

NAB BEHAVIOURAL INSIGHTS

The Changing Workplace - The “Great Resignation”, Working from Home & Returning to the Office

NAB Behavioural & Industry Economics

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1 in 5 Australians are considering leaving their current job, but numbers are falling. Intentions to leave remain highest in Mining & Agribusiness and among workers in digital/data, sales, labouring and other IT/technology. Australians are spending 34% of their work week on average at home (down from 38% in Q1), but ideally still want 48%. Commute time remains the key (and rising) concern over returning to the workplace, as worries over catching COVID continue to ease.

COVID-19 has fundamentally changed the workplace, blending work and life with lasting impacts on workplace culture, employee attitudes and expectations. After decades of low employee turnover a very sizeable share of the adult working population are still considering leaving their current job, but numbers are declining.

In total, 1 in 5 (19%) Australians working full or part time said they were considering leaving their current place of employment - down from 22% in Q1 and 23% in Q4 2021 when NAB first started tracking this data. There was also an increase in the number of working Australians who had no intention of changing jobs and were not keeping up with potential job opportunities (34% in Q2, from 30% in the previous quarter and 31% in Q4 2021). Younger workers were again most likely to have considered a change of jobs in Q2 (unchanged at 24%), with this number stepping down progressively in each age group to just 8% in the over 65 group (13% in Q1).

The Q2 survey also revealed some significant changes in intentions to change jobs across industries. The number of workers considering changing jobs was highest in Mining (34% up from 28% in Q1) and Agribusiness (34% down from 40% in Q1). The number of workers considering changing jobs continues to be lowest in the Property Services (8% vs. 15% in Q1) and Recreation & Personal Services (9% vs. 16% in Q1) sectors. The survey also highlighted big increases in the number of workers considering changing jobs in the Utilities (32% vs. 22% in Q1), Wholesale (30% vs. 11% in Q1), Finance & Insurance Services (25% vs. 19% in Q1), Education (20% vs. 15% in Q1) and Health Services (19% vs. 11% in Q1) sectors. We also noted very big declines in the number of workers thinking about changing jobs in the Construction (18% vs. 39% in Q1), Telecoms (13% vs. 42% in Q1) and Government (15% vs. 27%) sectors.

By employment type, the highest number of employees looking to change jobs were digital & data workers (27% but down from 31% in Q1), sales workers (unchanged at 26%), labourers (basically unchanged at 24%) and other IT & technology workers (also basically unchanged at 23%). The lowest number of workers considering change were clerical & admin workers (basically unchanged at 15%) and community & personal service workers (16% down from 18% in Q1).

On average, Australians spent 34% of their work week working from home in Q2, down from 38% in Q1. However, while the proportion of the work week at home fell to 36% for full time workers (42% in Q1), it was basically unchanged for part time workers (27%). Workers in nearly all states were spending less time working from home, except in WA where the proportion doing so increased to 26% in Q2 (23% in Q1). Workers in VIC (38%) and NSW (34%) spent the most time working from home, though down from 43% and 45% respectively in Q1. Time spent working at home also fell sharply in the ACT to 32% (40% in Q1), but was basically unchanged in SA (28%). It declined in QLD (27% vs. 30% in Q1), and more so in the NT (20% vs. 31%) and TAS (18% vs. 23%).

By industry, workers in the Finance & Insurance (61%), Telecoms (60%), Business Services (56%) and Utilities (51%) led the way, though workers in all these sectors also said they were spending somewhat less time working from home than in Q1. Workers in the Education (8%) and Health Services (16%) sectors were spending the least amount of time working from home, and somewhat less so than in Q1.

Ideally workers still want to spend half their week at home (48%) - but higher for full time (50%) than part time (42%) workers. An unchanged number in VIC (54%) still want to spend most time working from home, followed by NSW (48%) and the ACT (48%). In WA, workers ideally want to spend more time at home (46% vs. 42% in Q1) but in SA (39% vs. 43% in Q1) and TAS (37% vs. 46% in Q1) less time. Women still want to spend more time at home (50%) than men (46%). By age, workers in the 30-49 (52%) and 18-29 (49%) ideally would spend around half their week working at home. Workers in the over 65 group however wanted to spend less time at home (43% vs. 50% in Q1), and the 50-64 age group the least (36%).

By job type, digital & data and other & IT & tech workers (63%) ideally want to spend most time at home, followed by clerical & admin workers (55%), professionals (55%) and managers (52%). By industry, Finance & Insurance (71% up from 66% in Q1) and Business Services (66%) led the way, followed by Telecoms (63%), Utilities (61%) and Agribusiness (59%). Workers in Education (27%), Government (39%), Health Services (39%) and Hospitality (37%) ideally would spend the least time working from home.

A comparison of the actual work week against employees ideal situation, suggests very few groups continue to enjoy their optimal work week. While on average working Australians are spending 34% of their week at home, ideally they would like to spend 48% at home. The average amount of time workers currently work from home in a typical week fell well short of their ideal in all states.

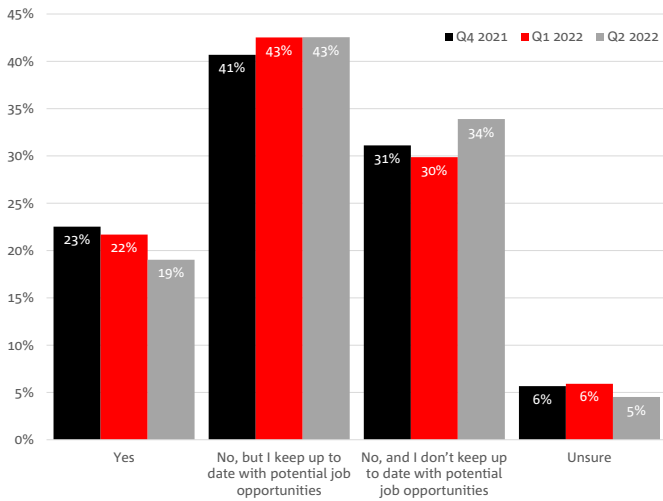
By job type, digital & data workers are the only group currently spending around their ideal amount of time working from home (61% current; 63% ideal), with managers also currently spending relatively close to their ideal amount of time working from home (44% current; 52% ideal). The gap was biggest for trades workers (11% current; 33% ideal), general unskilled workers (20% current; 42% ideal), clerical & admin workers (35% current; 55% ideal), labourers (17% current; 36% ideal), and community & personal services workers (13% current; 32% ideal). The Telecoms (60% current; 63% ideal); Wholesale (44% current; 50% ideal), Construction (34% current; 42% ideal), Business Services (56% current; 66% ideal) and Finance & Insurance Services (61% current; 71% ideal) sectors are the only sectors that appear to be providing relatively close ideal working from home conditions for their workers. Industries where the gap between current and ideal work from home conditions are widest include Health Services (16% current; 39% ideal), Accommodation, Cafes, Restaurants & Clubs (21% current; 42% ideal), Government (20% current; 19% ideal) and Educations (8% current; 27% ideal).

