Community Perceptions of Australia's Infrastructure

Prepared for Infrastructure Australia

November 2018

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Background, objectives and methodology

Background and objectives

Infrastructure Australia is an independent statutory body, set up to advise on the prioritisation and delivery of nationally significant infrastructure.

One of Infrastructure Australia's key roles is to audit Australia's national infrastructure, setting national and state level priorities.

The first Australian Infrastructure Audit was released in 2015. It was the first ever independent, comprehensive review of Australia's infrastructure and our future needs across transport, water, energy and telecommunications.

Now, Infrastructure Australia is undertaking the second Australian Infrastructure Audit (The Audit). The Audit provides an exploration of the largest challenges facing Australian infrastructure over the coming 15 years, and identifies gaps and opportunities that are likely to emerge.

A key aspect of The Audit is that the views of the community are considered.

Overall objective:

Ascertain an understanding of community sentiment relating to infrastructure and associated sectors, as well as organisational perceptions and awareness relating to Infrastructure Australia the organisation.

Specifically, provide an understanding of:

1. The Australian community's perceptions as to the **access, quality and affordability of Australian infrastructure** – including assessment of current sentiment, perception of changes over the past five years and expectations of change over the coming five years.
2. **Hypothesis-led questions on the impacts of infrastructure** on other decisions, for example where people live, work and locate a business, preferred methods of funding, sentiment to population growth, consideration of the priority of investment in various infrastructure sectors, and the quality and nature of community consultation.

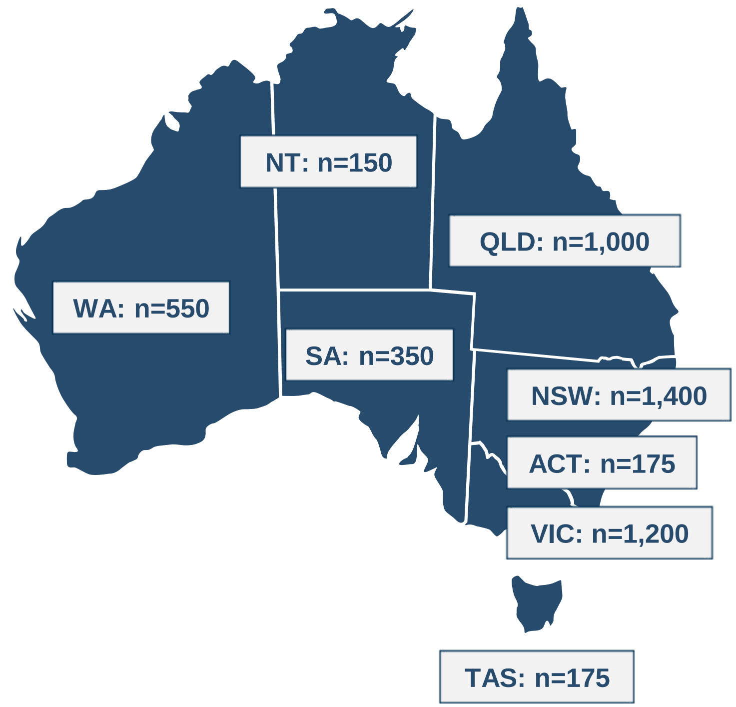
Research methodology

Quantitative
Online survey

n=5,000 Australians

- Survey quotas on age, gender and location, and weighting applied at the analysis stage to actual age/gender/location proportions based on ABS census data.
- The maximum margin of error on the total sample of n=5,000 is +/-1.4% at the 95% confidence level
- Differences of +/-1% for net scores are due to rounding.
- Approximately 20 minutes in length.
- Conducted 16th – 21st November 2018.

Total Australia-wide sample: n=5,000



The research was conducted in compliance with AS-ISO 20252.

Infrastructure Sectors

Energy	Water	Telecommunications	Freight Transport	Passenger Transport	Social Infrastructure
• Electricity networks / services	• Drinking water supply	• Fixed lined telecommunications networks / services	• Freight transport networks / services	• National highways and motorways (generally named using an A or M reference e.g. the M1, A1)	• Health and aged care services
• Gas networks / services	• Waste water services	• Broadband telecommunications networks / services	• Waste services (e.g. garbage collection)	• Arterial and main roads (generally named with a B reference, e.g. the B8)	• Educational facilities (e.g. pre-schools, schools, TAFE, universities)
	• Irrigation or industrial water	• Mobile telecommunications networks / services	• Post and parcel services	• Local roads	• Social / public housing
			• Freight services (e.g. road, rail, aviation or marine)	• Trams / light rail and train networks / services	• Justice (e.g. police stations and courts) and corrections (prison) facilities / services
				• Bus networks / services	• Parks and open spaces
				• Ride share (e.g. Uber or taxis) and other ‘on-demand’ transport services (e.g. Bridj, dial-a-ride, Keoride)	• Arts, cultural and recreational facilities / services (e.g museums, theatres, stadia and libraries)
				• Cycleways, cycle lanes, pedestrian areas and pathways supporting ‘active transport’	

Reporting notes: segment definitions

The table below shows the definitions of sub-sample segments described throughout the report:

Label	Description
Disability/carers/family	Those who have a long term disability, those who care for someone with a long-term disability and those who have a family member with a long-term disability
CALD	Those from Culturally and Linguistically Diverse backgrounds
ATSI*	Those of Aboriginal and Torres Strait Islander descent (*Small sample size, n=65)
Children in HH	Children under 17 in household
No children in HH	No children under 17 in household
HHI	Household income
Business owner/decision maker	Owner, financial partner or main decision maker in an Australian business turning over more than $75,000 per annum

In some instances, categories have been combined for reporting purposes. Full definitions are as follows:

- TOTAL POOR = Very poor + poor
- TOTAL GOOD = Very good + good
- TOTAL DIFFICULT = Very difficult + difficult
- TOTAL EASY = Very easy + easy
- TOTAL COSTLY = Very costly + costly
- TOTAL AFFORDABLE = Very affordable + affordable

Executive Summary

Quality, accessibility of infrastructure

In the main, the quality of Australia's infrastructure is seen as average or good and likely to get better

A minimal number of Australians rate the quality of infrastructure in their area as poor. In most instances, quality ratings are divided between average and good, although half (50%) or more of the population rate the following as good: drinking water supply; parks and open spaces; waste services; electricity networks and services; arts, cultural and recreational facilities; educational facilities; and post and parcel services.

Social and public housing, trams / light rail and trains, broadband telecommunications, bus services, and local roads receive the highest poor ratings (ranging from 20-25% poor ratings).

On the overwhelming range of infrastructure areas, more Australians expect quality to get better rather than worse over the next five years. Mobile and broadband networks and services are where there are the highest expectations of improvement, whilst social and public housing is the only area where there are higher expectations of a decline rather than improvement in the next five years. Expectations of improvement versus decline are on a par for local roads and justice and corrections facilities and services.

Accessibility is mostly easy and unlikely to worsen

Australians generally find it easy to access infrastructure. Social and public housing is the only area where people see it as more difficult than easy to access, noting that 34% have no view.

Access to key infrastructure such as trams / light rail and trains, and health and aged care services can be improved, with under four in 10 people (38%) indicating they find these services easy to access. Even fewer people say it is easy to access freight transport networks and services and irrigation or industrial water, but there is less need for direct access to these services and corresponding higher levels of people not having a view.

The most difficult infrastructure to access are seen as social and public housing (29%), trams / light rail and trains (21%) and health and aged care services and bus networks and services (both mentioned by 20%).

Looking forward, accessibility to infrastructure is unlikely to change, with a majority projecting that accessibility to all types of infrastructure will be the same in five years. Only social and public housing and health and aged care services are expected to be more difficult than easy to access in five year's time.

Cost and affordability of infrastructure

Opinions are divided on the affordability of infrastructure

Unlike quality and accessibility, Australians are unable to come to a consensus on the affordability of infrastructure. There are some exceptions, with the majority (61%) rating electricity networks and services as costly. By contrast, parks and open spaces are rated as affordable to a majority of people (58%).

On all forms of telecommunications (fixed line, broadband and mobile) costly ratings outweigh affordable ratings, particularly broadband. The same is true for some key types of social infrastructure, namely, health and aged care services and educational facilities.

Gas networks and services and post and parcel services are other types of infrastructure where costly ratings outweigh affordable ratings.

For most types of infrastructure, affordability is expected to stay about the same

Importantly, Australians do not see costs as improving on balance over the next five years. On most types of infrastructure, most people think costs will be about the same and on all areas more people expect affordability to decline rather than improve.

Australians are particularly gloomy on the cost of electricity (55% say it is likely to be less affordable in five years), health and aged care services (49%), post and parcel services and gas (both 42%).

On the other side of the scale, broadband and mobile telecommunications are rated most likely to be more affordable in five years, with 21% of the population predicting this – although about a third expect them to be less affordable.

Ride share and ‘on demand’ transport services is seen as being competitive over last five years

Ride share (e.g. Uber or taxis) and other ‘on-demand’ transport services (e.g. Bridj, dial-a-ride, Keoride) are the only services where there are mixed opinions on affordability over the last five years. 18% say they are more affordable and 20% say they are less affordable, with 61% saying affordability is about the same.

On all other infrastructure and service areas, where affordability has changed it is seen to have become less rather than more affordable.

Impacts on decisions, technology use and funding preferences

Infrastructure is an important consideration when choosing where to live

The impact of infrastructure on important life decisions including where to live, work, locate a business and which activities to participate in, is evident. However, infrastructure is most likely to be a major consideration when choosing where to live, with a majority of Australians indicating that all types of infrastructure have a bearing on this decision.

Roads and drinking water supply (each mentioned by 78%) as are the *most* important infrastructure to consider when deciding where to live.

In terms of where to work, roads and public transport receive equal top rating, both mentioned by 41%.

A user-pays model for funding infrastructure garners majority support

A user-pays model is the only model that receives support from a majority (51%) of Australians as a means of funding infrastructure development.

There is minority support for asset recycling (38%), special levies on those who benefit (30%) or increasing general taxation (18%) as models for funding infrastructure development, with a majority (57%) opposing increased taxation.

Home and mobile technologies are most likely to be adopted in the coming five years

Looking to the future, half of Australians (50%) indicate they are likely to use 5G mobile technology within the next five years. With approximately a third of the population indicating they will use high-speed broadband, home electricity storage and smart home appliances in the coming five years, home technologies are the next innovations most likely to be adopted.

In particular, 5G technology (5% currently use), home electricity storage (4% currently use) and smart home appliances (15% currently use) will experience a large proliferation in the near the future, whereas 46% already use high-speed broadband.

Investment in health and aged care services is prioritised above other areas

A majority indicate they prefer more investment in a number of types of infrastructure. Health and aged care services (mentioned by 77%) are prioritised over all other areas. Local roads and broadband telecommunications are prioritised next, ahead of mobile telecommunications and educational facilities.

Almost 1-in-5 (18%) would prefer less investment in ride share and other ‘on demand’ transport services.

Population growth and community considerations

Population growth is a concern to a majority of Australians

Approximately seven in 10 Australians (68%) indicate they are at least ‘somewhat concerned’ about population growth in their area (19% are ‘extremely’ concerned, 18% ‘very’ concerned and 30% ‘somewhat concerned’).

Those in the more populous states are significantly more likely to be concerned than the rest of the country (Victoria 74%, New South Wales 71%). Population growth is also a more prominent concern for people in inner (71%) and outer urban (72%) areas.

Less than one in 10 (9%) are not at all concerned, with residents of the NT, the ACT and Tasmania the least concerned.

Consideration of community views is highly important

The vast majority of Australians (80%) indicate it is extremely or very important for government to consider the views of the community when planning and investing in major infrastructure, with 46% saying it is extremely important.

Those aged 55+ years (89% important) and those in regional (85%) and rural (87%) hold the strongest views on this issue.

Communities directly impacted by infrastructure are most important to consider

While most agree it is important for government to consider the views of the community when planning and investing in major infrastructure, opinions on the views that are *most* important to consider are mixed.

The views of the community living in close proximity to infrastructure (47%) and people who are impacted by the construction of infrastructure (46%) are rated slightly more important to canvass than the views of potential users (43%), a community cross-section (43%) and the taxpayers that will meet the cost of the project (39%).

The views of infrastructure experts are seen as the least important to consider (34%).

Areas performing poorly

Infrastructure with the largest **negative** ratings for each are outlined below:

Quality

5 years ago (worse)	**Now** (poor)	**Over next 5 years** (get worse)
• Social and public housing • Local roads • Post and parcel services	• Social and public housing • Trams / light rail and train networks and services • Broadband telecommunications networks and services • Bus networks and services	• Social and public housing • Health and aged care services • Local roads

Accessibility

5 years ago (more difficult)	**Now** (difficult)	**Over next 5 years** (get more difficult)
• Social and public housing • Health and aged care services • Justice and corrections facilities and services • Post and parcel services	• Social and public housing • Trams / light rail and train networks and services • Health and aged care services • Bus networks and services	• Social and public housing • Health and aged care services • Justice and corrections facilities and services • Post and parcel services

Affordability

5 years ago (less affordable)	**Now** (costly)	**Over next 5 years** (get less affordable)
• Electricity networks and services • Health and aged care services • Post and parcel services	• Electricity networks and services • Health and aged care services • Broadband telecommunications networks and services	• Electricity networks and services • Health and aged care services • Gas networks and services • Post and parcel services

Areas performing well

Infrastructure with the largest **positive** ratings for each are outlined below:

Quality

5 years ago (better)

- Ride share and other 'on-demand' transport services
- Mobile telecommunications networks and services
- Broadband telecommunications networks and services

Now (good)

- Drinking water supply
- Parks and open spaces
- Waste services

Over next 5 years (get better)

- Mobile telecommunications networks and services
- Broadband telecommunications networks and services
- Ride share and other 'on-demand' transport services

Accessibility

5 years ago (easier)

- Ride share and other 'on-demand' transport services
- Mobile telecommunications networks and services
- Broadband telecommunications networks and services

Now (easy)

- Drinking water supply
- Parks and open spaces
- Electricity networks and services

Over next 5 years (get easier)

- Broadband telecommunications networks and services
- Mobile telecommunications networks and services
- Ride share and other 'on-demand' transport services

Affordability

5 years ago (more affordable)

- Mobile telecommunications networks and services
- Broadband telecommunications networks and services
- Ride share and other 'on-demand' transport services

Now (affordable)

- Parks and open spaces
- Cycleways, cycle lanes, pedestrian areas and pathway supporting 'active transport'
- Local roads

Over next 5 years (get more affordable)

- Mobile telecommunications networks and services
- Broadband telecommunications networks and services
- Ride share and other 'on-demand' transport services

Section A: Quality, Accessibility and Affordability of Infrastructure

Overview: Quality of infrastructure

Quality of infrastructure: Key findings

Now

In the main, the quality of Australia's infrastructure today is rated as average or good. With a quarter of the population rating it as poor quality, social and public housing is the sector with the largest deficit. Passenger transport is an area of focus, with trams / light rail / train and bus networks and services, and local roads all receiving relatively high poor ratings, along with broadband telecommunications.

Compared to five years ago

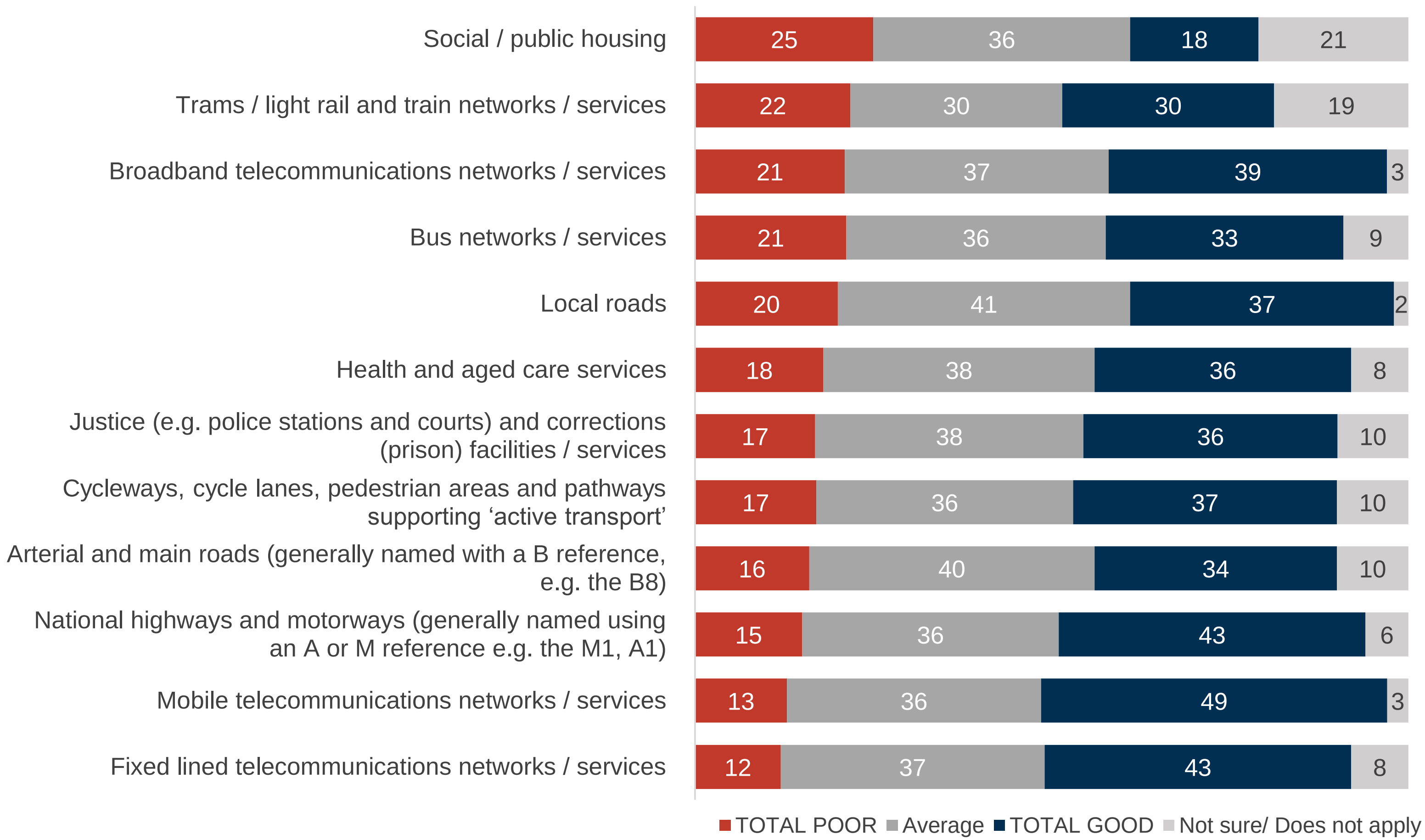
The majority of Australians rate the quality of all types of infrastructure as about the same as five years ago, with the exception being broadband telecommunications, where a large portion see this as improving over the last five years. Social infrastructure including social and public housing, justice and corrections and health and aged care services are rated worse than five years ago by a relatively high proportion of the population, along with local roads and post and parcel services.

Expectations five years from now

Outlooks are steady, with a majority expecting the quality of infrastructure to stay about the same over the next five years. The exceptions to this are health and aged care services, where in relative terms people are more likely to rate this as getting worse, along with telecommunications (mobile and broadband), where a relatively larger proportion of people expect these to improve. Social and public housing and local roads are other types of infrastructure where quality is rated as more likely to deteriorate over the next five years.

Perceived quality of infrastructure

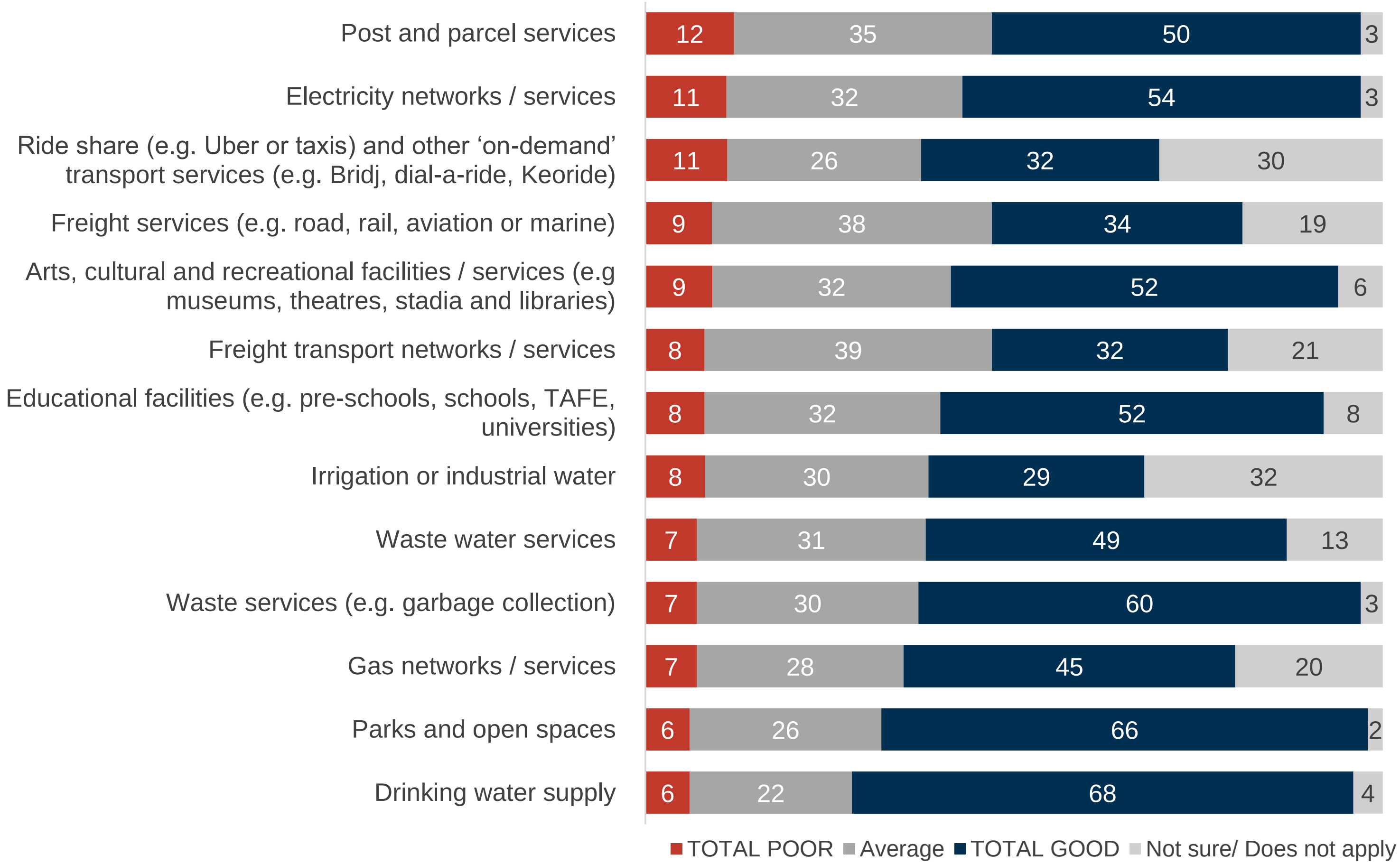
Perceived quality of infrastructure (%)



Q. Firstly, thinking about the overall quality of different types of infrastructure. By that we mean providing a safe, efficient, reliable network / service to end users. How would you rate the quality of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? Again, please answer as an end-user (customer) of these types of networks, services and facilities. (It's okay if you're not sure, it's just your general impressions we're after.)
Base: All respondents, (n=5,000).

Perceived quality of infrastructure

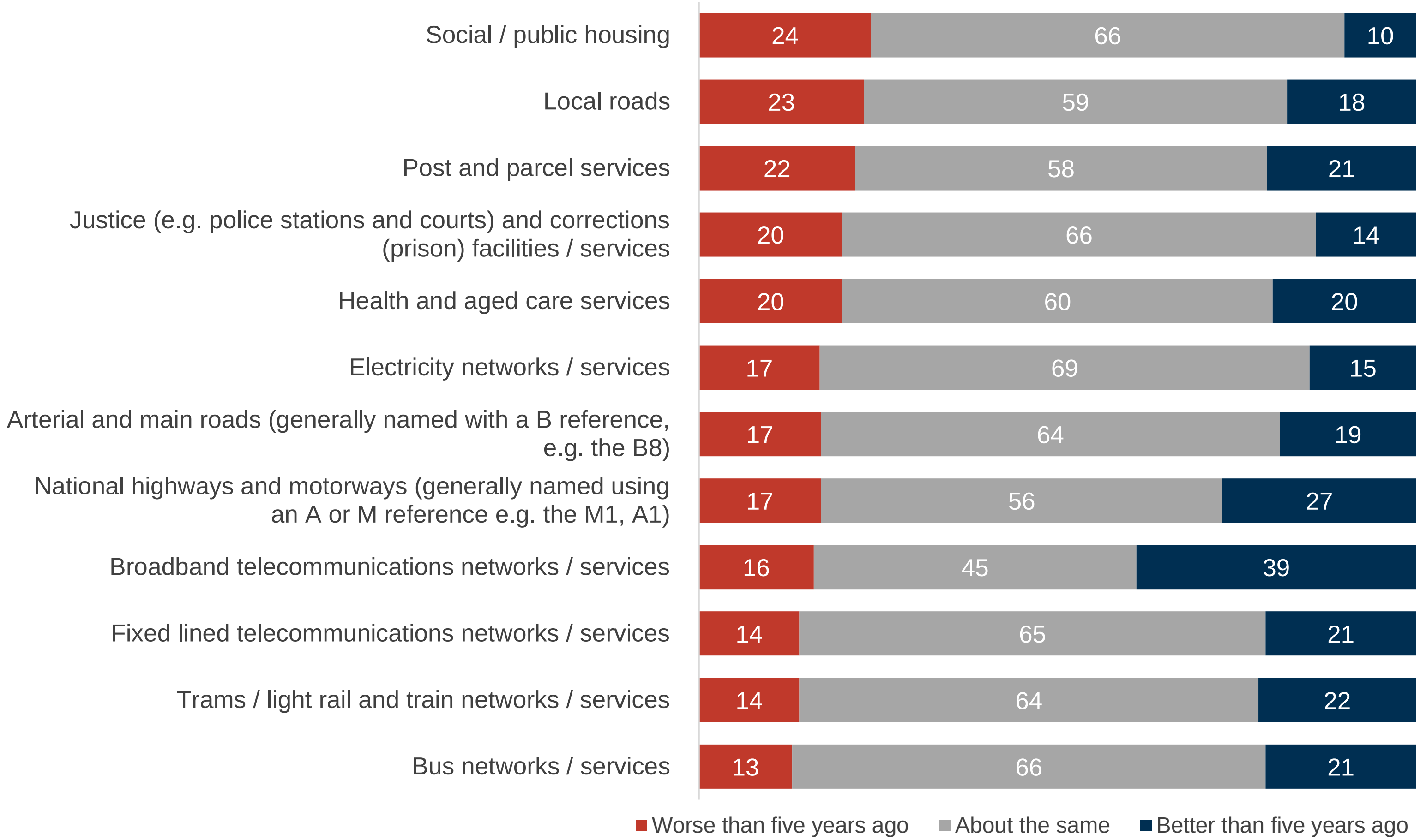
Perceived quality of infrastructure (%) (cont'd)



Q. Firstly, thinking about the overall quality of different types of infrastructure. By that we mean providing a safe, efficient, reliable network / service to end users. How would you rate the quality of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? Again, please answer as an end-user (customer) of these types of networks, services and facilities. (It's okay if you're not sure, it's just your general impressions we're after.)
Base: All respondents, (n=5,000).

Quality of infrastructure compared to five years ago

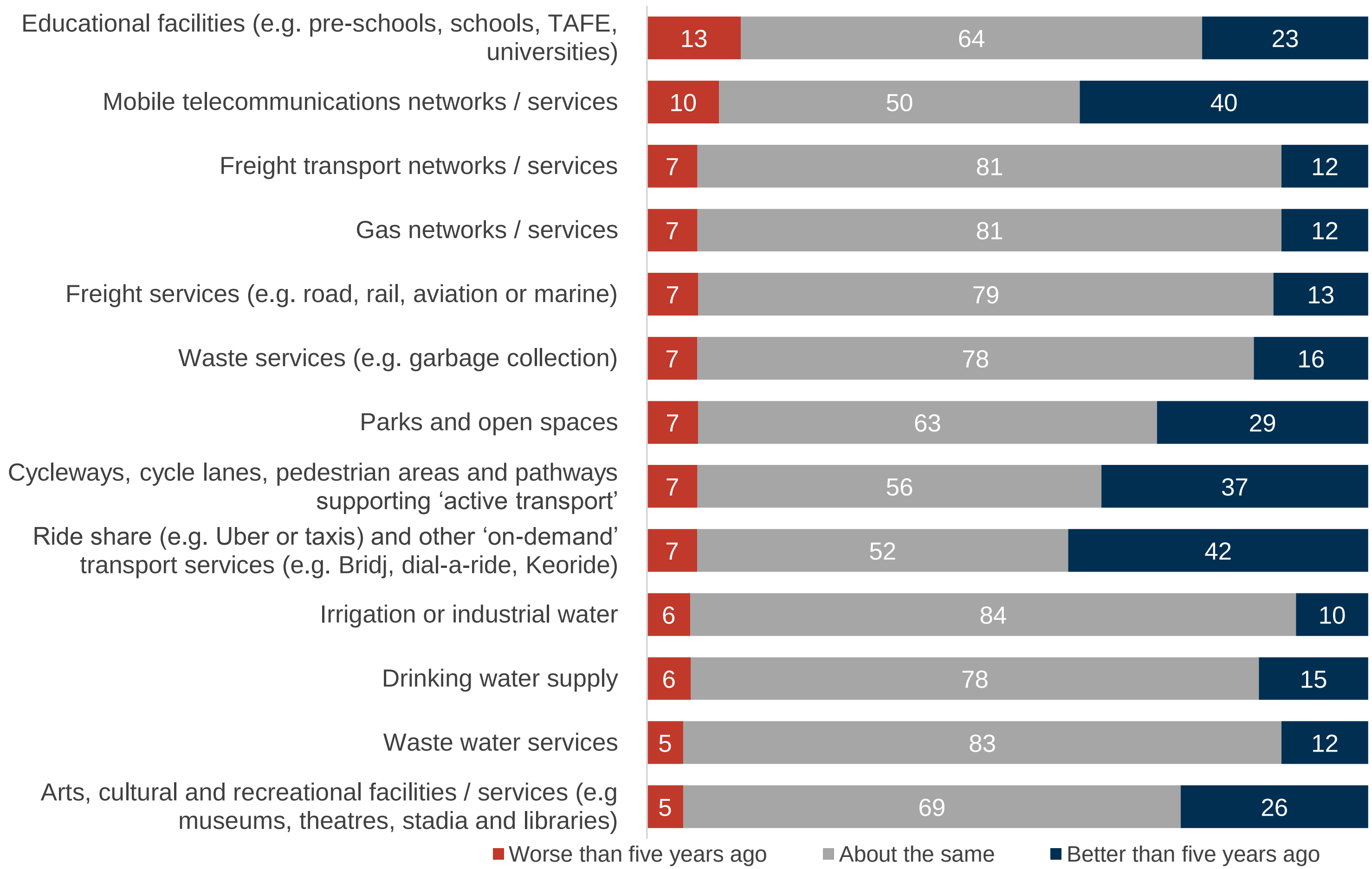
Perceived quality of infrastructure compared to five years ago (%)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is the overall **quality** better or worse?*
Base: All respondents, (n=5,000).

Quality of infrastructure compared to five years ago

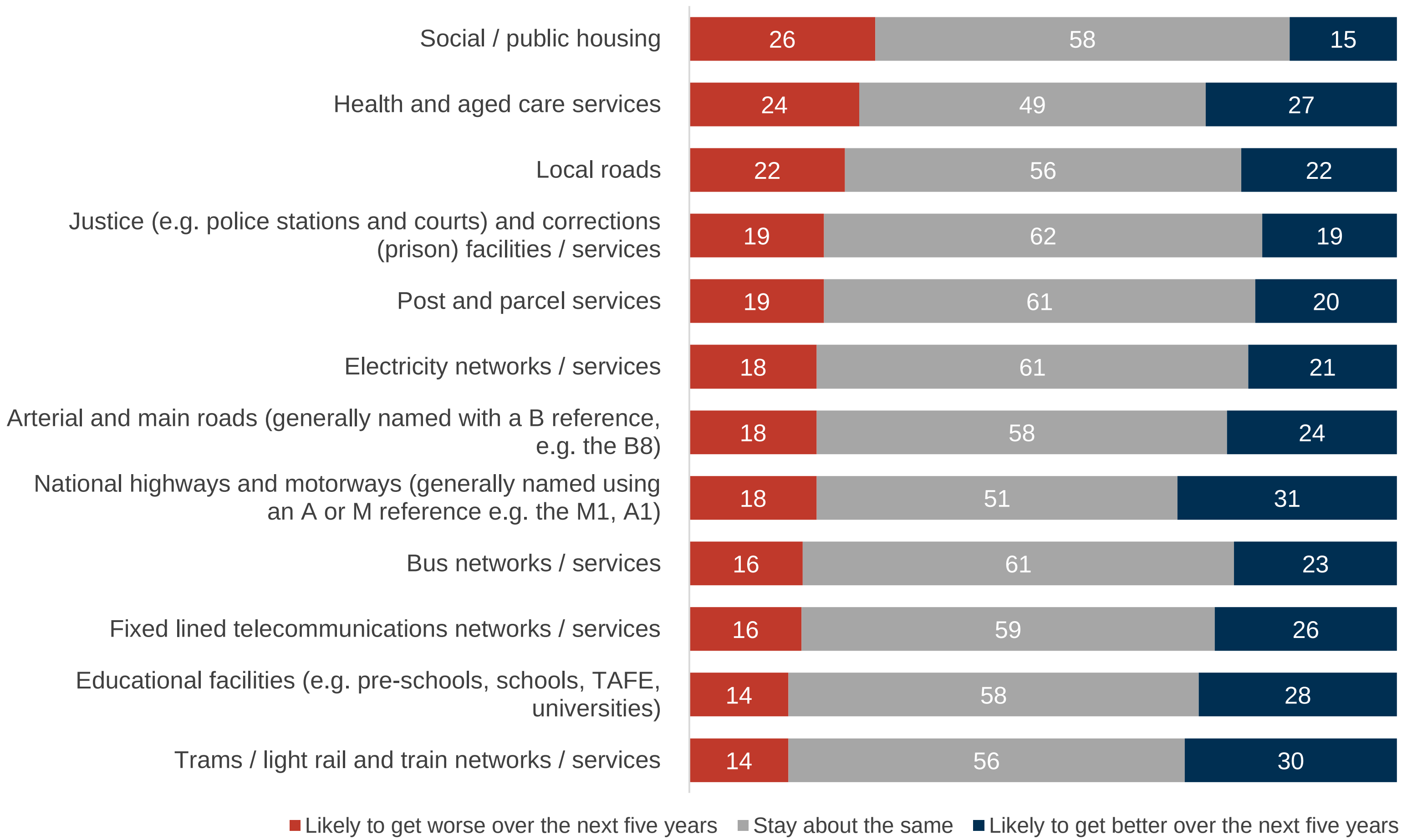
Perceived quality of infrastructure compared to five years ago (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is the overall **quality** better or worse?*
Base: All respondents, (n=5,000).

