

NAB INFRASTRUCTURE SURVEY 2018

AUSTRALIAN INFRASTRUCTURE THROUGH THE EYES OF ITS PEOPLE



NAB Behavioural & Industry Economics

July 2018

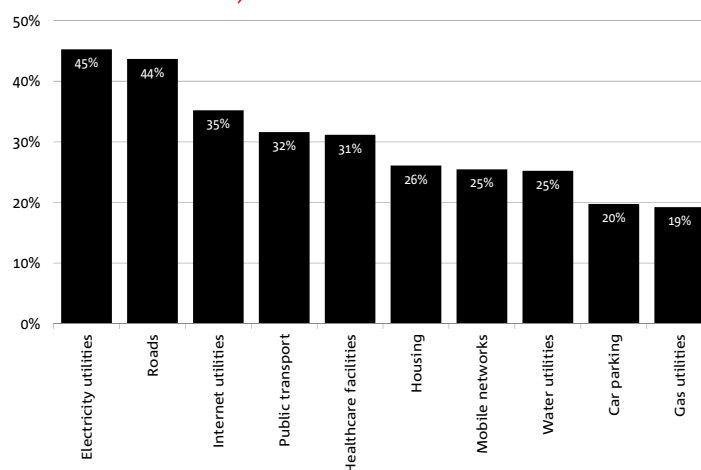
This special NAB report provides a unique insight into Australia's current and future infrastructure needs through the eyes of the people who rely upon it. It draws upon feedback from over 1,000 Australians across the country on what types of infrastructure and services they really value in their lives, the main areas which they believe are getting better and those that are getting worse, and finally asks where they think infrastructure investment should be prioritised and who should be responsible for its provision.

KEY SURVEY FINDINGS

- Infrastructure clearly plays an important role in our everyday lives, but some areas impact Australians much more than others.
- In this survey, Australians were asked to assess infrastructure as it relates to their "daily lives" (e.g. housing, safety, shopping), "critical services" (e.g. utilities, education, healthcare), and "travel and work" (e.g. public transport, roads, job availability).
- **What infrastructure impacts Australians most?** Electricity and roads were identified as having the **biggest overall impact** - affecting almost 1 in 2 people (either positively or negatively). Electricity had the biggest impact in SA, while roads were most important in NSW/ACT & WA. Gas impacted Victorians a lot more than other states.
- **What has improved (and deteriorated) most in the past 5 years across all aspects of infrastructure?** The biggest **improvements** have been in every day shopping and cultural entertainment options, recreational outdoor environments (such as parks, playgrounds, cycling paths & beaches) and mobile phone/internet access.
- The **biggest areas of deterioration** in the past 5 years have been in the cost of utilities (and in all states, but particularly QLD), traffic congestion and cost of healthcare (most notably in TAS and QLD).
- **What about the future?** Australians see little prospect for improvement in some key areas of infrastructure in the next 5 years. In fact, many Australians expect areas of infrastructure such as utility costs (particularly electricity), traffic congestion and the cost of healthcare to deteriorate much further. But some aspects are expected to continue **improving** - led by shopping and entertainment options, outdoor recreational environments and mobile phone/internet access.

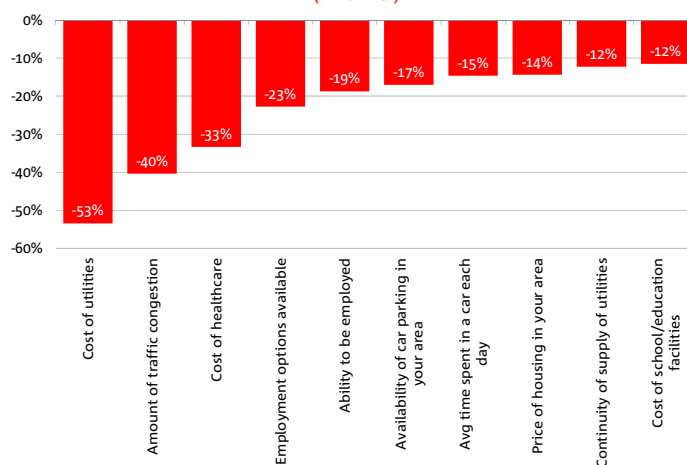
Which infrastructure matters most? Electricity, roads, internet, public transport & healthcare have the biggest impact on our daily lives.

TOP 10 TYPES OF INFRASTRUCTURE THAT MOST (POSITIVELY OR NEGATIVELY) IMPACT LIFE & WORK ON A DAILY BASIS



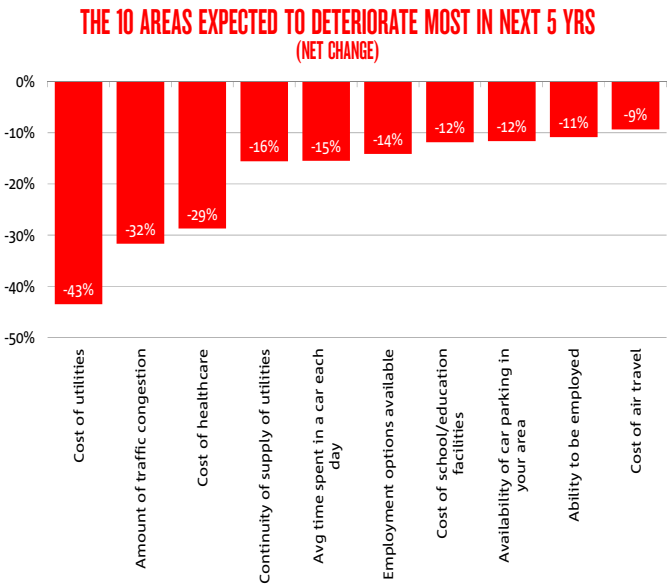
What's deteriorated over the past 5 years? Utility costs, traffic congestion, healthcare costs and our employment options have deteriorated most.

THE 10 AREAS THAT HAVE DETERIORATED MOST IN LAST 5 YRS (NET CHANGE)

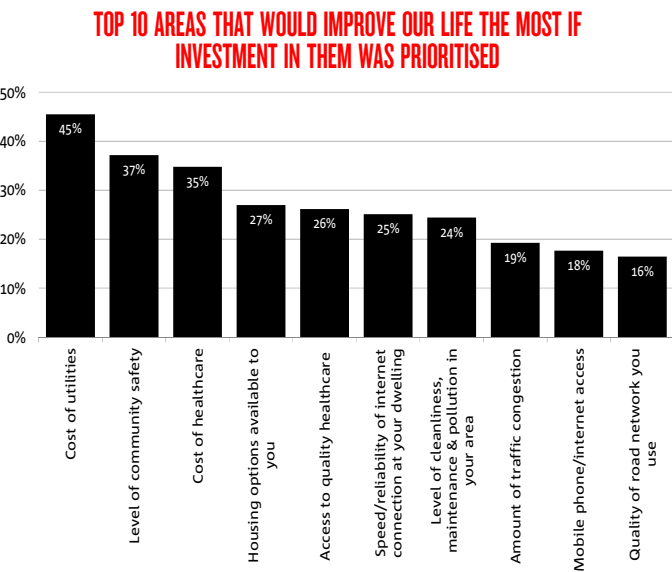


- **Where do Australians believe that investment should be prioritised?** Perhaps not surprisingly, Australians believe the cost of utilities (gas, electricity and water) is the number one area that would improve their lives if investment was prioritised - according to almost 1 in 2 (45%) people across the country. VIC was the exception with the level of community safety identified as the biggest investment priority.
- **Priority areas do however differ by state.** The level of cleanliness, maintenance and pollution ranked in the top 5 in NSW/ACT & WA, but did not feature in other states. Instead, investment in continuity of electricity supply was a far bigger priority in SA/NT and employment in TAS.
- Other areas that would also make a big difference to our lives are: community safety; cost of healthcare; housing; access to quality healthcare; speed/reliability of home internet; and the level of cleanliness, maintenance and pollution in our local areas.
- **Australians clearly see infrastructure responsibility as the domain of government.** Australians 'moderately' agree that private businesses have responsibility for improving infrastructure in the next five years. But the majority see it as the remit of state, local and federal government, in that order.

What about the future? Areas expected to worsen most over the next 5 years - utility costs, traffic congestion and cost of healthcare.



Where must we prioritise investment? Utilities is the number 1 area Australians believe they would most benefit from further investment, followed by community safety.