What are the key barriers to returning to the workplace. The most common obstacle for over 4 in 10 (43%) workers overall continues to be commute time (up from 40% in Q1). Around 3 in 10 identified traffic congestion (30%), and loss of flexibility for exercise and other activities (29%). Other areas that resonated most (though for slightly fewer Australians than in Q1) included having to change their routine (27%), spending less time with family & friends (24%), the cost of public transport (23%) and having to work longer hours (22%). COVID is weighing less heavily on the psyche of Australian workers, with 29% highlighting the fear of catching COVID or transmitting it to others as a key barrier, down from 33% in the previous quarter. However, somewhat more workers cited access to parking (19% vs. 17%) and the cost of parking (19% vs. 16% in Q1) as barriers to returning to the workplace. Other key barriers included having to work longer hours (21%), complying with dress codes and other workplace requirements (20%), and having to spend time with people (17%). Around 14% of all workers said there were no barriers to returning to the workplace, down slightly from 16% in Q1.

The main differences between women and men related to loss of flexibility for exercise & other activities (35% women; 25% men), complying with dress codes & other workplace requirements (23% women; 15% men) and commute times (47% women; 40% men). By age, we noted a much higher number in the 18-29 group who highlighted loss of flexibility for exercise & other activities (41%) and cost of public transport (35%) as key barriers to returning to the workplace, with a much higher number in the over 65 age group signalling there were no barriers to returning to work (41%).

Survey findings

Considering leaving current place of employment: overall



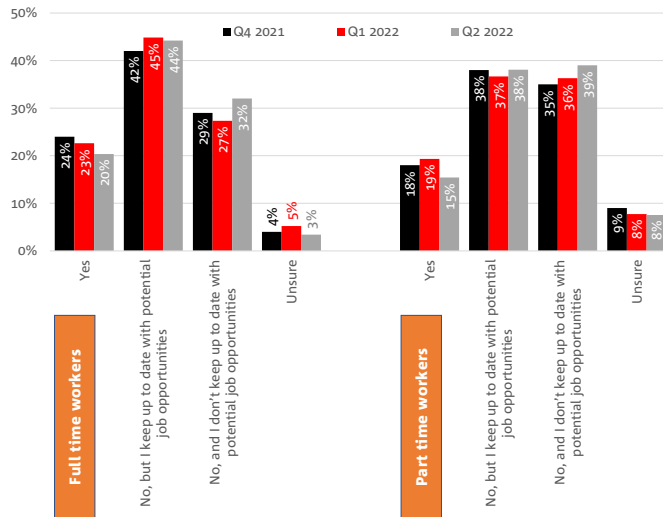
Fewer Australians considered changing jobs in Q2. In total, 1 in 5 (19%) Australians working full or part time said they were considering leaving their current place of employment - down from 22% in the previous quarter and 23% in Q4 2021 when we first started tracking this data.

Just over 4 in 10 (43%) were not considering leaving, but were keeping up to date with potential job opportunities. This was unchanged from the previous quarter but up slightly from 41% in Q4 2021.

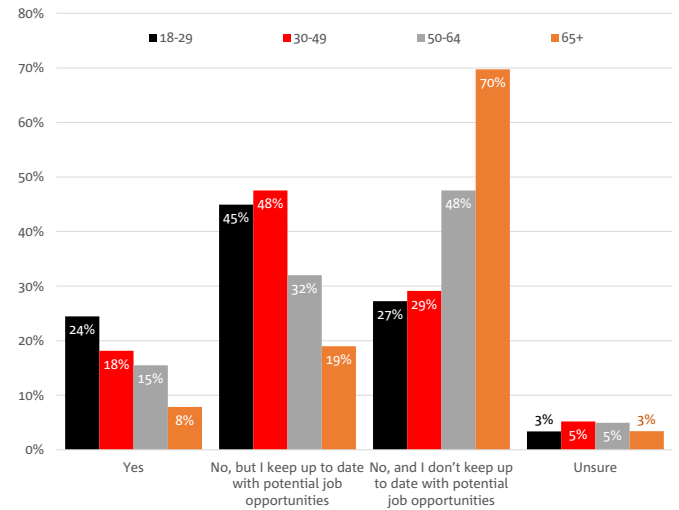
We also noted a relatively large increase in the number of working Australians who had no intention of changing jobs and were not keeping up with potential job opportunities to 34% in Q2 - from 30% in the previous quarter and 31% in Q4 2021.

A broadly similar number - around 1 in 20 or 5% - remained unsure (6% in previous survey).