Quality of infrastructure over the next five years

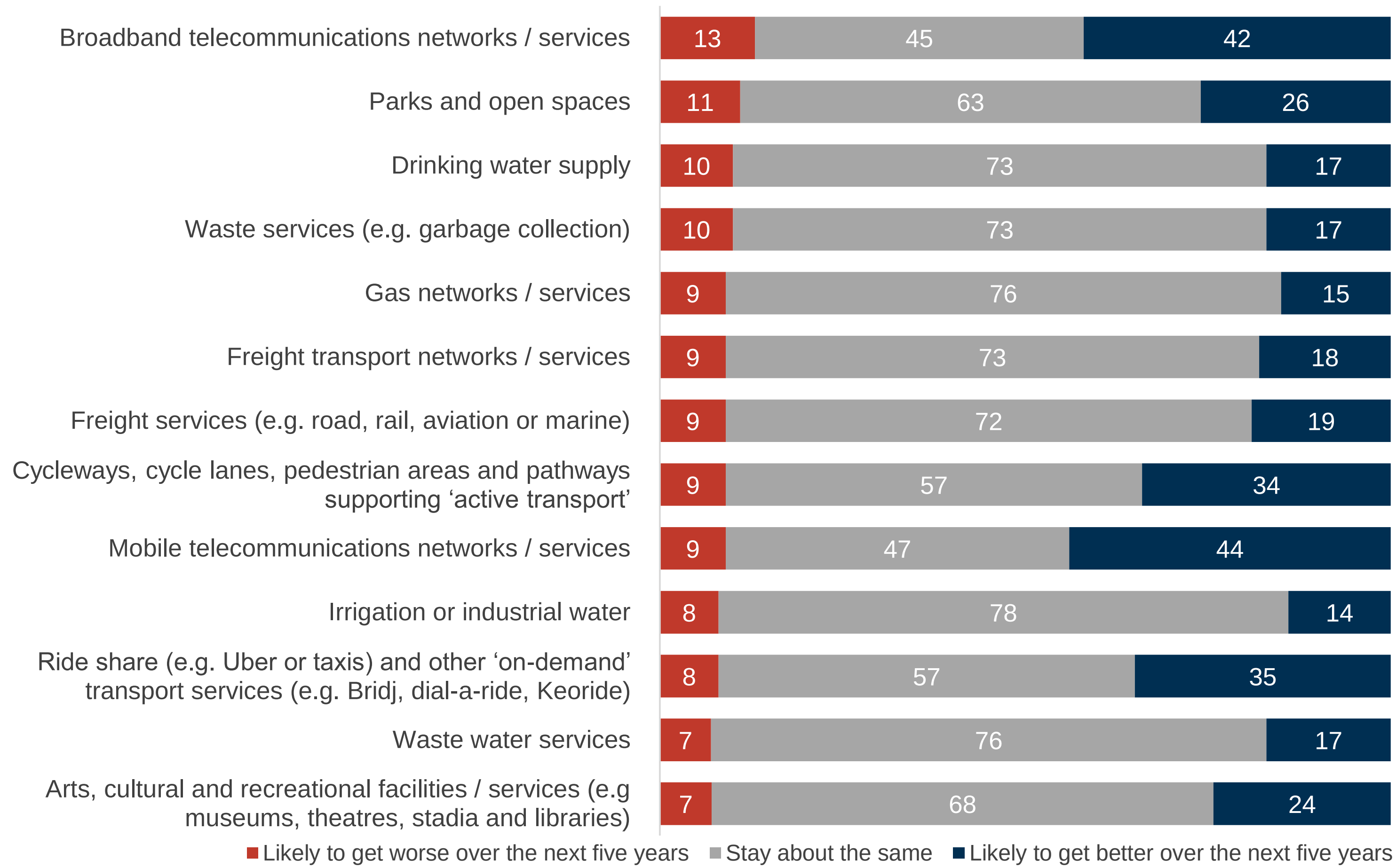
Expected quality of infrastructure over the next five years (%)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is the overall **quality** likely to get better or worse?*
Base: All respondents, (n=5,000).

Quality of infrastructure over the next five years

Expected quality of infrastructure over the next five years (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is the overall **quality** likely to get better or worse?*
Base: All respondents, (n=5,000).

Overview: Accessibility of infrastructure

Accessibility of infrastructure: Key findings

Now

Australia's infrastructure is easily accessible to most, however there are some key areas where accessibility can be improved. Social and public housing, trams / light rail / train and bus networks and services, and health and aged care facilities, are types of infrastructure that are more likely to be difficult to access. Access to vital infrastructure, including drinking water and electricity, is easy for a large majority of the population.

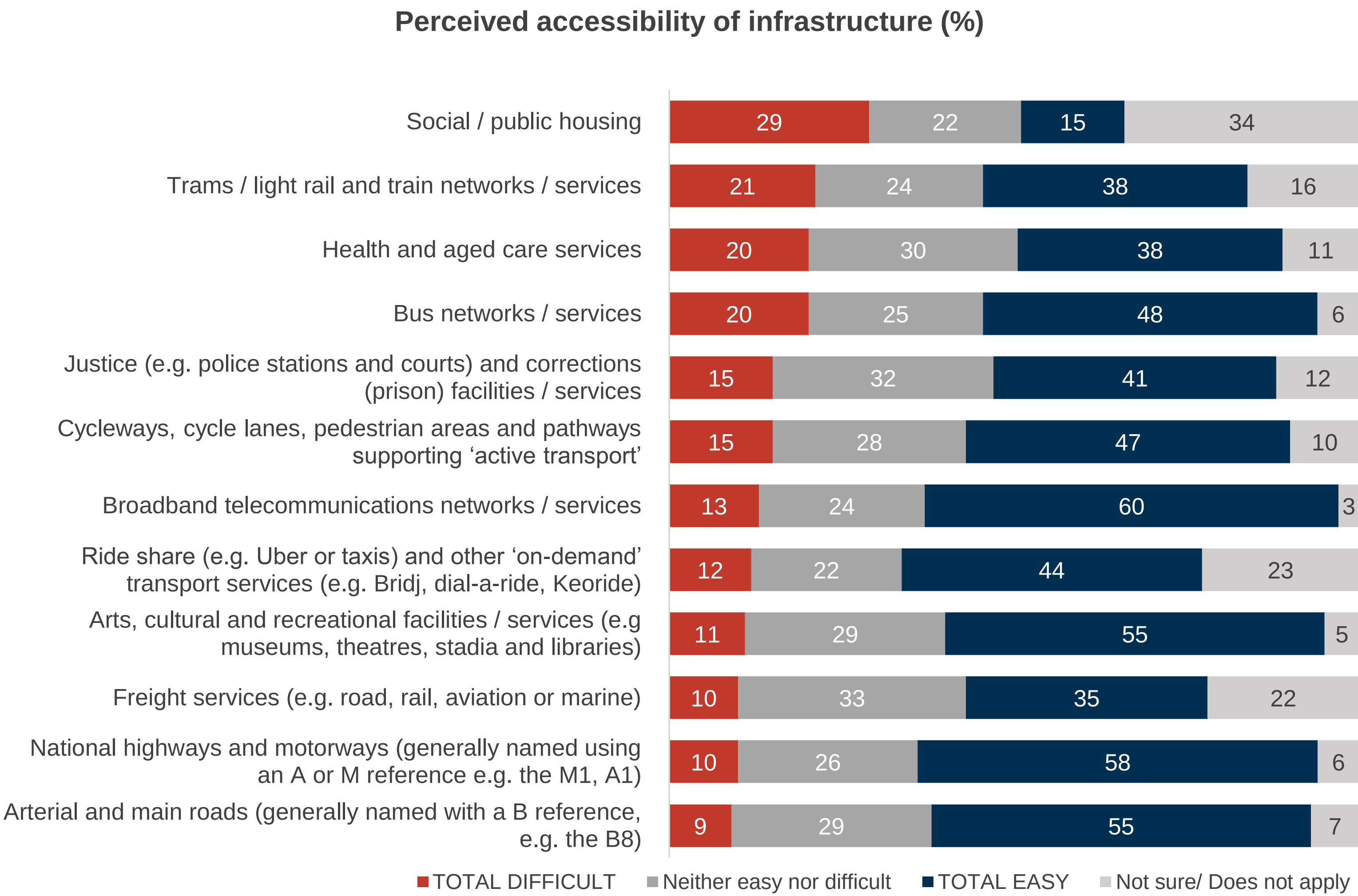
Compared to five years ago

In the main, accessibility to all types of infrastructure has remained about the same as five years ago. Certain types of social infrastructure are more likely to be seen as more difficult to access compared to five years ago, namely, social and public housing, health and aged care services, and justice and corrections facilities and services. Post and parcel services is another area where access has become increasingly difficult for relatively more people.

Expectations five years from now

Accessibility to all types of infrastructure is expected to remain the same over the next five years. The outlook for social and public housing, health and aged care services and justice and corrections is more negative, with a relatively higher proportion of people expecting accessibility to these services to decline over the next five years. The same is also true for access to post and parcel services.

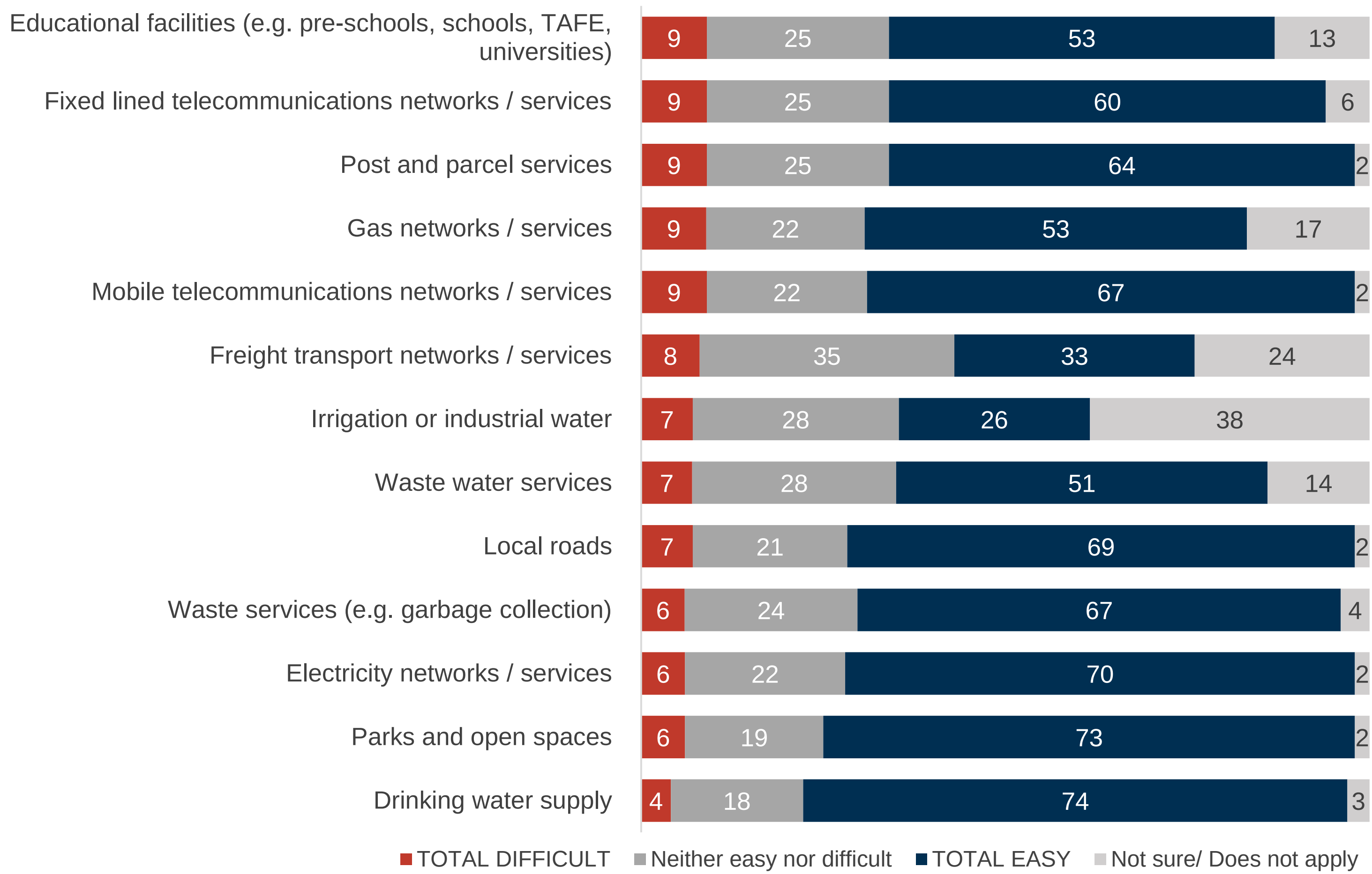
Perceived accessibility of infrastructure



*Q. Now thinking about the overall **accessibility** of different types of infrastructure. By that we mean how well connected you are to different types of infrastructure. How **easy** or **difficult** is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]?*
Base: All respondents, (n=5,000).

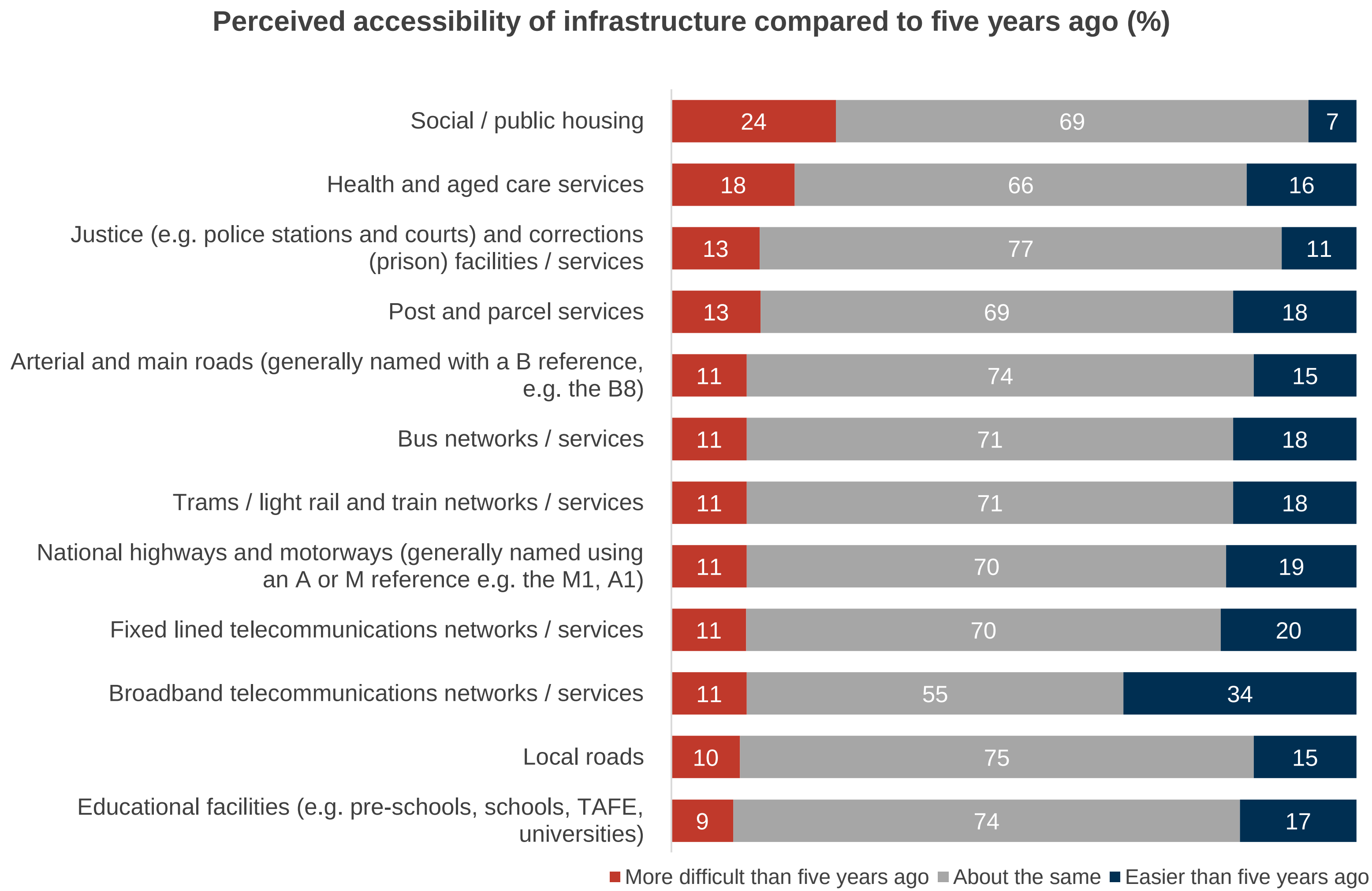
Perceived accessibility of infrastructure

Perceived accessibility of infrastructure (%) (cont'd)



*Q. Now thinking about the overall **accessibility** of different types of infrastructure. By that we mean how well connected you are to different types of infrastructure. How **easy** or **difficult** is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]?*
Base: All respondents, (n=5,000).

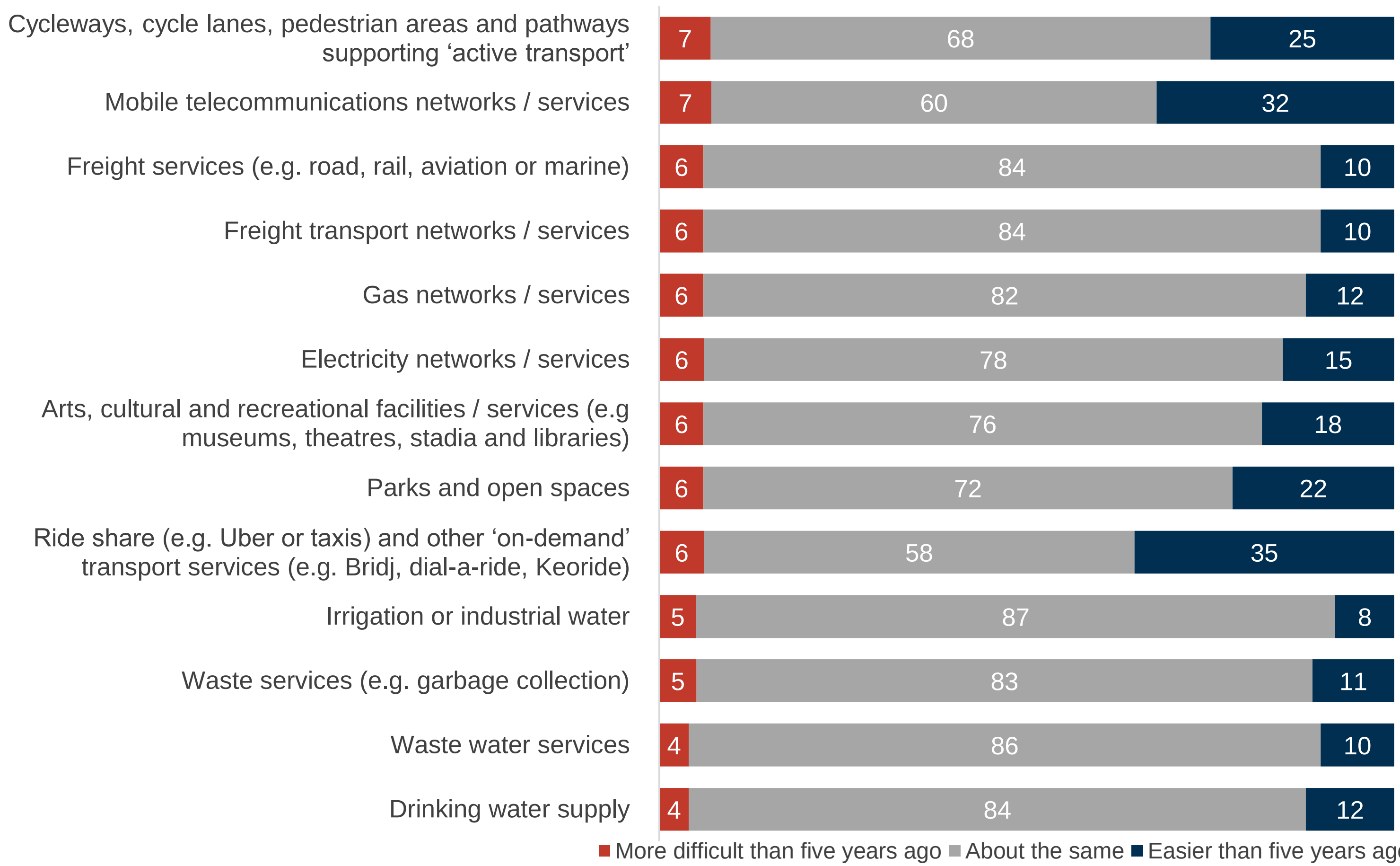
Accessibility of infrastructure compared to five years ago



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is it easier or more difficult for you to **access**?*
Base: All respondents, (n=5,000).

Accessibility of infrastructure compared to five years ago

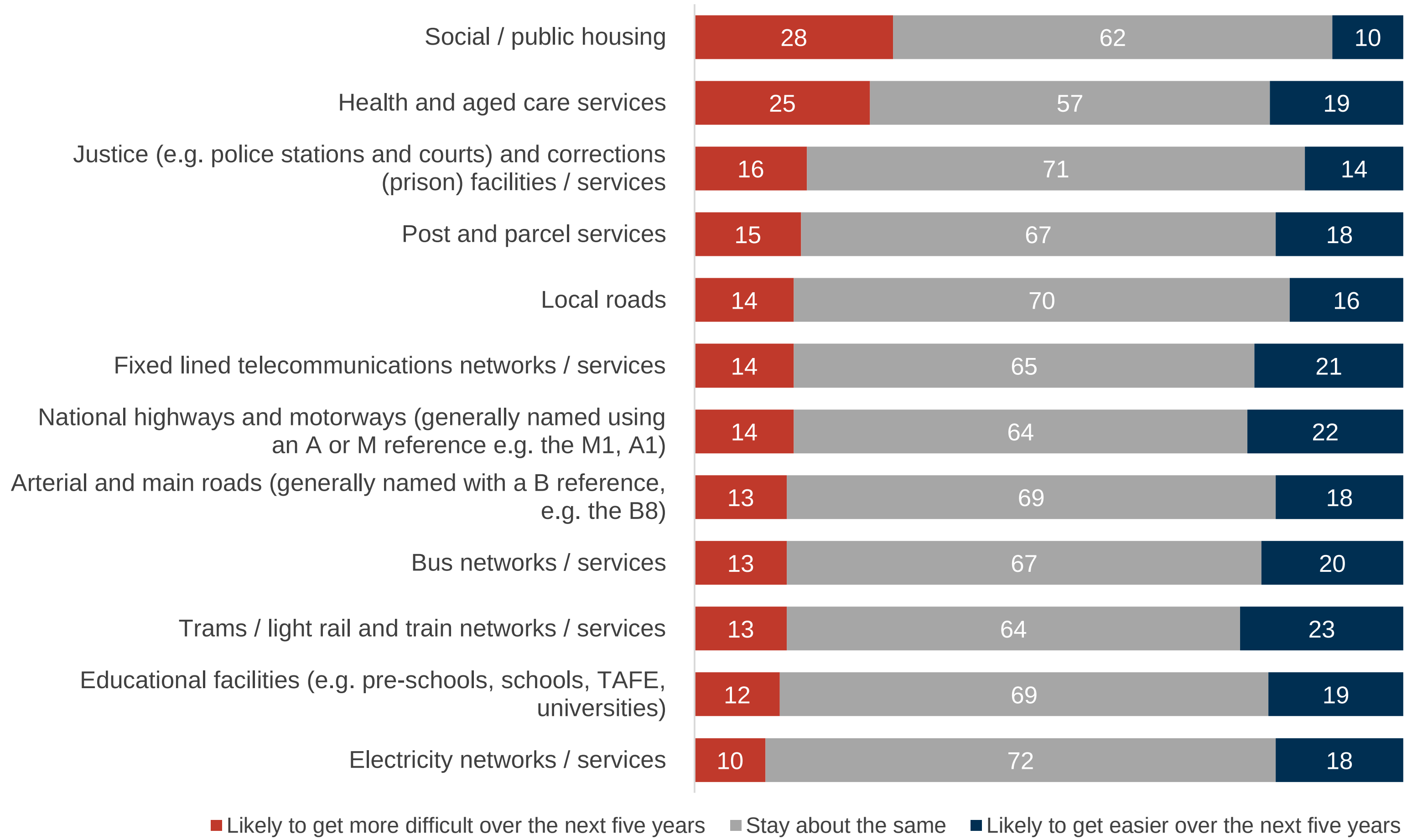
Perceived accessibility of infrastructure compared to five years ago (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is it easier or more difficult for you to **access**?*
Base: All respondents, (n=5,000).

Accessibility of infrastructure over the next five years

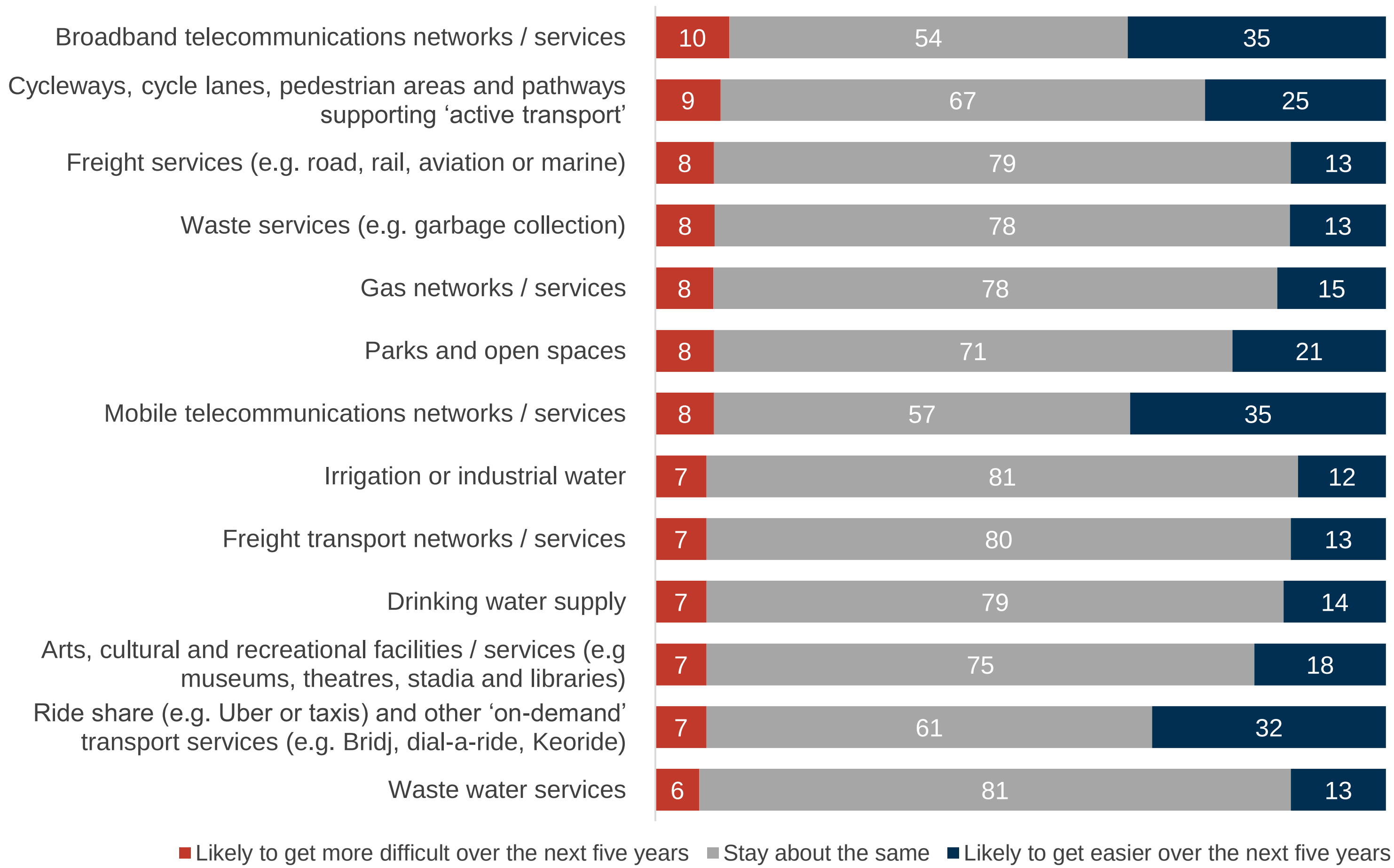
Expected accessibility of infrastructure over the next five years (%)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is it likely to get easier or more difficult for you to **access**?*
Base: All respondents, (n=5,000).

Accessibility of infrastructure over the next five years

Expected quality of infrastructure over the next five years (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is it likely to get easier or more difficult for you to **access**?*
Base: All respondents, (n=5,000).

Overview: Affordability of infrastructure

Affordability of infrastructure: Key findings

Now

Australians are mostly divided on the affordability of infrastructure. However, there are key areas seen to be more costly than affordable. Electricity networks and services are the most costly type of infrastructure and the only sector where a majority rate it as ‘costly’. Health and age care services are costly to almost half the population, followed by broadband and mobile telecommunications. Educational facilities and gas networks and services also receive relatively high costly ratings compared to other areas.

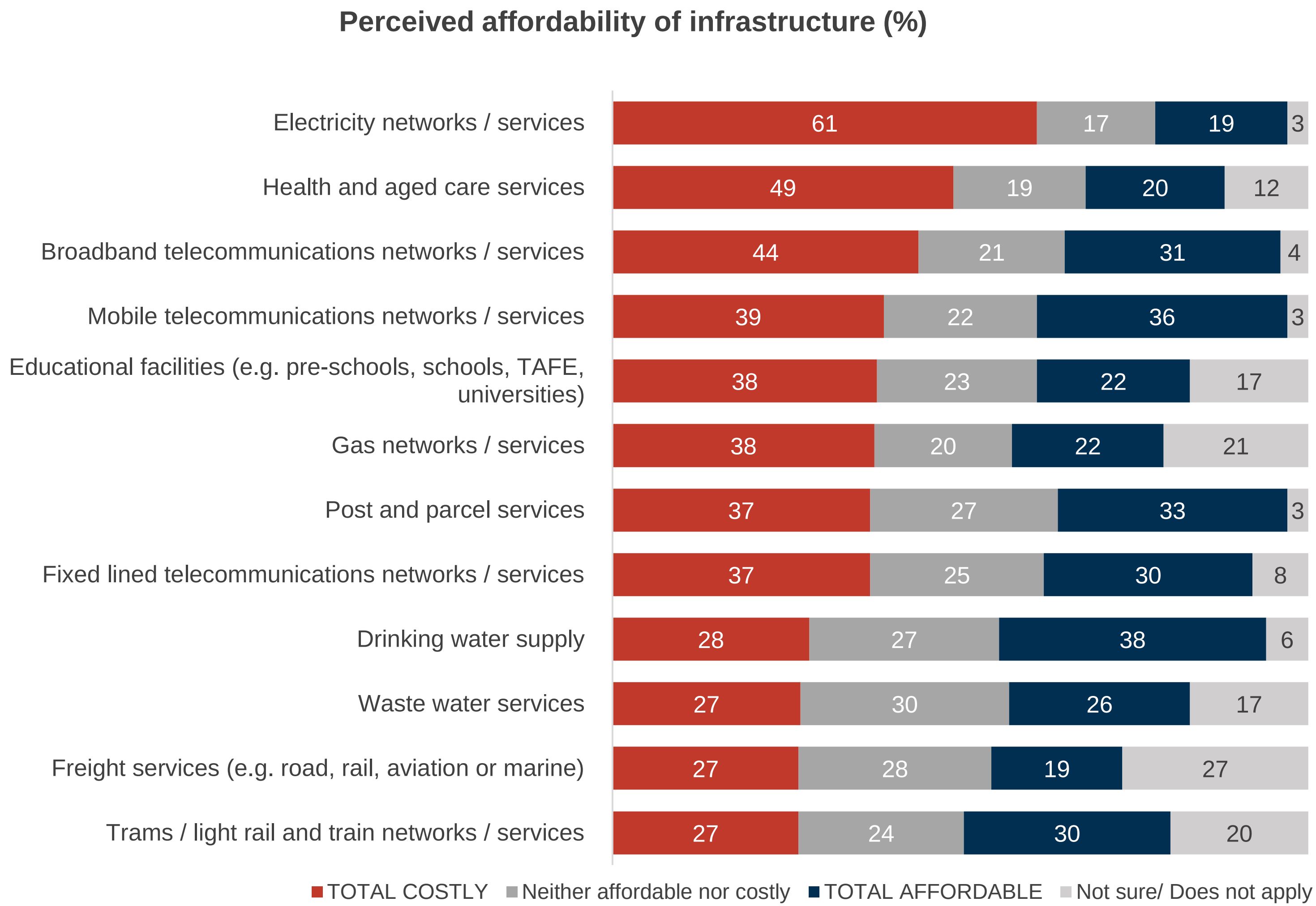
Compared to five years ago

Costs have not improved compared to five years ago. The cost of electricity in particular has worsened with a majority rating it as less affordable now. Health and aged care services, post and parcel services, and gas networks and services are other areas where a relatively higher proportion of people rate costs as less affordable compared to five years ago. For almost all other areas, cost has remained the same over the last five years.