TOP 5 INVESTMENT PRIORITIES BY LOCATION

	Total	NSW/ACT	VIC	QLD	WA	SA /NT	TAS	Metro	Regional	Rural	Remote
Cost of utilities such as electricity, gas, water	45%	42%	45%	50%	47%	46%	59%	43%	52%	42%	70%
The level of community safety	37%	29%	47%	38%	43%	36%	33%	38%	39%	35%	18%
Cost of healthcare	35%	39%	33%	32%	23%	40%	44%	34%	37%	35%	31%
The housing options available to you	27%	30%	28%	27%	23%	18%	23%	27%	28%	27%	16%
Access to quality healthcare	26%	24%	29%	23%	27%	34%	22%	24%	29%	32%	41%
Speed and reliability of the internet connection at your dwelling	25%	27%	22%	26%	31%	17%	20%	26%	20%	26%	42%
Level of cleanliness, maintenance, and pollution in your area	24%	29%	24%	21%	23%	21%	8%	26%	25%	19%	10%
Amount of traffic congestion	19%	22%	18%	22%	16%	10%	14%	22%	18%	6%	5%
Mobile phone/Internet access	18%	18%	17%	21%	16%	14%	11%	15%	19%	25%	39%
Quality of the road network you use	16%	16%	15%	23%	9%	19%	4%	15%	20%	16%	36%
Your ability to be employed	15%	13%	15%	18%	14%	20%	11%	17%	8%	16%	6%
The employment options available to you	15%	11%	18%	16%	15%	16%	28%	15%	15%	16%	6%
Continuity of supply of utilities such as electricity, gas, water	14%	13%	15%	13%	9%	25%	10%	14%	13%	14%	30%
Access to and range of everyday shopping options (like supermarkets, etc.)	11%	11%	8%	11%	19%	11%	14%	9%	16%	15%	9%

TOP 5 INVESTMENT PRIORITIES BY GENDER & AGE

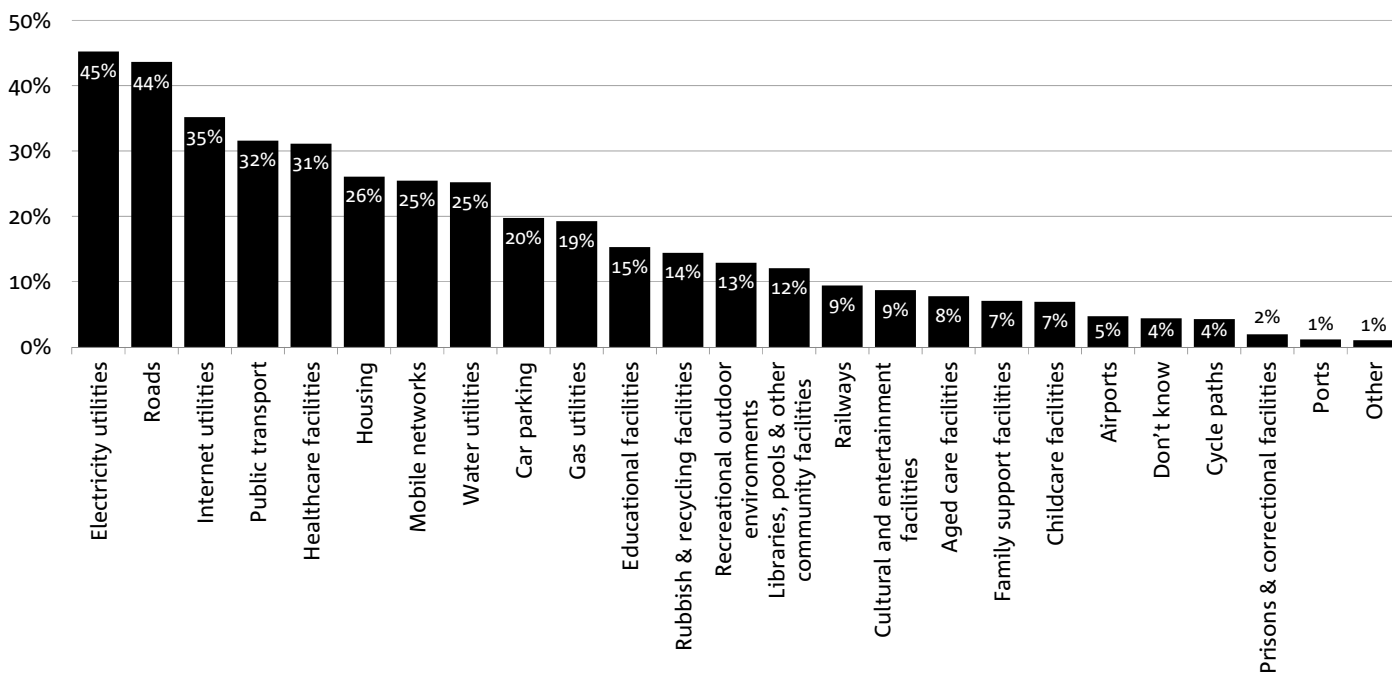
	Total	Male	Female	18 - 24 years	25 - 34 years	35 - 44 years	45 - 54 years	55 - 64 years	65 years and over
Cost of utilities	45%	46%	45%	28%	30%	38%	44%	63%	65%
Level of community safety	37%	34%	40%	36%	31%	34%	37%	39%	45%
Cost of healthcare	35%	33%	36%	34%	25%	30%	37%	37%	44%
Housing options available to you	27%	25%	29%	39%	40%	28%	24%	20%	15%
Access to quality healthcare	26%	25%	28%	13%	21%	22%	25%	31%	40%
Speed/reliability of internet connection at your dwelling	25%	25%	26%	24%	22%	24%	24%	28%	28%
Level of cleanliness, maintenance & pollution in your area	24%	24%	25%	28%	28%	23%	19%	17%	31%
Amount of traffic congestion	19%	20%	19%	14%	15%	17%	20%	27%	22%
Mobile phone/internet access	18%	20%	15%	22%	20%	18%	15%	19%	12%
Quality of road network you use	16%	17%	16%	5%	12%	14%	17%	25%	23%
Your ability to be employed	15%	13%	16%	30%	15%	16%	20%	11%	2%
Employment options available to you	15%	14%	16%	23%	23%	20%	15%	8%	4%
Continuity of supply of utilities	14%	15%	14%	4%	10%	11%	13%	18%	25%
Access & and range of everyday shopping options	11%	11%	11%	9%	11%	8%	9%	11%	17%

MAIN REPORT

KEY FACTORS THAT MOST IMPACT OUR DAILY LIVES & WORK

Infrastructure impacts the daily lives of all Australians - good infrastructure is valued highly and poor infrastructure can detract from the quality of our daily lives. But what types of infrastructure do Australians believe have the biggest impact (either positive or negative) on their life and work?

TYPES OF INFRASTRUCTURE THAT MOST (POSITIVELY OR NEGATIVELY) IMPACT LIFE & WORK ON A DAILY BASIS



Electricity (45%) and roads (44%) were perceived as having the biggest impact on the daily lives of Australians - affecting almost 1 in 2 people in some way (either positively or negatively).

Around 1 in 3 also said they were impacted by internet utilities (35%), public transport (32%) and healthcare facilities including mental health (31%). Housing (26%), mobile networks (25%) and water utilities (25%) also impacted the daily lives of around 1 in 4 Australians.

The things that impact us the least include ports (1%), prisons and correctional facilities (2%), cycle paths (4%) and airports (5%).

A closer inspection reveals some key differences according to where we live, by gender and age.

For example, electricity utilities impacted more Australians living in SA/NT (55%) than in any other state. In contrast, roads had the biggest impact on the daily lives of Australians living in NSW/ACT (46%) and WA (45%). Among other noticeable differences, gas impacted people in VIC (30%) a lot more than in any other states

Differences were also apparent by region. For example, healthcare facilities (including mental health) played a bigger role in the daily lives of people in regional cities (44%) than in capital cities (27%), but public transport (buses, trains, trams) was much more relevant in capital cities (38%) than all other areas. In remote areas, roads (72%) and electricity utilities (64%) had a far greater impact on daily lives than in any other area.

By gender, men and women were in broad agreement about what mattered most, but there were differences in some other areas. For example, car parking impacted almost twice as many women (24%) than men (14%), as did recreational outdoor environments (16% vs. 10%) and libraries and other community facilities (15% vs. 9%).

By age educational facilities played a far bigger role in the daily lives of 18-24 year olds (30%), while electricity utilities (56%) and healthcare facilities (44%) did for over 65s.

See tables below for more detail by location, gender and age.