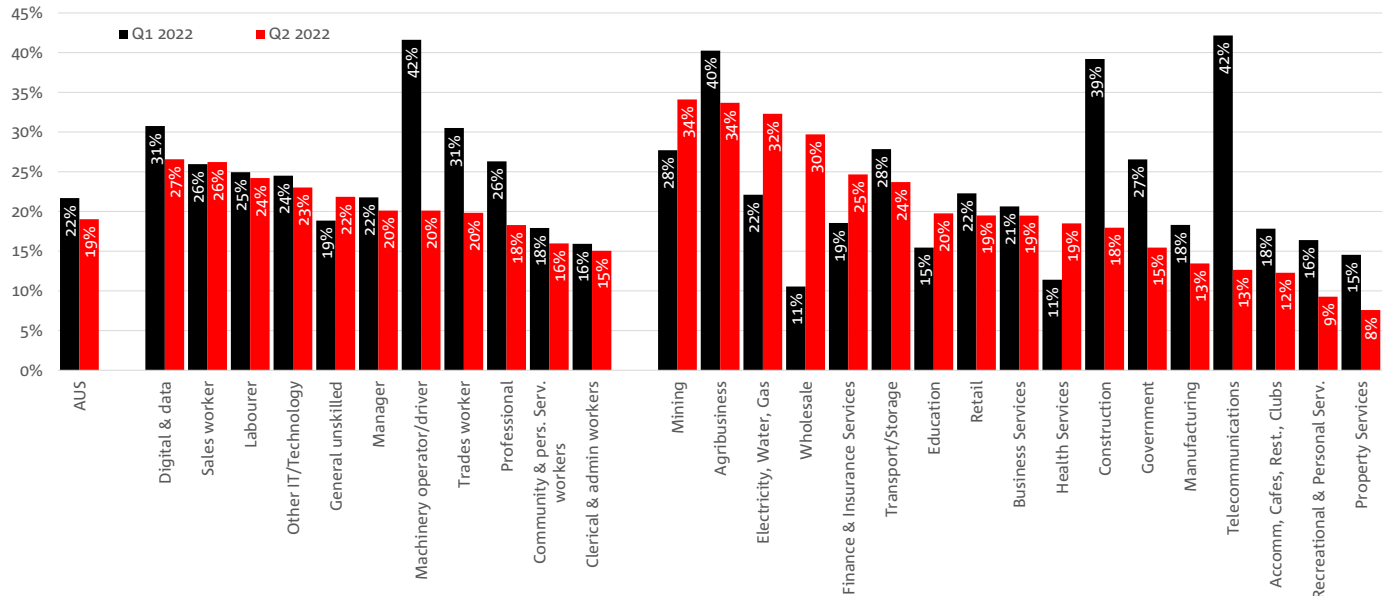
Considering leaving current place of employment: full time/part time



Considering leaving current place of employment: age



Considering leaving current place of employment "yes" only: type of job & industry



A bigger share of full time workers in Q2 considered leaving their current job in the next 12 months than part time workers (20% full time; 15% part time), though the number thinking about changing jobs fell relative to the last quarter (23% full time; 19% part time in Q1).

The number of full time (44%) and part time (38%) workers not considering changing jobs but keeping up to date with potential job opportunities was basically unchanged in Q2.

However, the survey did reveal a sizeable increase in the number of full time workers not looking to change jobs or keeping up with potential job opportunities to 32% (27% in Q1), and a more modest increase among part time workers to 39% (36% in Q1). Uncertainty remained higher for part time workers (8% part time; 3% full time).

Clear patterns continue to be evident by age group. Younger workers were again most likely to have considered a change of jobs in Q2 (unchanged at 24%), with this number stepping down progressively in each age group to just 8% in the over 65 group (13% in Q1). The number of workers not currently considering a change but keeping up with potential opportunities was highest in the 30-49 group (48% and up from 44% in Q1) and lowest in the over 65 group (19% but down from 22% in Q1).

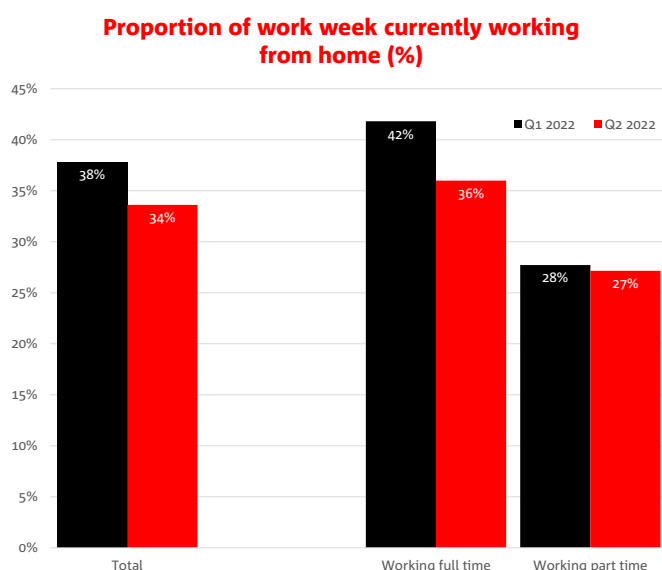
In contrast, the number of workers who were not considering changing or keeping up with potential opportunities was significantly higher in the over 65 group (70% up from 57% in Q1), and stepped down progressively in each age group to just 27% in the 18-29 group (21% in Q1).

By employment type, the highest number of employees looking to change jobs were digital & data workers (27% but down from 31% in Q1), sales workers (unchanged at 26%), labourers (basically unchanged at 24%) and other IT & technology workers (also basically unchanged at 23%). The lowest number of workers considering change were clerical & admin workers (basically unchanged at 15%) and community & personal service workers (16% down from 18% in Q1).

We also noted significant falls in the number of machinery operators or drivers considering a change in Q2 (20% vs. 42% in Q1), trades workers (20% vs. 31% in Q1) and professionals (18% vs. 26% in Q1). General unskilled workers were the only group where the number of workers considering a job change increased (22% vs. 19% in Q1) - see chart above.

The Q2 survey also revealed some significant changes in intentions to change jobs across industries. The number of workers considering changing jobs was highest in Mining (34% up from 28% in Q1) and Agribusiness (34% down from 40% in Q1). The number of workers considering changing jobs continues to be lowest in the Property Services (8% vs. 15% in Q1) and Recreation & Personal Services (9% vs. 16% in Q1) sectors.

The survey also highlighted big increases in the number of workers considering changing jobs in the Utilities (32% vs. 22% in Q1), Wholesale (30% vs. 11% in Q1), Finance & Insurance Services (25% vs. 19% in Q1), Education (20% vs. 15% in Q1) and Health Services (19% vs. 11% in Q1) sectors. We also noted very big declines in the number of workers thinking about changing jobs in the Construction (18% vs. 39% in Q1), Telecoms (13% vs. 42% in Q1) and Government (15% vs. 27%) sectors.