Expectations five years from now

Costs to consumers are not expected to ease in the coming five years. A majority expect the cost of electricity to worsen while a relatively large proportion also predict health and aged care services, gas networks and services, post and parcel services, and educational facilities, to become less affordable. The expectation for all other types of infrastructure is that costs will largely remain the same. However in all instances, predictions that infrastructure will be less affordable in five years outweigh those who expect it to be more affordable.

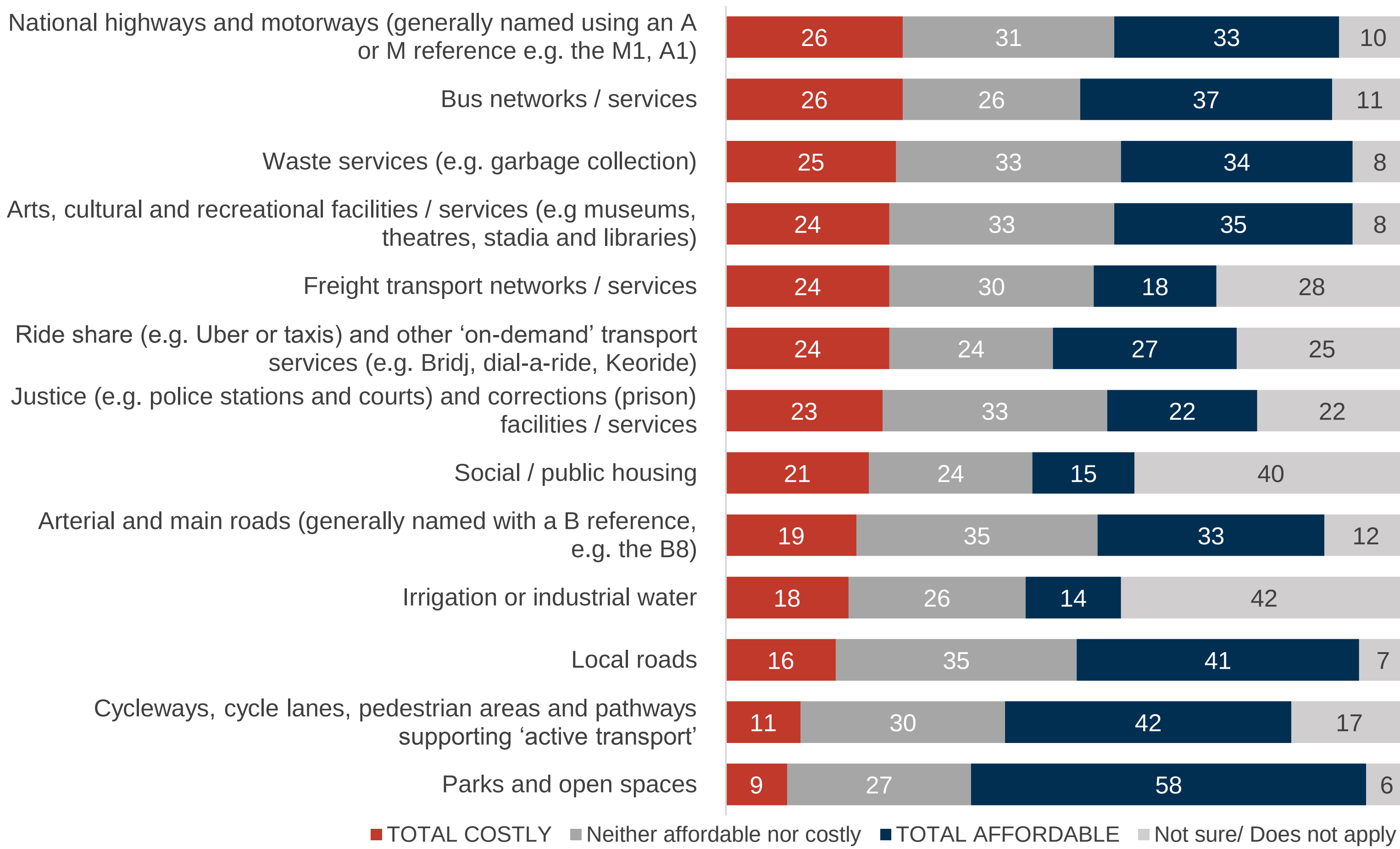
Perceived affordability of infrastructure



*Q. Now thinking about the overall **cost and affordability to you** of accessing different types of infrastructure. How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]?*
Base: All respondents, (n=5,000).

Perceived affordability of infrastructure

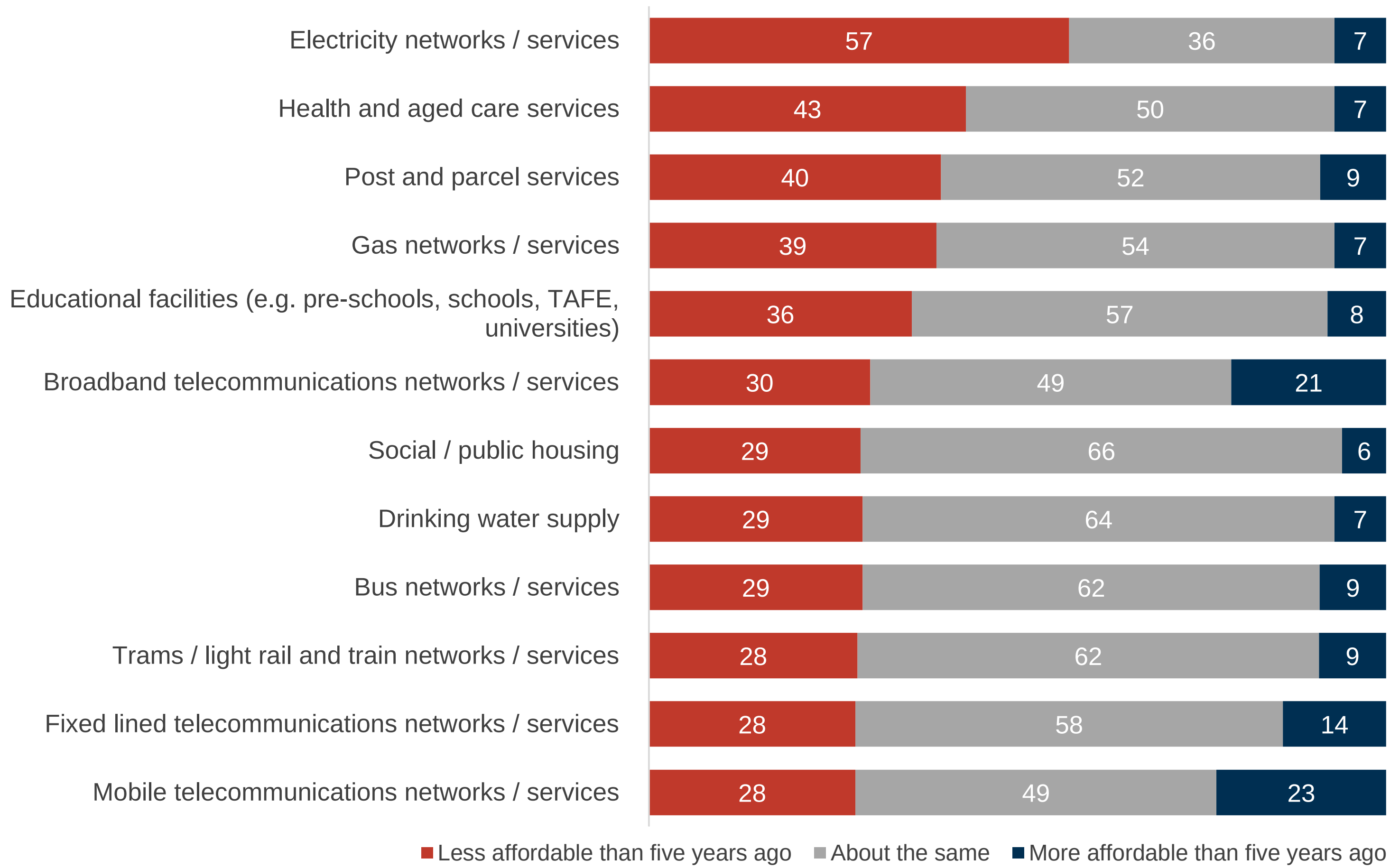
Perceived affordability of infrastructure (%) (cont'd)



*Q. Now thinking about the overall **cost and affordability to you** of accessing different types of infrastructure. How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]?*
Base: All respondents, (n=5,000).

Affordability of infrastructure compared to five years ago

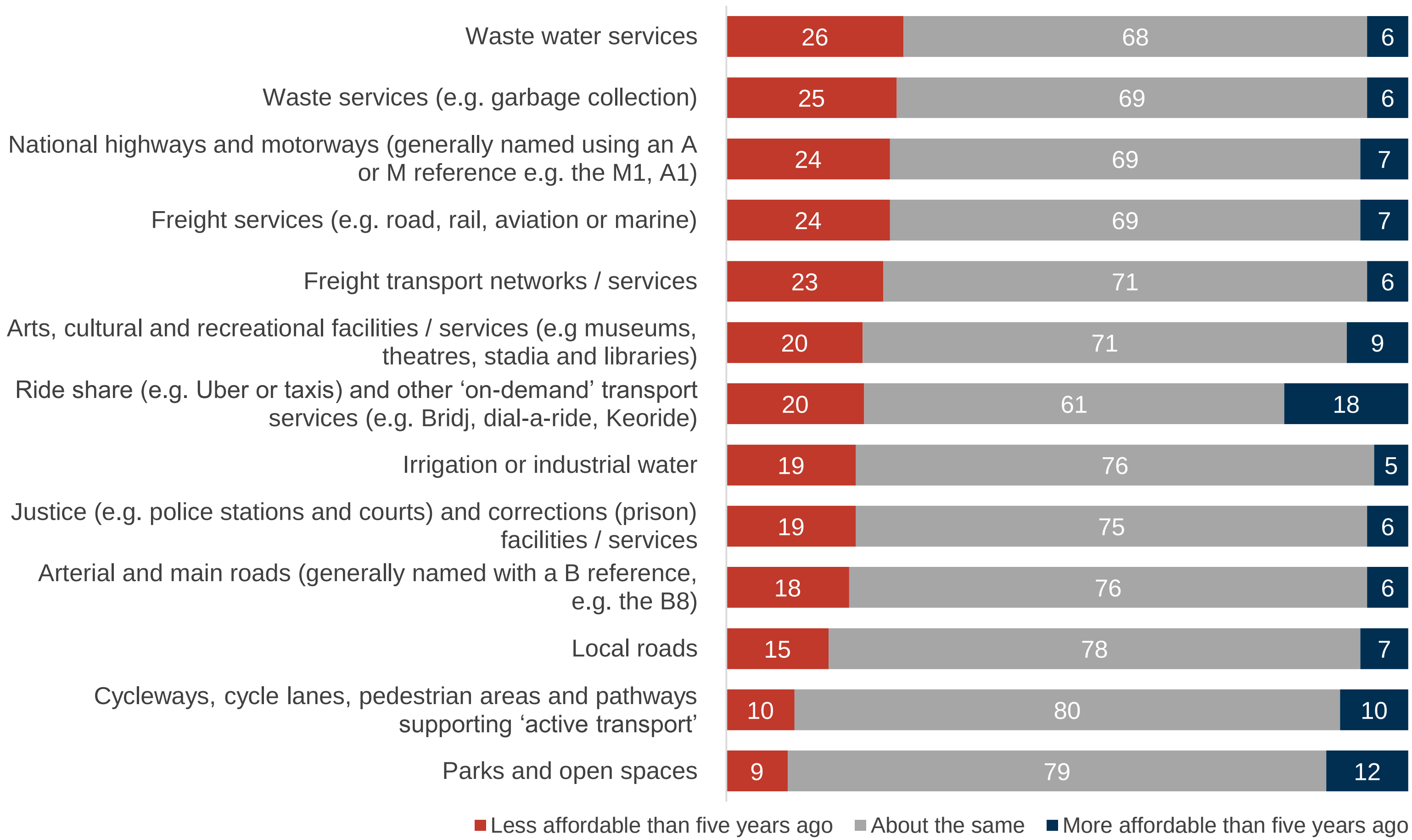
Perceived affordability of infrastructure compared to five years ago (%)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is it **more affordable** or **less affordable** to you?*
Base: All respondents, (n=5,000).

Affordability of infrastructure compared to five years ago

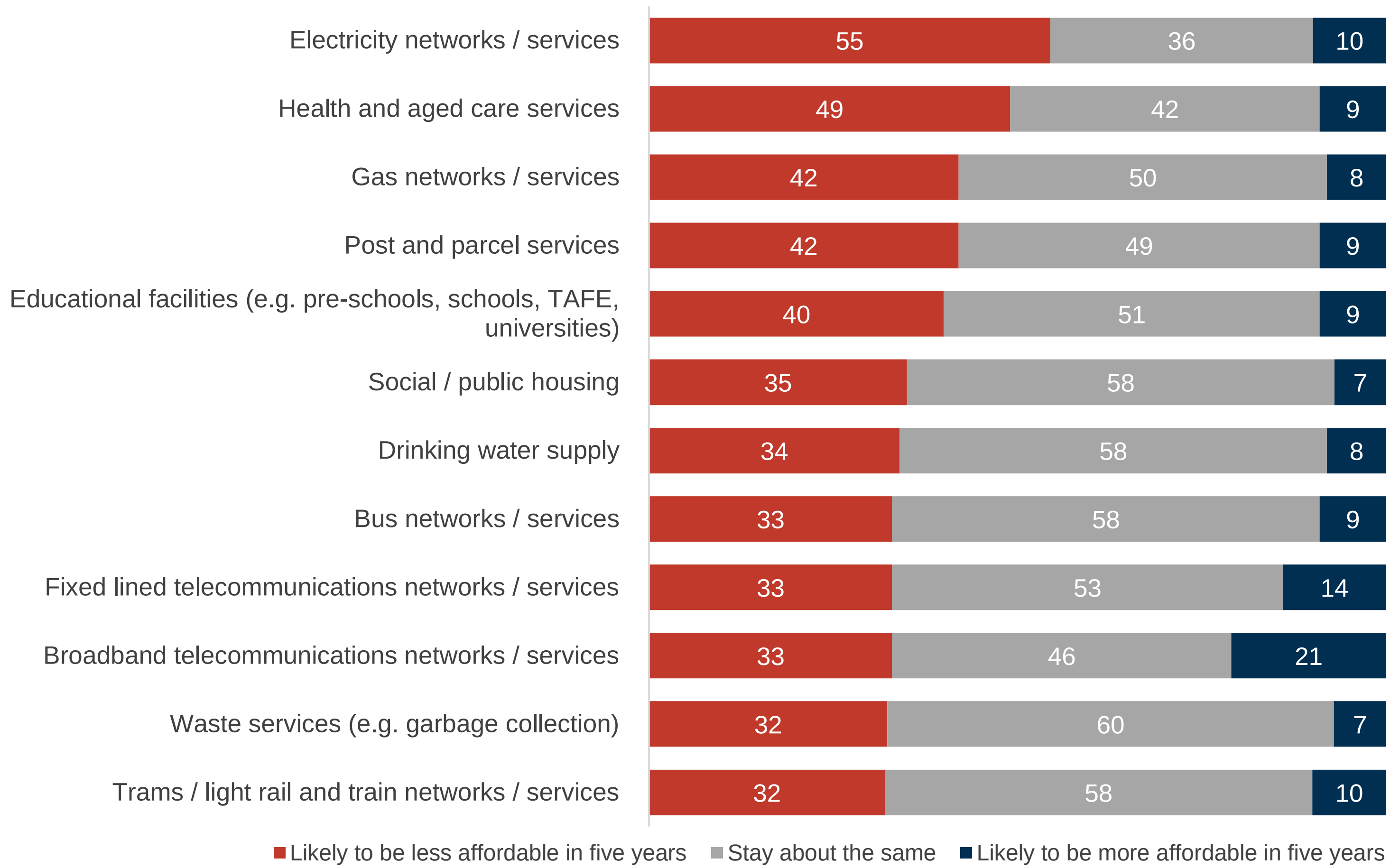
Perceived affordability of infrastructure compared to five years ago (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Compared to **five years ago** is it **more affordable** or **less affordable** to you?*
Base: All respondents, (n=5,000).

Affordability of infrastructure over the next five years

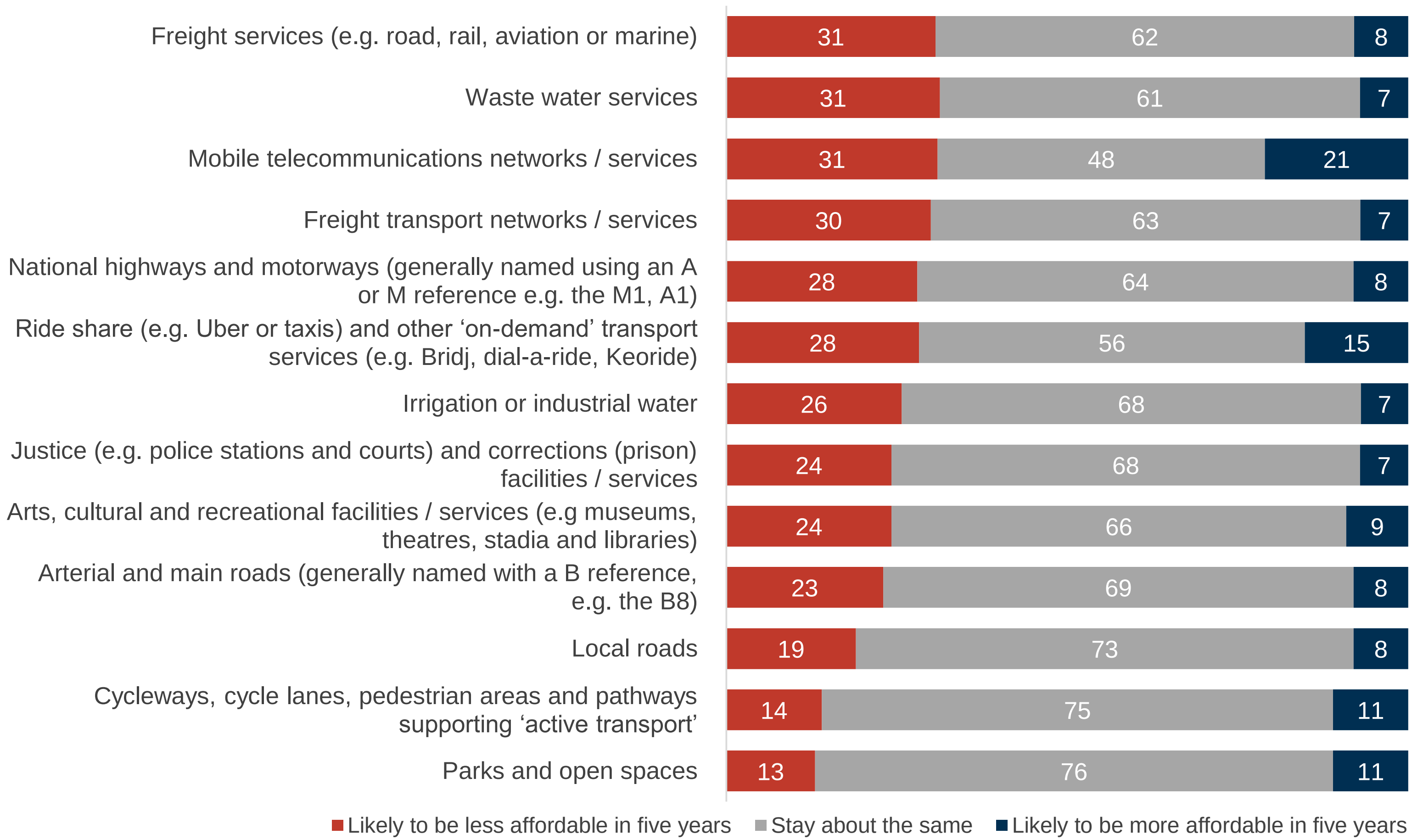
Expected affordability of infrastructure over the next five years (%)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is it likely to become **more affordable** or **less affordable** to you?*
Base: All respondents, (n=5,000).

Affordability of infrastructure over the next five years

Expected affordability of infrastructure over the next five years (%) (cont'd)



*Q. For each of these types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]: Over the **next five years** is it likely to become **more affordable** or **less affordable** to you?*
Base: All respondents, (n=5,000).

Infrastructure Sectors

Energy

Energy: Key findings

Quality

Most Australians rate the quality of their energy (both electricity and gas) as either good or average. The majority also rate the quality of their energy as consistent with five years ago and while some are concerned that it will decline over the next five years, the overriding view is that quality is likely to remain the same or improve.

Accessibility

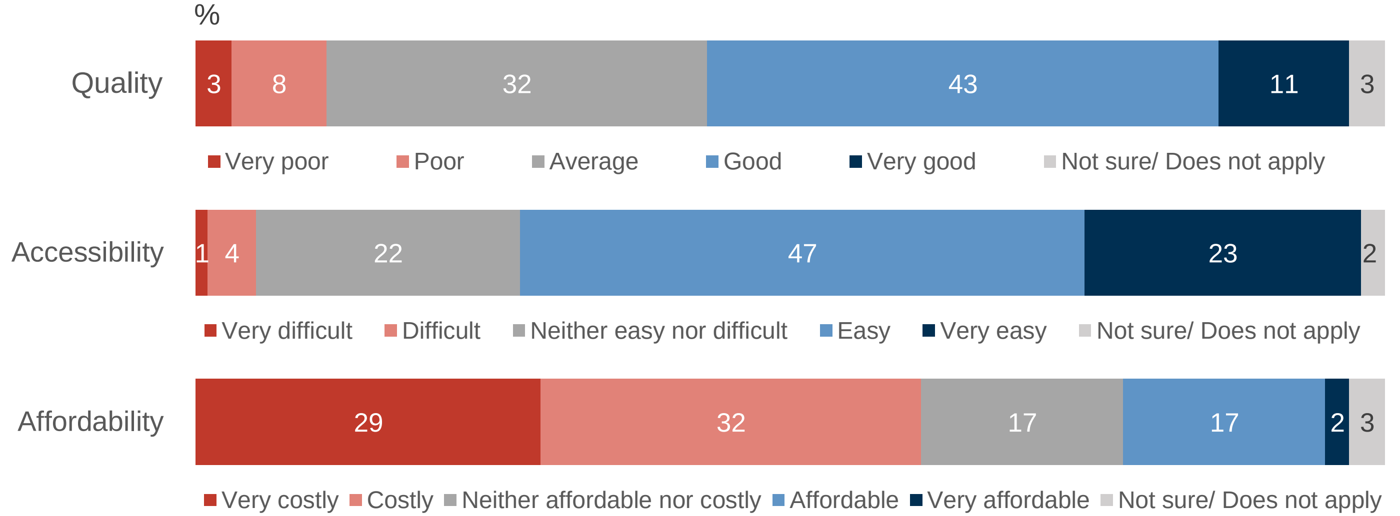
Electricity is more accessible than gas however in the main, both are easy to access to a majority of Australians. Most see electricity and gas as accessible as five years ago and likely to remain this way five years from now. There is minimal concern that accessibility to either electricity or gas will become more difficult in the future.

Affordability

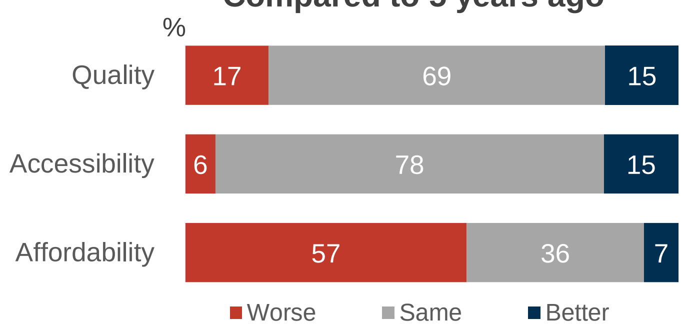
Electricity is costly to most people and is seen to have become worse in the past five years. Outlooks are negative with a majority predicting it will become more expensive five years from now. The same is true for gas but to a lesser extent. While gas is mostly viewed as costly today, the majority feel it is the same as five years ago and likely to cost the same five years from now.

Electricity networks and services

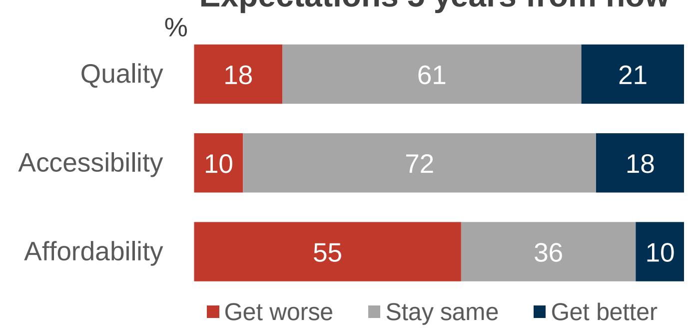
A majority of Australians rate the electricity networks and services where they live as **good** and **easy to access,** but **costly** and **likely to become less affordable** over the next five years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of electricity networks and services

Quality

A majority of Australians rate the **quality** of electricity networks and services where they live as **good** (54%, including 11% very good), **about the same** as **five years ago** (69%), and **likely to stay about the same** over the **next five years** (61%).

A similar number of people feel it has become worse (17%) than better (15%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: SA (24%), disability/carers/family (14%)
- *good*: 55+ yrs (58%), WA (59%), ACT (64%)
- *worse:* VIC (20%), SA (30%), outer urban (19%)
- *better:* 18-34 yrs (21%), QLD (18%), NT (25%), CALD (19%)
- *likely to get worse:* 55+ yrs (21%), SA (24%), disability/carers/family (22%)
- *likely to get better:* 18-34 yrs (31%), SA (28%), CALD (29%).

Accessibility

Similarly, a majority rate electricity where they live as **easy** to access (70%, including 23% very easy), **about as accessible** as **five years ago** (78%), and **likely to stay about the same** over the **next five years** (72%).

Positively, more feel it has become easier to access (15%) than more difficult (6%) compared with five years ago, and that it is likely to get easier (18%) than more difficult (10%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: disability/carers/family (8%)
- *easy*: 55+ years (74%), ACT (78%)
- *more difficult:* SA (10%), outer urban (8%), disability/carers/family (9%)
- *easier:* 18-34 yrs (20%), inner urban (18%), CALD (21%)
- *likely to get more difficult:* 55+ yrs (12%), SA (14%), disability/carers/family (13%)
- *likely to get easier:* 18-34 yrs (24%), WA (23%), inner urban (23%), CALD (28%).

Affordability of electricity networks and services

Affordability

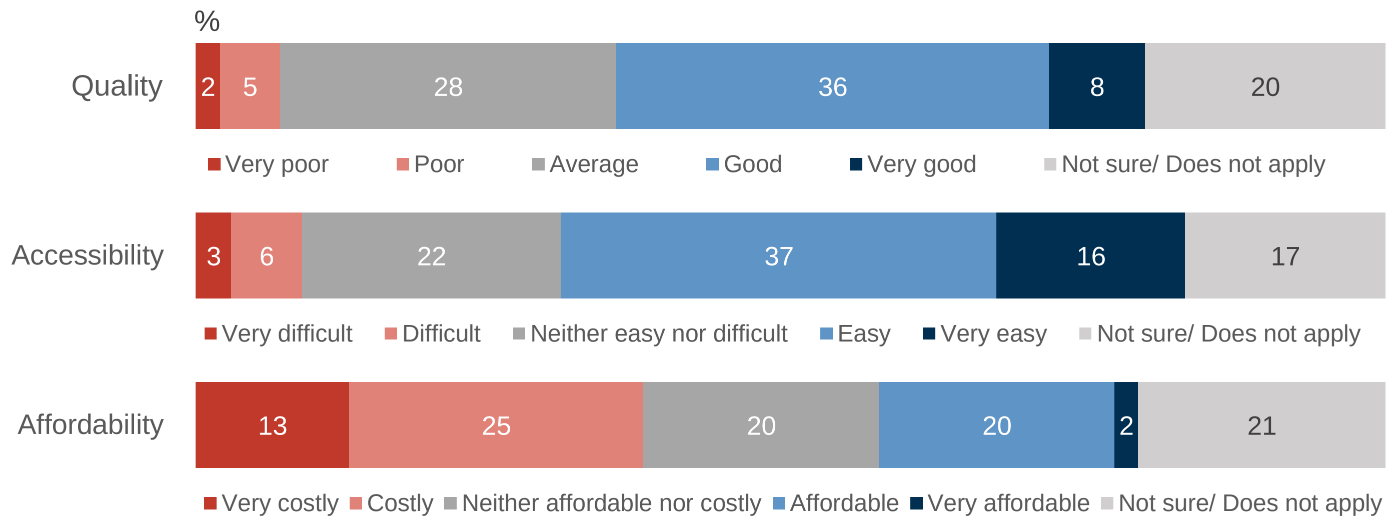
On **cost and affordability** of electricity where they live, a majority rate this as **costly** (61%, including 29% very costly), **less affordable** than **five years ago** (57%), and **likely to be less affordable** in **five years** (55%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

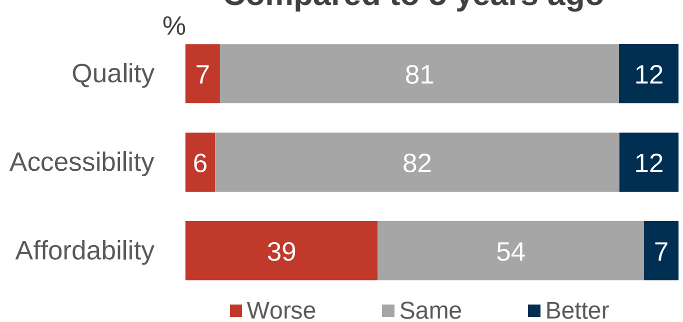
- *costly*: 35-54 yrs (65%), 55+ yrs (67%), SA (70%), disability/carers/family (66%)
- *affordable*: 18-34 yrs (22%), TAS (29%), ATSI (30%)
- *less affordable:* 55+ yrs (68%), VIC (62%), SA (63%), regional (61%), disability/carers/family (63%)
- *more affordable:* 18-34 yrs (11%), inner urban (9%), CALD (11%)
- *likely to become less affordable:* 55+ yrs (65%), regional (60%), not employed (58%) disability/carers/family (62%)
- *likely to become more affordable:* 18-34 yrs (14%), inner urban (13%), CALD (15%), ATSI (18%).

Gas networks and services

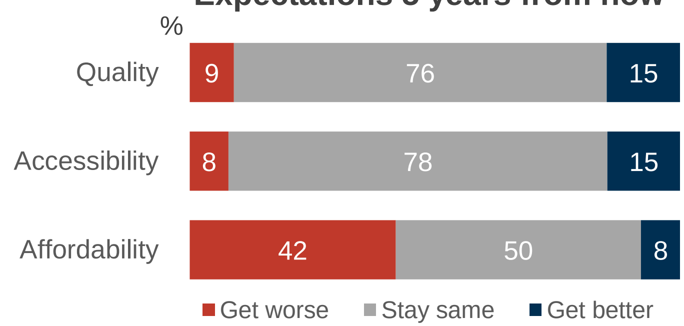
A majority of Australians rate the gas networks and services where they live as **good** and **easy to access,** but **costly** and **likely to become less affordable** over the next five years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of gas networks and services

Quality

Almost half of Australians rate the **quality** of gas networks and services where they live as **good** (45%, including 8% very good). The quality of gas is rated **about the same** as **five years ago** by a large majority (81%), with a firm expectation it is **likely to stay about the same** over the **next five years** (76%).

More feel it has become better (12%) than worse (7%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: TAS (13%), NT(16%), rural (14%), disability/carers/family (11%)
- *good*: VIC (56%), WA, (58%), ACT (58%), inner urban (50%), outer urban (49%), employed (48%)
- *worse:* VIC (11%), outer urban (9%), CALD (9%), disability/carers/family (10%)
- *better:* 18-34 yrs (17%), WA (22%), CALD (18%), ATSI (28%), employed (14%)
- *likely to get worse:* NSW (11%), VIC (11%), disability/carers/family (12%)
- *likely to get better:* 18-34 yrs (22%), WA (21%), inner urban (18%), CALD (24%), ATSI (27%).

Accessibility

Similarly, approximately half rate gas where they live as **easy** to access (53%, including 16% very easy). To most, gas is **about as accessible** as **five years ago** (82%), and **likely to stay about the same** over the **next five years** (78%).

More people feel it has become easier to access (12%) than more difficult (6%) compared with five years ago, and that it is likely to get easier (15%) than more difficult (8%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: men (10%), 35-54 yrs (11%), TAS (22%), NT (15%), rural (15%), disability/carers/family (11%)
- *easy*: 18-34 yrs (58%), VIC (65%), WA (64%), ACT (63%), inner urban (60%), outer urban (56%), employed (57%)
- *more difficult:* disability/carers/family (9%)
- *easier:* 18-34 yrs (18%), WA (20%), inner urban (15%), employed (15%), CALD (19%), ATSI (22%)
- *likely to get more difficult:* NSW (10%), disability/carers/family (11%)
- *likely to get easier:* 18-34 yrs (21%), WA (22%), outer urban (17%), CALD (23%), ATSI (26%).

Affordability of gas networks and services

Affordability

On **cost and affordability** of gas where they live, more people rate this as **costly** (38%, including 13% very costly), **less affordable** than **five years ago** (39%), and **likely to be less affordable** in **five years** (42%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly*: 35-54 yrs (43%), VIC (48%), ACT (51%), outer urban (43%), disability/carers/family (41%)
- *affordable*: 18-34 yrs (29%), WA, (29%), inner urban (26%), employed (24%), ATSI (34%), HHI &100K+ (26%)
- *less affordable:* 55+ yrs (43%), VIC (54%), ACT (53%), outer urban (44%), disability/carers/family (45%)
- *more affordable:* 18-34 yrs (12%), WA (14%), inner urban (9%), employed (9%) CALD (11%), ATSI (23%)
- *likely to become less affordable:* women (44%), 55+ yrs (47%), VIC (52%), ACT (55%), outer urban (45%) disability/carers/family (48%)
- *likely to become more affordable:* 18-34 yrs (13%), WA (14%) inner urban (11%), CALD (15%), ATSI (20%).

Water

Water:
Key findings

Quality

The quality of Australia's drinking water supply is rated as good by a large majority of people. Waste water services are not rated as well but are still seen to be good quality to half of the population. Many Australians do not have experience / views on irrigation or industrial water with views among those that do mainly positive or neutral. Quality of all water infrastructure is largely the same as five years ago and likely to remain the same five years from now.