TOP 5 FACTORS THAT MOST IMPACT OUR DAILY LIVES BY LOCATION

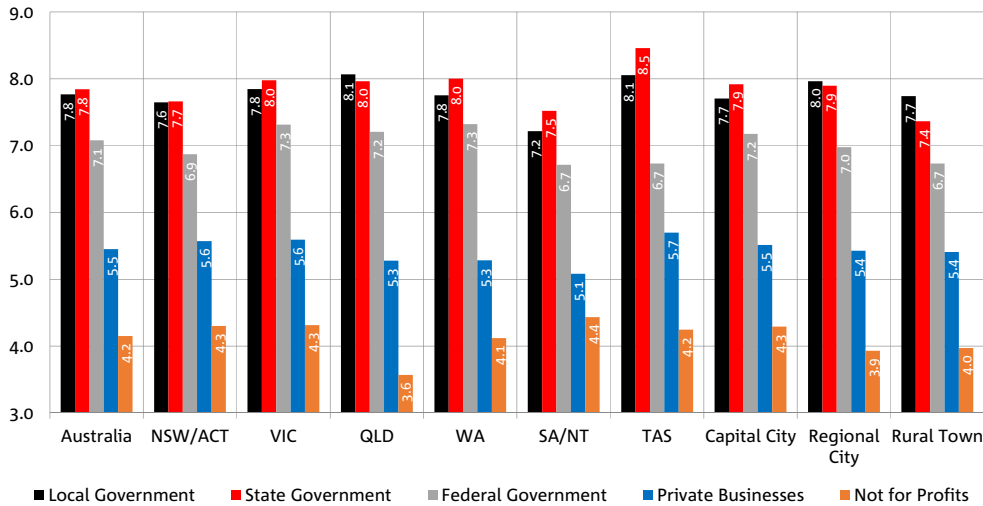
	Total	NSW/ ACT	VIC	QLD	WA	SA + NT	TAS	Metro	Regional	Rural	Remote
Electricity utilities	45%	44%	43%	49%	39%	55%	46%	43%	47%	48%	64%
Roads	44%	46%	40%	46%	45%	39%	31%	44%	37%	45%	72%
Internet utilities	35%	33%	34%	40%	38%	28%	43%	33%	37%	42%	35%
Public transport	32%	35%	35%	24%	33%	27%	26%	38%	20%	13%	30%
Healthcare facilities	31%	34%	26%	26%	38%	41%	29%	27%	44%	33%	33%
Housing	26%	26%	26%	25%	27%	30%	23%	29%	22%	19%	13%
Mobile networks	25%	25%	25%	28%	29%	22%	10%	25%	25%	28%	29%
Water utilities	25%	23%	24%	27%	24%	33%	37%	26%	25%	19%	35%
Car parking	20%	21%	22%	20%	18%	10%	16%	22%	22%	9%	3%
Gas utilities	19%	15%	30%	10%	21%	23%	16%	21%	17%	12%	15%
Educational facilities	15%	15%	18%	13%	16%	16%	4%	16%	13%	14%	9%
Rubbish & recycling facilities	14%	17%	13%	12%	23%	5%	15%	14%	14%	18%	8%
Recreational outdoor environments	13%	13%	10%	12%	20%	12%	18%	12%	13%	19%	15%
Libraries, pools & other community facilities	12%	12%	10%	13%	10%	18%	15%	11%	10%	22%	10%

TOP 5 FACTORS THAT MOST IMPACT OUR DAILY LIVES GENDER & AGE

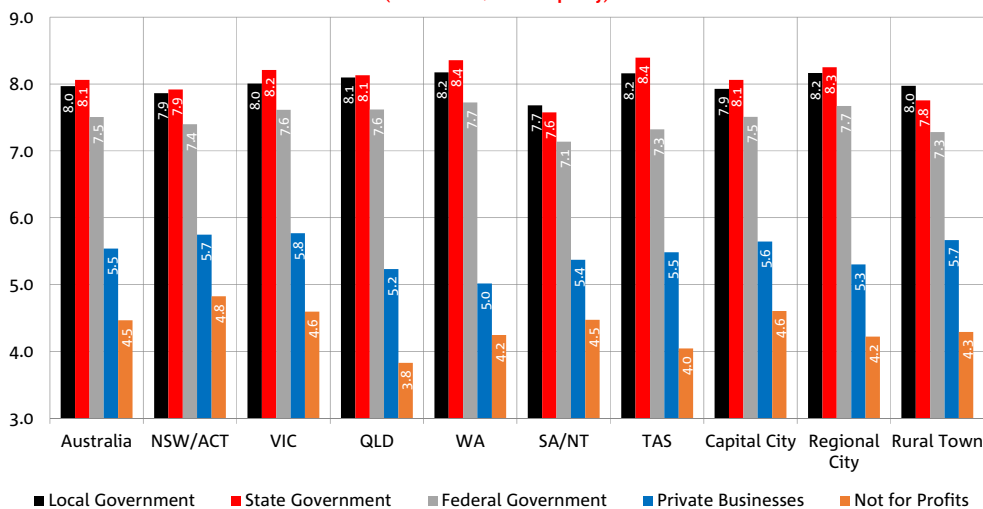
	Total	Men	Women	18 - 24 years	25 - 34 years	35 - 44 years	45 - 54 years	55 - 64 years	65+ years
Electricity utilities	45%	50%	41%	25%	40%	46%	48%	50%	56%
Roads	44%	43%	44%	36%	35%	45%	46%	51%	47%
Internet utilities	35%	37%	33%	38%	38%	34%	36%	32%	35%
Public transport	32%	34%	30%	44%	33%	31%	26%	32%	27%
Healthcare facilities	31%	29%	33%	23%	25%	29%	30%	33%	44%
Housing	26%	27%	25%	38%	32%	36%	22%	16%	16%
Mobile networks	25%	26%	25%	29%	34%	28%	28%	23%	14%
Water utilities	25%	28%	22%	21%	21%	27%	28%	27%	27%
Car parking	20%	15%	24%	21%	20%	15%	20%	20%	23%
Gas utilities	19%	20%	18%	15%	20%	20%	21%	17%	21%
Educational facilities	15%	14%	17%	30%	23%	22%	11%	7%	3%
Rubbish & recycling facilities	14%	15%	13%	14%	13%	13%	16%	14%	16%
Recreational outdoor environments	13%	10%	16%	12%	7%	12%	13%	18%	14%
Libraries, pools & other community facilities	12%	9%	15%	13%	12%	9%	13%	10%	16%

WHO SHOULD BE RESPONSIBLE FOR INFRASTRUCTURE & SERVICES?

EXTENT YOU THINK RESPONSIBILITY FOR INFRASTRUCTURE & SERVICES IN YOUR AREA LIES NOW (0 = not at all; 10 = completely)



WHERE YOU THINK RESPONSIBILITY FOR INFRASTRUCTURE & SERVICES IN YOUR AREA SHOULD LIE IN NEXT 5 YEARS (0 = not at all; 10 = completely)



Australians clearly see infrastructure responsibility as the domain of government.

And they agree very strongly this responsibility should rest primarily with state governments, followed by local and federal government.

Australians agreed only moderately that private businesses should have responsibility, and even fewer thought it should lie with not-for profits.

There was also broad agreement as to where responsibility for infrastructure and services should lie - irrespective of the state or region where people live.

And when asked who should be responsible for infrastructure and services in the next 5 years, Australians were even more adamant that it should be the remit of state, local and federal government - in that order.

Australians also only “moderately” agreed that private businesses have responsibility for improving infrastructure in the next five years.

Clearly, this presents an opportunity for business to tell a better story about how they can help improve infrastructure and services in Australia.