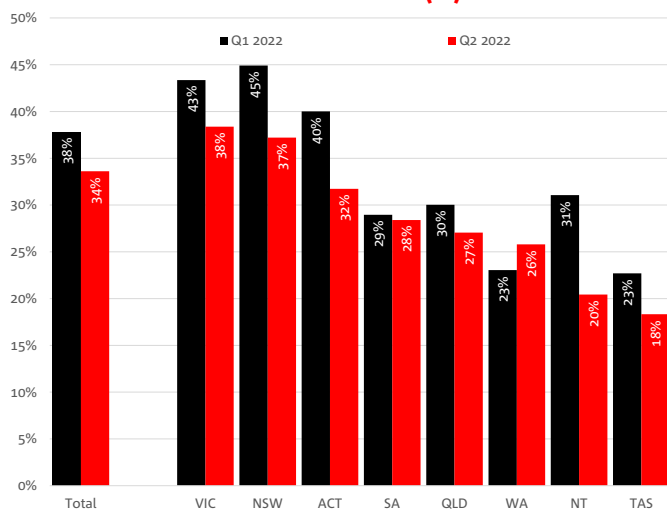
On average, working Australians spent 34% of their work week working from home in Q2, down from 38% in Q1.

However, while the proportion of the work week spent working from home fell to 36% for full time workers (42% in Q1), it was basically unchanged for part time workers (27%).

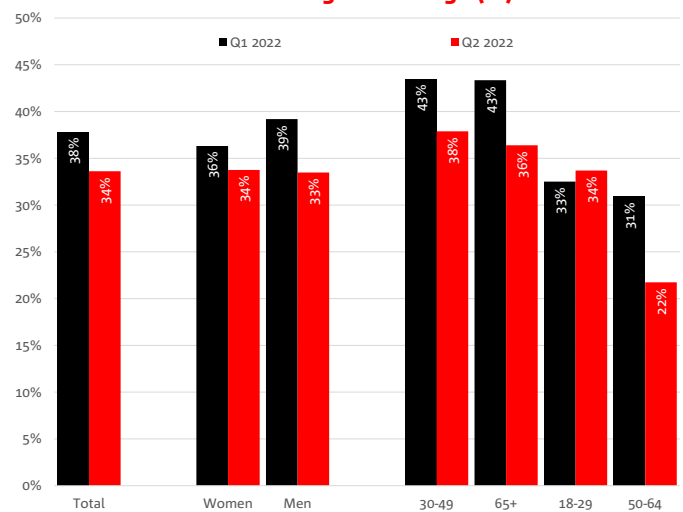
Workers in nearly all states were spending less time working from home, except in WA where the proportion doing so increased to 26% in Q2 (23% in Q1). Workers in VIC (38%) and NSW (34%) spent the most time working from home, though down from 43% and 45% respectively in Q1.

Time spent working at home also fell sharply in the ACT to 32% (40% in Q1), but was basically unchanged in SA (28%). It declined in QLD (27% vs. 30% in Q1), and more so in the NT (20% vs. 31%) and TAS (18% vs. 23%) - see chart below.

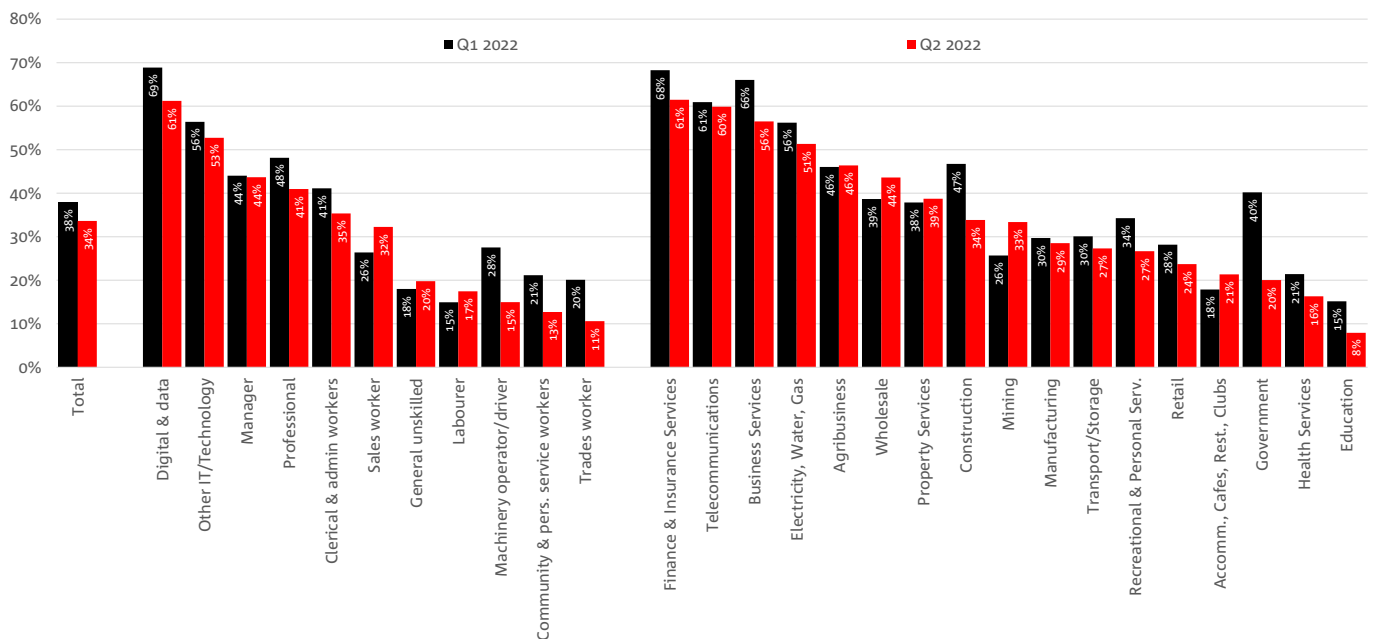
Proportion of work week currently working from home: state (%)



Proportion of work week currently working from home: gender & age (%)



Proportion of work week currently working from home: type of job & industry (%)