Accessibility

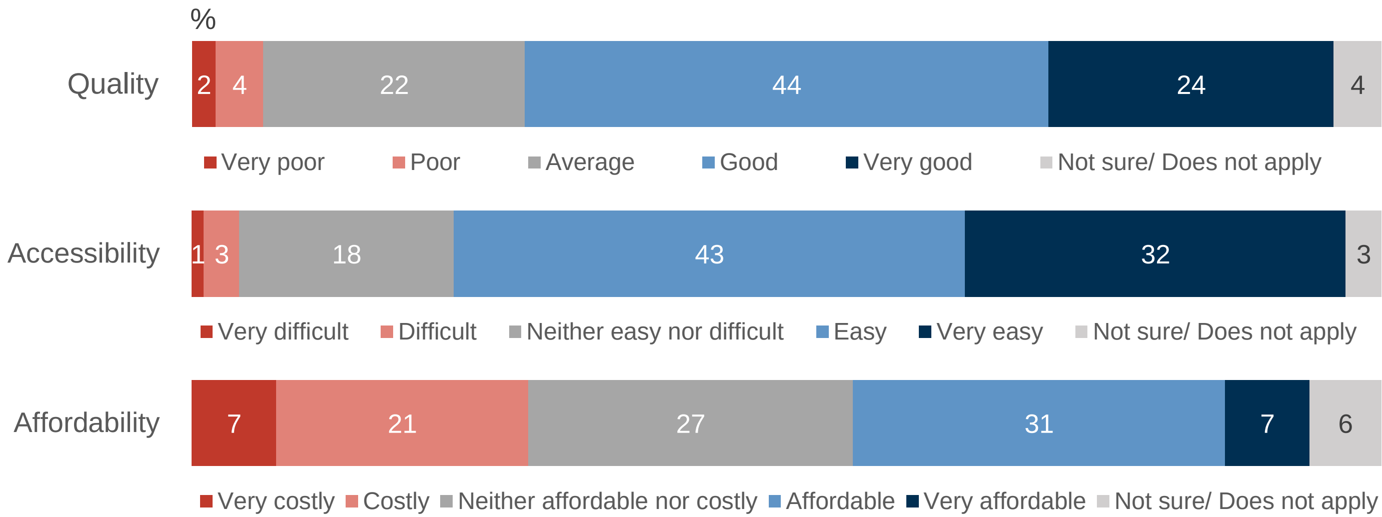
Drinking water supply is the most accessible form of water infrastructure to Australians. Among those who can form an opinion on irrigation water, most rate it as easy to access or neither easy nor difficult. Waste water services are accessible to just over half of the population. A significant majority hold the view that the accessibility of all types of water infrastructure is the same as five years ago and unlikely to change five years from now.

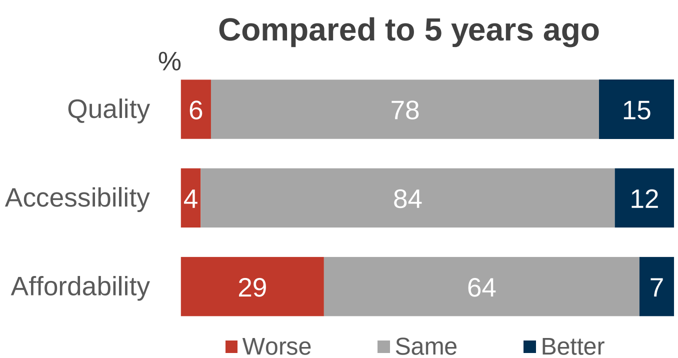
Affordability

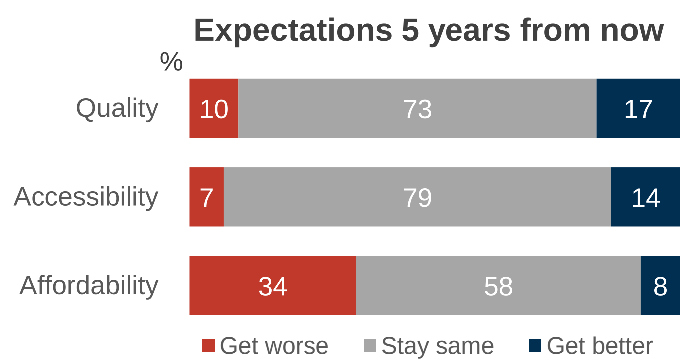
Drinking water supply is most affordable to Australians with affordable ratings outweighing costly ratings. Less people see waste water as affordable, however one in five Australians are unable to form an opinion on the cost of waste water, more so than drinking water. Four in 10 Australians have no experience of the cost of irrigation water. In the main, all types of water infrastructure are seen to cost the same as five years ago and likely to stay the same over the next five years.

Drinking water supply

A majority of Australians rate the drinking water where they live as **good quality** and **easy to access**, and likely to remain so. However three in ten rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.







*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of drinking water

Quality

A majority of Australians rate the **quality** of drinking water where they live as **good** (68%, including 24% very good), **about the same** as **five years ago** (78%), and **likely to stay about the same** over the **next five years** (73%).

Positively, few see it as poor (6%), more feel it has become better (15%) than worse (6%) over the last five years, and that it is likely to get better (17%) over the next five years (versus 10% worse).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: WA (9%), SA (11%), rural (15%), self employed (9%), disability/carer/family (8%)
- *good*: 55+ yrs (73%), VIC (74%), ACT (84%), inner urban (72%) outer urban (72%)
- *worse:* disability/carer/family (9%)
- *better:* 18-34 yrs (20%), CALD (21%)
- *likely to get worse:* WA (13%), disability/carer/family (13%).
- *likely to get better:* 18-34 yrs (22%), WA (22%), inner urban (21%), CALD (27%), ATSI (31%).

Accessibility

Similarly, a majority rate drinking water where they live as **easy** to access (74%, including 32% very easy), **about as accessible** as **five years ago** (84%), and **likely to stay about the same** over the **next five years** (79%).

Very few rate access as difficult (4%). More feel it is easier to access (12%) than more difficult (4%) compared with five years ago, and that it is likely to get easier (14%) than more difficult to access (7%) over the next five.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: rural (8%), disability/carer/family (6%)
- *easy*: 55+ yrs (77%), ACT (85%)
- *more difficult:* NSW (6%), CALD (6%)
- *easier:* 18-34 yrs (17%), employed (14%), CALD (18%), ATSI (28%)
- *likely to get more difficult:* no significant differences
- *likely to get easier:* 18-34 yrs (20%), inner urban (17%), CALD (23%).

Affordability of drinking water

Affordability

There are **mixed views** on the **cost and affordability** of drinking water. While more rate this as affordable (38%) than costly (28%), a substantial number are neutral (27%) or undecided (6%).

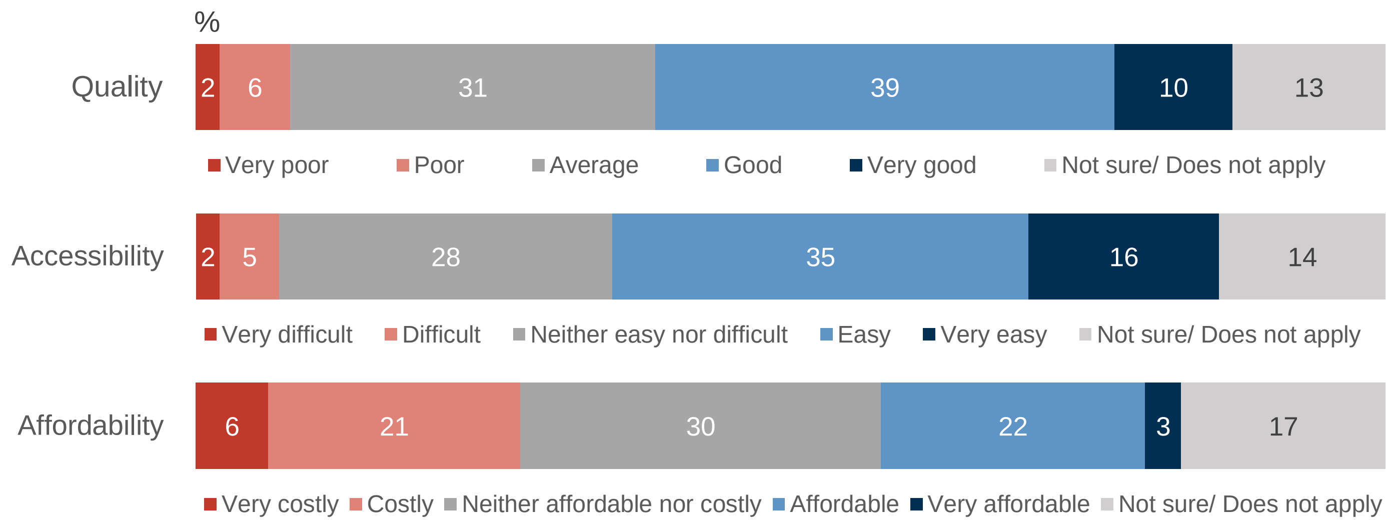
Most find affordability **about the same** (64%) or **less affordable** (29%) than **five years ago**, and expect it to be **about the same** (58%) or **less affordable** in **five years** (34%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

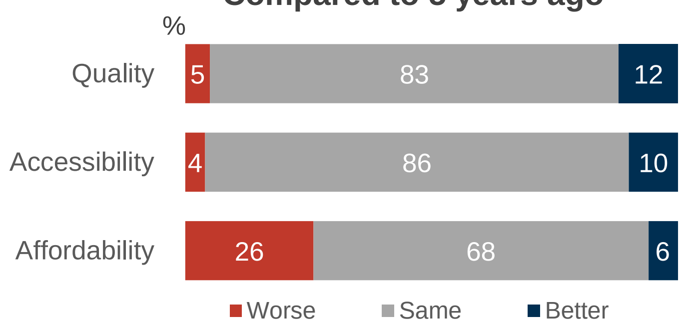
- *costly*: 35-54 yrs (32%), 55+ yrs (31%), WA (34%), disability/carer/family (34%)
- *affordable*: 18-34 yrs (43%), NSW (41%), inner urban (43%), HHI $100K+ (42%)
- *less affordable:* 55+ yrs (34%), VIC (32%), WA (33%), outer urban (32%), disability/carer/family (34%)
- *more affordable:* 18-34 yrs (12%), inner urban (9%), employed (9%), CALD (12%)
- *likely to become less affordable:* 55+ yrs (41%), VIC (39%), WA (41%), outer urban (37%), disability/carer/family (40%).
- *likely to become more affordable:* 18-34 yrs (12%), inner urban (10%), CALD (14%), ATSI (19%).

Waste water services

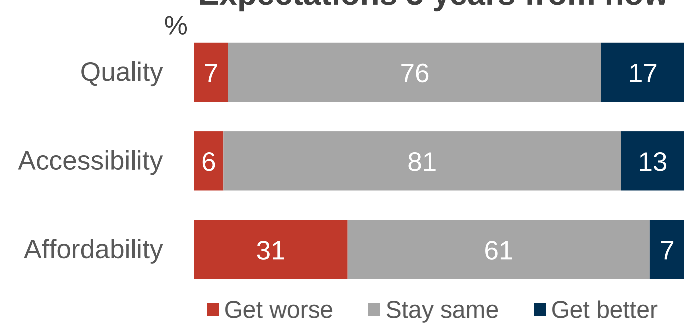
Around half of Australians rate the waste water services where they live as **good quality** and **easy to access**, and most believe them likely to remain so. However more than one in four rate them as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of waste water services

Quality

While almost half of Australians rate the **quality** of waste water services where they live as **good** (49%), a substantial number view them as only **average** (31%).

Most view the quality **as about the same** as **five years ago** (83%), and **likely to stay about the same** over the **next five years** (76%).

Positively, few feel services are poor (7%), more feel they have become better (12%) than worse (5%) over the last five years, and that they are likely to get better (17%) over the next five years (versus 7% worse).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: disability/carer/family (10%)
- *good*: VIC (53%), ACT (58%), inner urban (52%)
- *worse:* disability/carer/family (6%)
- *better:* 18-34 yrs (17%), employed (14%), CALD (18%), ATSI (21%)
- *likely to get worse:* VIC (9%), disability/carer/family (10%)
- *likely to get better:* 18-34 yrs (23%), WA (22%), inner urban (19%), CALD (26%).

Accessibility

Similarly, around half rate waste water services where they live as **easy** to access (51%, compared with 28% neutral and 7% difficult), and most view them as **about as accessible** as **five years ago** (86%), and **likely to stay about the same** over the **next five years** (81%).

More feel they are easier to access (10%) than more difficult (4%) compared with five years ago, and they are likely to get easier (13%) than more difficult (6%) over the next five.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: self employed (10%), CALD (9%), disability/carer/family (9%)
- *easy*: VIC (55%), employed (55%)
- *more difficult:* CALD (6%)
- *easier:* 18-34 yrs (15%), employed (12%), CALD (16%), ATSI (29%).
- *likely to get more difficult:* no significant differences
- *likely to get easier:* 18-34 yrs (20%), WA (16%), inner urban (16%), CALD (22%), ATSI (25%).

Affordability of waste water services

Affordability

There are **mixed views** on the **cost and affordability** of waste water services with slightly more rating them as costly (27%) than affordable (26%) and a substantial number being neutral (30%) or undecided (17%) on this.

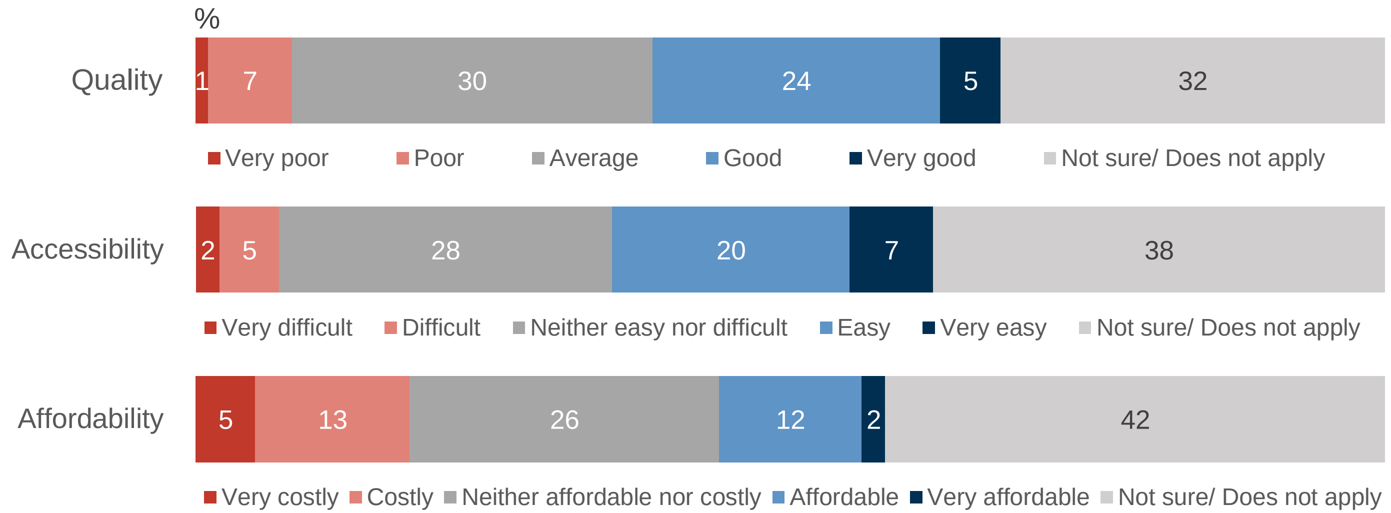
Most Australians find affordability **about the same** (68%) or **less affordable** than **five years ago** (26%), and expect it to be **about the same** (61%) or **less affordable** in **five years** (31%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

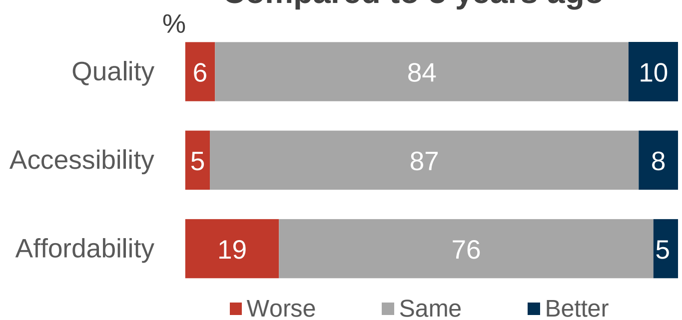
- *costly*: 35-54 yrs (32%), VIC (31%), WA (32%), outer urban (30%), disability/carer/family (32%)
- *affordable*: 18-34 yrs (30%), HHI $100K+ (29%)
- *less affordable:* 55+ yrs (30%), VIC (32%), WA (30%), outer urban (30%), disability/carer/family (29%)
- *more affordable:* 18-34 yrs (10%), CALD (9%), ATSI (12%)
- *likely to become less affordable:* 55+ yrs (37%), VIC (38%), outer urban (35%), disability/carer/family (35%)
- *likely to become more affordable:* 18-34 yrs (12%), SA (11%), inner urban (10%), CALD (13%), ATSI (19%).

Irrigation or industrial water

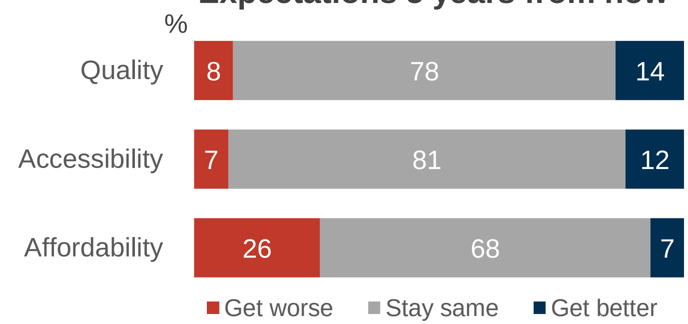
Many Australians do not have experience / views on irrigation or industrial water where they live but, among those that do, quality and access ratings are mainly positive or neutral. However two in ten rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of irrigation or industrial water

Quality

Three in ten Australians each, rate the **quality** of irrigation / industrial water where they live as **good** (29%) or as **average** (30%), and a similar number have no experience / no view on this (32%).

Most view the quality **as about the same** as **five years ago** (84%) and **likely to stay about the same** over the **next five years** (78%).

Positively, few feel this water quality is poor (8%), more feel it has become better (10%) than worse (6%) over the last five years, and that it is likely to get better (14%) over the next five years (versus 8% worse).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: ATSI (15%)
- *good*: 18-34 yrs (34%), VIC (33%), employed (33%)
- *worse:* disability/carer/family (8%)
- *better:* 18-34 yrs (16%), employed (12%), CALD (16%), ATSI (20%)
- *likely to get worse:* 55+ yrs (10%), VIC (10%), self employed (13%), disability/carer/family (12%)
- *likely to get better:* 18-34 yrs (20%), WA (18%), inner urban (17%), CALD (22%), ATSI (26%).

Accessibility

Similarly, 26% rate irrigation / industrial water where they live as **easy** to access, with 28% being neutral and 38% undecided, and most view it as **about as accessible** as **five years ago** (87%), and **likely to stay about the same** over the **next five years** (81%). Few feel it is difficult to access (7%). More feel it is easier to access (8%) than more difficult (5%) compared with five years ago, and that it is likely to get easier (12%) than more difficult (7%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: men (9%), rural (11%), self employed (11%), ATSI (14%), disability/carer/family (10%).
- *easy*: 18-34 yrs (36%), inner urban (30%), employed (31%), business owners (35%)
- *more difficult:* business owners (11%)
- *easier:* 18-34 yrs (13%), inner urban (10%), employed (10%), CALD (14%), ATSI (18%), business owners (16%)
- *likely to get more difficult:* 55+ yrs (9%), disability/carer/family (9%)
- *likely to get easier:* 18-34 yrs (19%), inner urban (14%), employed (14%), CALD (20%), ATSI (29%).

Affordability of irrigation or industrial water

Affordability

While many Australians are **neutral** (26%) or **undecided** (42%) on the **cost and affordability** of irrigation / industrial water, more rate it as **costly** (18%) than affordable (14%).

Most feel costs are **about the same** (76%) or **less affordable** (19%) than **five years ago**, and expect them to be **about the same** (68%) or **less affordable** in another **five years** (26%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly*: business owners (25%), HHI $50K-100K (20%)
- *affordable*: 18-34 yrs (21%), inner urban (17%), employed (16%), business owners (24%), HHI $100K+ (17%)
- *less affordable:* VIC (23%), disability/carer/family (22%), business owners (22%)
- *more affordable:* 18-34 yrs (10%), employed (6%), CALD (8%), ATSI (14%), business owners (12%)
- *likely to become less affordable:* 55+ yrs (29%), VIC (31%), disability/carer/family (29%)
- *likely to become more affordable:* 18-34 yrs (11%), inner urban (9%), CALD (12%), ATSI (29%), business owners (15%).

Regional views on irrigation or industrial water

Regional views on irrigation or industrial water

People living in **regional locations are not significantly different** from the general population in their views on irrigation or industrial water.

Quality is **more likely** to be seen as **good** than poor and expected to stay the same. **Accessibility** and **affordability** are also mostly expected to **remain the same in five years.**

Quality:

- *poor*: 8%
- *good*: 25%
- *worse:* 6%
- *better:* 8%
- *likely to get worse:* 8%
- *likely to get better:* 10%.

Accessibility:

- *difficult*: 8%
- *easy*: 22%
- *more difficult:* 5%
- *easier:* 5%
- *likely to get more difficult:* 6%
- *likely to get easier:* 9%.

Affordability:

- *costly*: 16%
- *affordable*: 11%
- *less affordable:* 19%
- *more affordable:* 3%
- *likely to become less affordable:* 26%.
- *likely to become more affordable:* 4%

Telecommunications

Telecommunications: Key findings

Quality

The vast majority of Australians view all forms of telecommunications as either average or good, with the quality of mobile networks and services the best. Importantly, only a small proportion of the population hold the view that quality of telecommunications is worse than five years ago and likely to be worse five years from now. Broadband and mobile services are expected to improve the most.

Accessibility

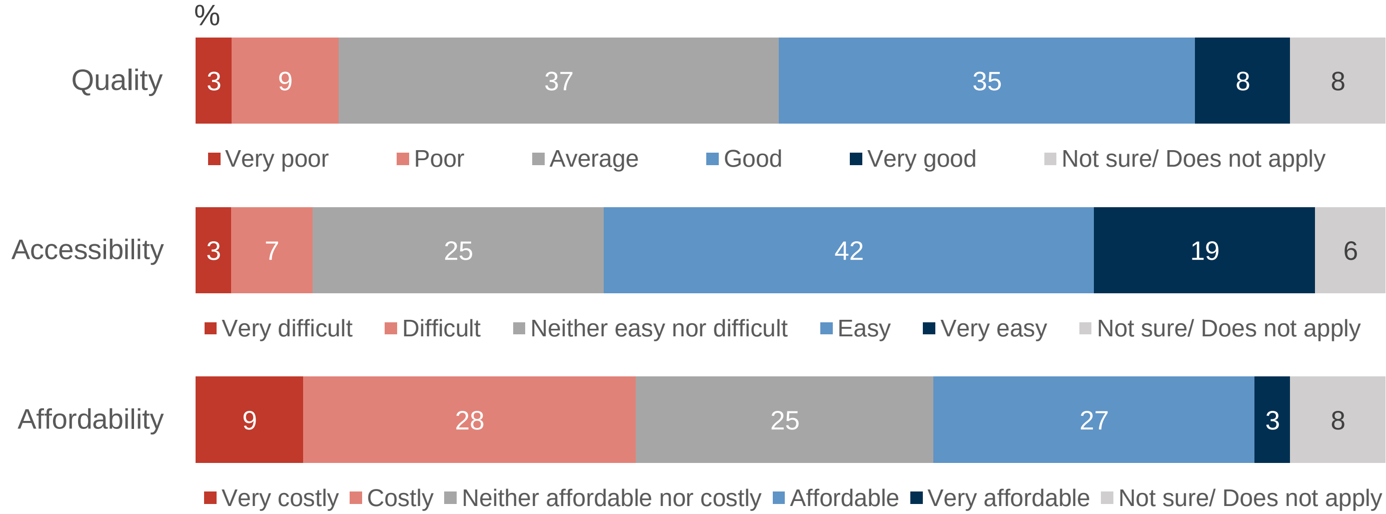
A majority see all types of telecommunications as accessible, with mobile slightly more accessible than broadband and fixed line. To most, fixed line is accessible as five years ago and likely to stay the same, however there is a firm expectation that accessibility to both broadband and mobile telecommunications will improve over the next five years.

Affordability

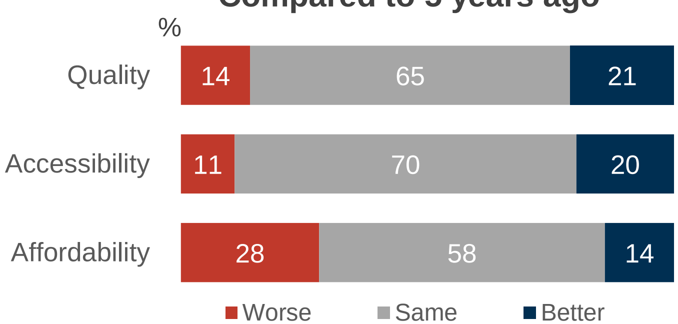
Opinion is divided on the affordability of telecommunications. While all types of telecommunications are more likely to be seen as costly than affordable, the differences are relatively small. Perceptions on costs compared to fives years ago are also largely consistent across all types of telecommunications, with approximately a third indicating they have become more expensive. The same is true for five years from now, with a third expecting costs to worsen.

Fixed lined telecommunications networks and services

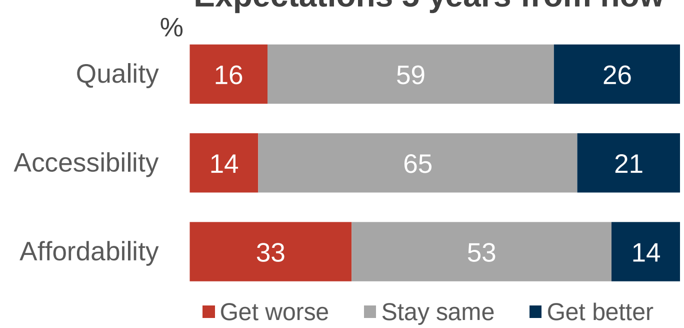
A majority of Australians rate fixed line telecommunications where they live as **easy to access**, and likely to remain so. However approximately a third or more rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of fixed lined telecommunications networks and services

Quality

Almost half of Australians rate the **quality** of fixed lined telecommunications networks and services where they live as **good** (43%, including 8% very good), with a large portion rating it as **average** (37%).

The quality of fixed lined telecommunications networks and services is rated **about the same** as **five years ago** by the majority (65%), with the majority also feeling it is **likely to stay about the same** over the **next five years** (59%).

More feel it has become better (21%) than worse (14%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: disability/carers/family (15%)
- *good*: 55+ yrs (48%), VIC (47%), TAS, (51%)
- *worse:* 55+ yrs (16%), disability/carers/family (17%)
- *better:* 18-34 yrs (27%), WA (25%), CALD (25%), ATSI (32%)
- *likely to get worse:* 55+ yrs (19%), disability/carers/family (21%)
- *likely to get better:* 18-34 yrs (35%), WA (31%), inner urban (29%), CALD (33%).

Accessibility

A majority of Australians rate fixed lined telecommunications where they live as **easy** to access (60%, including 19% very easy), **about as accessible** as **five years ago** (70%), and **likely to stay about the same** over the **next five years** (65%).

More people feel it has become easier to access (20%) than more difficult (11%) compared with five years ago, and that it is likely to get easier (21%) than more difficult (14%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: disability/carers/family (13%)
- *easy*: no significant differences
- *more difficult:* disability/carers/family (15%)
- *easier:* 18-34 yrs (25%), CALD (26%)
- *likely to get more difficult:* 55+ yrs (17%), disability/carers/family (19%)
- *likely to get easier:* 18-34 yrs (28%), WA (27%), CALD (29%), ATSI (43%).

Affordability of fixed lined telecommunications networks and services

Affordability

On **cost and affordability** of fixed lined telecommunications where they live, more people rate this as **costly** (37%, including 9% very costly), than **affordable** (30%).

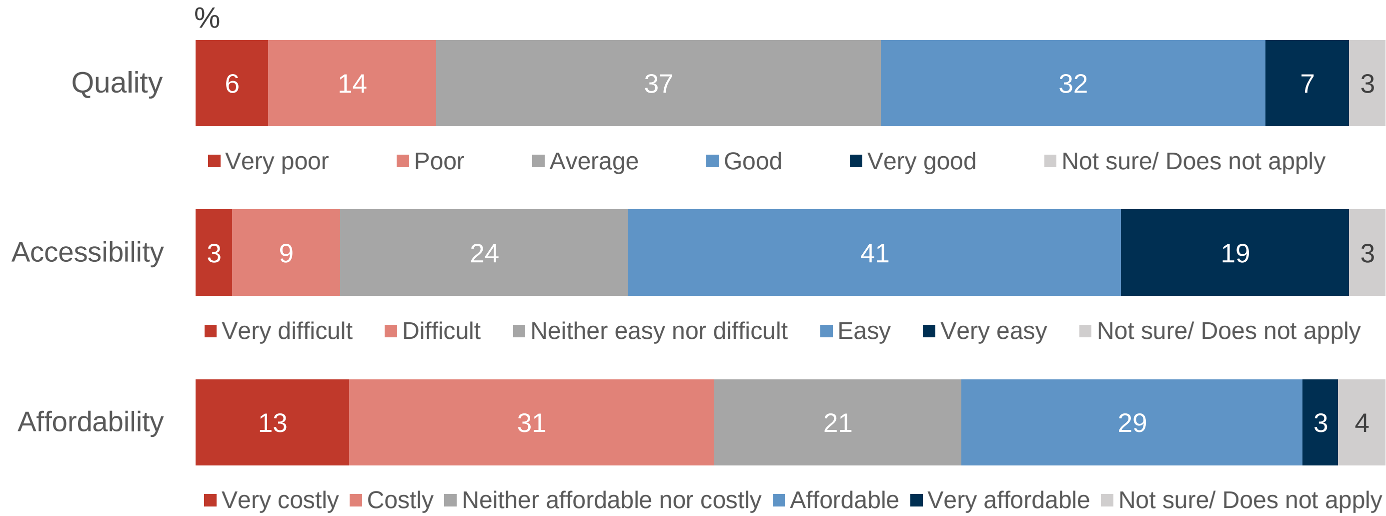
Less affordable than **five years ago** (28%) ratings outweigh **more affordable** ratings (14%) by two-to-one. The same is true for **likely to be less affordable** in **five years** (33%) and **likely to be more affordable in five years** (14%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

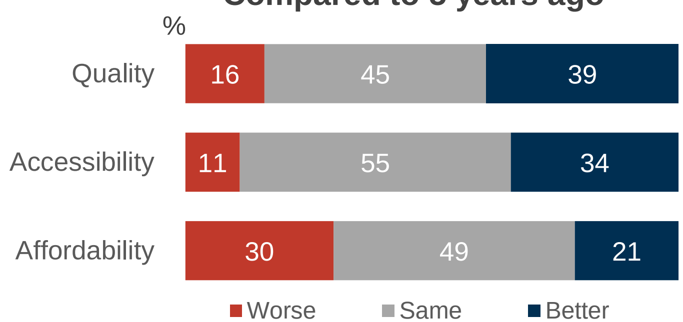
- *costly*: 35-54 yrs (40%), disability/carers/family (43%), HHI <$50K (40%)
- *affordable*: self employed (38%), HHI $100K+ (34%)
- *less affordable:* 55+ yrs (34%), VIC (31%), not employed (31%), disability/carers/family (33%) HHI <$50K (32%)
- *more affordable:* 18-34 yrs (19%), inner urban (17%), employed (16%) CALD (17%)
- *likely to become less affordable:* 55+ yrs (39%), VIC (36%), not employed (36%), disability/carers/family (38%), HHI <$50K (36%)
- *likely to become more affordable:* 18-34 yrs (21%), inner urban (17%), CALD (22%).

Broadband telecommunications networks and services

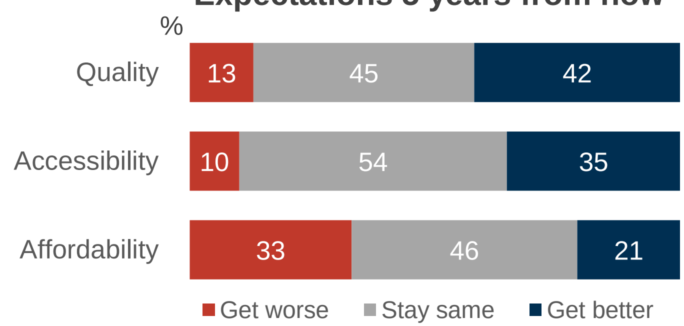
A majority of Australians rate broadband telecommunications where they live as **easy to access**, and likely to remain so. However four in 10 rate it as **costly,** while a third rate it **less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years. A sizable portion expect the **quality** of broadband telecommunications to improve.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of broadband telecommunications networks and services

Quality

Most Australians rate the **quality** of broadband telecommunications networks and services where they live as either **good** (39%, including 7% very good) with a sizable portion rating it as **average** (37%).

The quality of broadband telecommunications networks and services is rated **about the same** as **five years ago** by almost half of people (45%). Outlooks lean positive with 45% saying it is **likely to stay about the same** over the **next five years** and 42% indicating it will **get better**.

More people feel it has become better (39%) than worse (16%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: men (24%), disability/carers/family (24%)
- *good*: 55+ yrs (43%), TAS, (48%)
- *worse:* disability/carers/family (21%)
- *better:* WA (45%), NT (55%), TAS (51%), rural (46%)
- *likely to get worse:* 55+ yrs (16%), disability/carers/family (17%)
- *likely to get better:* 18-34 yrs (47%), QLD (46%), WA (48%), CALD (46%).

Accessibility

A majority of Australians rate broadband telecommunications where they live as **easy** to access (60%, including 19% very easy). To most, broadband telecommunications are **about as accessible** as **five years ago** (45%) or **more accessible** (34%) and **likely to stay about the same** over the **next five years** (54%) or **get easier** (35%).

