born after 1995 (and at least 18 years of age at the time of the survey).

Typically, Millennials rate institutions most favourably, while the other results are mixed. Notably, the not-for-profit sector is positively perceived by the younger two generations (Generation Z and Millennials)

while the older generations (Generation X, Baby Boomers, and the Silent Generation) perceive them negatively. The government and public sectors are rated most harshly by Generation X while the private sector is most negatively rated by Baby Boomers.

All generations rate charitable organisations as showing the highest degree of leadership for the greater good. Generation X rate the Federal Government as showing the least leadership for the greater good. Opinions were most divided about trade unions. Generation Z rate them favourably, while Baby Boomers and the Silent Generation rate them highly unfavourably.

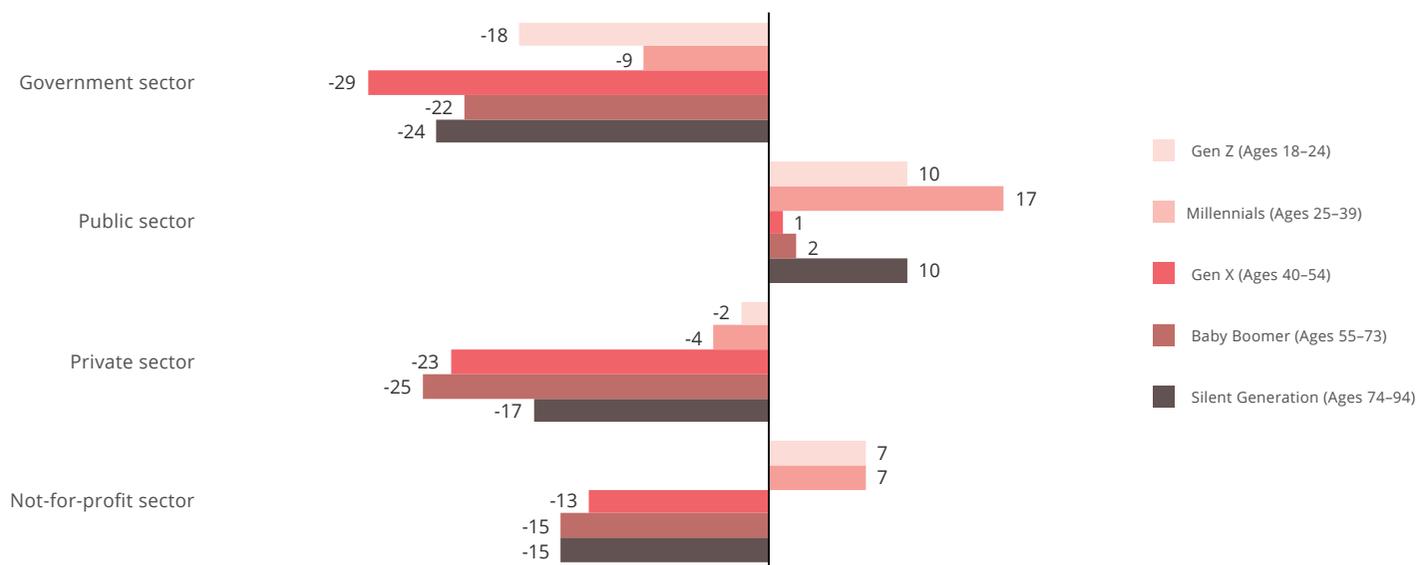


FIGURE 103. ALI BY SECTOR, DIFFERENCES BY GENERATION

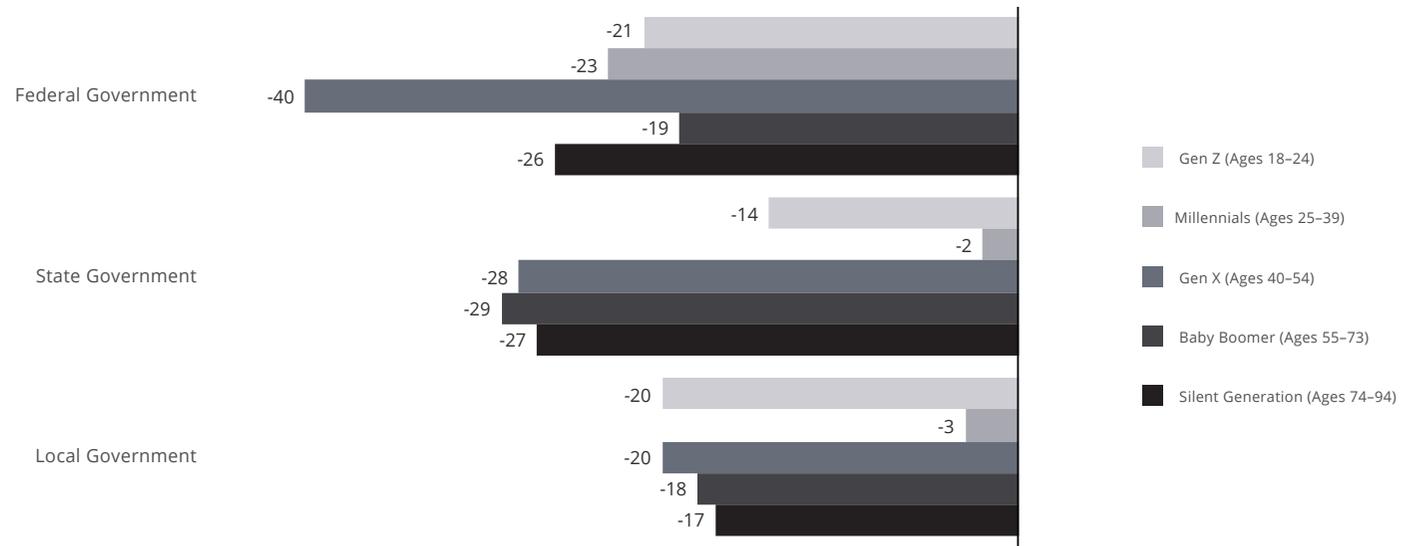


FIGURE 104. ALI BY INSTITUTION (GOVERNMENT SECTOR), DIFFERENCES BY GENERATION

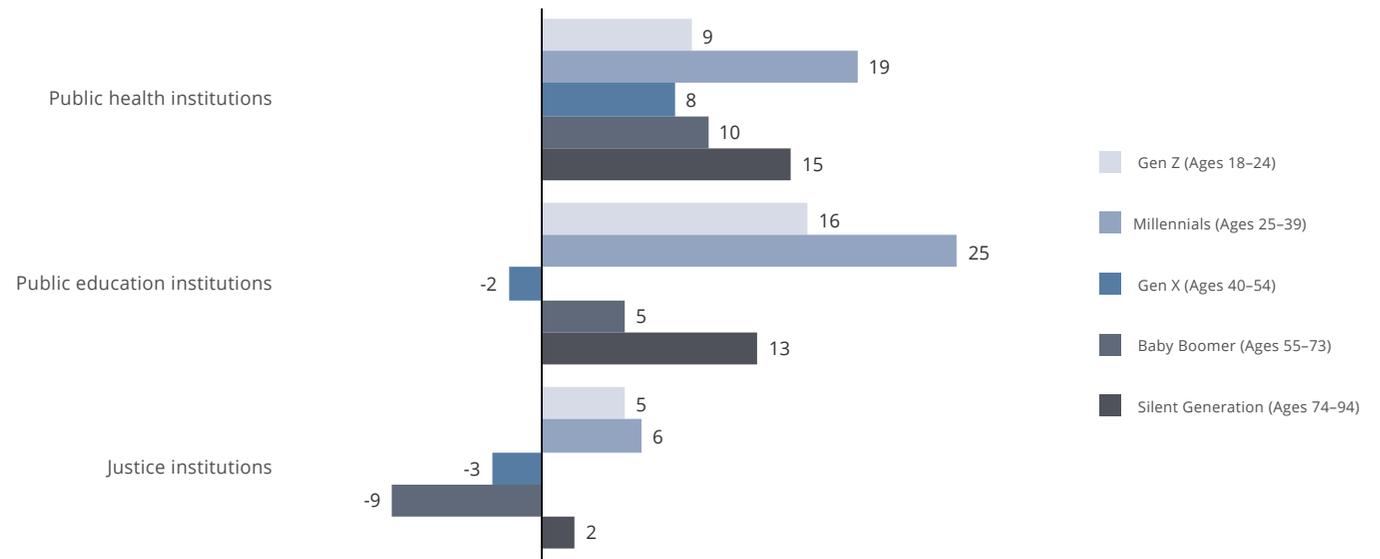


FIGURE 105. ALI BY INSTITUTION (PUBLIC SECTOR), DIFFERENCES BY GENERATION

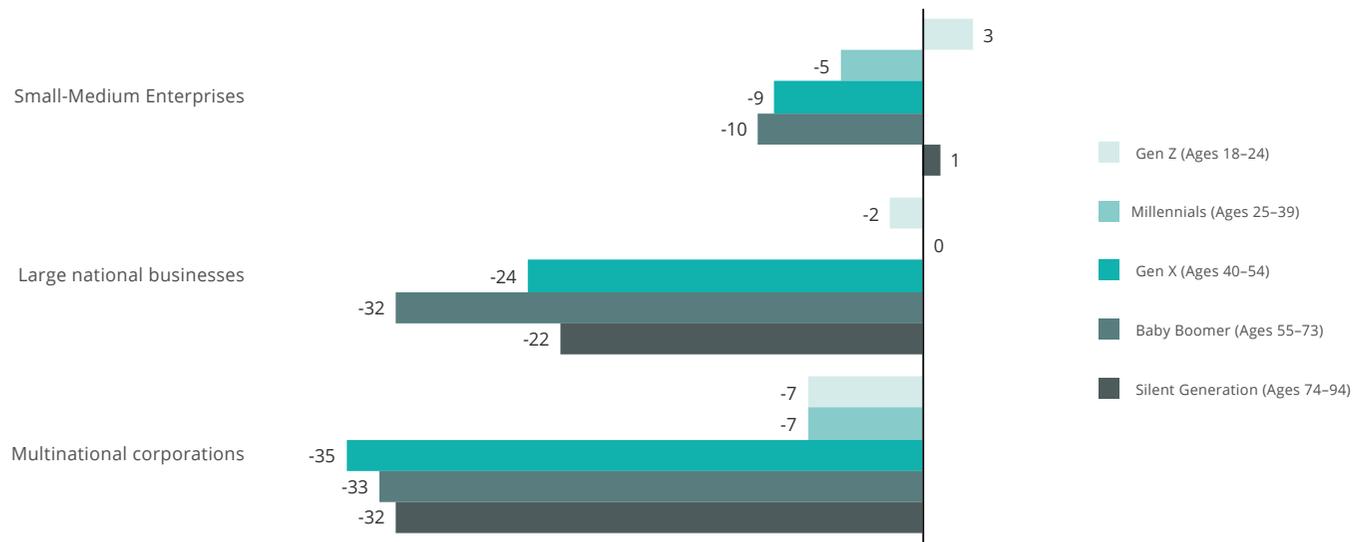


FIGURE 106. ALI BY INSTITUTION (PRIVATE SECTOR), DIFFERENCES BY GENERATION