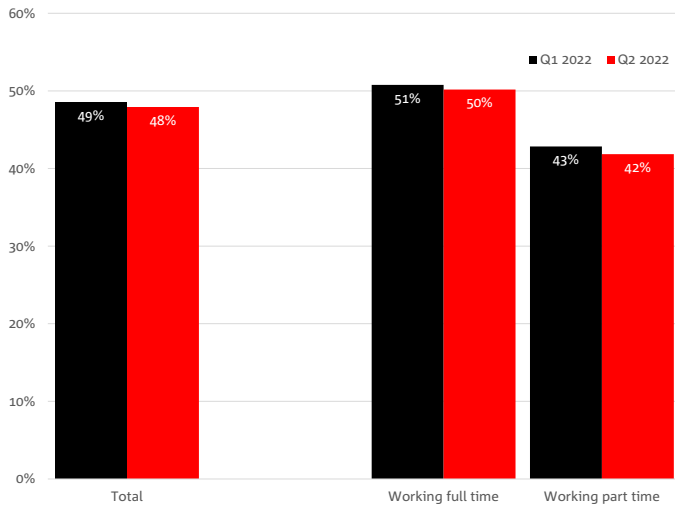
Both women (34%) and men (33%) spent around one-third of the week working from home in Q2. However, both genders spent less time working from home relative to the previous quarter, with the decline somewhat more evident for men (39% in Q1) than women (36% in Q1).

Workers in most age groups also said they spent less of their week working from home in Q2, except in the 18-29 group where it was basically unchanged (34%). Workers in the 30-49 (38%) and over 65 (36%) group were spending the most time working from home, but somewhat less so than in the previous quarter (43% each). Workers in the 50-64 age group spent the least amount of time working from home (22%) and considerably less than in Q1 (31%).

By job type, digital & data workers spent most time working from home (61%), followed by other IT & tech workers (53%). Trades (11%) and community services workers (13%) spent the least amount of time doing so. The amount of time spent working from home also fell for most job types, except general unskilled workers, labourers and managers.

By industry, workers in the Finance & Insurance (61%), Telecoms (60%), Business Services (56%) and Utilities (51%) led the way, though workers in all these sectors also said they were spending somewhat less time working from home than in Q1. Workers in the Education (8%) and Health Services (16%) sectors were spending the least amount of time working from home, and somewhat less so than in Q1.

Proportion of work week ideally like to work from home (%)

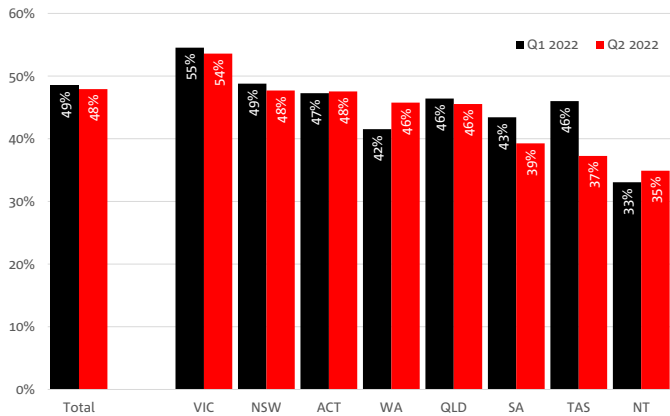


Ideally workers still want to spend half their week at home (48%) - but higher for full time (50%) than part time (42%) workers. An unchanged number in VIC (54%) still want to spend most time working from home, followed by NSW (48%) and the ACT (48%). In WA, workers ideally want to spend more time at home (46% vs. 42% in Q1) but in SA (39% vs. 43% in Q1) and TAS (37% vs. 46% in Q1) less time.

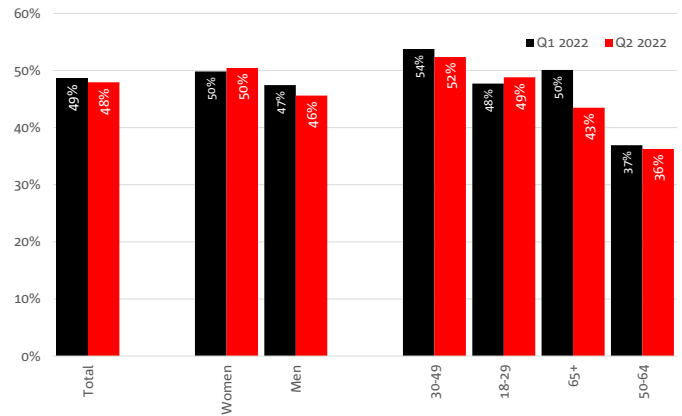
Women still want to spend more time at home (50%) than men (46%). By age, workers in the 30-49 (52%) and 18-29 (49%) ideally would spend around half their week working at home. Workers in the over 65 group however wanted to spend less time at home (43% vs, 50% in Q1), and the 50-64 age group the least (36%).

By job type, digital & data and other & IT & tech workers (63%) ideally want to spend most time at home, followed by clerical & admin workers (55%), professionals (55%) and managers (52%). By industry, Finance & Insurance (71% up from 66% in Q1) and Business Services (66%) led the way, followed by Telecoms (63%), Utilities (61%) and Agribusiness (59%). Workers in Education (27%), Government (39%), Health Services (39%) and Hospitality (37%) ideally would spend the least time working from home.