More people feel it has become easier to access (34%) than more difficult (11%) compared with five years ago, and that it is likely to get easier (35%) than more difficult (10%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: disability/carers/family (16%)
- *easy*: TAS (69%), self employed (67%)
- *more difficult:* disability/carers/family (14%)
- *easier:* WA (40%), TAS (43%), NT (50%), rural (42%)
- *likely to get more difficult:* 55+ yrs (13%), NSW (12%), disability/carers/family (14%)
- *likely to get easier:* QLD (39%), WA (46%), disability/carers/family (14%).

Affordability of broadband telecommunications networks and services

Affordability

On **cost and affordability** of broadband telecommunications where they live, more people rate this as **costly** (44%, including 13% very costly), than **affordable** (31%).

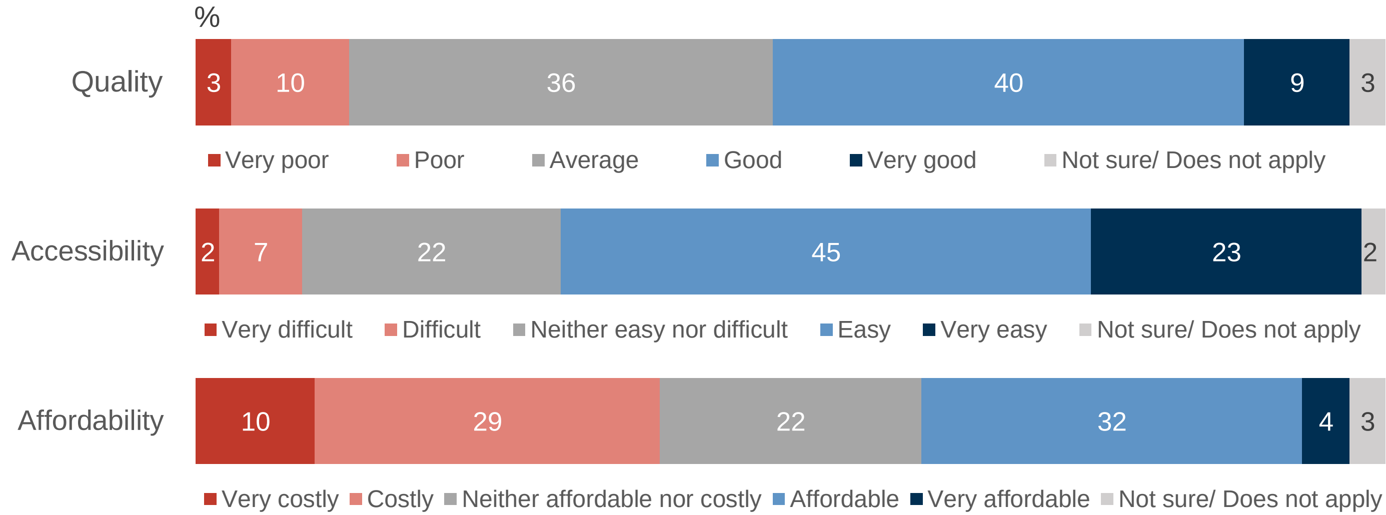
Less affordable than **five years ago** ratings (30%) outweigh **more affordable** ratings (21%). While more people feel it **likely to be less affordable** in **five years** (33%) than **more affordable in five years** (21%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

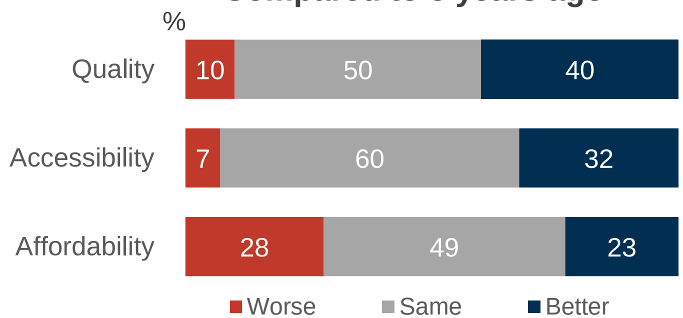
- *costly*: WA (49%), disability/carers/family (49%)
- *affordable*: self employed (40%), HHI $100K+ (34%)
- *less affordable:* 55+ yrs (36%), not employed (33%), disability/carers/family (36%), HHI <$50K (34%)
- *more affordable:* 18-34 yrs (24%), self employed (20%).
- *likely to become less affordable:* 55+ yrs (40%), VIC (36%), not employed (36%), disability/carers/family (39%), HHI <$50K (38%)
- *likely to become more affordable:* men (23%), 18-34 yrs (26%), NT (30%), inner urban (25%), CALD (27%).

Mobile telecommunications networks and services

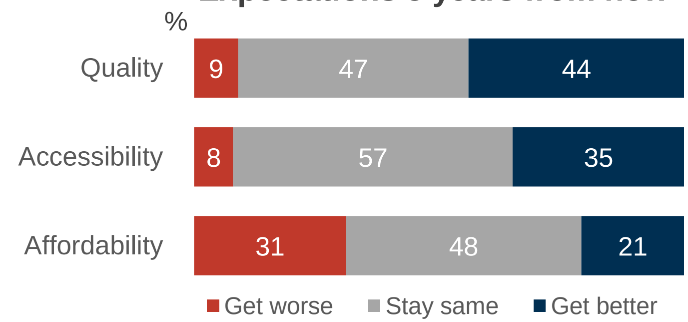
Half of Australians rate mobile telecommunications where they live as **good quality,** while a majority rate it as **easy to access**, and likely to remain so. However approximately four in 10 rate it as **costly,** with people more likely to rate it as **less affordable** than 5 years ago than affordable and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



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Base: All respondents (n=5,000).

Quality and accessibility of mobile telecommunications networks and services

Quality

Most Australians rate the **quality** of mobile telecommunications networks and services where they live as either **good** (49%, including 9% very good) or **average** (36%).

The quality of mobile telecommunications networks and services is rated **about the same** as **five years ago** by half of people (50%). Outlooks lean positive with 47% saying it is **likely to stay about the same** over the **next five years** and 44% indicating it will **get better**.

More people feel it has become better (40%) than worse (10%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: WA (18%), rural (20%) disability/carers/family (16%)
- *good*: 55+ yrs (52%), TAS, (59%)
- *worse:* no significant differences
- *better:* 18-34 yrs (44%), NT (50%)
- *likely to get worse:* disability/carers/family (12%)
- *likely to get better:* 18-34 yrs (49%), QLD (48%), WA (50%).

Accessibility

A majority of Australians rate mobile telecommunications where they live as **easy** to access (67%, including 23% very easy). To most, broadband telecommunications are **about as accessible** as **five years ago** (60%) or even **more accessible** (32%) and **likely to stay about the same** over the **next five years** (57%) or **get easier** (35%).

Only 7% feel it has become more difficult to access compared to five years ago (32% feel it has become easier). Less people feel it is likely to get more difficult to access in five years (8%) than easier (35%).

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: rural (13%), disability/carers/family (12%)
- *easy*: ACT (75%), inner urban (70%)
- *more difficult:* disability/carers/family (10%)
- *easier:* 18-34 yrs (36%), NT (44%)
- *likely to get more difficult:* 55+ yrs (9%), NSW (10%), disability/carers/family (11%)
- *likely to get easier:* 18-34 yrs (38%), WA (44%), NT (44%), CALD (40%), ATSI (50%).

Affordability of mobile telecommunications networks and services

Affordability

On **cost and affordability** of mobile telecommunications where people live, **costly** ratings (39%, including 10% very costly), are similar to **affordable** ratings (36%, including 4% very affordable).

Less affordable than **five years ago** ratings (28%) are slightly higher than **more affordable** ratings (23%). While more people feel it **likely to be less affordable** in **five years** (31%) than **more affordable** (21%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly*: disability/carers/family (44%), HHI <$50K (42%)
- *affordable*: self employed (44%), HHI $100K+ (41%)
- *less affordable:* 55+ yrs (33%), not employed (31%), disability/carers/family (33%), HHI <$50K (31%)
- *more affordable:* 18-34 yrs (28%), NT (32%), self employed (30%), CALD (27%), HHI $100K+ (27%)
- *likely to become less affordable:* women (33%), 55+ yrs (36%), VIC (34%), not employed (33%), disability/carers/family (36%), HHI <$50K (35%)
- *likely to become more affordable:* 18-34 yrs (26%), NT (33%), inner urban (25%), CALD (27%), HHI $100K+ (24%).

Freight Transport

Freight transport: Key findings

Quality

Approximately one in five Australians cannot form an opinion on the quality of freight transport and freight services. Among those that can, most rate these as either average or good. Both waste services and post and parcel services are viewed as good by at least half of the population. A majority see the quality of all types of freight transport as the same as five years ago and likely to remain the same fives years from now.

Accessibility

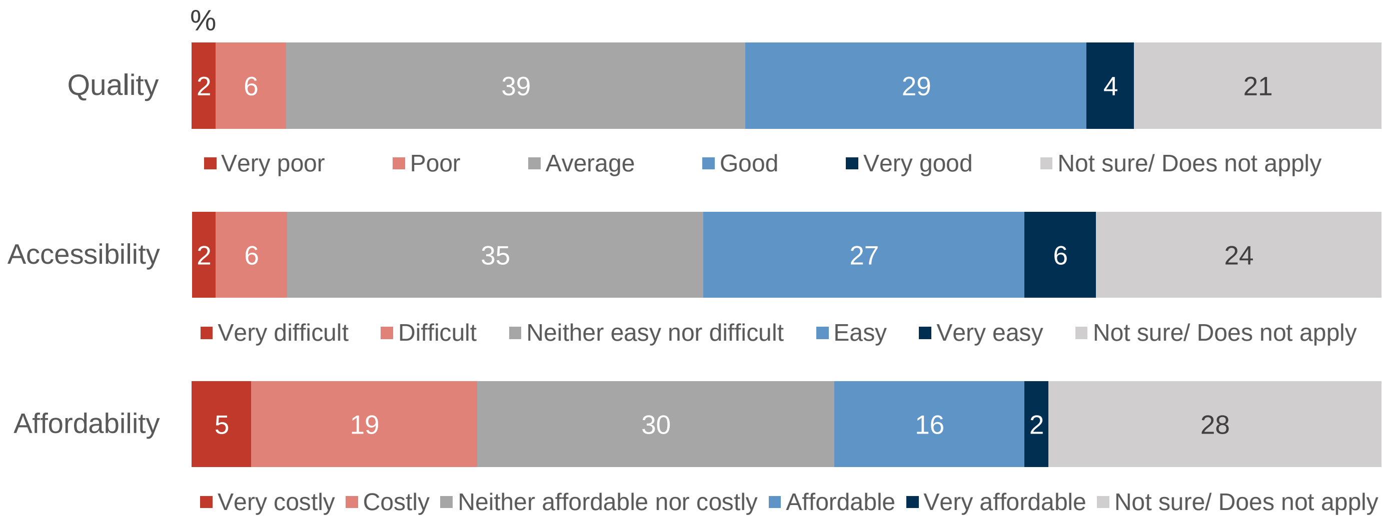
Waste services and post and parcel services are easy to access to a majority of Australians. Among those that can form an opinion, accessibility of freight transport and freight services is divided between easy to access and neither easy nor difficult. In the main, accessibility to all forms of freight transport is the same compared to five years ago and likely to remain the same over the next five years.

Affordability

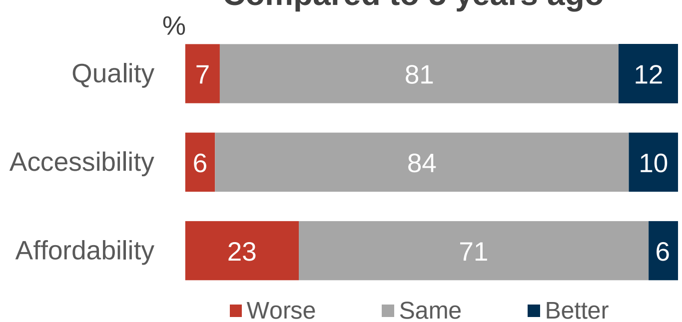
There are a mix of views on the affordability of freight transport. Post and parcel services are the most costly to Australians and more likely to worsen over the next five years than other types of freight transport. While not as costly as post and parcel services, waste services, freight transport and freight services are unlikely to improve in affordability over the next five years. The cost of these services has generally not improved over the last five years either.

Freight transport networks and services

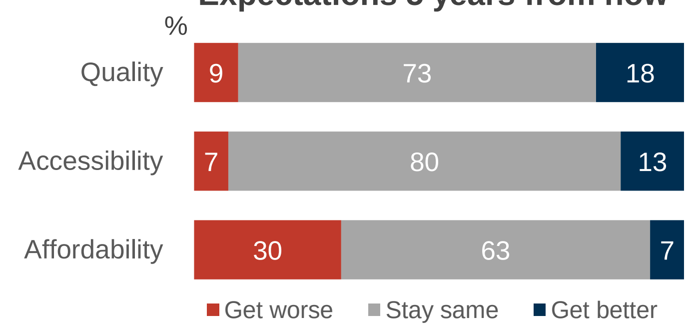
Many Australians do not have experience / views on freight transport networks and services where they live but, among those that do, quality and access ratings are mainly positive or neutral. However a quarter or emore rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of freight transport networks and services

Quality

Most Australians rate the **quality** of freight transport networks and services where they live as either **average** (39%) or **good** (32%). The quality of freight transport networks and services is rated **about the same** as **five years ago** by a large majority of people (81%).

A majority also say it is **likely to stay about the same** over the **next five years** (73%) and 18% indicate it will **get better** (only 9% feel it will get worse).

More people feel it has become better (12%) than worse (7%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NT (17%), rural (13%), disability/carers/family (10%)
- *good*: ATSI (45%)
- *worse:* outer urban (8%), disability/carers/family (10%)
- *better:* 18-34 yrs (16%), CALD (18%), ATSI (21%)
- *likely to get worse:* VIC (11%), disability/carers/family (11%)
- *likely to get better:* 18-34 yrs (24%), WA (24%), CALD (28%), ATSI (31%).

Accessibility

Most Australians rate freight transport networks and services where they live as **easy** to access (33%, including 6% very easy) or **neither easy nor difficult** (35%). To most, freight transport networks and services are **as accessible** as **five years ago** (84%) and **likely to stay about the same** over the **next five years** (80%).

Only 6% feel it has become more difficult to access compared to five years ago (10% feel it has become easier). More people indicate it is likely to get easier to access in five years (13%) than more difficult (7%).

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: regional (10%), rural (14%), disability/carers/family (11%)
- *easy*: men (36%), 18-34 yrs (37%), 35-54 yrs (38%), NT (42%), employed (37%), ATSI (47%)
- *more difficult:* NSW, (8%), VIC (8%) disability/carers/family (8%)
- *easier:* 18-34 yrs (14%), CALD (17%)
- *likely to get more difficult:* no significant differences
- *likely to get easier:* 18-34 yrs (19%), inner urban (15%), CALD (21%), ATSI (28%).

Affordability of freight transport networks and services

Affordability

On **cost and affordability** of freight transport networks and services where they live, **costly** ratings (24%, including 5% very costly), are higher than **affordable** ratings (18%). A further 30% see it as neither affordable nor costly.

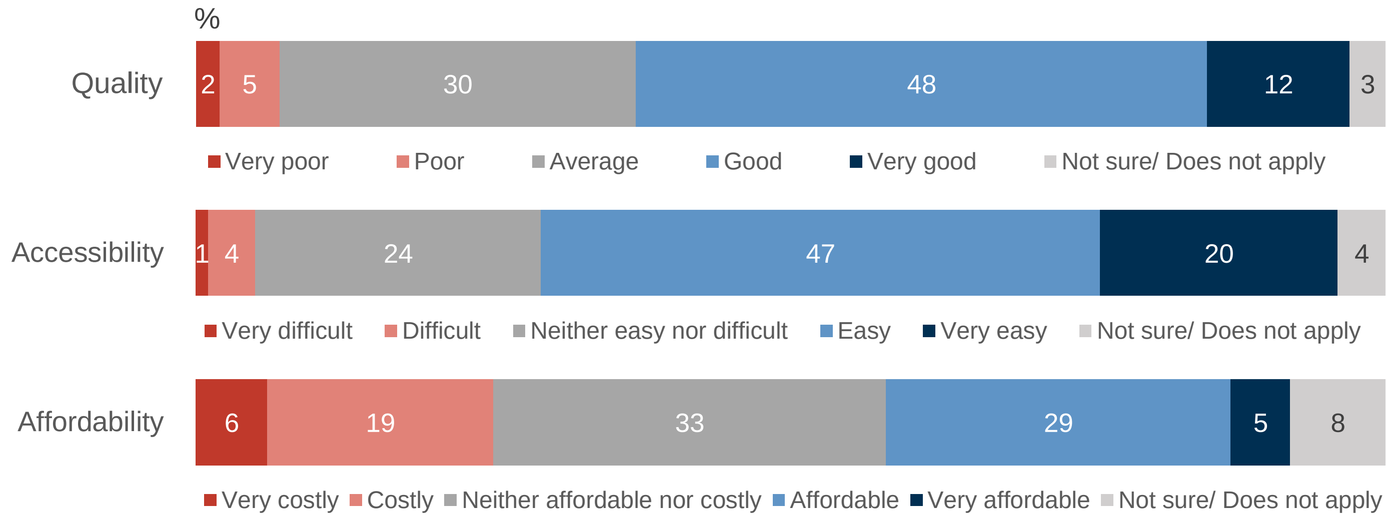
A majority see affordability as the same as **five years ago** (71%), however more rate it less affordable (23%) than more affordable five years ago (6%). More people feel it **likely to be less affordable** in **five years** (30%) than **more affordable** (7%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

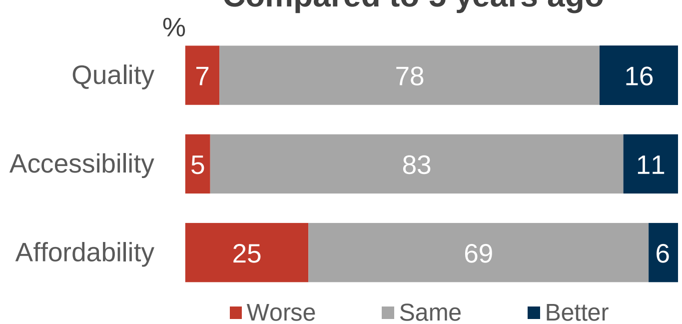
- *costly*: 35-54 yrs (27%), NT (50%), rural (31%), self employed (29%) disability/carers/family (28%), HHI <$50K (28%)
- *affordable*: 18-34 yrs (21%), inner urban (21%), HHI $100K+ (21%)
- *less affordable:* 55+ yrs (27%), self employed (29%), disability/carers/family (28%)
- *more affordable:* 18-34 yrs (11%), inner urban (9%) employed (8%), CALD (11%), ATSI (15%)
- *likely to become less affordable:* 55+ yrs (37%), not employed (32%), disability/carers/family (36%), HHI <$50K (35%)
- *likely to become more affordable:* 18-34 yrs (13%), inner urban (10%), CALD (14%), ATSI (15%), HHI 50k – $100K (9%).

Waste services

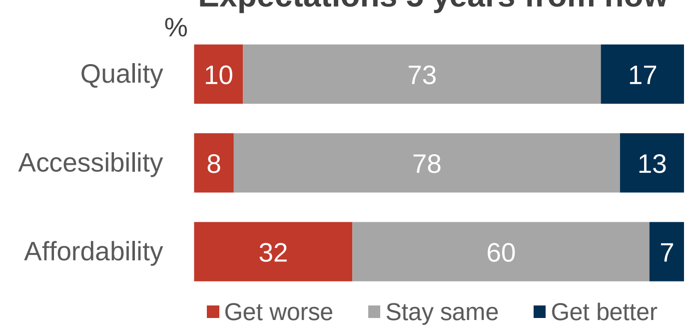
A majority of Australians rate waste services where they live as **good quality** and **easy to access**, and likely to remain so. However a quarter or more rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of waste services

Quality

A majority of Australians rate the **quality** of waste services where they live as **good** (60%, including 12% very good), **about the same** as **five years ago** (78%), and **likely to stay about the same** over the **next five years** (73%).

More people feel it has become better (16%) than worse (7%) compared with five years ago. More people also feel it is likely to get better (17%) than worse (10%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: CALD (10%), disability/carers/family (9%)
- *good*: 55+ yrs (66%), QLD (65%)
- *worse:* VIC (9%), disability/carers/family (10%)
- *better:* CALD (20%)
- *likely to get worse:* VIC (16%), disability/carers/family (12%)
- *likely to get better:* 18-34 yrs (22%), WA (23%), CALD (25%), ATSI (30%).

Accessibility

Similarly, a majority rate waste services where they live as **easy** to access (67%, including 20% very easy), **about as accessible** as **five years ago** (83%), and **likely to stay about the same** over the **next five years** (78%).

Positively, more feel it has become easier to access (11%) than more difficult (5%) compared with five years ago, and that it is likely to get easier (13%) than more difficult (8%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: rural (9%), CALD (8%), ATSI (12%), disability/carers/family (7%)
- *easy*: 55+ yrs (72%), ACT (81%), not employed (70%)
- *more difficult:* men (7%), employed (7%) disability/carers/family (7%)
- *easier:* 18-34 yrs (15%), CALD (17%).
- *likely to get more difficult:* VIC (12%), disability/carers/family (10%)
- *likely to get easier:* 18-34 yrs (19%), WA (17%), inner urban (16%), CALD (22%), ATSI (31%).

Affordability of waste services

Affordability

On **cost and affordability** of waste services where they live, a majority rate this as either **affordable** (34%) or **neither affordable nor costly** (33%).

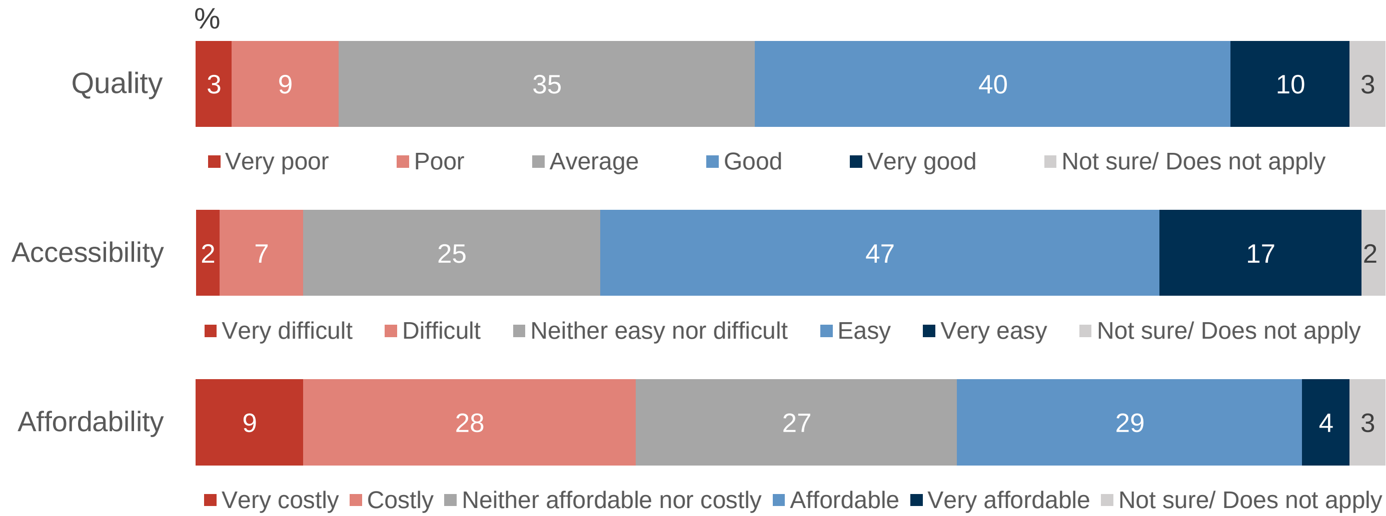
A majority see affordability as the same as **five years ago** (69%), however more rate it **less affordable** (25%) than **more affordable than five years ago** (6%). More people feel it **likely to be less affordable** in **five years** (32%) than **more affordable** (7%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

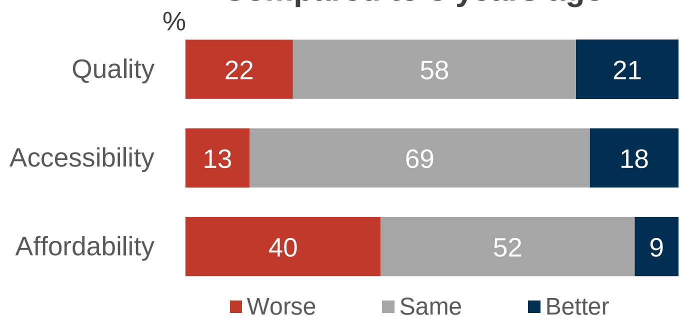
- *costly*: 35-54 yrs (29%), 55+ yrs (27%), VIC (29%), self employed (31%), disability/carers/family (29%)
- *affordable*: HHI 50k – $100K (37%), HHI $100K+ (37%)
- *less affordable:* 35-54 yrs (27%), 55+ yrs (29%), VIC (30%), disability/carers/family (29%)
- *more affordable:* 18-34 yrs (10%), CALD (10%), ATSI (17%)
- *likely to become less affordable:* 55+ yrs (41%), VIC (38%), WA (37%), not employed (36%), disability/carers/family (37%), HHI <$50K (36%)
- *likely to become more affordable:* 18-34 yrs (12%), inner urban (9%), CALD (14%), ATSI (17%).

Post and parcel services

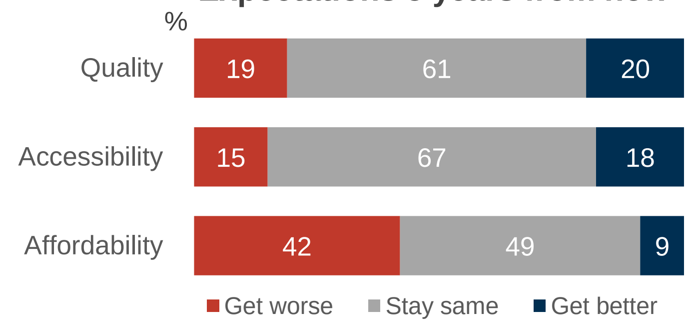
Half of Australians rate post and parcel where they live as **good quality**, while a majority rate it **easy to access**, and likely to remain so. However more than a third rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of post and parcel services

Quality

Half of Australians rate the **quality** of post and parcel services where they live as **good** (50%, including 10% very good), while a majority rate quality **about the same** as **five years ago** (58%), and **likely to stay about the same** over the **next five years** (61%).

As many people feel it has become better (21%) as they do worse (22%) compared with five years ago. As many people also feel it is likely to get better (20%) than worse (19%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NT (27%), disability/carers/family (16%)
- *good*: 55+ yrs (56%), regional (54%) not employed (53%)
- *worse:* 55+ yrs (24%), VIC (25%), SA (27%), disability/carers/family (25%)
- *better:* 18-34 yrs (24%), ATSI (37%)
- *likely to get worse:* VIC (22%), disability/carers/family (23%)
- *likely to get better:* 18-34 yrs (27%), WA (24%), inner urban (23%), CALD (29%), ATSI (39%).

Accessibility

A majority rate post and parcel services where they live as **easy** to access (64%, including 17% very easy), **about as accessible** as **five years ago** (69%), and **likely to stay about the same** over the **next five years** (67%).

More feel it has become easier to access (18%) than more difficult (13%) compared with five years ago, and that it is likely to get easier (18%) than more difficult (15%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: NT (15%), disability/carers/family (12%)
- *easy*: 55+ yrs (67%)
- *more difficult:* VIC (16%), disability/carers/family (16%)
- *easier:* 18-34 yrs (24%), inner urban (21%), CALD (24%), ATSI (37%)
- *likely to get more difficult:* 55+ yrs (17%), VIC (17%), disability/carers/family (18%)
- *likely to get easier:* 18-34 yrs (26%), inner urban (23%), CALD (26%), ATSI (39%).

Affordability of post and parcel services

Affordability

On **cost and affordability** of post and parcel services where people live, views are mixed with a third rating it as **affordable** (33%), approximately another third rating it as **costly** (37%) and 27% seeing it as **neither affordable nor costly**.

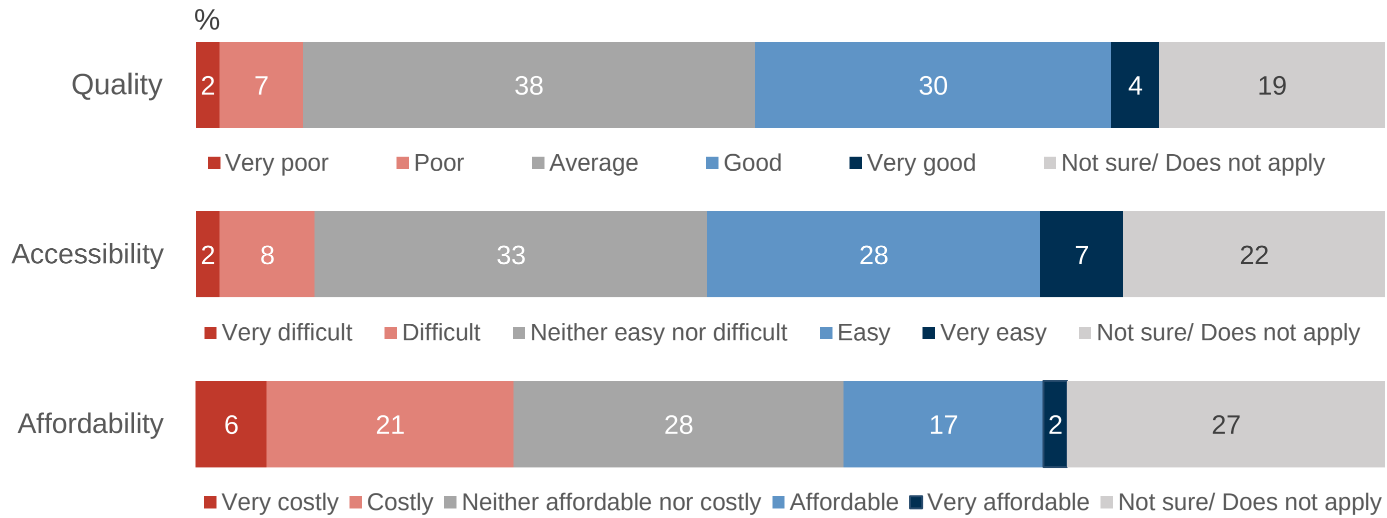
A majority see affordability as the same as **five years ago** (52%), however more rate it **less affordable** (40%) than **more affordable than five years ago** (9%). More people feel it is **likely to be less affordable** in **five years** (42%) than **more affordable** (9%), with 49% projecting it to **cost the same in five years.**

Some demographic groups are *significantly more likely* than the national average to rate costs as:

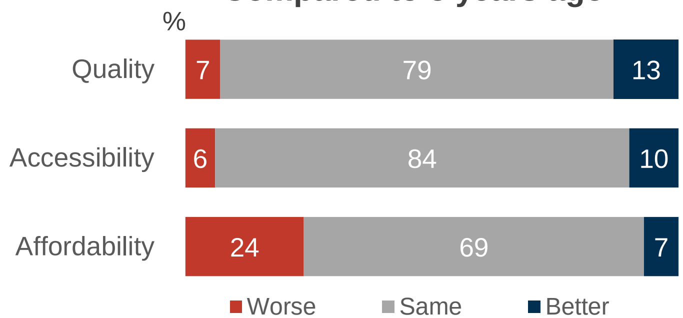
- *costly*: women (41%), 35-54 yrs (41%), disability/carers/family (42%)
- *affordable*: ATSI (51%)
- *less affordable:* women (43%), 55+ yrs (47%), VIC (43%) not employed (43%), disability/carers/family (45%)
- *more affordable:* 18-34 yrs (13%), CALD (11%), ATSI (18%)
- *likely to become less affordable:* women, (46%), 55+ yrs (50%), not employed (47%), disability/carers/family (48%), HHI <$50K (46%)
- *likely to become more affordable:* 18-34 yrs (15%), inner urban (12%), CALD (15%), ATSI (24%).

Freight services

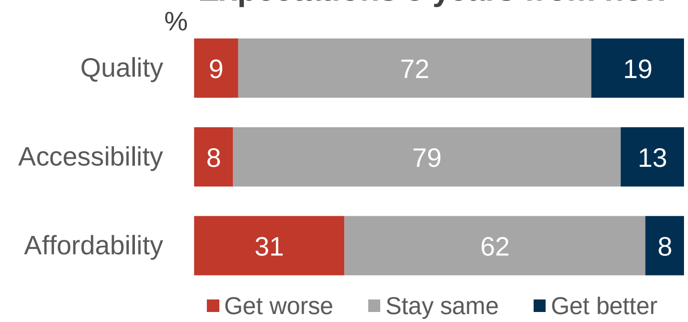
Many Australians do not have experience / views on freight services where they live but, among those that do, quality and access ratings are mainly positive or neutral. However approximately a quarter or more rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of freight services

Quality

Most Australians rate the **quality** of freight services where they live as **good** (34%) or **average** (38%), while a majority rate quality **about the same** as **five years ago** (79%), and **likely to stay about the same** over the **next five years** (72%).

More people feel it has become better (13%) than worse (7%) compared to five years ago. More people also feel it is likely to get better (19%) than worse (9%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NT (22%), rural (15%), disability/carers/family (12%)
- *good*: no significant differences
- *worse:* CALD (10%), disability/carers/family (10%)
- *better:* 18-34 yrs (17%), NT (19%), CALD (20%)
- *likely to get worse:* VIC (12%), disability/carers/family (11%)
- *likely to get better:* 18-34 yrs (26%), WA (25%), CALD (30%), ATSI (38%).

Accessibility

Most people rate freight services where they live as **easy** to access (35%) or **neither easy nor difficult** (33%), while a majority rate it **about as accessible** as **five years ago** (84%), and **likely to stay about the same** over the **next five years** (79%).

More feel it has become easier to access (10%) than more difficult (6%) compared with five years ago, and that it is likely to get easier (13%) than more difficult (8%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: regional (12%), rural (16%), disability/carers/family (13%)
- *easy*: 35-54 yrs (39%), QLD (39%), employed (38%)
- *more difficult:* VIC (8%), disability/carers/family (8%)
- *easier:* 18-34 yrs (15%), inner urban (13%), employed (12%), CALD (18%), ATSI (20%)
- *likely to get more difficult:* no significant differences
- *likely to get easier:* 18-34 yrs (19%), WA (17%), inner urban (17%), CALD (22%), ATSI (32%).