DAILY LIFE

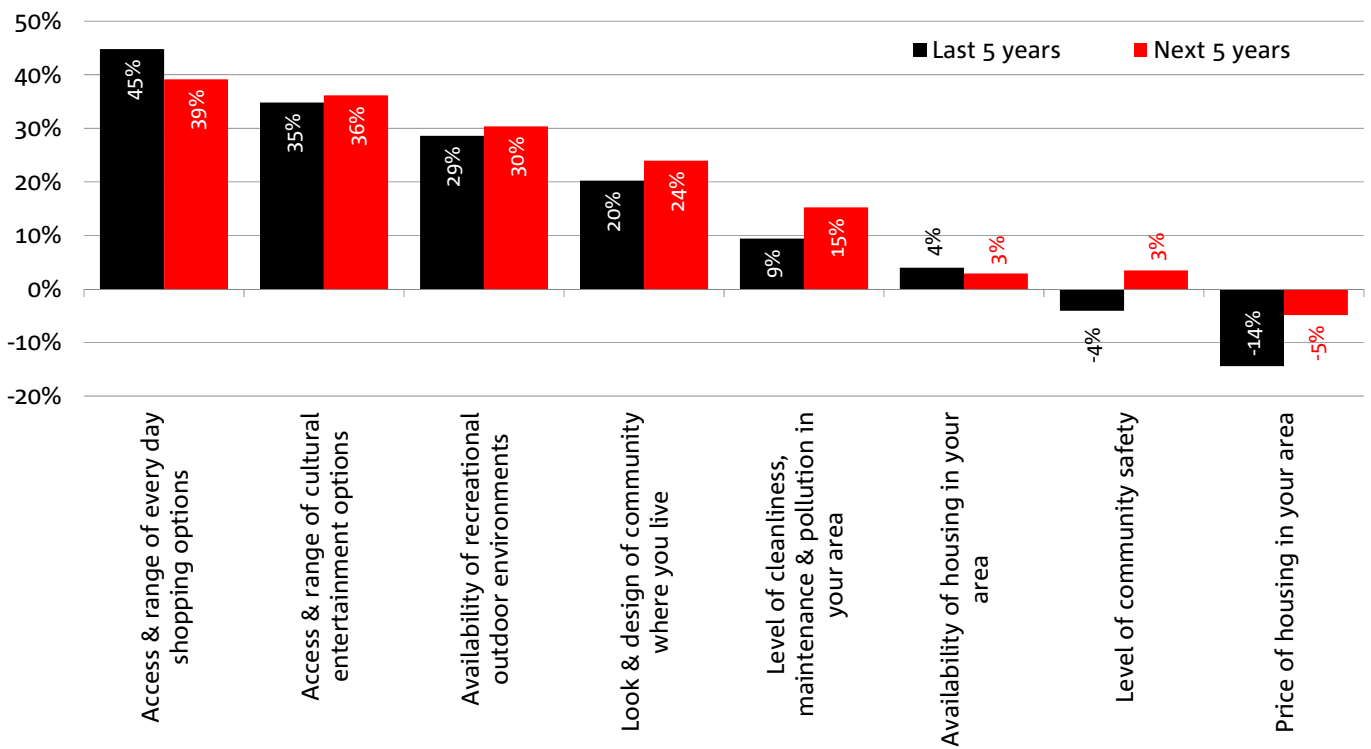
Australians were asked whether a number of areas associated with their daily life had improved or deteriorated over the last 5 years and whether they thought these areas would improve or deteriorate in the next 5 years.

On the positive side, the greatest improvements in the last 5 years have been seen in the range of shopping (45%) and cultural entertainment options (35%) available. Positive gains have also been made in regards to the availability of a range of recreational outdoor environments such as parks, playgrounds, cycling paths and beaches (29%) and the look and design of the communities in which we live (20%).

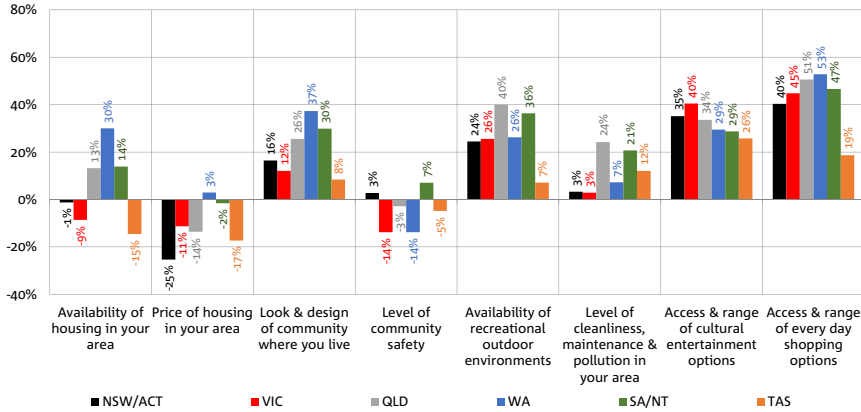
Smaller gains were noted in the level of cleanliness, maintenance and pollution in their area (9%) and housing availability (4%). Encouragingly, all of these areas are expected to continue improving in the next 5 years.

On the negative side, however, deterioration was seen in the price of housing (with more expected) and the level of community safety, although this is expected to improve somewhat over the next 5 years.

DAILY LIFE IN AUSTRALIA: BETTER OR WORSE (NET CHANGE)



DAILY LIFE: BETTER OR WORSE IN LAST 5 YRS - BY STATE (NET CHANGE)



By state, WA noticed a higher than average improvement in housing availability, as did QLD and SA/NT in the areas of cleanliness, maintenance and pollution and the availability of recreational outdoor environments.

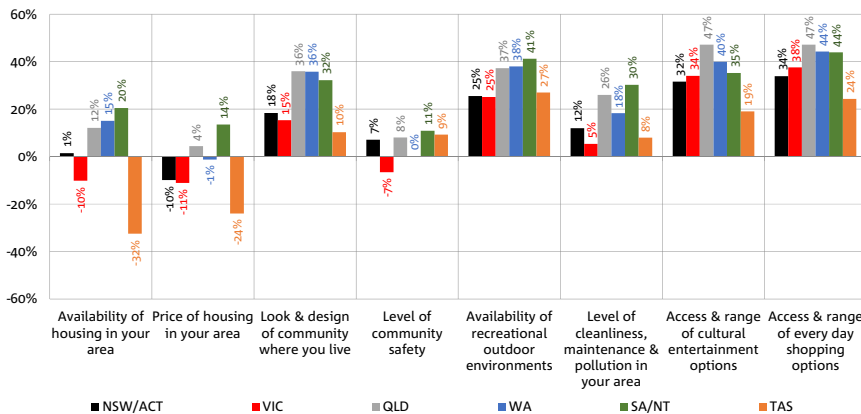
Housing prices were seen to have deteriorated in nearly all states, particularly in NSW. WA was the only state to report an improvement in the last 5 years and also the only state with a net positive perception of housing prices.

Australians living in VIC and WA noticed a much larger deterioration in the level of community safety, while improvement in the range of shopping options was less pronounced in TAS relative to all other states.

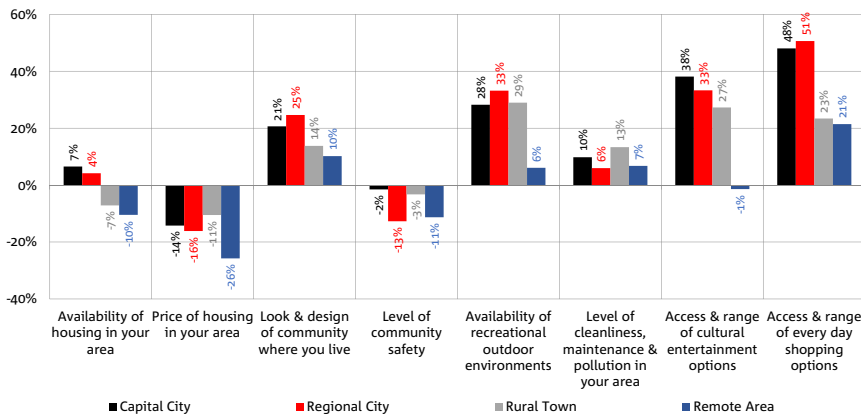
Looking ahead, community safety is expected to improve in all states except VIC, where more deterioration is expected.

Expectations for housing availability in the next 5 years are expected to deteriorate in TAS and VIC, with house prices also deteriorating further in TAS, VIC and NSW/ACT.

DAILY LIFE: BETTER OR WORSE IN NEXT 5 YRS - BY STATE (NET CHANGE)



DAILY LIFE: BETTER OR WORSE IN LAST 5 YRS - BY REGION (NET CHANGE)



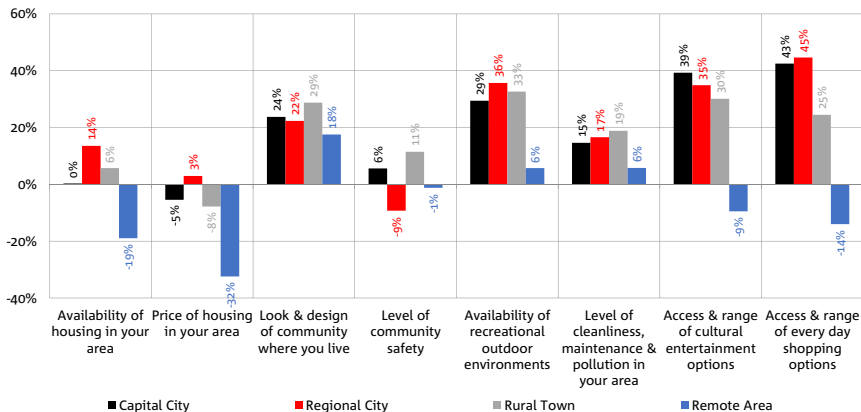
Australians living in all regions believe they have seen the price of housing in their area deteriorate, particularly in remote areas, where housing availability has also worsened.