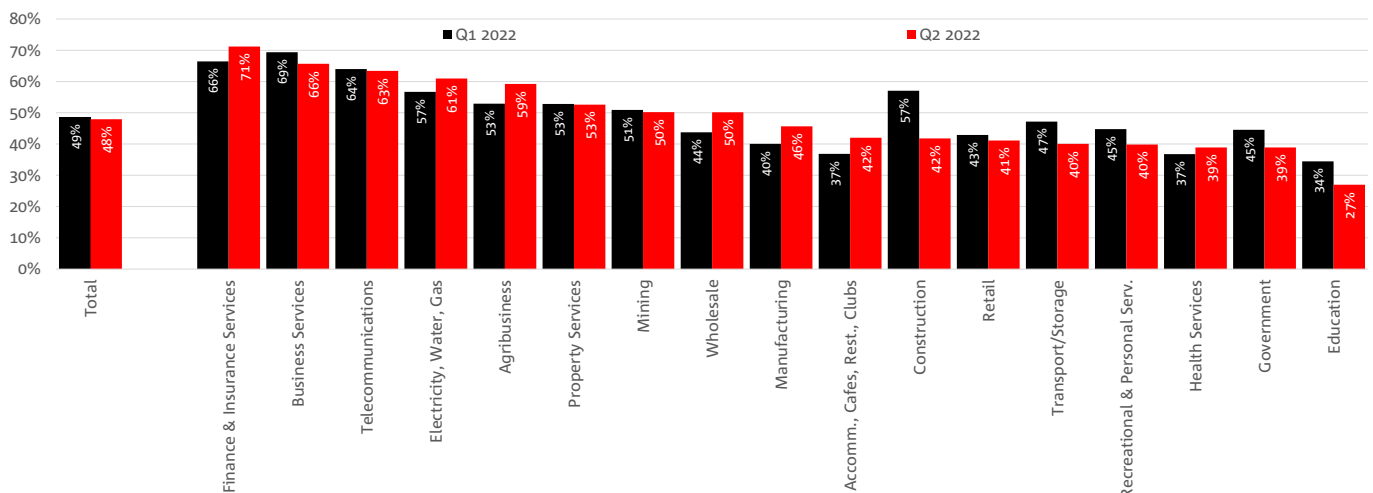
Proportion of work week ideally like to work from home: state (%)



Proportion of work week ideally like to work from home: gender & age (%)



Proportion of work week ideally like to work from home: industry (%)



So, are Australian workers currently working from home as much as they would ideally like to? The chart below compares the proportion of their work week currently spent working from home in Q2 against what their ideal situation would be in all key groups. It continues to suggest very few groups currently enjoy their ideal work from home conditions.

Overall, working Australians currently spend 34% of their week working from home, but ideally would like to be spending 48% of their week at home. Both full time (36% current; 50% ideal) and part time (27% current; 42% ideal) workers spend less time working from home than they would ideally like to, with both groups reporting a similar “gap” between current and ideal conditions (around 14-15%).

The average amount of time workers currently work from home in a typical week fell well short of their ideal in all states. In Q2, ideal working from home conditions fell most short in WA (26% current; 46% ideal), TAS (18% current; 37% ideal) and QLD (27% current; 46% ideal). The gap was smallest in NSW (37% current; 48% ideal) and SA (28% current; 39% ideal).

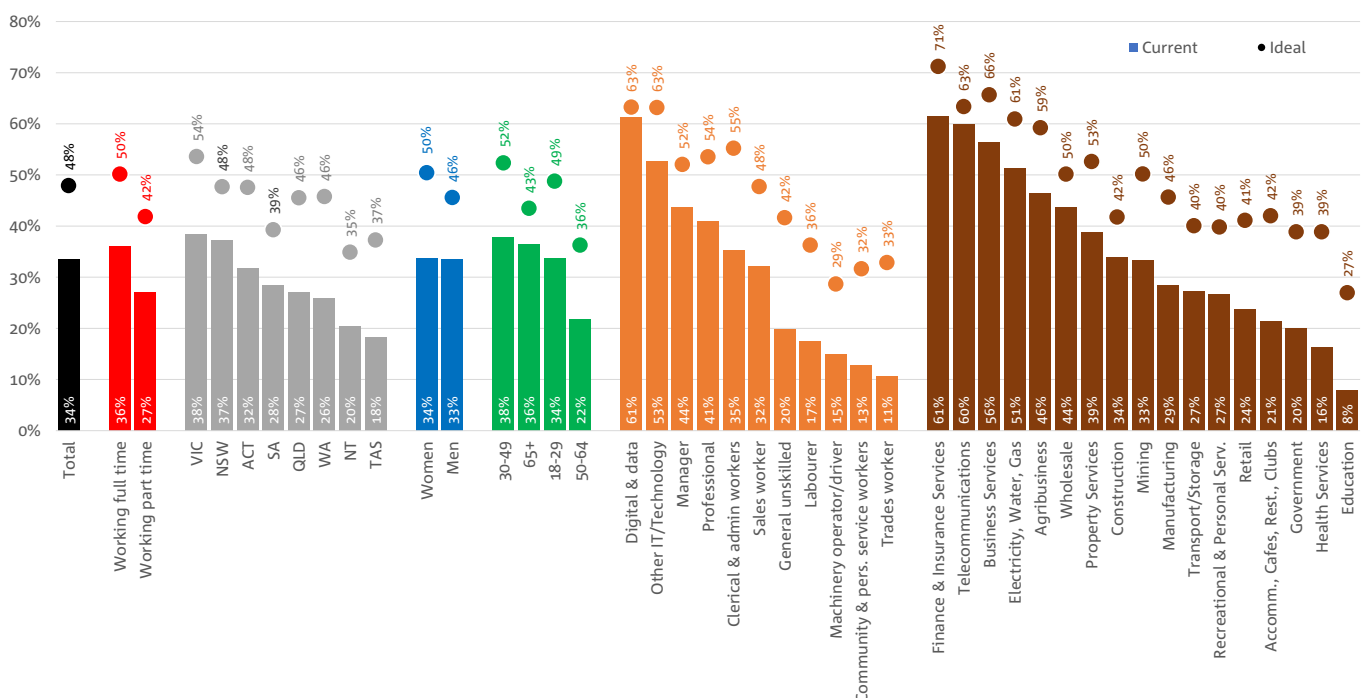
Both men and women would ideally prefer to spend more of their week working from home, but the gap between current and ideal conditions continues to be somewhat larger for women (34% current; 50% ideal) than men (33% current; 46% ideal).

All age groups want to spend more time working from home. But the gap between current and ideal conditions was somewhat more apparent in the 18-29 (34% current; 49% ideal), 50-64 (27% current; 36% ideal) and 30-49 (38% current; 52% ideal) age groups than in the over 65 age group (36% current; 43% ideal).

By job type, digital & data workers are the only group currently spending around their ideal amount of time working from home (61% current; 63% ideal), with managers also currently spending relatively close to their ideal amount of time working from home (44% current; 52% ideal). The gap was biggest for trades workers (11% current; 33% ideal), general unskilled workers (20% current; 42% ideal), clerical & admin workers (35% current; 55% ideal), labourers (17% current; 36% ideal), and community & personal services workers (13% current; 32% ideal).