Affordability of freight services

Affordability

On **cost and affordability** of freight services where people live, views are mixed with a quarter rating it as **costly** (27%), approximately another quarter rating it as **neither affordable nor costly** (28%) and 19% seeing it as **affordable** (27% indicate they are unsure/does not apply).

A majority see affordability as the same as **five years ago** (69%), however more rate it **less affordable** (24%) than **more affordable than five years ago** (7%). More people feel it is **likely to be less affordable** in **five years** (31%) than **more affordable** (8%), with most projecting it to **cost the same in five years** (62%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly*: NT (55%), rural (34%), disability/carers/family (31%) HHI <$50K (30%)
- *affordable*: 18-34 yrs (22%), employed (21%)
- *less affordable:* 55+ yrs (28%), disability/carers/family (29%)
- *more affordable:* 18-34 yrs (11%), inner urban (9%), CALD (11%)
- *likely to become less affordable:* 55+ yrs (39%), not employed (34%), disability/carers/family (36%), HHI <$50K (35%)
- *likely to become more affordable:* 18-34 yrs (13%), inner urban (11%), CALD (14%), ATSI (19%).

Passenger Transport

Passenger transport: Key findings

Quality

The quality of Australia's passenger transport infrastructure is largely consistent (around one third 'good' ratings), with national highways rated the best. On most types of passenger transport, approximately one in five Australians rate it as poor. Views that quality has improved over the last five years tend to outweigh views that quality has worsened, with the exception being local roads where the reverse is true. Expectations are generally positive for the coming five years.

Accessibility

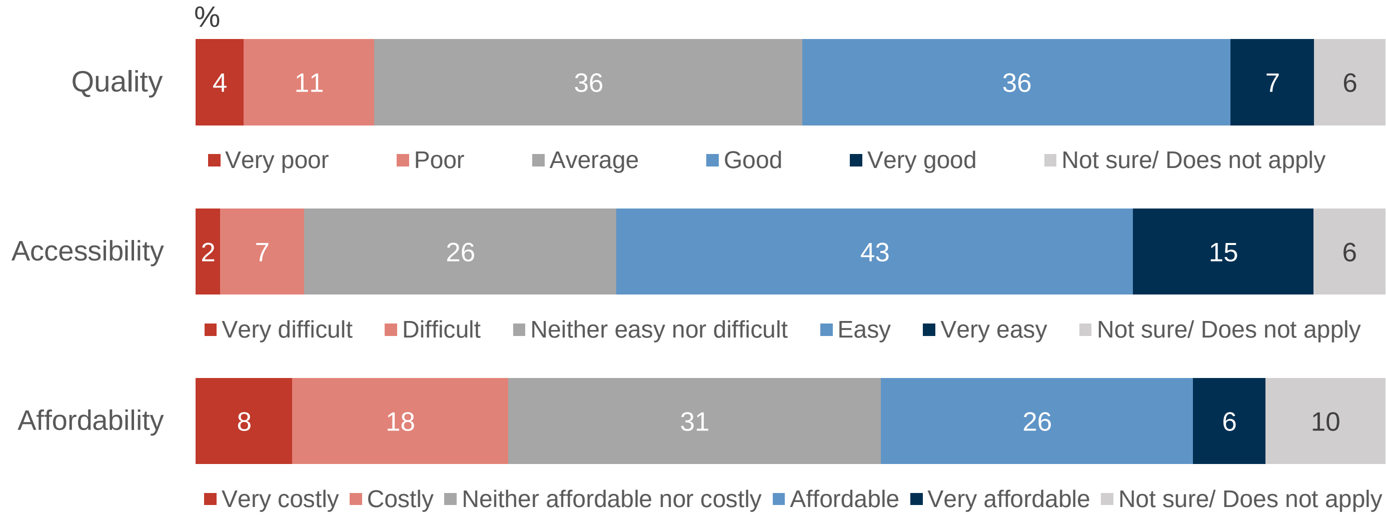
Passenger transport is easily accessible to a majority of Australians. The exceptions are tram, light rail and train networks and services, bus services and ride share/ on demand services where just under half find these easily accessible. In the main, access to passenger transport is the same as five years ago and expectations are positive, with most seeing accessibility as improving or at a minimum, staying the same.

Affordability

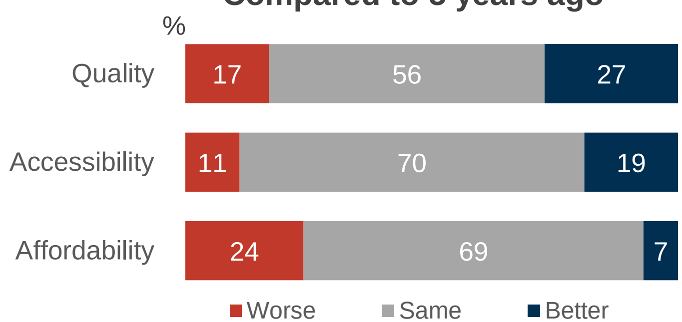
Views on the affordability of passenger transport tend to be mixed. National highways, tram/ light rail/ trains, buses and ride share services are most costly (approximately one quarter see these as costly). Cycleways are most affordable. Positive outlooks are minimal with consumers expecting the cost of passenger transport is likely to stay the same or get worse. Buses and tram/ light rail/ trains are the passenger transport rated as most likely to become more expensive over the next five years.

National highways and motorways

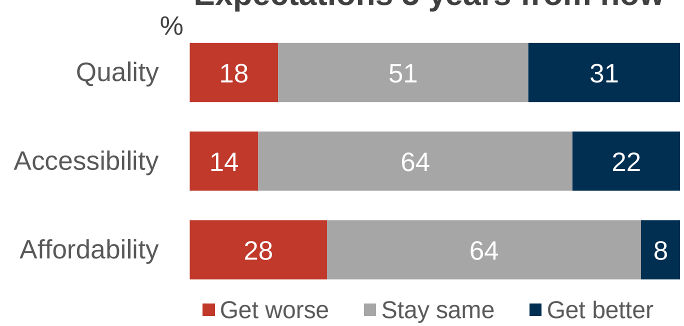
Four in 10 Australians rate national highways and motorways where they live as **good quality**, while a majority rate it **easy to access**, and likely to remain so. However a quarter rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years. The majority still feel affordability will remain consistent.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of national highways and motorways

Quality

Slightly more Australians rate the **quality** of national highways and motorways where they live as **good** (43%) than as **average** (36%), and few rate them as **poor** (15%).

Most feel the quality is **about the same** (56%) or **better** (27%) than **five years ago,** and **likely to stay about the same** (51%) or **get better** (31%) over the **next five years**. Positively, few see it as worse than five years ago (17%) or likely to get worse (18%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: QLD (23%), rural (21%), disability/ carer/family (17%)
- *good*: VIC (49%), ACT (56%), NT (58%), inner urban (47%)
- *worse:* 55+ yrs (19%), VIC (19%), QLD (24%)
- *better:* WA (33%), NT (35%), CALD (31%), disability/ carer/family (31%)
- *likely to get worse:* 55+ yrs (20%), VIC (22%), QLD (22%).
- *likely to get better:* WA (37%), CALD (37%).

Accessibility

Similarly, a majority rate national highways and motorways where they live as **easy** to access (58%, including 15% very easy), **about as accessible** as **five years ago** (70%), and **likely to stay about the same** over the **next five years** (64%).

Few rate access as difficult (10%). More feel it is easier to access (19%) than more difficult (11%) compared with five years ago, and that it is likely to get easier (22%) than more difficult (14%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult:* no significant differences
- *easy*: ACT (75%), NT (70%), regional (62%)
- *more difficult:* VIC (14%), QLD (14%), rural (13%)
- *easier:* CALD (25%)
- *likely to get more difficult:* VIC (17%), rural (17%)
- *likely to get easier:* 18-34 yrs (25%), CALD (30%), ATSI (33%).

Affordability of national highways and motorways

Affordability

There are mixed views on the **cost and affordability** of national highways and motorways. While more rate this as **affordable** (33%) than costly (26%), a substantial number are **neutral** (31%) or undecided (10%).

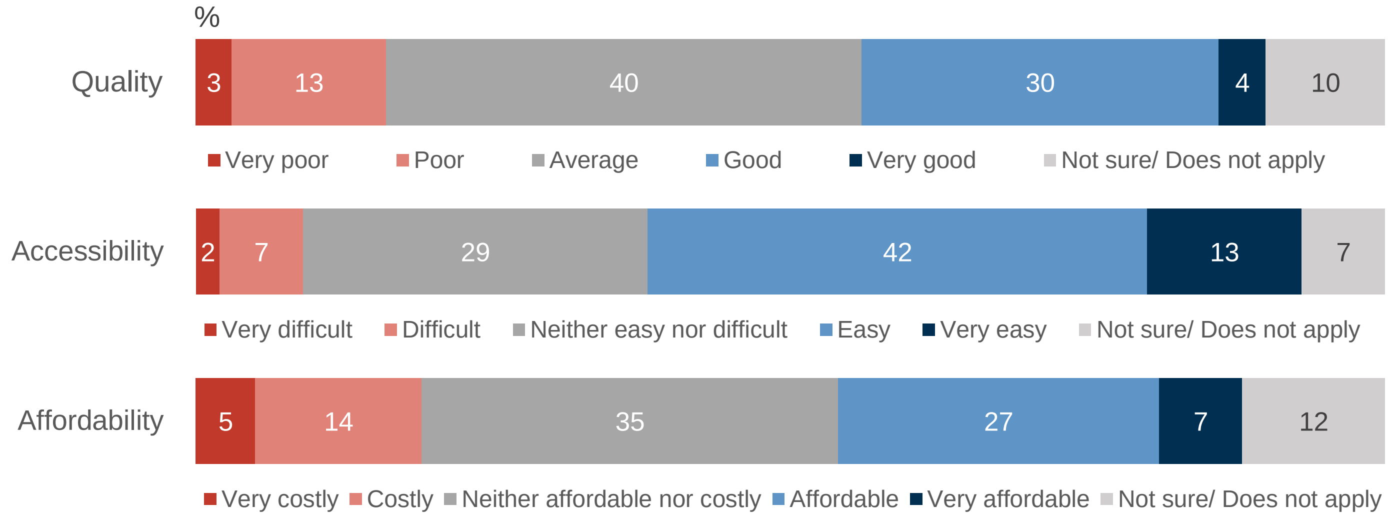
Most find affordability **about the same** (69%) or **less affordable** (24%) than **five years ago**, and expect it to be **about the same** (64%) or **less affordable** (28%) over the next **five years.**

Some demographic groups are *significantly more likely* than the national average to rate costs as:

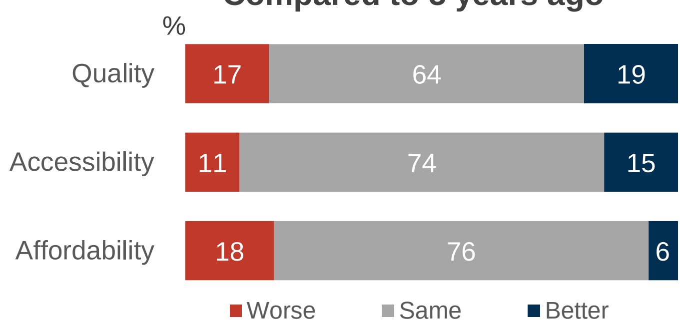
- *costly*: 35-54 yrs (29%), NSW (34%), inner urban (32%), self employed (32%), disability/carer/family (30%)
- *affordable:* men (36%), SA (42%), ACT (43%), NT (42%), HHI $100K+ (38%)
- *less affordable:* NSW (30%), inner urban (28%), outer urban (27%), self employed (30%), disability/carer/family (28%)
- *more affordable:* 18-34 yrs (10%), CALD (12%), ATSI (17%)
- *likely to become less affordable:* 55+ yrs (31%), NSW (32%), inner urban (31%), outer urban (31%), disability/carer/ family (32%)
- *likely to become more affordable:* men (10%), 18-34 yrs (13%), inner urban (11%), CALD (15%), ATSI (23%), HHI $50K-100K (11%).

Arterial and main roads

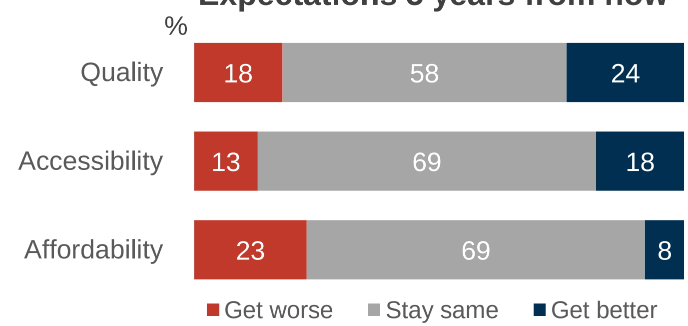
A third of Australians rate arterial and main roads where they live as **good quality**, while a majority rate it **easy to access**, and likely to remain so. One in five rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years. The majority still feel affordability has been and will remain consistent.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of arterial and main roads

Quality

More Australians rate the **quality** of arterial and main roads where they live as **average** (40%) than good (34%), but few rate this as poor (16%).

A majority feel the quality is **about the same** as **five years ago** (64%), and **likely to stay about the same** over the **next five years** (58%).

Positively, more see this as better (19%) than five years ago than worse (17%), and as likely to get better (24%) over the next five years than worse (18%).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: rural (22%)
- *good*: WA (42%), ACT (54%), NT (50%), inner urban (38%)
- *worse:* 55+ yrs (20%), VIC (21%), self employed (23%), disability/carer/family (20%)
- *better:* WA (26%), NT (38%), outer urban (21%)
- *likely to get worse:* 55+ yrs (22%), VIC (23%)
- *likely to get better:* WA (29%), CALD (30%).

Accessibility

A majority rate arterial and main roads where they live as **easy** to access (55%, including 13% very easy), **about as accessible** as **five years ago** (74%), and **likely to stay about the same** over the **next five years** (69%).

Few rate access as difficult (9%). More feel it is easier to access (15%) than more difficult (11%) compared with five years ago, and that it is likely to get easier (18%) than more difficult (13%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: disability/carer/family (11%)
- *easy*: WA (61%), ACT (75%), NT (65%)
- *more difficult:* men (12%), VIC (14%), inner urban (13%), outer urban (12%), disability/carer/family (13%)
- *easier:* WA (19%), CALD (20%)
- *likely to get more difficult:* 55+ yrs (16%), VIC (17%), inner urban (16%), outer urban (16%)
- *likely to get easier:* 18-34 yrs (20%), WA (23%), CALD (24%), ATSI (28%).

Affordability of arterial and main roads

Affordability

There are mixed views on the **cost and affordability** of arterial and main roads. While more rate them as **affordable** (33%) than costly (19%), a substantial number are **neutral** (35%) or undecided (12%) on this.

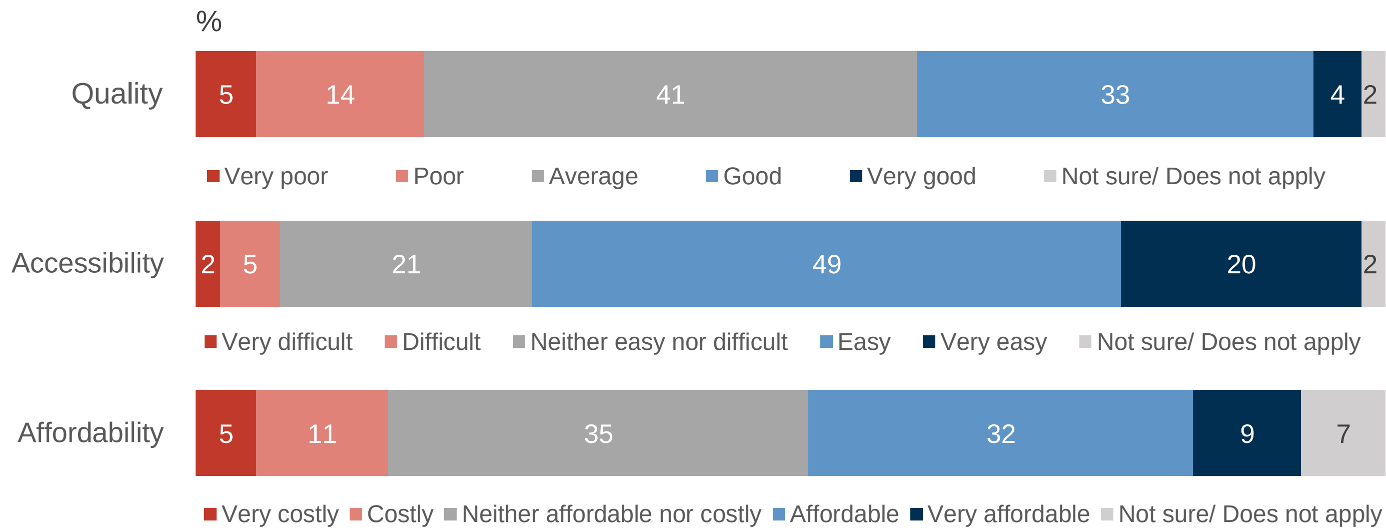
Most find affordability **about the same** (76%) or **less affordable** (18%) than **five years ago**, and expect it to be **about the same** (69%) or **less affordable** (23%) over the next **five years**.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

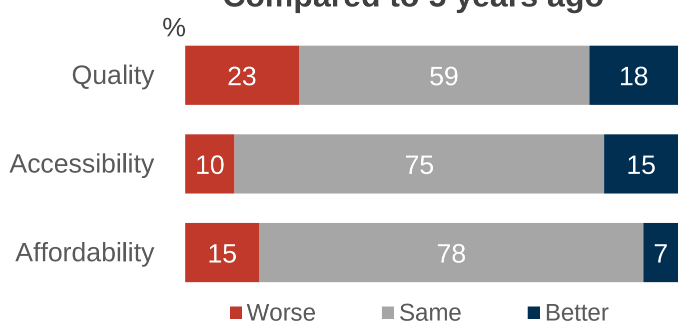
- *costly*: 35-54 yrs (22%), NSW (22%), inner urban (22%), self employed (24%), disability/carer/family (22%)
- *affordable:* SA (41%), ACT (43%), NT (41%), HHI $100K+ (40%)
- *less affordable:* NSW (20%), inner urban (20%), disability/carer/family (21%)
- *more affordable:* 18-34 yrs (9%), inner urban (8%), CALD (10%), ATSI (17%)
- *likely to become less affordable:* NSW (20%), inner urban (26%), disability/ carer/family (26%)
- *likely to become more affordable:* 18-34 yrs (12%), inner urban (10%), CALD (13%), ATSI (18%).

Local roads

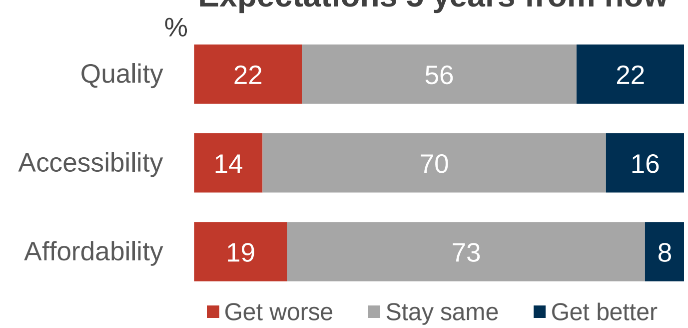
More than a third of Australians rate local roads where they live as **good quality**, four in 10 rate them as **average.** A majority rate local roads **easy to access**, and likely to remain so. Four in 10 rate them as **affordable,** with the majority rating them as **affordable as five years ago** and likely to remain the same in five years from now.



Compared to 5 years ago



Expectations 5 years from now



Q. How would you rate the ***quality*** *of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to* ***access*** *the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the* ***affordability to you*** *of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of local roads

Quality

Opinion is divided on the **quality** of local roads with more Australians rating them as **average** (41%) than good (37%), and one in five rating them as poor (20%).

A majority feel the quality is **about the same** as **five years ago** (59%), and **likely to stay about the same** over the **next five years** (56%). More see it as worse (23%) than five years ago than better (18%), and as many see it as likely to get worse over the next five years as get better (22% each).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: 55+ yrs (23%), NSW (23%), regional (26%), rural (31%), disability/carer/family (25%)
- *good*: WA (50%), ACT (59%), NT (49%), inner urban (42%), outer urban (41%), CALD (42%)
- *worse:* 35-54 yrs (25%), 55+ yrs (26%), VIC (28%), regional (26%), self employed (31%), disability/carer/family (27%)
- *better:* 18-34 yrs (24%), WA (25%), NT (35%), CALD (24%)
- *likely to get worse:* 55+ yrs (27%), VIC (27%), regional (26%), self employed (28%), disability/carer/family (26%)
- *likely to get better:* 18-34 yrs (28%), WA (30%), NT (33%), CALD (29%).

Accessibility

Similarly, a majority rate local roads where they live as **easy** to access (69%, including 20% very easy), **about as accessible** as **five years ago** (75%), and **likely to stay about the same** over the **next five years** (70%).

Few rate access as difficult (7%). More feel it is easier to access (15%) than more difficult (10%) compared with five years ago, and that it is likely to get easier (16%) than more difficult (14%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: NSW (9%), disability/ carer/family (10%)
- *easy*: women (72%), WA (76%), ACT (83%), NT (78%)
- *more difficult:* NSW (13%), VIC (13%)
- *easier:* 18-34 yrs (19%), CALD (22%)
- *likely to get more difficult:* 55+ yrs (16%), VIC (17%), disability/carer/family (16%)
- *likely to get easier:* 18-34 yrs (21%), WA (22%), CALD (25%).

Affordability of local roads

Affordability

More Australians rate the **cost and affordability** of local roads as **affordable** (41%) than costly (16%), however a substantial number are **neutral** (35%) or undecided (7%) on this.

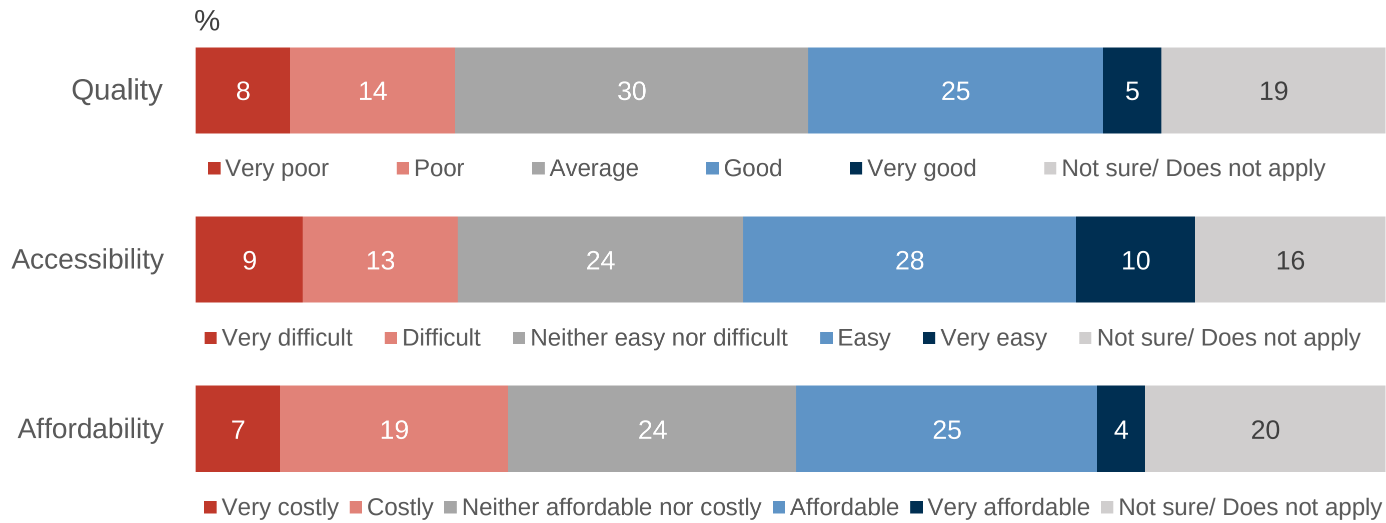
Most rate affordability **about the same** (78%) or **less affordable** (15%) than **five years ago**, and expect it to be **about the same** (73%) or **less affordable** (19%) over the next **five years**.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

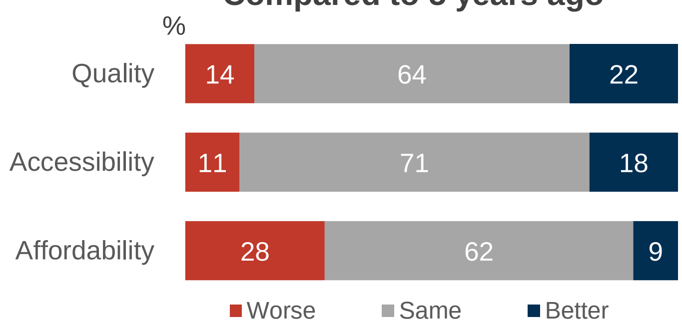
- *costly*: 35-54 yrs (19%), self employed (21%), disability/carer/family (19%), HHI <$50K (19%)
- *affordable:* 18-34 yrs (45%), HHI $100K+ (47%)
- *less affordable:* disability/carer/family (18%)
- *more affordable:* 18-34 yrs (11%), CALD (13%), ATSI (17%)
- *likely to become less affordable:* disability/carer/family (23%)
- *likely to become more affordable:* 18-34 yrs (12%), inner urban (10%), CALD (14%), ATSI (18%).

Tram, light rail and train networks and services

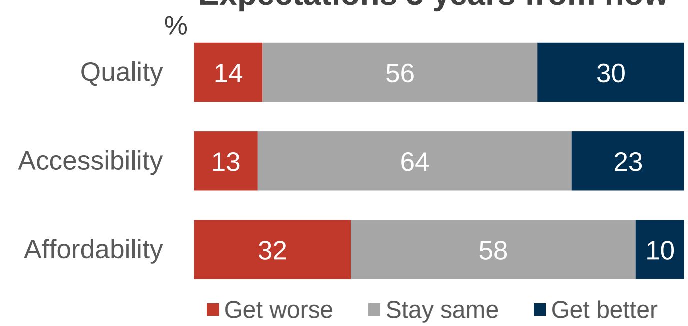
Views on the quality, accessibility and affordability of tram, light rail and train services are mixed, however a majority rate all as likely to stay the same. Affordability is more likely to be seen as **less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years. The majority still feel affordability has been and will remain consistent.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of tram, light rail and train networks and services

Quality

Opinion is divided on the **quality** of light / heavy rail networks and services. An equal proportion of Australians rate services and infrastructure where they live as **good** as rate them **average** (30% each), and more than one in five rate these as poor (22%).

However, most feel the quality is **about the same** (64%) or **better** (22%) than **five years ago**, and **likely to be about the same** (56%) or **better** (30%) in **five years' time**. Only 14% each see it as worse than five years ago and as likely to get worse over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NSW (25%), TAS* (32%), ACT* (34%), regional* (25%)
- *good*: VIC (41%), inner urban (39%), outer urban (36%), CALD (37%)
- *worse:* NSW (18%), disability/carer/family (17%)
- *better:* 18-34 yrs (25%), SA (33%), ACT (32%), inner urban (26%), outer urban (28%), CALD (27%)
- *likely to get worse:* VIC (17%)
- *likely to get better:* 18-34 yrs (38%), WA (36%), ACT (56%), inner urban (38%), outer urban (36%), CALD (36%).

Accessibility

More rate light / heavy rail where they live as **easy to access** (38%) than **difficult** (21%), however a substantial number are neutral (24%) or undecided (16%). A majority feel these services are **about as accessible** as **five years ago** (71%), and **likely to stay about the same** over the **next five years** (64%).

More feel it is easier to access (18%) than more difficult (11%) compared with five years ago, and that it is likely to get easier (23%) than more difficult (13%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: QLD (25%), TAS* (28%), ACT* (35%), regional* (27%), rural* (31%), disability/ carer/family (26%)
- *easy*: 18-34 yrs (43%), VIC (49%), inner urban (51%), outer urban (43%), employed (41%), CALD (44%).
- *more difficult:* NSW (14%), disability/carer/family (14%)
- *easier:* 18-34 yrs (23%), inner urban (23%), outer urban (22%), CALD (25%)
- *likely to get more difficult:* 55+ yrs (15%), VIC (15%), disability/carer/family (16%)
- *likely to get easier:* 18-34 yrs (31%), WA (27%), ACT (50%), inner urban (30%), outer urban (27%), employed (25%), CALD (31%).

* Higher levels of undecided / does not apply recorded for these groups.

Affordability of tram, light rail and train networks and services

Affordability

More Australians rate the **cost and affordability** of light / heavy rail as **affordable** (30%) than costly (27%), however a substantial number are neutral (24%) or undecided (20%).

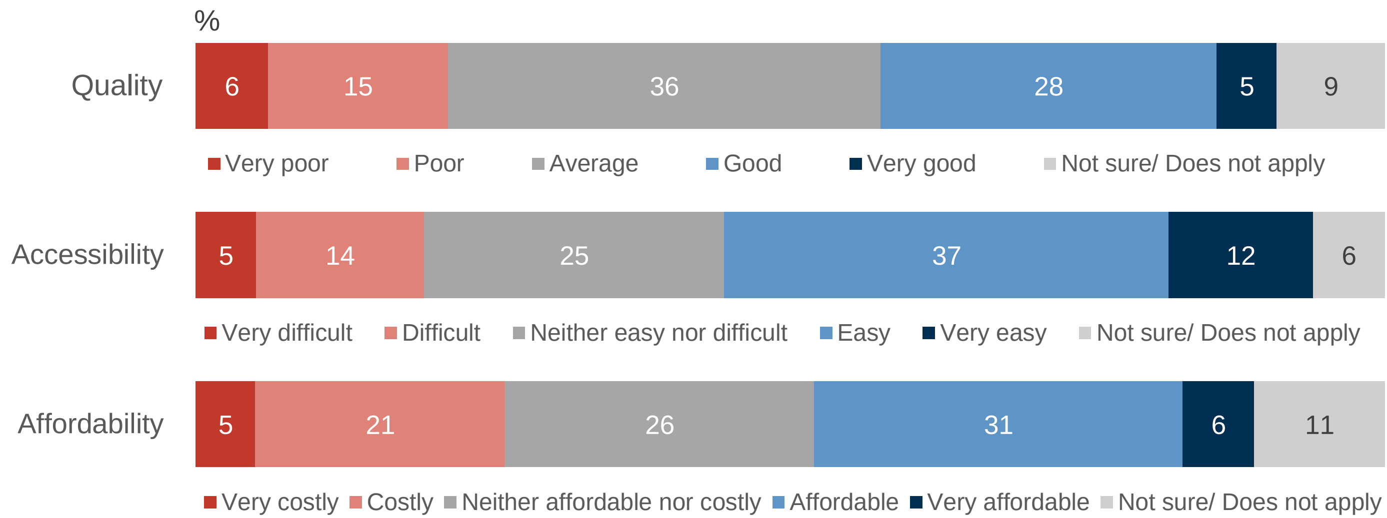
Most rate affordability **about the same** (62%) or **less affordable** (28%) than **five years ago**, and expect it to be **about the same** (58%) or **less affordable** (32%) over the next **five years**.

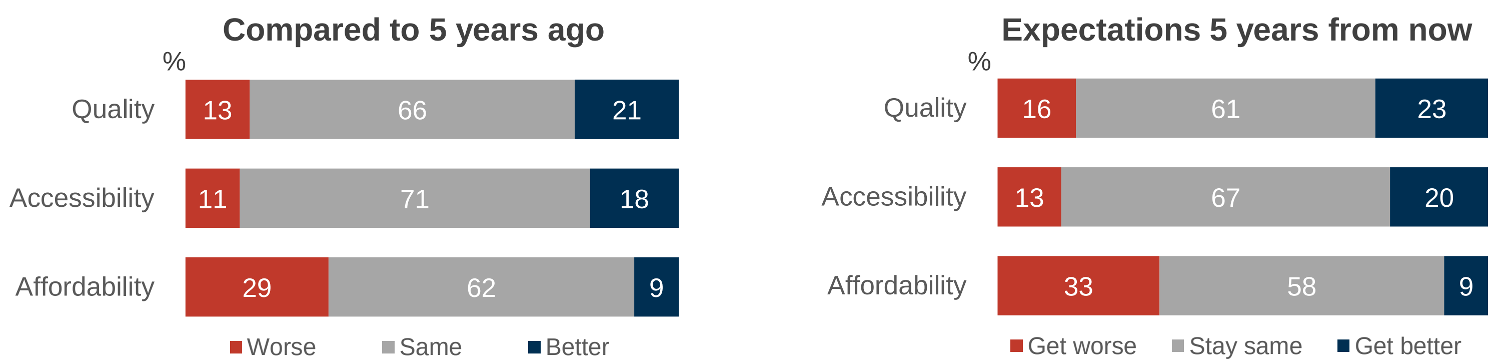
Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly:* 35-54 yrs (30%), inner urban (31%), employed (30%), CALD (32%)
- *affordable:* VIC (34%), SA (40%), inner urban (37%), outer urban (32%)
- *less affordable:* 35-54 yrs (31%), VIC (32%), CALD (32%), inner urban (31%), disability/carer/family (32%)
- *more affordable:* 18-34 yrs (13%), outer urban (11%), CALD (13%), ATSI (21%)
- *likely to become less affordable:* VIC (36%), disability/carer/family (36%)
- *likely to become more affordable:* 18-34 yrs (14%), ACT (18%), inner urban (13%), CALD (16%), ATSI (21%).

Bus networks and services

A third of Australians rate bus networks and services where they live as **good quality**, while a majority rate it **easy to access**, and likely to remain so. A quarter or more rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years. The majority still feel affordability has been and will remain consistent.





*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of bus networks and services

Quality

Opinion is divided on the **quality** of bus networks and services. More Australians rate services where they live as **average** (36%) than **good** (33%), and more than one in five rate them as **poor** (21%).

Most feel the quality is **about the same** (66%) or **better** (21%) than **five years ago**, and **likely to be about the same** (61%) or **better** (23%) in **five years' time**.