The level of community safety was also perceived to have deteriorated in all regions, but especially in major regional cities and in remote areas.

More deterioration in community safety is expected in regional cities and remote towns in the next 5 years, but Australians living in capital cities and rural towns expect it to improve.

Over the next 5 years, Australians living in remote locations were more likely than other locations to believe that the access to and range of shopping options and cultural entertainment options would deteriorate. They also expect housing prices and availability to deteriorate further over the next 5 years.

DAILY LIFE: BETTER OR WORSE IN NEXT 5 YRS - BY REGION (NET CHANGE)



SERVICES

Australians were asked whether a number of services which they may access had improved or deteriorated over the last 5 years and whether they thought these areas would improve or deteriorate in the next 5 years.

On the positive side, the greatest improvements over the last 5 years were seen in mobile phone/internet access (20%) and access to a library and other community facilities (20%).

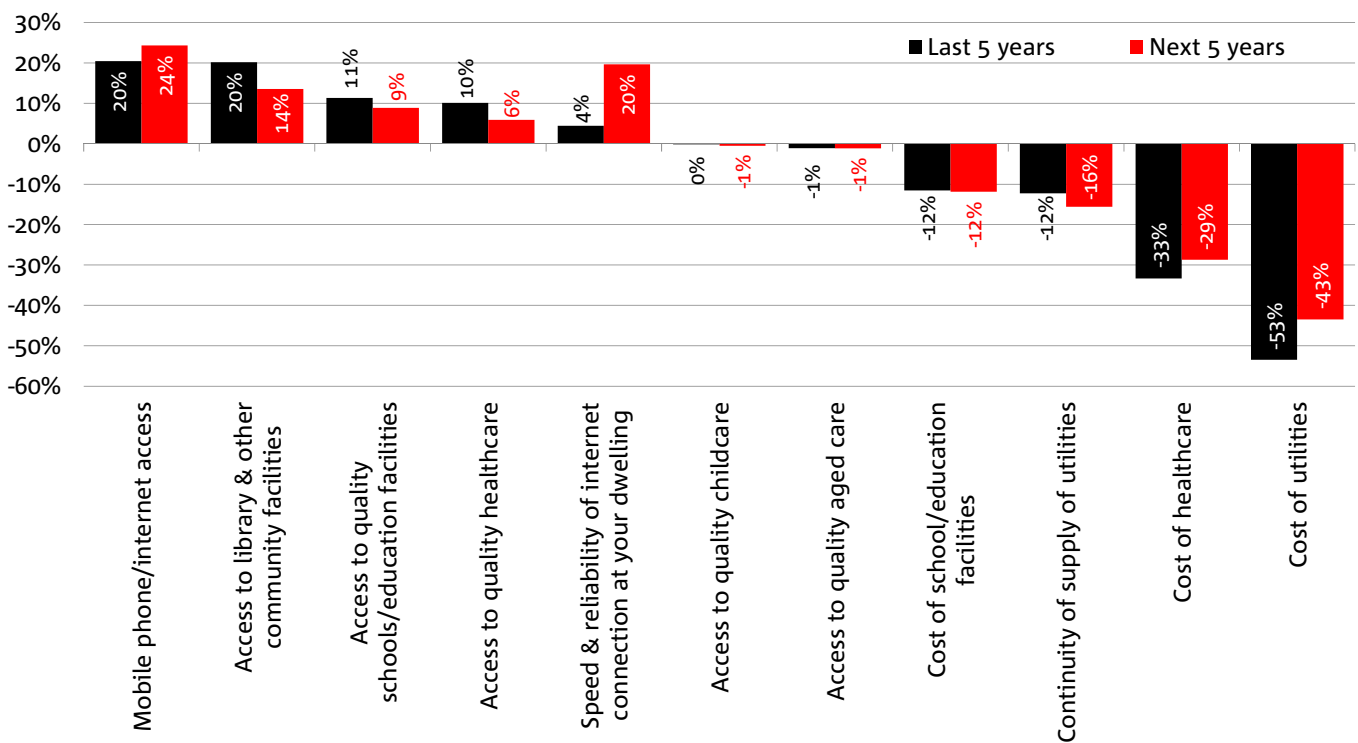
Positive gains were also made in regards to access to quality schools and other educational facilities (11%), quality healthcare (10%) and the speed and reliability of home internet connections (4%). Encouragingly all of these areas are expected to continue improving in the next 5 years, particularly home internet.

There was very little change in perceptions around access to quality childcare and age care and little change is expected in the future.

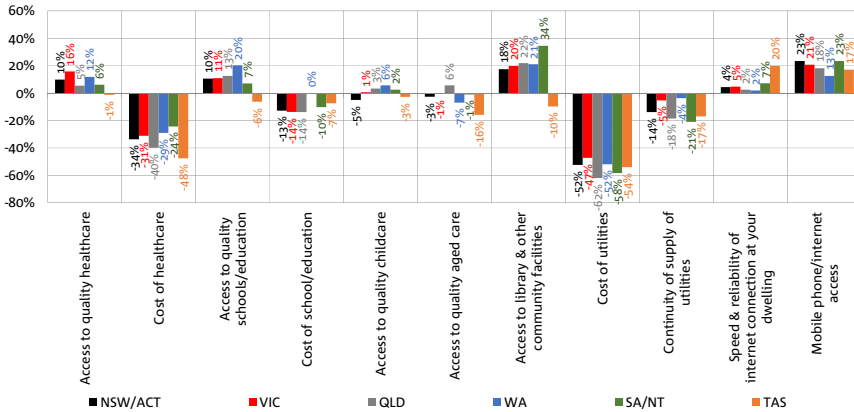
But some very significant concerns were noted in the areas of the cost of utilities (-53%) and the cost of healthcare (-33%) both over the last five years and looking forward.

Other areas of concern in the last 5 years related to continuity of utility supplies (-12%) and education costs (-12%) and more Australians expect both these areas to deteriorate further over the next 5 years.

SERVICES IN AUSTRALIA: BETTER OR WORSE (NET CHANGE)



SERVICES: BETTER OR WORSE IN LAST 5 YRS - BY STATE
(NET CHANGE)

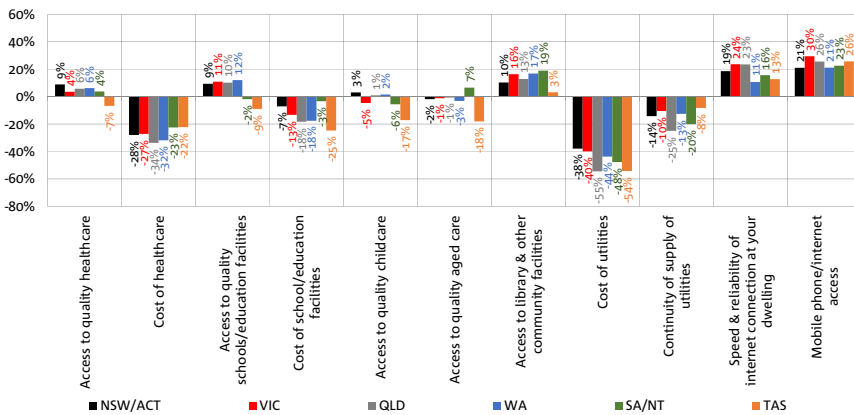


The cost of utilities has been a significant concern in all states over the last 5 years. It has deteriorated in all states - ranging from -62% in QLD to -47% in VIC.

The cost of healthcare was also identified as a problem in all states, with the biggest deterioration seen in TAS (-48%) and QLD (-40%).

Of concern, Australians living in all states anticipate further deterioration in the cost of utilities and healthcare in the next 5 years.

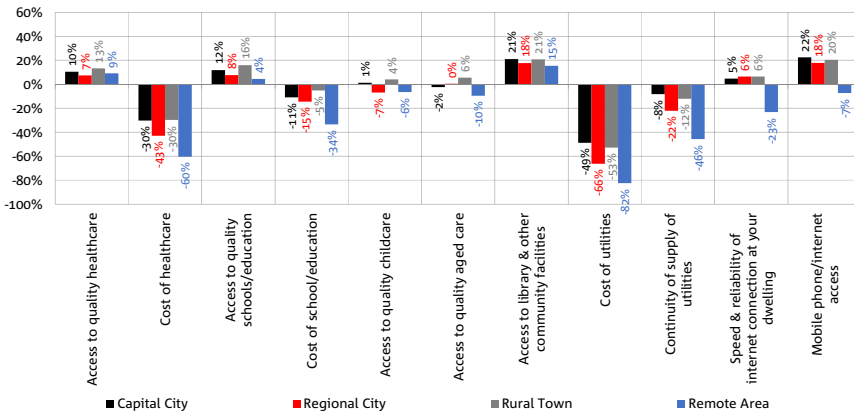
SERVICES: BETTER OR WORSE IN NEXT 5 YRS - BY STATE
(NET CHANGE)



TAS was the only state to see a net deterioration over the last 5 years when it came to access to libraries and other community facilities - but this is expected to improve somewhat in the next 5 years.