The Telecoms (60% current; 63% ideal); Wholesale (44% current; 50% ideal), Construction (34% current; 42% ideal), Business Services (56% current; 66% ideal) and Finance & Insurance Services (61% current; 71% ideal) sectors are the only sectors that appear to be providing relatively close ideal working from home conditions for their workers. Industries where the gap between current and ideal work from home conditions are widest include Health Services (16% current; 39% ideal), Accommodation, Cafes, Restaurants & Clubs (21% current; 42% ideal), Government (20% current; 19% ideal) and Educations (8% current; 27% ideal).

Proportion of work week currently working from home & proportion of work week ideally like to work from home (Q2 2022)



Australian workers who were spending time working from home were asked what the key barriers were to wanting to get back to the workplace. The most common obstacle for over 4 in 10 (43%) workers overall was commute time (up from 40% in Q1). Around 3 in 10 however also continued to point to traffic congestion (30%), and loss of flexibility for exercise and other activities (29%). Other areas that resonated with most workers (though for slightly less than in Q1) included having to change their routine (27%), spending less time with family & friends (24%), the cost of public transport (23%) and having to work longer hours (22%).

The survey also suggested COVID was weighing less heavily on the psyche of Australian workers, with just 29% highlighting the fear of catching COVID or transmitting it to others as a key barrier, down from 33% in the previous quarter. However, somewhat more workers cited access to parking (19% vs. 17%) and the cost of parking (19% vs. 16% in Q1) as barriers to returning to the workplace.

Other key barriers included having to work longer hours (21%), complying with dress codes and other workplace requirements (20%), and having to spend time with people (17%).

Around 14% of all workers said there were no barriers to returning to the workplace, down slightly from 16% in Q1.

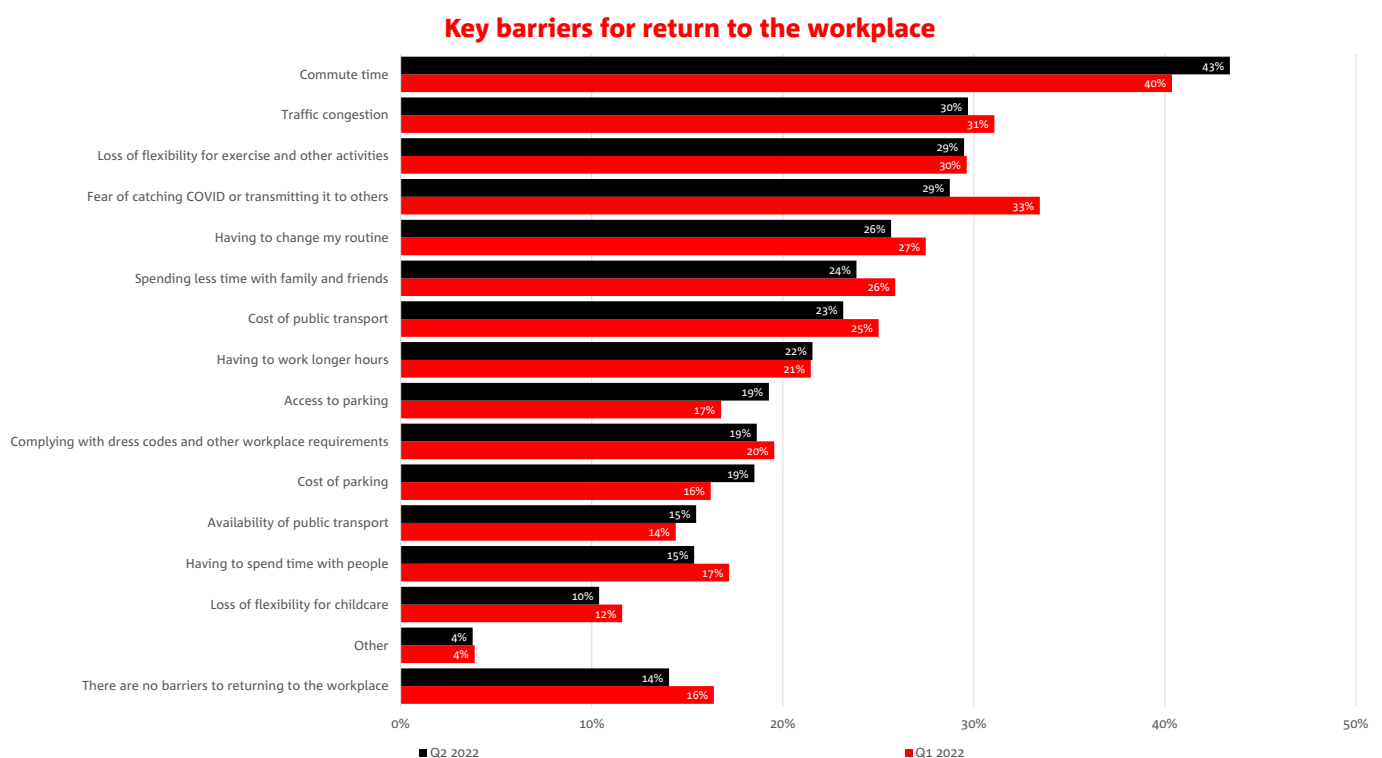
Key differences between full and part time workers were cost of public transport (27% full time; 7% part time), loss of flexibility for exercise & other activities (31% full time; 23% part time), and commute time (45% full time; 38% part time). Around 22% of part time workers however said there were no barriers holding them back from returning to their workplace, compared to 12% of full time workers.

Among key take outs by state was the much higher number of workers in QLD (38%), SA (37%) and VIC (33%) pointing to commute times, in SA fear of catching COVID or spreading it to others (39%), in NSW having to change their routines (29%), in WA spending less time with family & friends (37%), in SA access to parking (31%), in NSW (20%) and VIC (17%) availability of public transport, and in ACT, TAS & NT (combined) loss of flexibility for childcare (27%)

The main differences between women and men related to loss of flexibility for exercise & other activities (35% women; 25% men), complying with dress codes & other workplace requirements (23% women; 15% men) and commute times (47% women; 40% men).