Few see it as worse than five years ago (13%) or likely to get worse over the next five years (16%).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: TAS (36%), ACT (31%), regional* (26%), rural* (35%), disability/carer/family (25%)
- *good*: WA (40%), inner urban (41%), outer urban (36%)
- *worse:* SA (18%), TAS (19%), ACT (30%)
- *better:* 18-34 yrs (26%), inner urban (27%), CALD (27%), ATSI (32%)
- *likely to get worse:* ACT (35%), inner urban (18%)
- *likely to get better:* 18-34 yrs (30%), WA (30%), inner urban (28%), CALD (33%).

Accessibility

More find bus networks and services where they live as **easy to access** (48%) than difficult (20%), while one in four have a neutral view (25%). A majority feel they are **about as accessible** as **five years ago** (71%), and **likely to stay about the same** over the **next five years** (67%).

More feel they are easier to access (18%) than more difficult (11%) compared with five years ago, and that they are likely to get easier (20%) than more difficult (13%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: QLD (23%), regional* (26%), rural* (35%), ATSI (32%), disability/carer/family (24%)
- *easy*: inner urban (58%), outer urban (52%)
- *more difficult:* ACT (20%), disability/carer/family (15%)
- *easier:* 18-34 yrs (22%), WA (21%), inner urban (22%), CALD (25%), ATSI (31%)
- *likely to get more difficult:* ACT (27%), disability/carer/family (17%)
- *likely to get easier:* 18-34 yrs (26%), WA (26%), inner urban (24%), CALD (29%), ATSI (38%).

* Higher levels of undecided / does not apply recorded for these groups.

Affordability of bus networks and services

Affordability

More Australians rate the **cost and affordability** of bus networks and services as **affordable** (37%) than **costly** (26%), however as many are neutral (26%) / undecided (11%).

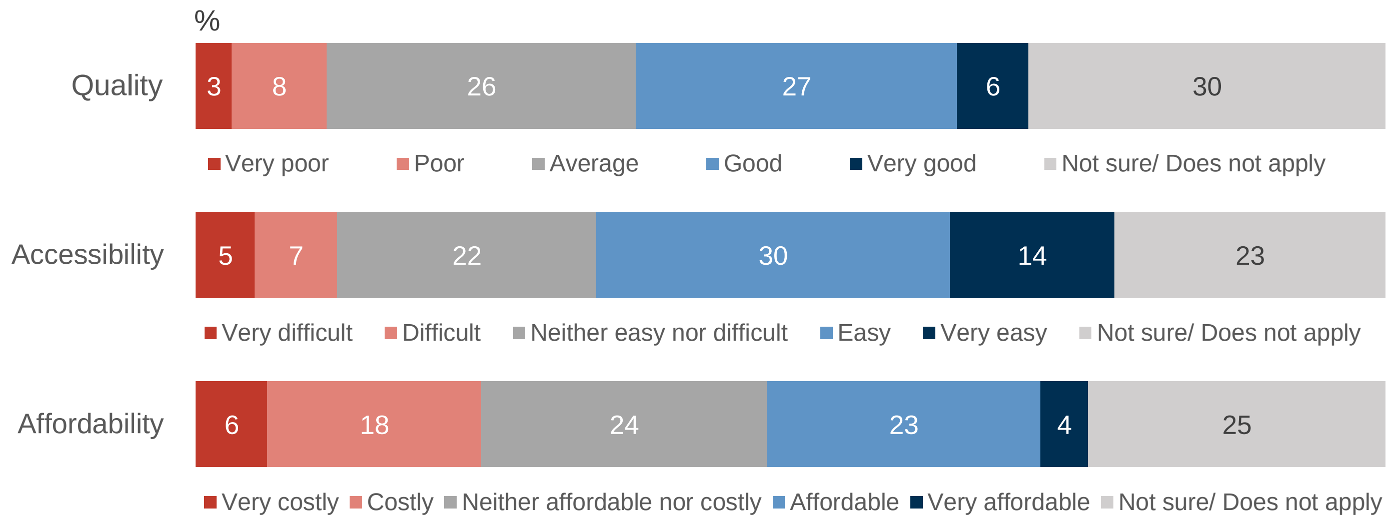
Most find costs **about the same** (62%) or **less affordable** (29%) than **five years ago**, and expect them to be **about the same** (58%) or **less affordable** (33%) over the next **five years**.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

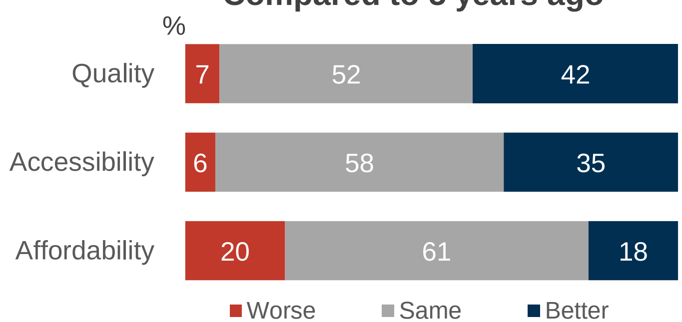
- *costly:* 35-54 yrs (31%), QLD (31%), inner urban (31%), employed (30%), CALD (33%)
- *affordable:* WA (42%), NT (45%)
- *less affordable:* 35-54 yrs (32%), CALD (32%), HHI $100K+ (31%)
- *more affordable:* 18-34 yrs (12%), CALD (12%), ATSI (17%)
- *likely to become less affordable:* disability/carer/family (37%)
- *likely to become more affordable:* 18-34 yrs (14%), inner urban (12%), CALD (13%).

Ride share and other on-demand transport services

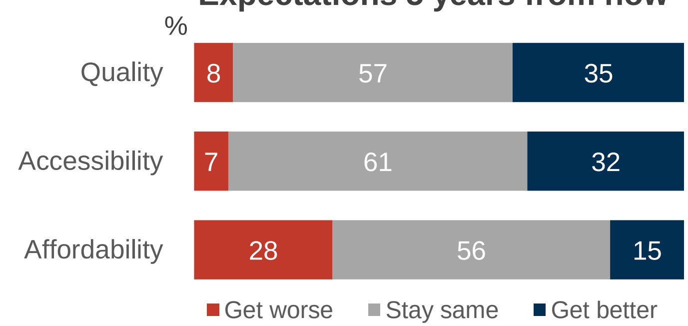
Many Australians do not have experience / views on ride share or other on-demand transport services where they live but, among those that do, quality and access ratings are mainly positive or neutral. However approximately a quarter rate it as **costly, less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.



Compared to 5 years ago



Expectations 5 years from now



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Quality and accessibility of ride share and other on-demand transport services

Quality

Opinion is divided on the **quality** of ride share / on demand transport services. More Australians rate the services where they live as **good** (32%) or average (26%) than poor (11%), but a substantial number have no experience / no view on this new service type (30%).

Most feel the quality is **about the same** (52%) or **better** (42%) than **five years ago**, and **likely to be about the same** (57%) or **better** (35%) in **five years' time**. Few see it as worse than five years ago (7%) or likely to get worse (8%).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NT (24%), regional* (17%), rural* (23%), disability/carer/family* (14%)
- *good*: 18-34 yrs (46%), VIC (37%), inner urban (47%), outer urban (36%), employed (40%), CALD (40%)
- *worse:* ATSI (14%), disability/carer/ family (9%)
- *better:* 18-34 yrs (53%), WA (48%), ACT (55%), inner urban (52%), outer urban (48%), employed (49%)
- *likely to get worse:* 55+ yrs (10%)
- *likely to get better:* 18-34 yrs (47%), WA (39%), inner urban (42%), employed (39%), ATSI (50%).

Accessibility

More find ride share / on demand transport services where they live **easy to access** (44%) than difficult (12%), while a similar total are neutral (22%) / undecided (23%).

Most feel accessibility is **about the same** (58%) or **easier** (35%) than **five years ago**, and **likely to be about the same** (61%) or **easier** (32%) in **five years' time**. Few rate accessing these services more difficult than five years ago (6%) or likely to become more difficult (7%).

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: NT (21%), regional* (19%), rural* (30%), disability/carer/family* (15%)
- *easy*: 18-34 yrs (58%), WA (49%), ACT (58%), inner urban (60%), outer urban (49%), employed (53%), CALD (50%)
- *more difficult:* rural (10%), disability/carer/family (9%)
- *easier:* 18-34 yrs (45%), WA (42%), ACT (47%), inner urban (45%), outer urban (41%), employed (41%)
- *likely to get more difficult:* 55+ yrs (8%), disability/carer/family (11%)
- *likely to get easier:* 18-34 yrs (43%), WA (38%), NT (40%), inner urban (39%), employed (37%), CALD (37%).

* Higher levels of undecided / does not apply recorded for these groups.

Affordability of ride share and other on-demand transport services

Affordability

More Australians rate the **cost and affordability** of ride share / on demand transport services as **affordable** (27%) than costly (24%), however almost half are neutral (24%) / undecided (25%).

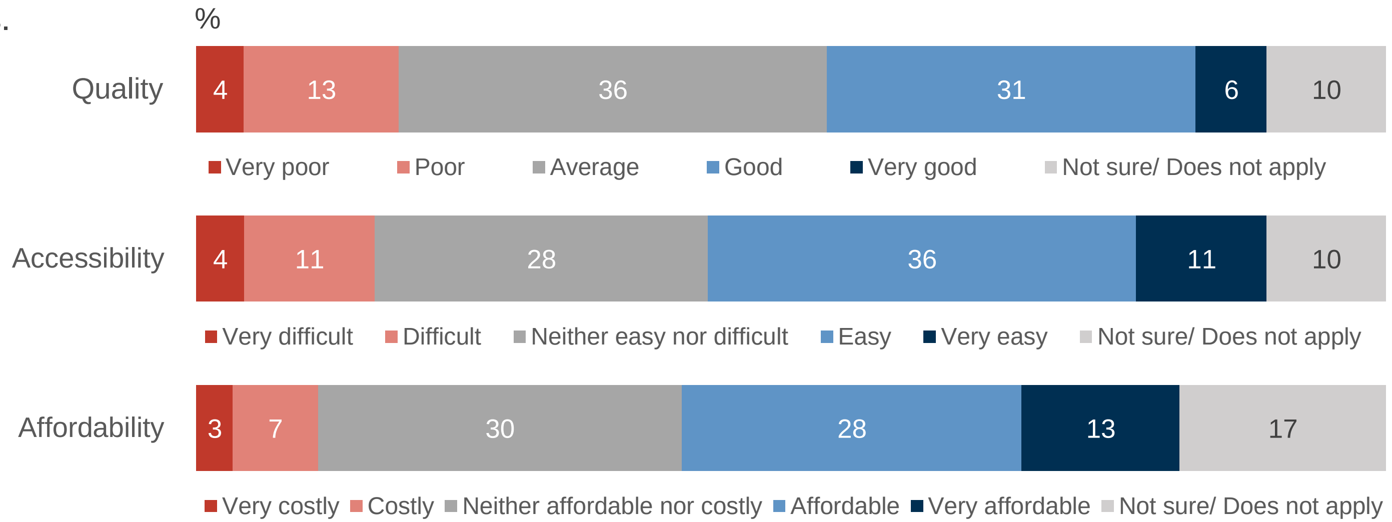
Most rate affordability **about the same** (61%) or **less affordable** (20%) than **five years ago**, and expect it to be **about the same** (56%) or **less affordable** (28%) over the next **five years**.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

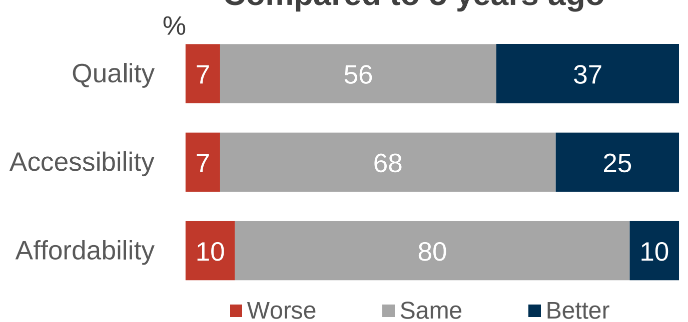
- *costly:* inner urban (28%)
- *affordable:* 18-34 yrs (37%), WA (32%), inner urban (35%), employed (33%), CALD (30%), ATSI (42%), HHI $100K+ (37%)
- *less affordable:* 55+ yrs (23%), disability/carer/family (25%), HHI <$50K (23%)
- *more affordable:* 18-34 yrs (27%), WA (25%), inner urban (23%), outer urban (21%), employed (23%), CALD (23%), HHI $100K+ (24%)
- *likely to become less affordable:* 55+ yrs (32%), not employed (31%), disability/carer/family (34%), HHI <$50K (33%)
- *likely to become more affordable:* 18-34 yrs (22%), NT (21%), inner urban (18%), employed (17%), CALD (22%), ATSI (27%), HHI $100K+ (18%).

Cycleways, cycle lanes, pedestrian areas and pathways supporting ‘active transport’

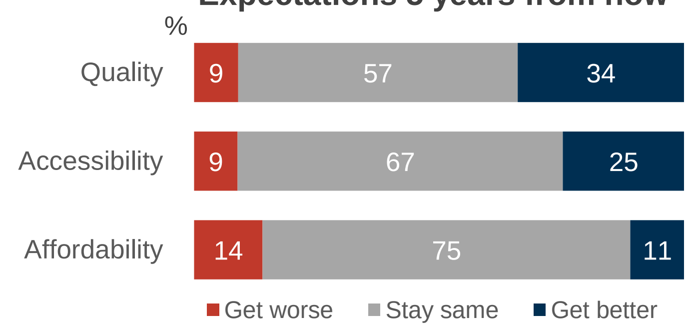
Australians tend to rate active transport where they live as **good quality**, **easy to access** and **affordable.** Perceptions lean positive with a majority indicating quality, accessibility and affordability have either **remained the same** or **improved in the past five years**. Most also predict quality, accessibility and affordability to improve or stay the same in five years.



Compared to 5 years ago



Expectations 5 years from now



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Base: All respondents (n=5,000).

Quality and accessibility of cycleways, cycle lanes, pedestrian areas, pathways supporting 'active transport'

Quality

Opinion is divided on the **quality** of 'active transport' infrastructure. Almost as many Australians rate current infrastructure where they live as **average** (36%) as rate it **good** (37%), and 17% rate it as **poor**.

However, most feel the quality is **about the same** (56%) or **better** (37%) than **five years ago**, and **likely to be about the same** (57%) or **better** (34%) in **five years' time**.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NSW (22%), TAS (25%), regional (21%), rural (26%), disability/carer/family (21%)
- *good*: ACT (65%), inner urban (41%)
- *worse:* NSW (9%), disability/carer/family (9%)
- *better:* QLD (40%), WA (42%), SA (42%), NT (46%)
- *likely to get worse:* inner urban (10%)
- *likely to get better:* 18-34 yrs (39%), WA (41%), inner urban (38%).

Accessibility

Almost half rate the 'active transport' infrastructure where they live as **easy** to access (47%). Fewer rate it as neutral (28%) or difficult (15%).

Most feel accessibility is **about the same** (68%) or **easier** (25%) than **five years ago**, and **likely to be about the same** (67%) or **easier** (25%) in **five years' time**. Few rate accessing these services more difficult than five years ago (7%) or likely to become more difficult (9%).

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: NSW (19%), TAS (22%), disability/carer/family (17%)
- *easy*: VIC (51%), ACT (78%), NT (62%), inner urban (50%), employed (50%)
- *more difficult:* inner urban (9%), CALD (10%), ATSI (17%), disability/ carer/family (9%)
- *easier:* QLD (29%), WA (30%), inner urban (29%)
- *likely to get more difficult:* NSW (11%), CALD (11%), disability/ carer/family (11%)
- *likely to get easier:* 18-34 yrs (32%), QLD (28%), WA (30%), inner urban (30%), CALD (29%), ATSI (36%).

Affordability of cycleways, cycle lanes, pedestrian areas, pathways supporting 'active transport'

Affordability

More Australians rate the **cost and affordability** of 'active transport' infrastructure as **affordable** (42%) than costly (11%), however almost half are neutral (30%) / undecided (17%).

Most rate affordability **about the same** (80%) as **five years ago**, and expect it to be **about the same** (75%) over the next **five years**. Few rate it as more costly (10%) or likely to become so (14%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly:* men (13%), HHI <$50K (13%)
- *affordable:* 18-34 yrs (46%), ACT (53%), inner urban (49%), employed (45%), HHI $100K+ (48%)
- *less affordable:* disability/carer/family (13%)
- *more affordable:* 18-34 yrs (13%), inner urban (13%), CALD (15%), ATSI (23%)
- *likely to become less affordable:* no significant differences
- *likely to become more affordable:* 18-34 yrs (15%), inner urban (14%) CALD (16%), ATSI (25%).

Social Infrastructure

Social infrastructure: Key findings

Quality

A quarter of Australians rate the quality of social and public housing as poor, more than all other types of social infrastructure. Health services are also rated as poor by one in five people, however good ratings outweigh poor ratings by two-to-one. Australians rate the quality of parks and arts/ cultural/ recreational facilities the best. Social and public housing quality is more likely to be seen as worse than five years ago than better and also more likely to worsen in the coming five years.

Accessibility

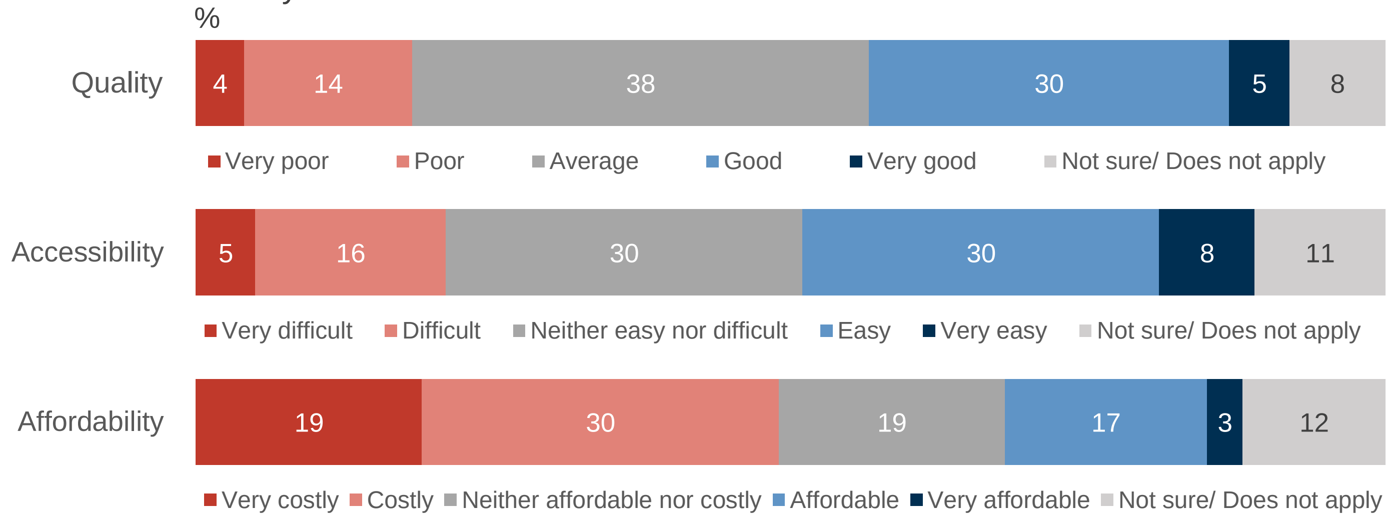
Social and public housing is also the least accessible form of social infrastructure with approximately one in three people rating it difficult to access. Health services are difficult to access for one in five people. A majority hold the view that access to these services hasn't improved in five years and most also see access to these services as staying being the same in five years. Educational facilities, parks and arts/ cultural/ recreational facilities are easily accessible to a majority of people.

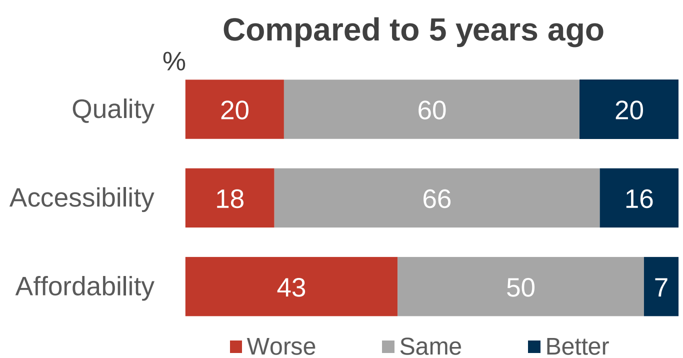
Affordability

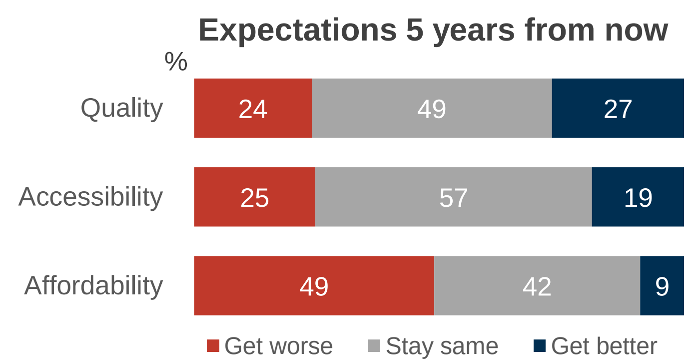
Health and aged care services are costly to half of Australians and are the most costly type of social infrastructure. Four in 10 feel it has become more costly over the last five years, while half predict costs to rise in five years time. Educational facilities are also more likely to be seen as costly than affordable with a firm expectation that costs have risen and will continue to increase. Views are more positive towards parks and arts/ cultural/ recreational facilities where affordable ratings outweigh costly ratings.

Health and aged care services

A majority of Australians rate health and aged care services where they live as **average** or **poor.** Less than half find services **easy to access,** while a sizeable amount of the population find services **costly** and **likely to become less affordable** over the next five years.







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Base: All respondents (n=5,000).

Quality and accessibility of health and aged care services

Quality

In terms of health and aged care services, twice as many Australians rate the **quality** of services where they live as **good** (36%, including 5% very good) than those who rate it as **poor** (18%, including 4% very poor). Most people (60%) rate the quality of health and aged care services **about the same** as **five years ago**.

While half of Australians (49%) think the quality of services where they live is **likely to stay about the same** over the **next five years**, a quarter (27%) expect it will **get better**.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: 55+ yrs (21%), SA (24%), NT (25%), disability/carers/family (25%).
- *good*: QLD (39%).
- *worse:* 55+ yrs (24%), SA (27%), TAS (31%), disability/carers/family (27%).
- *better:* 18-34 yrs (24%), regional (24%).
- *likely to get worse:* 55+ yrs (29%), ACT (35%), disability/carers/family (30%)
- *likely to get better:* 18-34 yrs (32%), WA (33%), CALD (33%).

Accessibility

Most Australians rate health and aged care services where they live as **easy** to access (38%, including 8% very easy) or **neither easy nor difficult** (30%). The majority of people believe services are **as accessible** as **five years ago** (66%) and are **likely to stay about the same** over the **next five years** (57%).

More people feel it is likely to get more difficult to access in five years (25%) than easier (19%).

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: 55+ years (25%), TAS (32%), rural (28%), disability/carers/family (29%).
- *easy*: 18-34 yrs (42%), children in HH (43%).
- *more difficult:* 55+ years (23%), TAS (31%), disability/carers/family (26%).
- *easier:* 18-34 yrs (20%), NT (23%), ATSI (27%).
- *likely to get more difficult:* 55+ yrs (32%), TAS (33%), disability/carers/family (32%)
- *likely to get easier:* 18-34 yrs (24%), WA (22%), CALD (24%).

Affordability of health and aged care services

Affordability

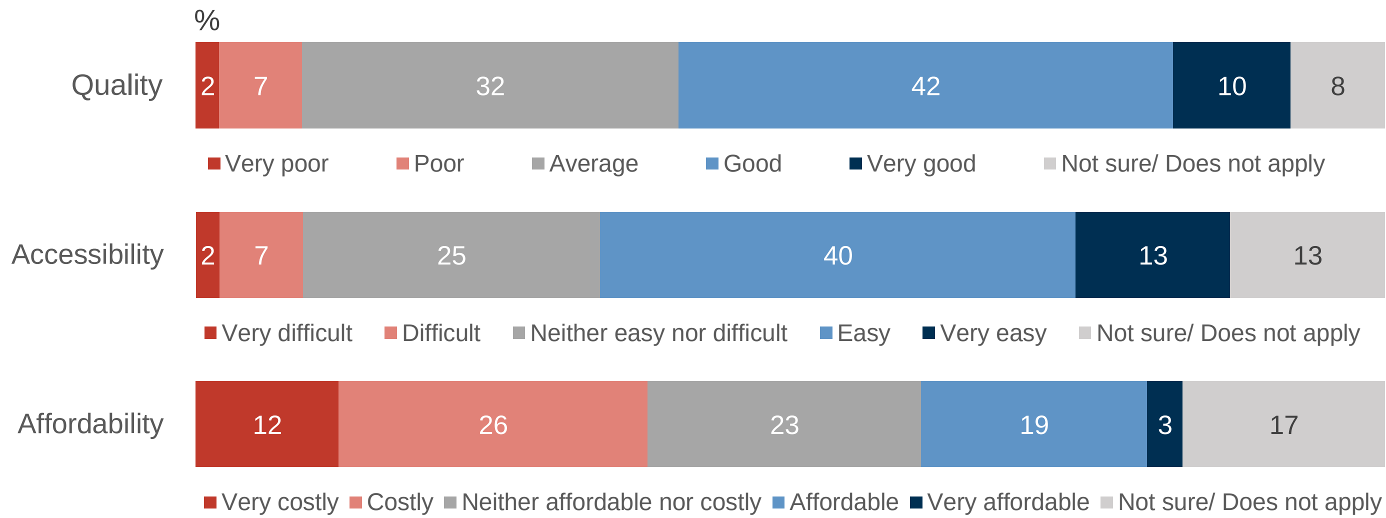
Half of Australians (49%) rate **cost and affordability** of health and aged care services where they live as **costly** (including 19% very costly). More people think it is **less affordable** than **five years ago** (43%) than **more affordable** (7%). Similarly, more people believe it **likely to be less affordable** in **five years** (49%) than **more affordable** (9%).

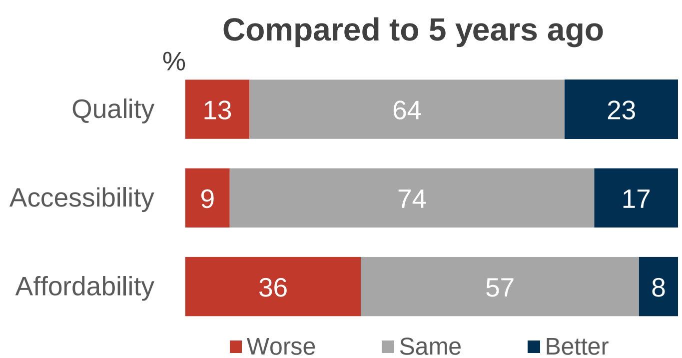
Some demographic groups are *significantly more likely* than the national average to rate costs as:

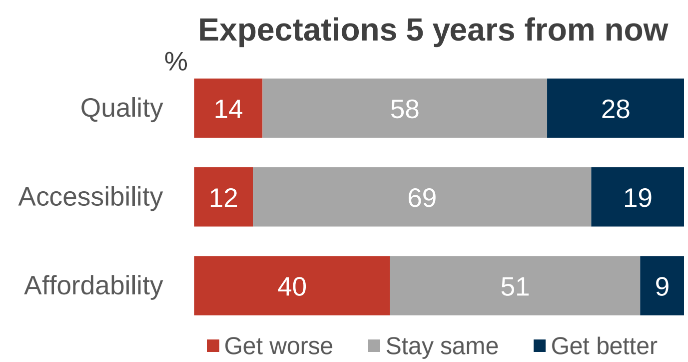
- *costly*: 55+ years (56%), disability/carers/family (56%), HHI <$50K (52%)
- *affordable*: 18-34 (23%)
- *less affordable:* 55+ yrs (52%), TAS (51%), disability/carers/family (51%)
- *more affordable:* 18-34 yrs (11%), WA (10%), CALD (10%), children in HH (9%)
- *likely to become less affordable:* 55+ yrs (61%), women (52%), not employed (53%), disability/carers/family (55%), no children in HH (51%), HHI <$50K (52%)
- *likely to become more affordable:* 18-34 yrs (14%), inner urban (11%), CALD (13%), ATSI (21%), children in HH (11%).

Educational facilities

A majority of Australians rate the educational facilities where they live as **good** and **easy to access.** More people rate educational facilities as **costly** than affordable and more **likely to become less affordable** over the next five years or stay the same.







*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]?*
Base: All respondents (n=5,000).

Quality and accessibility of educational facilities

Quality

Most Australians rate the **quality** of educational facilities (e.g. pre-schools, schools, TAFE, universities) where they live as **good** (52%, including 10% very good). The majority of people rate the quality **about the same** as **five years ago** (64%), and expect it is **likely to stay about the same** over the **next five years** (58%).

Twice as many people think the quality of educational facilities is likely to get better over the next five years (28%) than worse (14%).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: disability/carers/family (12%), CALD (11%)
- *good*: ACT (64%), QLD (56%), children in HH (55%).
- *worse:* NSW (17%), inner urban (16%), disability/carers/family (16%)
- *better:* 18-34 yrs (30%), QLD (27%), CALD (28%)
- *likely to get worse:* 35-54 yrs (17%), NSW (17%), disability/carers/family (17%)
- *likely to get better:* 18-34 yrs (37%), VIC (31%), CALD (35%), ATSI (42%), children in HH (32%).

Accessibility

Similarly, most people rate educational facilities where they live as **easy** to access (53%, including 13% very easy). The majority think it is **about as accessible** as **five years ago** (74%), and that it is **likely to stay about the same** over the **next five years** (69%).

More people feel it has become easier to access (17%) than more difficult (9%) compared with five years ago, and that it is likely to get easier (19%) than more difficult (12%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: no significant differences
- *easy*: women (55%), 18-34 yrs (57%), 35-54 yrs (56%), ACT (61%), employed (56%), children in HH (63%)
- *more difficult:* VIC (12%), disability/carers/family (12%)
- *easier:* 18-34 yrs (24%), employed (19%), CALD (23%), ATSI (34%), children in HH (21%)
- *likely to get more difficult:* disability/carers/family (15%)
- *likely to get easier:* 18-34 yrs (27%), inner urban (22%), employed (21%), ATSI (43%), CALD (28%), children in HH (23%).

Affordability of educational facilities

Affordability

On **cost and affordability** of educational facilities where they live, more people rate this as **costly** (38%, including 12% very costly), **less affordable** than **five years ago** (36%), and **likely to be less affordable** in **five years** (40%).

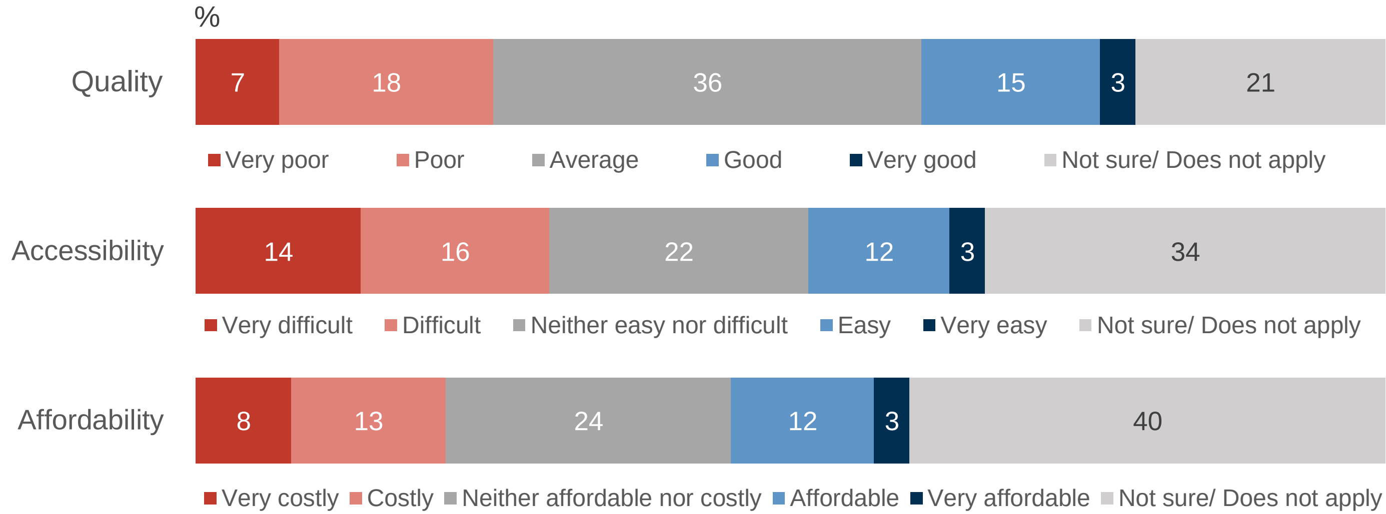
Only 8% of Australians believe educational facilities have become more affordable than five years ago, and 40% believe they are likely to be less affordable in five years.

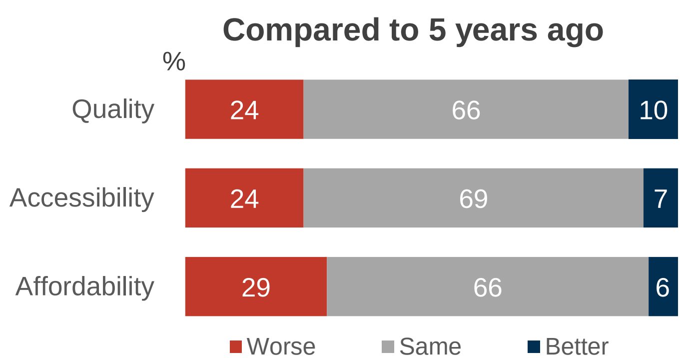
Some demographic groups are *significantly more likely* than the national average to rate costs as:

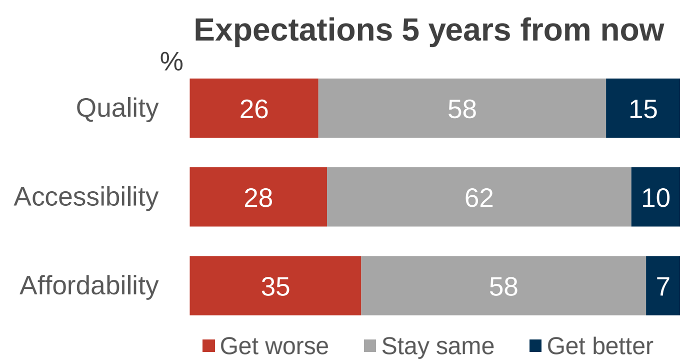
- *costly*: 18-34 yrs (41%), 35-54 yrs (42%), outer urban (41%), employed (41%), CALD (43%), children in HH (45%)
- *affordable*: 18-34 yrs (26%), NT (29%), employed (25%), ATSI (35%), HHI $100K+ (26%)
- *less affordable:* VIC (39%), disability/carers/family (40%)
- *more affordable:* 18-34 yrs (11%), CALD (11%), ATSI (27%), children in HH (12%)
- *likely to become less affordable:* SA (46%), disability/carers/family (45%), 55+ yrs (43%)
- *likely to become more affordable:* 18-34 yrs (14%), VIC (11%), inner urban (12%), CALD (15%), HHI $50K-$100K (11%).