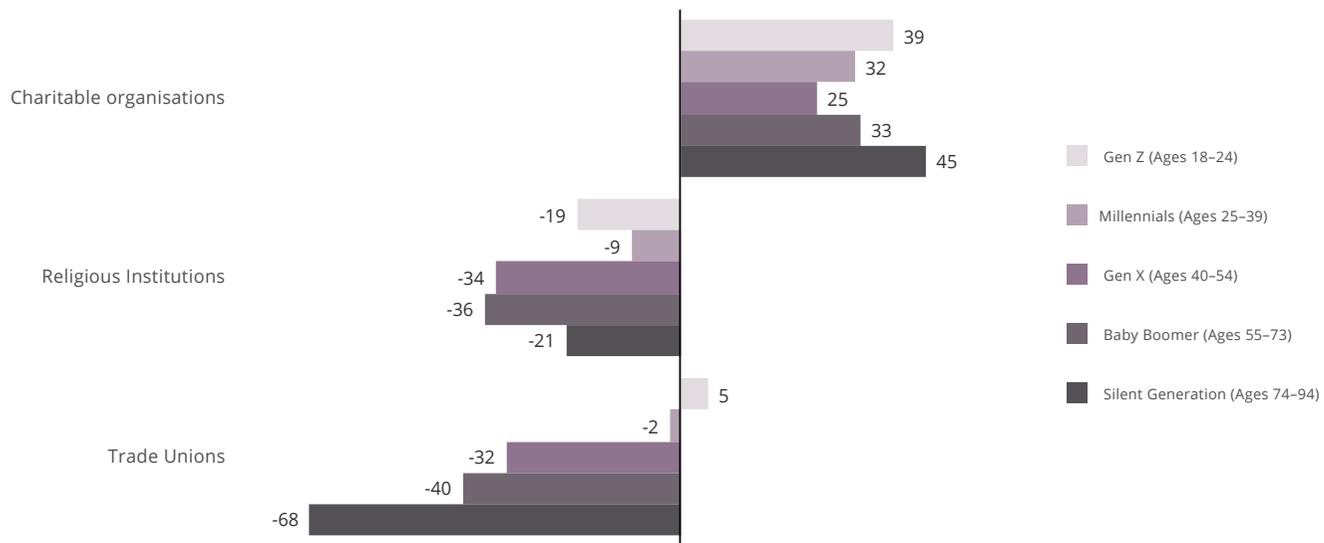


FIGURE 107. ALI BY INSTITUTION (NOT-FOR-PROFIT SECTOR), DIFFERENCES BY GENERATION



# SECTION 5

## CONCLUSION

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## SECTION 5. CONCLUSION

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Against a backdrop of unethical conduct, irresponsible leadership and distrust of institutions, there is pervasive sense that we are not well served by those who collectively manage, govern and lead our institutions. Concomitant with this is widespread expectation that leaders and their institutions should create value not just for select stakeholders but for society as a whole.