By age, we noted a much higher number in the 18-29 group who highlighted loss of flexibility for exercise & other activities (41%) and cost of public transport (35%) as key barriers to returning to the workplace, with a much higher number in the over 65 age group signalling there were no barriers to returning to work (41%).

There were also some important differences in barriers to returning to work by job type and by industry. These are highlighted in the table on the following page.



Key barriers for return to workplace

	Commute time	Traffic congestion	Loss of flexibility for exercise & other activities	Fear of catching COVID or transmitting it to others	Having to change my routine	Spending less time with family & friends	Cost of public transport	Having to work longer hours	Access to parking	Complying with dress codes & other workplace	Cost of parking	Availability of public transport	Having to spend time with people	Loss of flexibility for childcare	There are no barriers to returning to the workplace
All workers	43%	30%	29%	29%	26%	24%	23%	22%	19%	19%	19%	15%	15%	10%	14%
Working full time	45%	31%	31%	29%	27%	24%	27%	23%	20%	19%	19%	16%	15%	10%	12%
Working part time	38%	27%	23%	27%	23%	24%	9%	18%	15%	16%	15%	12%	17%	12%	22%
NSW	42%	25%	30%	30%	29%	19%	31%	22%	18%	17%	16%	20%	17%	9%	15%
VIC	46%	33%	24%	29%	31%	26%	20%	20%	18%	19%	23%	17%	16%	11%	12%
QLD	46%	38%	34%	23%	16%	27%	17%	23%	21%	20%	19%	7%	15%	14%	16%
SA	49%	37%	35%	39%	14%	24%	10%	24%	31%	23%	22%	5%	10%	7%	4%
WA	37%	27%	38%	29%	17%	37%	18%	22%	20%	25%	16%	13%	13%	10%	13%
ACT, TAS, NT	36%	21%	19%	24%	24%	25%	12%	25%	16%	13%	18%	9%	13%	27%	16%
Men	40%	28%	25%	26%	23%	22%	25%	19%	19%	15%	18%	15%	13%	9%	15%
Women	47%	32%	35%	31%	29%	26%	21%	24%	20%	23%	19%	16%	18%	12%	13%
18 - 29	46%	29%	41%	29%	33%	28%	35%	25%	24%	23%	25%	22%	17%	9%	8%
30 - 49	43%	30%	27%	29%	24%	25%	21%	21%	19%	18%	17%	13%	16%	14%	13%
50 - 64	42%	32%	19%	26%	18%	17%	11%	19%	14%	13%	11%	10%	11%	4%	21%
65+	38%	30%	12%	27%	17%	5%	9%	11%	9%	6%	18%	16%	5%	0%	41%
Manager	41%	31%	25%	26%	26%	23%	27%	21%	21%	15%	21%	14%	14%	13%	12%
Sales worker	45%	19%	27%	27%	24%	31%	12%	25%	21%	24%	16%	16%	15%	7%	14%
Professional	44%	30%	35%	29%	23%	23%	23%	21%	20%	21%	17%	18%	15%	13%	14%
Machinery op/driver	11%	11%	21%	11%	23%	11%	11%	33%	22%	21%	24%	22%	22%	11%	20%
Digital and data	57%	22%	38%	44%	35%	18%	51%	26%	21%	30%	13%	22%	4%	0%	4%
Other IT/Technology	57%	36%	39%	45%	33%	24%	44%	27%	26%	21%	23%	22%	19%	8%	4%
Labourer	6%	16%	10%	16%	20%	10%	5%	15%	11%	10%	15%	0%	13%	15%	14%
General unskilled	26%	26%	39%	21%	6%	40%	12%	38%	13%	6%	20%	25%	13%	6%	29%
Trades worker	47%	36%	8%	15%	10%	32%	41%	25%	16%	0%	0%	17%	7%	0%	14%
Comm. & pers services	43%	40%	38%	36%	26%	27%	9%	29%	33%	16%	28%	8%	8%	9%	11%
Clerical & admin	52%	34%	36%	27%	30%	26%	18%	16%	15%	14%	19%	15%	20%	7%	17%
Education	32%	33%	22%	26%	14%	27%	14%	33%	20%	18%	11%	9%	10%	14%	28%
Agribusiness	32%	15%	10%	32%	33%	17%	17%	24%	8%	18%	8%	10%	17%	8%	0%
Mining	27%	31%	52%	35%	20%	13%	7%	7%	27%	28%	0%	15%	7%	8%	7%
Manufacturing	35%	31%	12%	15%	18%	20%	15%	12%	26%	19%	8%	23%	16%	4%	27%
Construction	40%	21%	24%	35%	32%	19%	38%	25%	14%	19%	25%	14%	13%	24%	14%
Retail	28%	19%	19%	19%	29%	20%	26%	20%	22%	13%	19%	14%	14%	5%	20%
Wholesale	15%	24%	15%	9%	16%	28%	12%	6%	20%	8%	17%	0%	25%	12%	19%
Transport/Storage	52%	31%	33%	44%	30%	34%	24%	11%	16%	20%	24%	16%	14%	12%	8%
Finance & Ins. Serv.	54%	47%	41%	32%	25%	34%	34%	23%	14%	17%	18%	20%	15%	12%	13%
Business Services	54%	39%	34%	32%	24%	25%	33%	17%	20%	19%	24%	20%	19%	9%	8%
Property Services	39%	39%	31%	17%	28%	49%	13%	29%	25%	12%	21%	29%	24%	13%	0%
Hospitality	28%	12%	28%	29%	30%	22%	18%	32%	18%	13%	18%	9%	17%	17%	13%
Rec. & Personal Services	31%	22%	32%	30%	33%	13%	14%	20%	14%	11%	16%	6%	3%	11%	17%
Electricity, Water, Gas	46%	19%	44%	18%	27%	46%	40%	25%	10%	9%	0%	38%	26%	9%	0%
Telecommunications	64%	16%	20%	43%	27%	24%	26%	35%	35%	25%	24%	26%	11%	18%	3%
Health Services	45%	40%	34%	31%	18%	23%	12%	26%	26%	20%	16%	10%	11%	11%	19%
Government	56%	40%	41%	23%	29%	27%	19%	23%	14%	33%	28%	9%	18%	4%	17%

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