TAS was also the most negative state when it came to access to quality aged care and healthcare in the next 5 years.

SERVICES: BETTER OR WORSE IN LAST 5 YRS - BY REGION
(NET CHANGE)

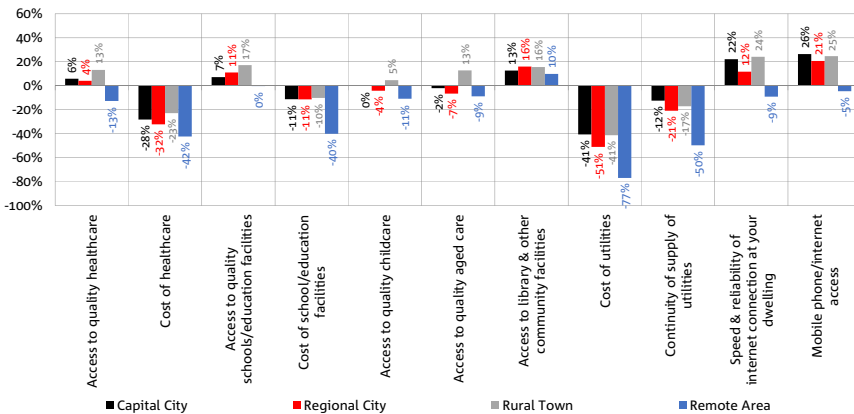


Australians living in all areas were most concerned about the costs of utilities, but those living in remote areas (-82%) were especially concerned about the deterioration of utility costs in the last 5 years.

The cost of healthcare and continuity of utility supplies also deteriorated the most in remote areas (-60%).

Respondents in remote locations were more likely to expect to see a deterioration in both the cost and continuity of supply of utilities over the next five year

SERVICES: BETTER OR WORSE IN NEXT 5 YRS - BY REGION
(NET CHANGE)



Australians living in remote areas also appear to be struggling in most other areas - they indicated deterioration in all other service areas, except quality healthcare, education and access to libraries and other community services.

Moreover, they expect all services to worsen in the next 5 years, except access to a library and other community services.

UTILITIES

Utilities play a very important role in the daily lives of Australians. In fact, gas, electricity, water, telephone/internet and mobile network services all rank in the top 10 areas of infrastructure that most positively or negatively impact our life and work on a daily basis.

Given their importance, Australians were asked to rate their level of concern with each of these utilities in the next 5 years.

At a national level, electricity was clearly the biggest concern - scoring 7.3 points out of 10 (10 is extremely concerned). Australians living in all states rated their concern for electricity highest across all states, although the level of concern ranged from 7.9 points in SA/NT to 6.6 points in WA.

The level of concern was significantly higher in remote areas (8.1 points) than in any other region.

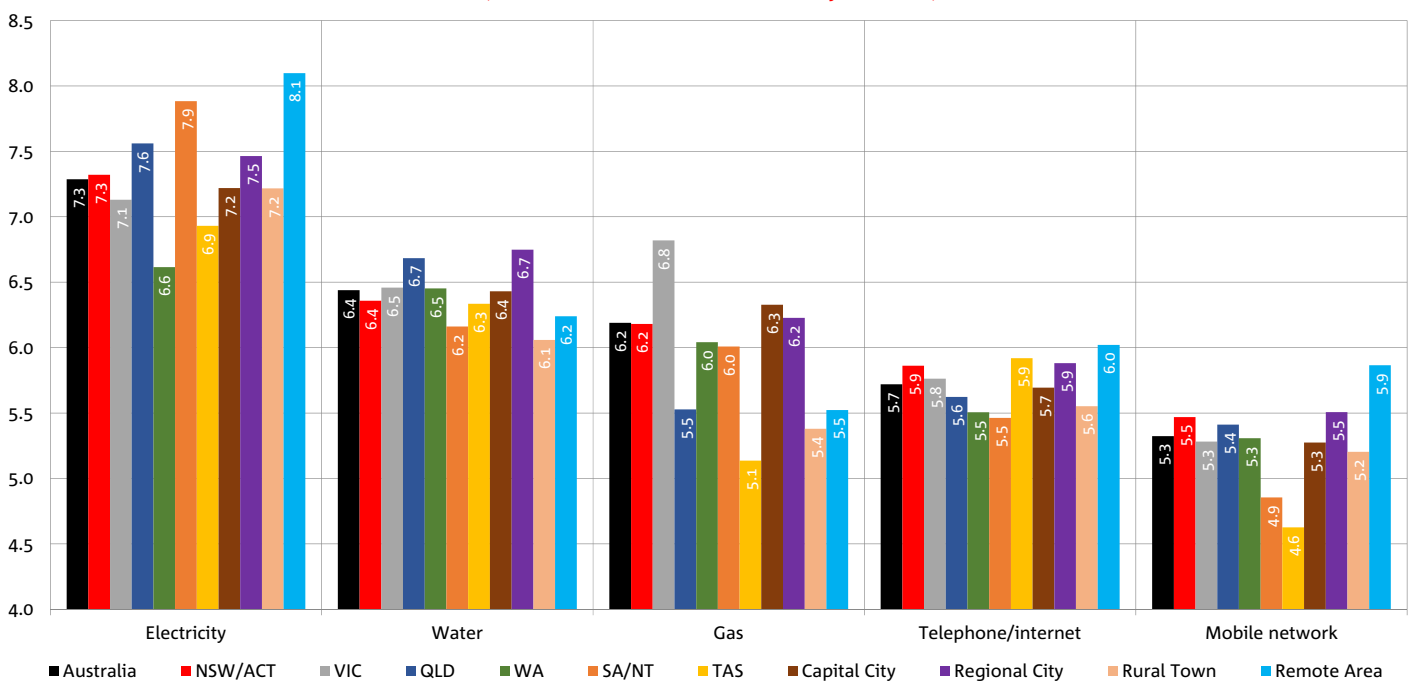
The next biggest areas of concern were water (6.4 points) and gas (6.2 points).

There was little difference in the level of concern about water across states and regions.

But a significant difference was noted by Victorian respondents who expressed a greater level of concern about gas (6.8 points).

Australians expressed only moderate concern about telephone/internet (5.7 points) and mobile networks (5.3 points) in the next 5 years - a result that was consistent in all locations.

LEVEL OF CONCERN OVER UTILITIES IN THE NEXT 5 YEARS (0 = not at all concerned; 10 = extremely concerned)



TRAVEL & WORK

Australians were asked whether a number of areas associated with travel and work had improved or deteriorated over the last 5 years and whether they thought these areas would improve or deteriorate in the next 5 years.