This sentiment is amply reflected in the findings of the 2019 Australian Leadership Index. This landmark study of public perceptions and expectations of leadership for the greater good in the government, public, private and not-for-profit sectors provides, for the first time, a holistic assessment of the perceived state of leadership for the greater good in Australian institutions.

This study reveals that the public has nuanced beliefs about the purpose of different types of institutions, which is reflected in meaningful variations in community expectations of institutions within and across the government, public, private and not-for-profit sectors. Thus, although gaps between perceptions and expectations are found for all institutions, these gaps provide important insights to institutional leaders about the areas they can address to become more closely aligned with community standards of leadership for the greater good.

To help institutional leaders identify priority areas to address in order to improve public perceptions of leadership for the greater good, this study revealed the key predictors or drivers of these perceptions at the

overall, sector and institutional level. From this flow a series of clear and actionable insights about what leaders can do to show leadership for the greater good.

Notably, this study revealed that public perceptions of *how* institutional leaders create value for their stakeholders are the strongest predictors of public perceptions of leadership for the greater good. This is observed consistently at the overall level, at the sector level and at the level of specific institutions. The more accountable, transparent and ethical institutional leaders and their institutions appear, the more they are perceived to show leadership for the greater good.

Despite the clarity about the drivers of public perceptions of leadership for the greater good, the study also revealed the complexity of leadership for the greater good. For example, the simultaneous pursuit of social and economic goals is not straightforward even in the most benign conditions. Similarly, it is not obvious how to be alive and responsive to the interests of key constituents and society, equally and simultaneously. The practice of leadership for the greater good is riven with incompatible goals and tensions. Leadership for the greater good is essential, but paradoxical, and therefore not easy.

Continual measurement of public expectations and perceptions of leadership for the greater good through the Australian Leadership Index provides institutions with a way to develop and test initiatives to improve the level of leadership for the greater good they are seen to display.

## THE ALI RESEARCH TEAM

The research team comprises researchers with expertise in leadership, large-scale survey design and administration, and advanced data analytics.

### **Dr Sam Wilson**

*Co-creator, Australian Leadership Index*

Sam has a PhD in social psychology from the University of Melbourne. He teaches leadership development to postgraduates in the Australian Graduate School of Entrepreneurship and conducts research with a range of industry groups. His research interests range from studies of leadership for the greater good to studies of the psychology of voluntary humanitarianism.

 [linkedin.com/in/samuel-wilson/](https://www.linkedin.com/in/samuel-wilson/)

sgwilson@swin.edu.au

### **Dr Jason Pallant**

*Co-creator, Australian Leadership Index*

Jason has a PhD in marketing from Monash University. He teaches Data Empowered Marketing to postgraduates in the Australian Graduate School of Entrepreneurship, and conducts marketing research with industry partners in a range of consumer-facing industries. His research interests lie primarily in understanding the drivers of consumer perceptions and behaviour.

 [linkedin.com/in/jason-pallant/](https://www.linkedin.com/in/jason-pallant/)

jjpallant@swin.edu.au

### **Dr Tim Bednall**

*Co-creator, Australian Leadership Index*

Tim has a PhD in organisational psychology from the University of New South Wales and is a registered organisational psychologist. He teaches HR Analytics and Critical Thinking to postgraduates in the Swinburne Business School. His research interests include workplace learning, employee innovative behaviour and advanced quantitative research methods.

 [linkedin.com/in/dr-timothy-bednall/](https://www.linkedin.com/in/dr-timothy-bednall/)

tbednall@swin.edu.au

### **Ms Sylvia Gray**

Sylvia is a provisional psychologist completing a Master of Psychology (Organisational) at Deakin University. She teaches into a variety of psychology units at Deakin University and is a research assistant for the Australian Leadership Index project. Her research interests are leadership, burnout and employee wellbeing.

 [linkedin.com/in/sylvia-gray/](https://www.linkedin.com/in/sylvia-gray/)

sylviagray@swin.edu.au