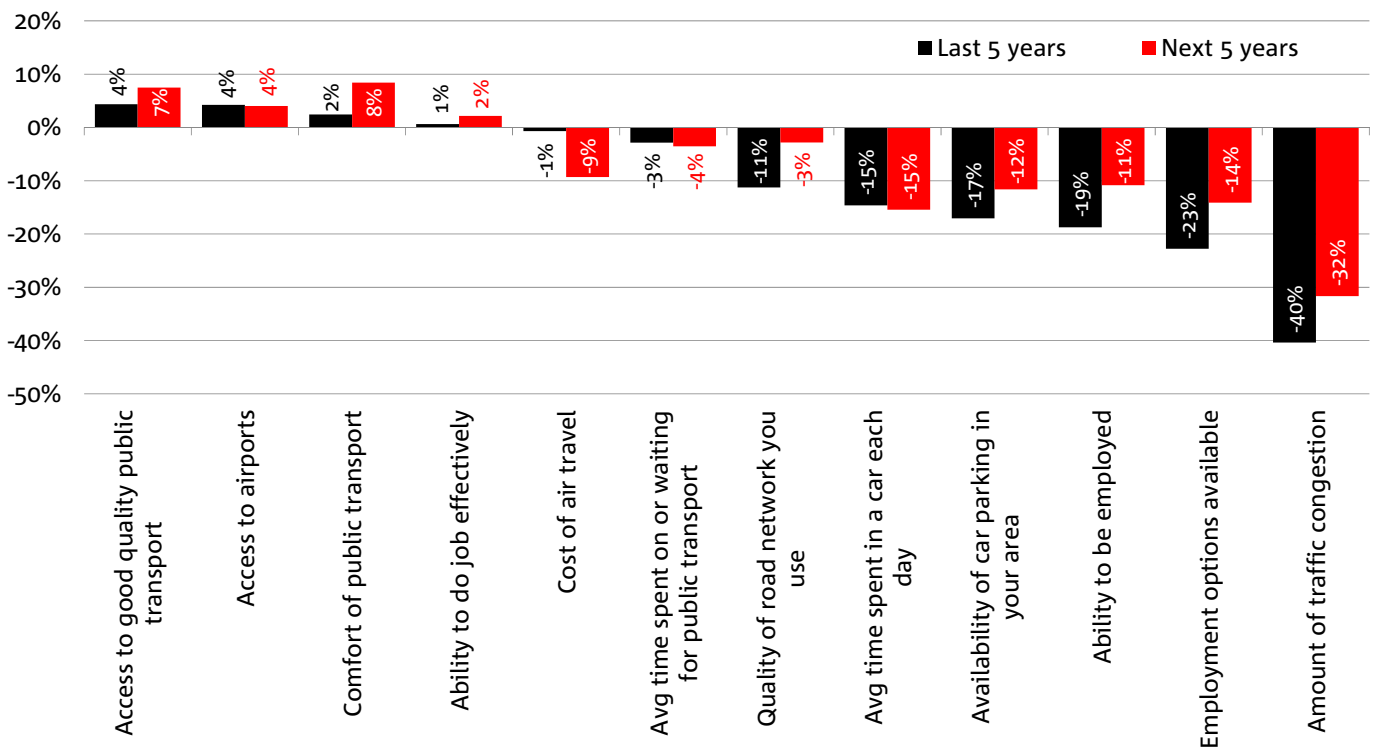
Significant concerns about deterioration in the last 5 years were most apparent in traffic congestion (-40%), employment opportunities (-23%) and the ability to be employed (-19%) - and the number of Australians who expect these things to get worse in the next 5 years outweighs the number anticipating an improvement, particularly in regards to traffic congestion (-32%).

Public car parking availability (-17%), the average time spent in a car every day (-15%) and the quality of the road network (-11%) were also seen to have deteriorated in the last 5 years, with a similar outcome expected in the next 5 years.

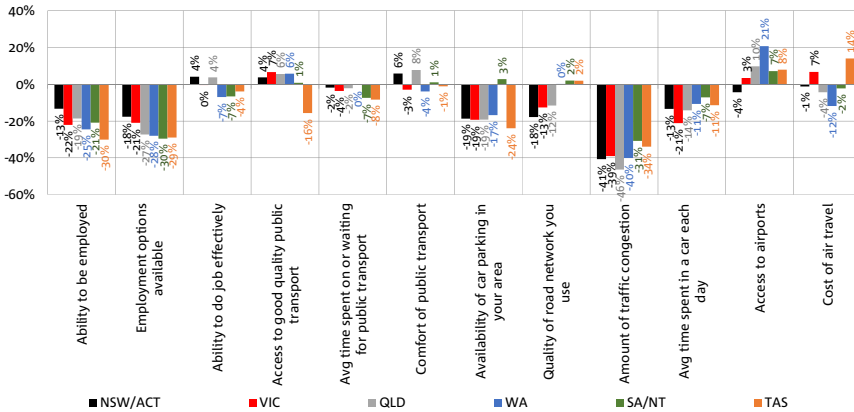
Interestingly, while Australians have seen little change in the cost of air travel in the last 5 years (-1%), significantly more people expect this situation to deteriorate in the next 5 years (-9%).

On the positive side, very modest improvements in the last 5 years were seen in access and quality of public transport services (4%), access to airports (4%), comfort or public transport (2%) and the ability to do our jobs effectively (1%). All of these areas are expected to continue improving in the next 5 years, particularly access to quality public transport and comfort of public transport.

TRAVEL/WORK IN AUSTRALIA: BETTER OR WORSE (NET CHANGE)



TRAVEL/WORK: BETTER OR WORSE IN LAST 5 YRS - BY STATE (NET CHANGE)



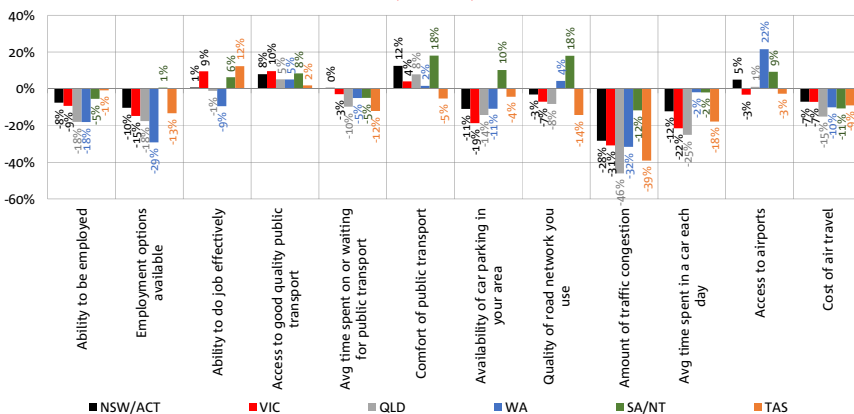
Traffic congestion deteriorated all states in the last 5 years - ranging from -46% in QLD to -12% in SA/NT.

Of concern, Australians living in all states anticipate further deterioration in the amount of traffic congestion in the next 5 years.

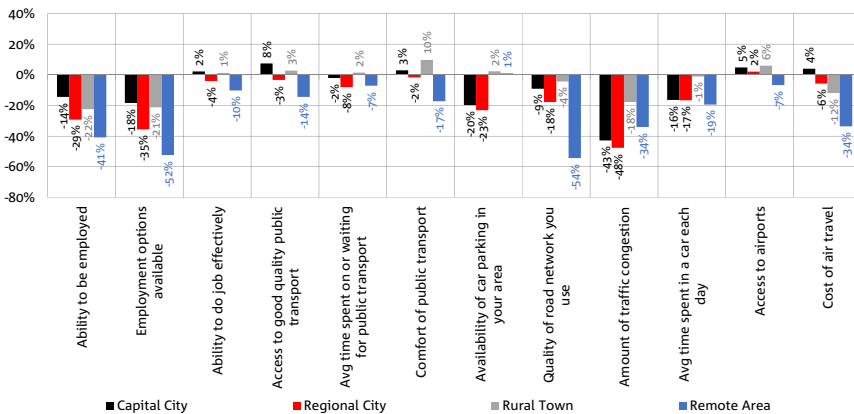
Employment options, the ability to be employed and the average time spent in a car have also deteriorated in all states in the past 5 years.

Australians living in all states expect these areas to deteriorate further in the next 5 years, except for employment option in SA/NT, which is expected to improve somewhat in the next 5 years.

TRAVEL/WORK: BETTER OR WORSE IN NEXT 5 YRS - BY STATE (NET CHANGE)



TRAVEL/WORK: BETTER OR WORSE IN LAST 5 YRS - BY REGION (NET CHANGE)



Traffic congestion has deteriorated most in regional and capital cities in the last 5 years and is expected to get worse in the next 5 years, particularly in regional cities.

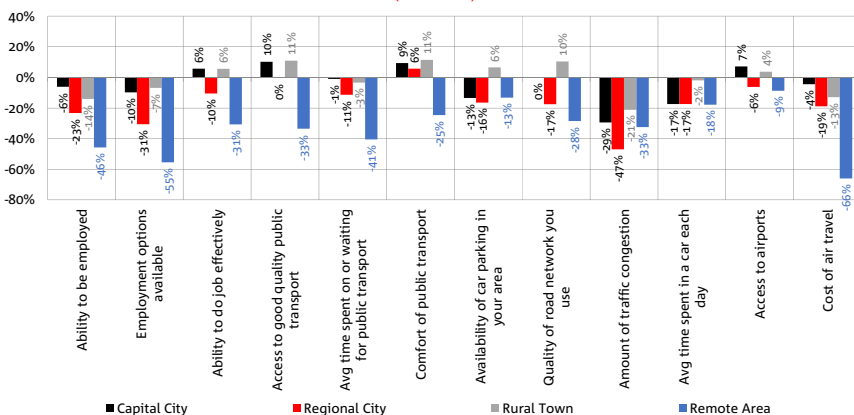
Australians living in remote locations were more likely to have seen deterioration in the employment options available to them and the quality of the road network.

Regional respondents were also more likely to have seen deterioration in employment options.

Looking forward, a lot more respondents in remote locations expect the cost of air travel and employment options available to them to deteriorate further in the next 5 years.

But significantly more people living in regional cities expect employment options available to them to deteriorate in the next 5 years.

TRAVEL/WORK: BETTER OR WORSE IN NEXT 5 YRS - BY REGION (NET CHANGE)



INVESTMENT PRIORITIES

The cost of utilities (such as gas, electricity and water) is the number one area that would improve the daily life of Australians if investment was prioritised - according to almost 1 in 2 (45%) people across the country.

Other areas that would also make a big difference to 1 in 3 Australians are community safety (37%) and the cost of healthcare (35%). Around 1 in 4 nominated housing (27%), access to quality healthcare (26%), speed/reliability of home internet (25%) and the level of local cleanliness/maintenance and pollution (24%).

A closer inspection reveals utility costs as the number issue in all states except VIC. But the highest number of people that said their life would improve with further investment lived in Tasmania (59%) and the least in NSW/ACT (42%).

In VIC, the level of community safety was seen as the biggest investment priority (47%), just ahead of utility costs (45%).

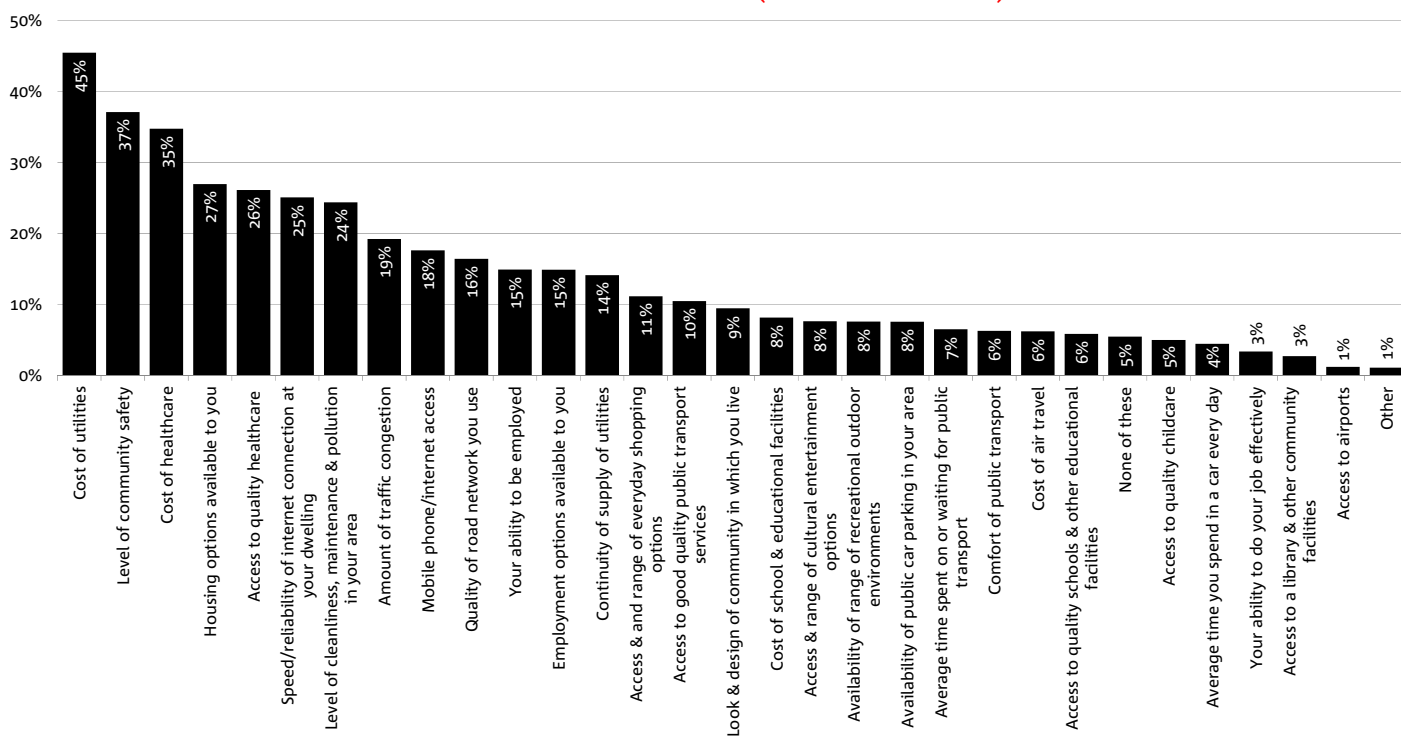
Utility costs was also a bigger priority for much more people living in remote areas (70%) and regional cities (52%) than in capital cities (43%) and rural areas (42%).

Among some other differences, the level of cleanliness, maintenance and pollution ranked in the top 5 priorities in NSW/ACT and WA but did not feature in other states. Instead, investment in continuity of electricity supply was a far bigger priority in SA/NT and the ability to be employed in TAS.

There was a broad consensus in the top investment priorities between men and women. By age, however, investment in employment options was seen as being a much more important priority for 18-24 year olds than in all other age groups.

See tables below for more details by location, gender and age.

AREAS THAT WOULD IMPROVE OUR LIVES OVERALL IF INVESTMENT IN THEM WAS PRIORITISED BY INFRASTRUCTURE PROVIDERS (% OF RESPONDENTS)



TOP 5 INVESTMENT PRIORITIES BY LOCATION

	Total	NSW/ACT	VIC	QLD	WA	SA /NT	TAS	Metro	Regional	Rural	Remote
Cost of utilities such as electricity, gas, water	45%	42%	45%	50%	47%	46%	59%	43%	52%	42%	70%
The level of community safety	37%	29%	47%	38%	43%	36%	33%	38%	39%	35%	18%
Cost of healthcare	35%	39%	33%	32%	23%	40%	44%	34%	37%	35%	31%
The housing options available to you	27%	30%	28%	27%	23%	18%	23%	27%	28%	27%	16%
Access to quality healthcare	26%	24%	29%	23%	27%	34%	22%	24%	29%	32%	41%
Speed and reliability of the internet connection at your dwelling	25%	27%	22%	26%	31%	17%	20%	26%	20%	26%	42%
Level of cleanliness, maintenance, and pollution in your area	24%	29%	24%	21%	23%	21%	8%	26%	25%	19%	10%
Amount of traffic congestion	19%	22%	18%	22%	16%	10%	14%	22%	18%	6%	5%
Mobile phone/Internet access	18%	18%	17%	21%	16%	14%	11%	15%	19%	25%	39%
Quality of the road network you use	16%	16%	15%	23%	9%	19%	4%	15%	20%	16%	36%
Your ability to be employed	15%	13%	15%	18%	14%	20%	11%	17%	8%	16%	6%
The employment options available to you	15%	11%	18%	16%	15%	16%	28%	15%	15%	16%	6%
Continuity of supply of utilities such as electricity, gas, water	14%	13%	15%	13%	9%	25%	10%	14%	13%	14%	30%
Access to and range of everyday shopping options (like supermarkets, etc.)	11%	11%	8%	11%	19%	11%	14%	9%	16%	15%	9%

TOP 5 INVESTMENT PRIORITIES BY GENDER & AGE

	Total	Male	Female	18 - 24 years	25 - 34 years	35 - 44 years	45 - 54 years	55 - 64 years	65 years and over
Cost of utilities	45%	46%	45%	28%	30%	38%	44%	63%	65%
Level of community safety	37%	34%	40%	36%	31%	34%	37%	39%	45%
Cost of healthcare	35%	33%	36%	34%	25%	30%	37%	37%	44%
Housing options available to you	27%	25%	29%	39%	40%	28%	24%	20%	15%
Access to quality healthcare	26%	25%	28%	13%	21%	22%	25%	31%	40%
Speed/reliability of internet connection at your dwelling	25%	25%	26%	24%	22%	24%	24%	28%	28%
Level of cleanliness, maintenance & pollution in your area	24%	24%	25%	28%	28%	23%	19%	17%	31%
Amount of traffic congestion	19%	20%	19%	14%	15%	17%	20%	27%	22%
Mobile phone/internet access	18%	20%	15%	22%	20%	18%	15%	19%	12%
Quality of road network you use	16%	17%	16%	5%	12%	14%	17%	25%	23%
Your ability to be employed	15%	13%	16%	30%	15%	16%	20%	11%	2%
Employment options available to you	15%	14%	16%	23%	23%	20%	15%	8%	4%
Continuity of supply of utilities	14%	15%	14%	4%	10%	11%	13%	18%	25%
Access & and range of everyday shopping options	11%	11%	11%	9%	11%	8%	9%	11%	17%

ABOUT THE SURVEY

The survey is based on the responses of over 1,000 Australians representative of the population.

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