Social and public housing

Many Australians do not have experience / views on social and public housing where they live but, among those that do, quality and access ratings are mainly negative or neutral. However two in ten rate it as **costly,** with more than a quarter rating it as **less affordable** than 5 years ago and **likely to become less affordable** in the next 5 years.







*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of social and public housing

Quality

More Australians rate the **quality** of social and public housing where they live as **poor** (25%, including 7% very poor) than **good** (18%, including 3% very good). To most, the quality of social and public housing is **about the same** as **five years ago** (66%), and **likely to stay about the same** over the **next five years** (58%).

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: 55+ yrs (31%), VIC (28%), NT (37%), TAS (34%), not employed (28%), disability/carers/family (34%)
- *good*: 18-34 yrs (24%), inner urban (22%), CALD (23%), employed (22%), ATSI (32%)
- *worse:* 55+ yrs (31%), TAS (36%), VIC (28%), not employed (27%), disability/carers/family (33%)
- *better:* 18-34 yrs (15%), employed (11%), CALD (14%) ATSI (22%)
- *likely to get worse:* 55+ yrs (34%), VIC (29%), ACT (35%), not employed (31%), disability/carers/family (36%)
- *likely to get better:* 18-34 yrs (23%), NT (22%), outer urban (18%), CALD (24%).

Accessibility

Few people rate social and public housing where they live as **easy** to access (15%, including 3% very easy). A majority feel that social and public are **about as accessible** as **five years ago** (69%) and are **likely to stay about the same** over the **next five years** (62%).

More people think it has become harder to access (24%) than easier (7%) compared with five years ago, and that it is likely to get more difficult (28%) than easier (10%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: 55+ years (35%), TAS (39%), NT (37%), regional (33%), disability/carers/family (39%), not employed (33%)
- *easy*: 18-34 yrs (22%), inner urban (19%), employed (18%), CALD (21%), ATSI (27%)
- *more difficult*: women (26%), 55+ years (31%), VIC (28%), TAS (34%), disability/carers/family (34%), not employed (27%)
- *easier*: 18-34 yrs (13%), inner urban (10%), employed (9%), CALD (13%), ATSI (16%)
- *likely to get more difficult:* 55+ yrs (38%), disability/carers/family (37%), self employed (35%), not employed (33%)
- *likely to get easier:* 18-34 yrs (15%), inner urban (13%), employed (13%), CALD (16%), ATSI (22%).

Affordability of social and public housing

Affordability

Similarly, few people rate social and public housing where they live as **affordable** (15%, including 3% very affordable). A majority believe that social and public housing is **about as affordable** as **five years ago** (66%) and **likely to stay about the same** over the **next five years** (58%).

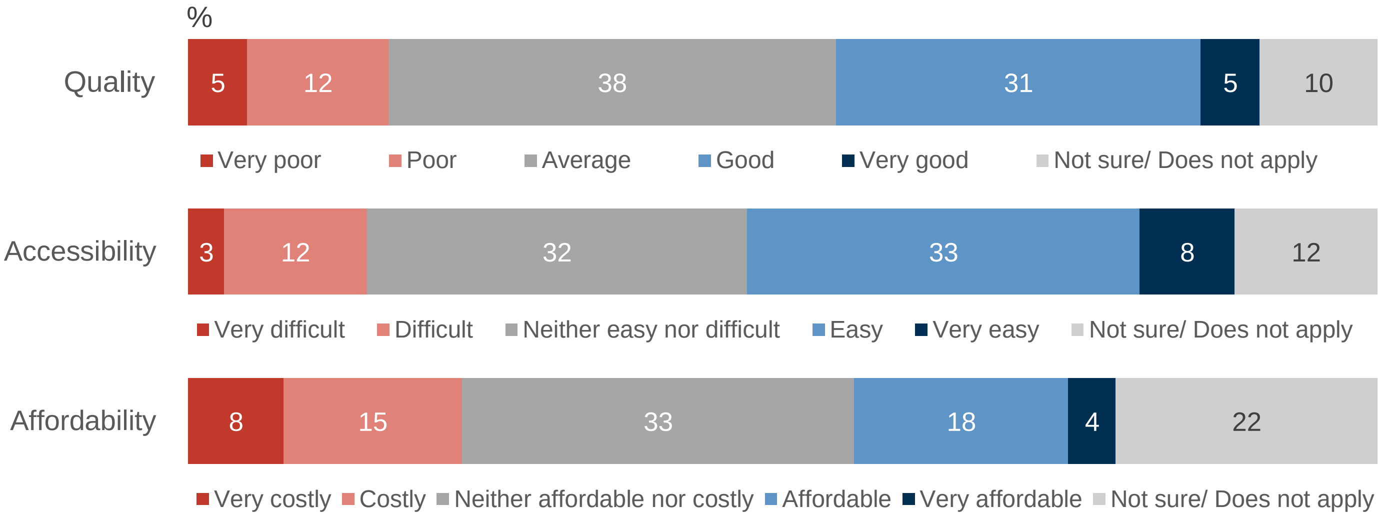
More than a third of Australians believe they are likely to be less affordable in five years (35%), and only 7% believe they will likely be more affordable.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

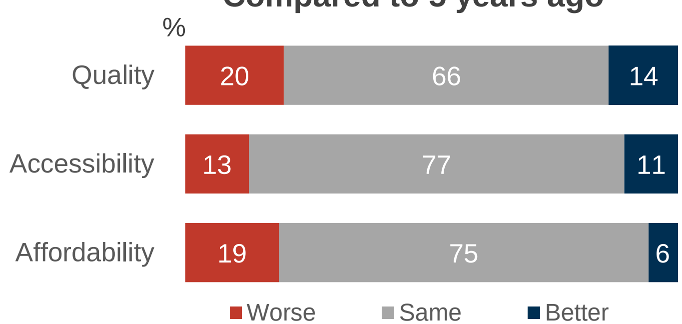
- *costly*: 55+ yrs (24%), disability/carers/family (28%), HHI <$50K (27%)
- *affordable*: 18-34 yrs (21%), inner urban (18%), CALD (18%), ATSI (37%)
- *less affordable:* 55+ yrs (35%), VIC (33%), TAS (39%), not employed (31%), disability/carers/family (37%), HHI <$50K (35%)
- *more affordable:* men (7%), 18-34 yrs (10%), inner urban (8%), employed (7%), CALD (10%), ATSI (18%)
- *likely to become less affordable:* 55+ yrs (45%), not employed (39%), disability/carers/family (43%), HHI <$50K (43%)
- *likely to become more affordable:* 18-34 yrs (12%), WA (10%), inner urban (10%), CALD (14%), ATSI (20%).

Justice and corrections facilities and services

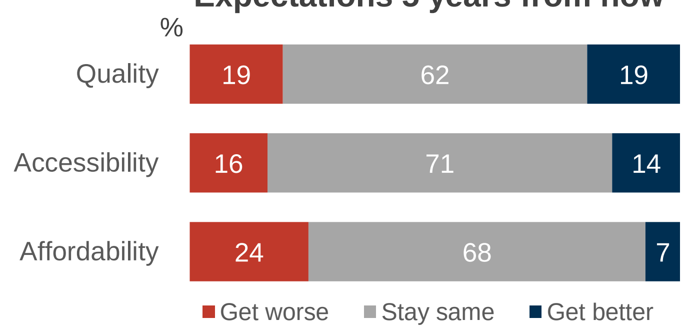
Australians mostly rate the **quality** of justice corrections where they live as **average** or **good,** with **accessibility** either **easy** or **neither easy nor difficult.** Views on affordability are mixed. A majority indicate quality, accessibility and affordability have **remained the same** in the past five years and are likely to do so in the future.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of justice and corrections facilities and services

Quality

A majority of Australians rate the **quality** of justice (e.g. police stations and courts) and corrections (prison) facilities and services where they live as **good** (36%, including 5% very good) or average (38%). To most, the quality of justice and corrections facilities and services is **about the same** as **five years ago** (66%), and **likely to stay about the same** over the **next five years** (62%).

More feel it has become worse (20%) than better (14%) compared with five years ago.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: 55+ yrs (20%), VIC (22%), NT (29%), outer urban (19%), disability/carers/family (21%)
- *good*: ACT (45%), inner urban (39%)
- *worse:* 55+ yrs (26%), VIC (30%), NT (32%), outer urban (25%), self employed (26%), disability/carers/family (24%)
- *better:* 18-34 yrs (17%), ATSI (30%)
- *likely to get worse:* 55+ yrs (24%), VIC (24%), outer urban (22%), self employed (24%), disability/carers/family (23%)
- *likely to get better:* 18-34 yrs (24%), WA (22%), NT (30%), CALD (25%).

Accessibility

More people rate justice and corrections facilities and services where they live as **easy** to access (41%, including 8% very easy), than **difficult** (15%). For a large majority, facilities and services are **about as accessible** as **five years ago** (77%), and **likely to stay about the same** over the **next five years** (71%).

More feel it has become more difficult to access (13%) than easier (11%) compared with five years ago, and that it is likely to get more difficult (16%) than easier (14%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: VIC (17%). SA (19%), NT (22%), self employed (19%), disability/carers/family (18%)
- *easy*: regional (45%)
- *more difficult:* 55+ yrs (16%), VIC (17%), SA (17%), disability/carers/family (17%)
- *easier:* 18-34 yrs (15%), CALD (15%)
- *likely to get more difficult:* 55+ yrs (21%), VIC (21%), outer urban (18%), self employed (21%), disability/carers/family (20%)
- *likely to get easier:* 18-34 yrs (20%), inner urban (17%), CALD (20%), ATSI (27%).

Affordability of justice and corrections facilities and services

Affordability

In terms of the **cost and affordability** of justice and corrections facilities and services where they live, similar proportions of people rate this as **affordable** (22%, including 4% very affordable) and **costly** (23%, including 8% very costly).

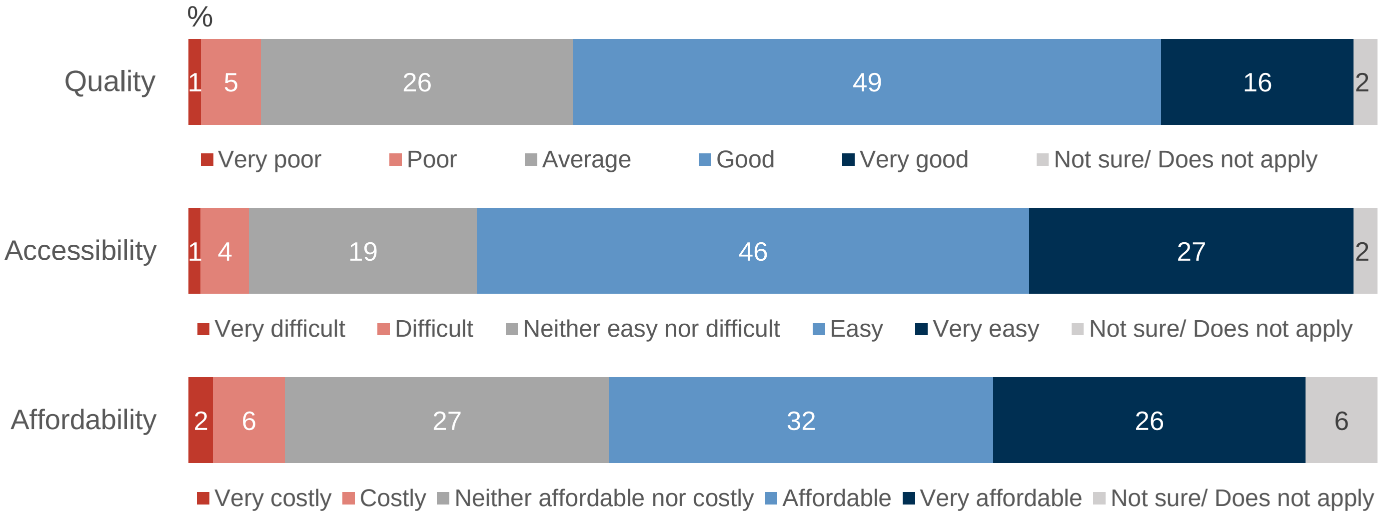
More Australians think these facilities and services are **less affordable** compared to **five years ago** (19%) than more affordable (6%), and **likely to be less affordable** in **five years** (24%) than more affordable (7%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

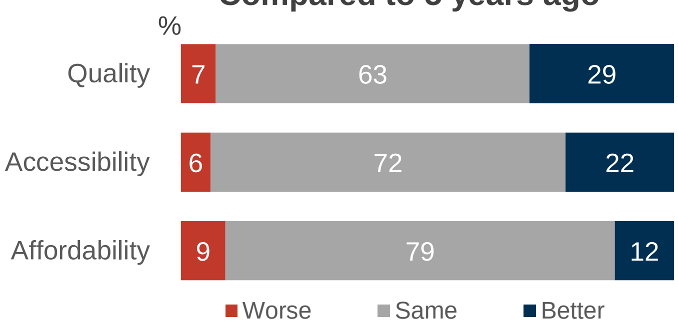
- *costly*: men (26%), NT (35%), self employed (32%), CALD (27%), disability/carers/family (27%)
- *affordable*: ATSI (33%)
- *less affordable:* VIC (24%), outer urban (21%), self employed (28%), disability/carers/family (22%)
- *more affordable:* 18-34 yrs (11%), inner urban (8%), employed (8%), CALD (10%), ATSI (23%)
- *likely to become less affordable:* 55+ yrs (28%), VIC (29%), disability/carers/family (28%)
- *likely to become more affordable:* 18-34 yrs (12%), inner urban (11%), CALD (13%), ATSI (19%), HHI $50K-$100K (9%).

Parks and open spaces

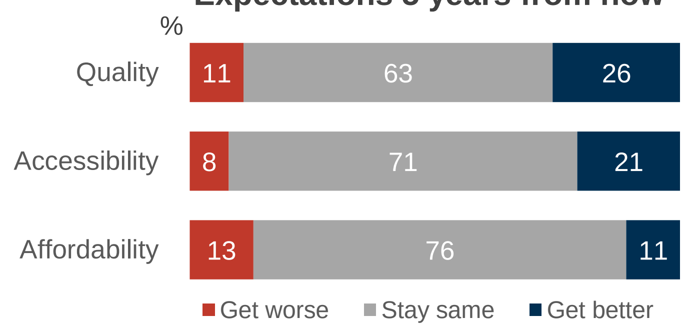
A majority of Australians rate parks and open spaces where they live as **good** and **easy to access** and **affordable.** Quality, accessibility and affordability has generally **remained the same** or **improved** in the last five years and is **likely to stay the same** over the next five years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of parks and open spaces

Quality

Positively, most Australians rate the **quality** of parks and open spaces where they live as **good** (66%, including 16% very good), with very few rating it as **poor** (6%, including 1% very poor). A majority of people believe the quality of parks and open spaces is **about the same** as **five years ago**, and **likely to stay about the same** over the **next five years** (both 63%).

More people feel the quality has become better (29%) than worse (7%) compared with five years ago, and that it is likely to get better (26%) than more worse (11%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: 18-34 yrs (8%), CALD (8%), disability/carers/family (9%)
- *good*: 55+ yrs (70%), WA (72%), TAS, (73%), ACT (82%)
- *worse:* NSW (9%), ACT (16%), inner urban (9%)
- *better:* women (32%), QLD (37%), WA (36%), children in HH (35%)
- *likely to get worse:* NSW (13%), ACT (21%)
- *likely to get better:* 18-34 yrs (33%), QLD (30%), WA (32%), inner urban (29%), employed (28%) CALD (32%), children in HH (31%).

Accessibility

A large majority of Australians rate parks and open spaces where they live as **easy** to access (73%, including 27% very easy). To most, parks and open spaces are **about as accessible** as **five years ago** (72%), and **likely to stay about the same** over the **next five years** (71%).

More people feel they have become easier to access (22%) than more difficult (6%) compared to five years ago, and that it is likely to get easier (21%) than more difficult (8%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: 18-34 yrs (8%), disability/carers/family (8%)
- *easy*: 55+ yrs (78%), TAS, (80%), ACT (83%)
- *more difficult:* 18-34 yrs (9%), employed (8%). CALD (9%)
- *easier:* 18-34 yrs (25%), QLD (25%), WA (27%), CALD (26%), children in HH (27%)
- *likely to get more difficult:* NSW (11%), outer urban (10%)
- *likely to get easier:* 18-34 yrs (27%), WA (26%), inner urban (24%), employed (23%), CALD (29%), ATSI 38%).

Affordability of parks and open spaces

Affordability

Most Australians rate the **cost and affordability** of parks and open spaces where they live as **affordable** (58%) or **neither affordable nor costly** (27%).

A majority think affordability of parks and open spaces is **about the same** as **five years ago** (79%) and is **likely to stay about the same** over the **next five years** (76%).

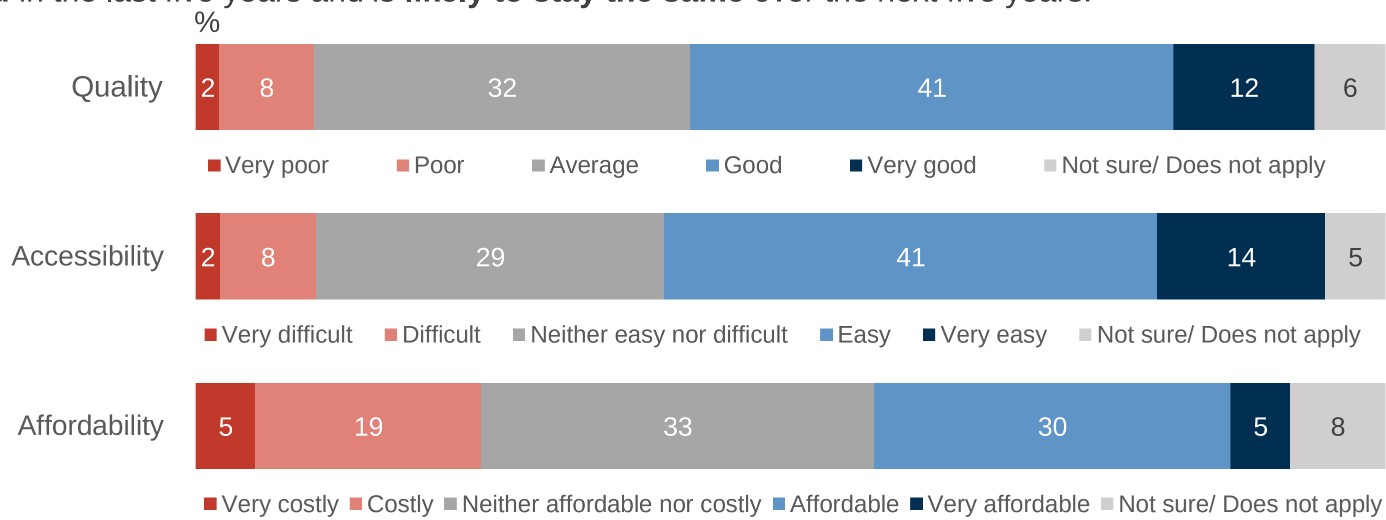
Although more people think it has become more affordable compared to five years ago (12%) than less (9%), and more people also think it is likely to be less affordable (13%) than more (11%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate costs as:

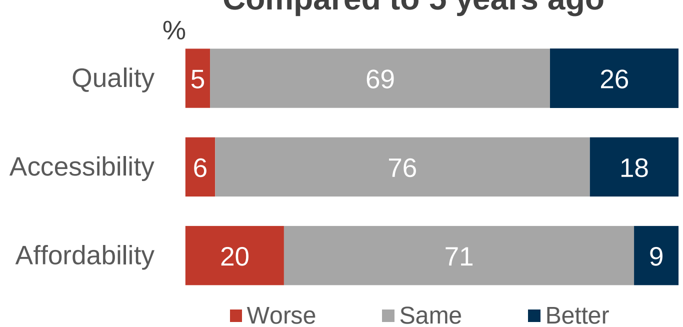
- *costly*: CALD (12%) disability/carers/family (11%)
- *affordable*: children in HH, HHI $100K+ (64%)
- *less affordable:* VIC (11%) CALD (11%), disability/carers/family (29%)
- *more affordable:* 18-34 yrs (17%), QLD (14%), employed (13%), CALD (18%), ATSI (21%), children in HH (15%)
- *likely to become less affordable:* no significant differences
- *likely to become more affordable:* 18-34 yrs (17%), inner urban (15%), employed (13%), CALD (18%), HHI $50K-$100K (13%), children in HH 15%).

Arts, cultural and recreational facilities and services

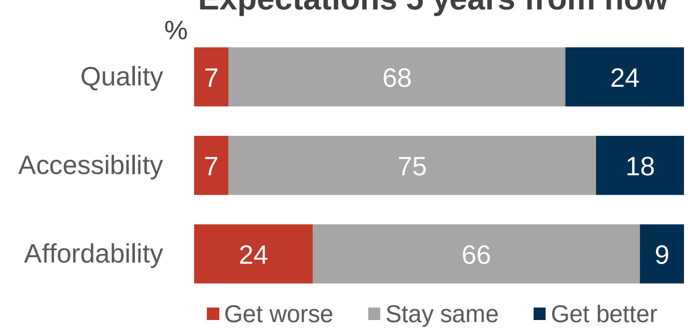
A majority of Australians rate arts, cultural and recreational facilities where they live as **good** and **easy to access.** Views on current **affordability** are **mixed.** Quality, accessibility and affordability has generally **remained the same** or **improved** in the last five years and is **likely to stay the same** over the next five years.



Compared to 5 years ago



Expectations 5 years from now



*Q. How would you rate the **quality** of the following in [CAPITAL / the region of STATE/TERRITORY where you live]? / How easy or difficult is it for you to **access** the following in [CAPITAL / the region of [STATE / TERRITORY where you live]? / How would you rate the **affordability to you** of accessing the following types of infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live]? / Compared to five years ago is the overall [quality/accessibility/affordability] better or worse? / Over the next five years is the overall [quality/access/affordability] likely to get [better or worse/ easier or more difficult to access/ more affordable or less or affordable]? Base: All respondents (n=5,000).*

Quality and accessibility of arts, cultural and recreational facilities and services

Quality

Most Australians rate the **quality** of arts, cultural and recreational facilities and services (e.g. museums, theatres, stadia and libraries) where they live as **good** (52%, including 12% very good), **about the same** as **five years ago** (69%), and **likely to stay about the same** over the **next five years** (68%).

Promisingly, more people believe it has become better (26%) than worse (5%) compared with five years ago. Similarly, more people believe it is likely to get better (24%) than worse (7%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate quality as:

- *poor*: NSW (11%), NT (18%), regional (12%), rural (18%), disability/carers/family (11%)
- *good*: women (55%), VIC (59%), ACT (74%), inner urban (59%), outer urban (56%)
- *worse:* NSW (7%), inner urban (7%)
- *better:* women (29%), 18-34 yrs (31%), VIC (29%), WA (33%), TAS (35%), CALD (30%), ATSI (39%), children in HH (30%)
- *likely to get worse:* NSW (9%), disability/carers/family (9%)
- *likely to get better:* 18-34 yrs (33%), WA (33%), inner urban (29%), CALD (31%).

Accessibility

Similarly, a majority rate of arts, cultural and recreational facilities and services where they live as **easy** to access (55%, including 14% very easy), **about as accessible** as **five years ago** (76%), and **likely to stay about the same** over the **next five years** (75%).

More people feel these facilities and services have become easier to access (18%) than more difficult (6%) compared to five years ago, and that it is likely to get easier (18%) than more difficult (7%) over the next five years.

Some demographic groups are *significantly more likely* than the national average to rate accessibility as:

- *difficult*: NSW (13%), regional (13%), rural (18%), disability/carers/family (14%)
- *easy*: women (58%), SA (64%), ACT (73%), inner urban (61%), children in HH (59%)
- *more difficult:* NSW (8%), disability/carers/family (9%)
- *easier:* 18-34 yrs (25%), WA (22%), inner urban (22%), employed (20%), CALD (24%), children in HH (22%)
- *likely to get more difficult:* NSW (10%), disability/carers/family (10%)
- *likely to get easier:* 18-34 yrs (26%), WA (24%), inner urban (23%), employed (20%), CALD (26%), children in HH (22%).

Affordability of arts, cultural and recreational facilities and services

Affordability

The majority of Australians rate of arts, cultural and recreational facilities and services where they live as either **affordable** (35%) or **neither affordable nor costly** (33%). To most, affordability is the same as **five years ago** (71%), however more rate it **less affordable** (20%) than **more affordable than five years ago** (9%). More people also expect it **likely to be less affordable** in **five years** (24%) than **more affordable** (9%).

Some demographic groups are *significantly more likely* than the national average to rate costs as:

- *costly*: disability/carers/family (28%).
- *affordable*: QLD (39%), ACT (51%), HHI $100K+ (40%).
- *less affordable:* VIC (25%), disability/carers/family (25%).
- *more affordable:* 18-34 yrs (14%), inner urban (12%), CALD (14%), ATSI (24%), children in HH (12%).
- *likely to become less affordable:* 55+ yrs (28%), disability/carers/family (28%), HHI <$50K (29%).
- *likely to become more affordable:* 18-34 yrs (16%), WA (13%), inner urban (13%), CALD (15%), ATSI (25%), children in HH (12%), HHI $50K-$100K (11%).

Section B: Hypothesis-led Policy Questions

Impacts on Decisions and Funding Preferences

Impacts on decisions and funding preferences: Key findings

Type of infrastructure is most pertinent to deciding where people live

Relative to other decisions, infrastructure is most important when deciding where people live as opposed to where people work, where people would locate a business or the types of social activities people participate in. A majority rate all types of infrastructure as important when deciding where to live, with roads and drinking water supply the most important factors in this decision.

Transport is most important to deciding where people work

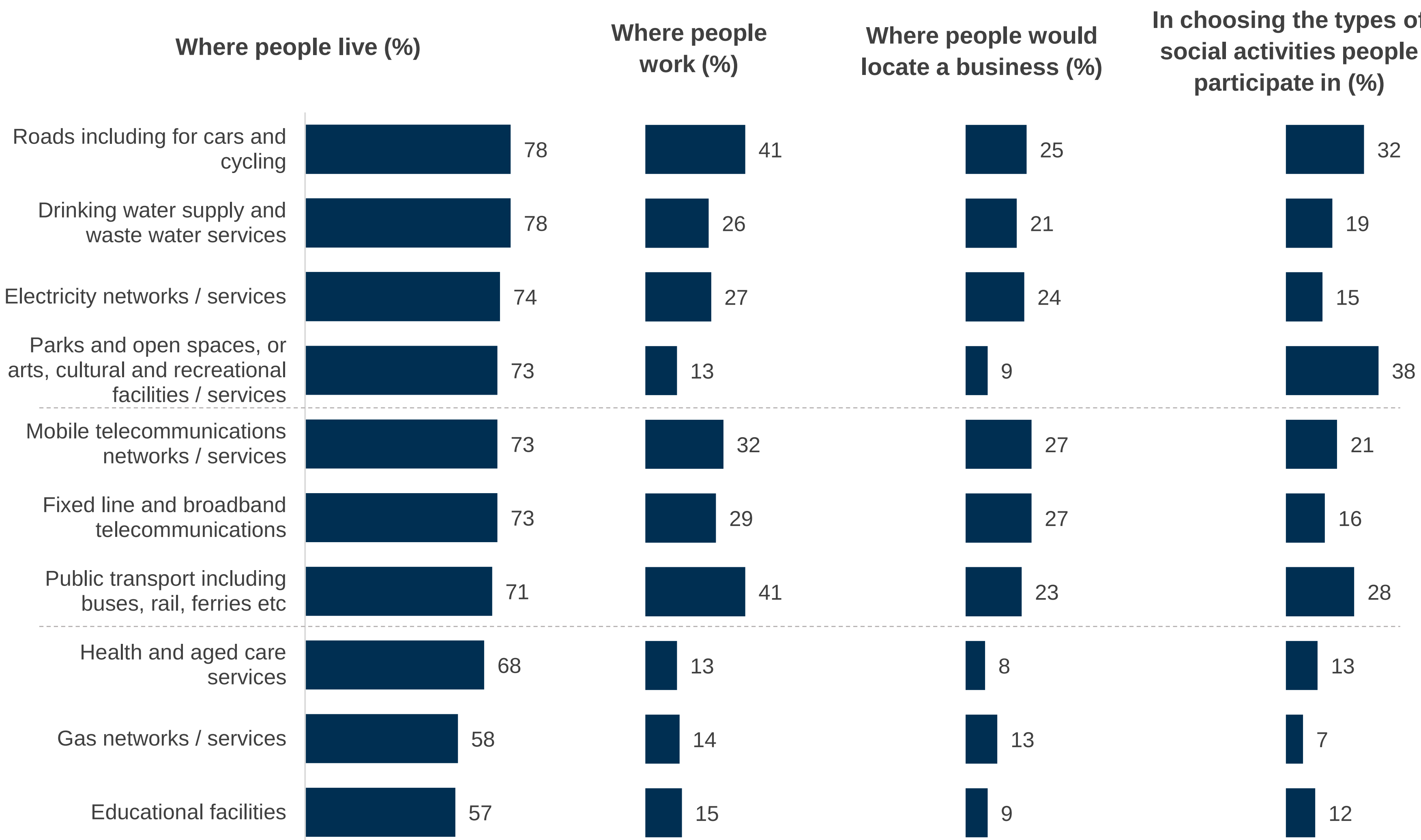
Roads and public transport are the most important considerations when deciding where to work. These factors are particularly pertinent for younger residents aged 18-34 years.

User-pays is the most preferred funding model

A user-pays model for funding infrastructure development is the only model with majority support (strongly or somewhat support) and is supported more than other models including asset recycling, special levies on those who benefit or increasing general taxation.

Type of infrastructure is most important when choosing where to live

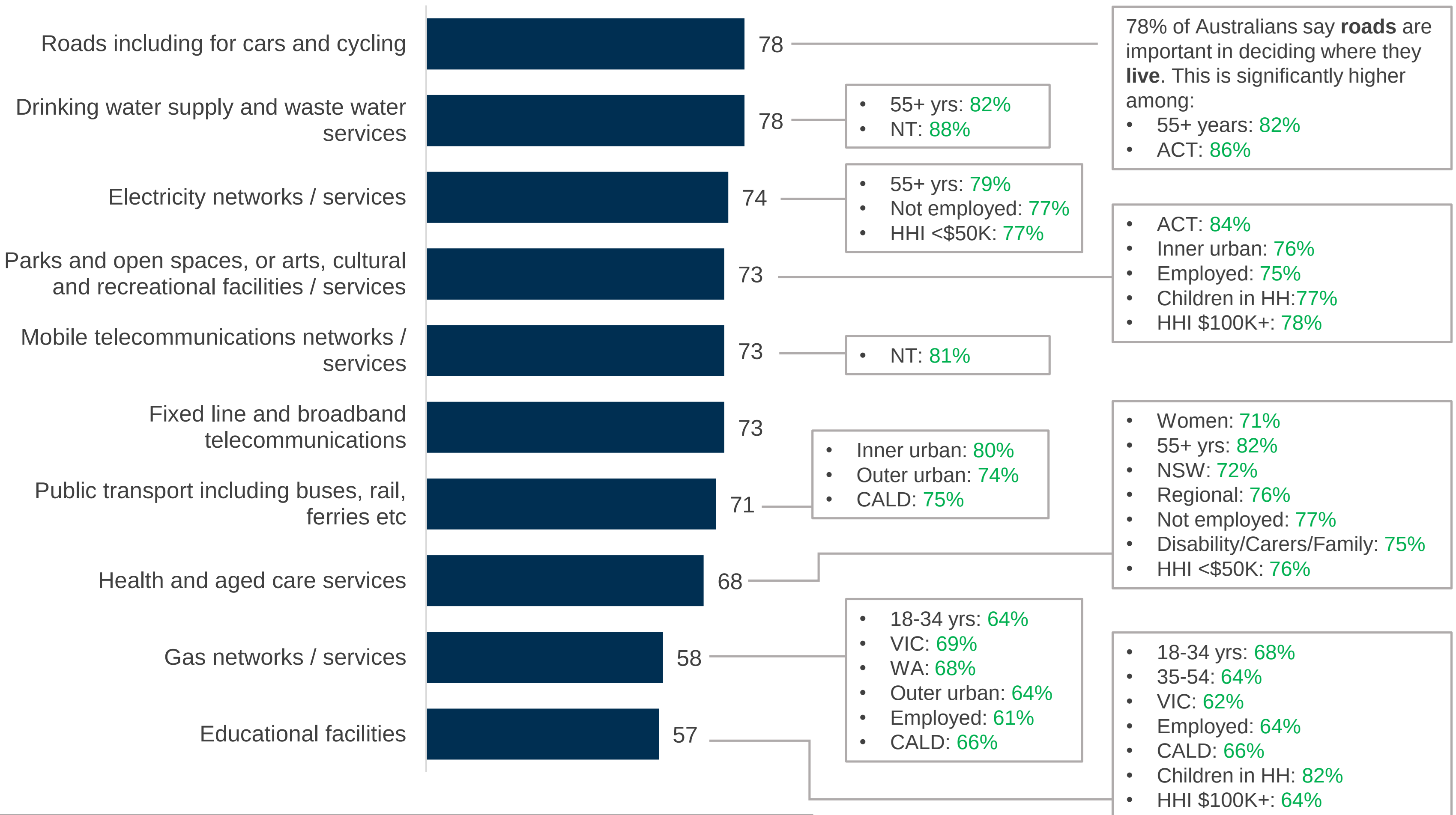
Importance of infrastructure in deciding:



*Q. For each of the following types of infrastructure, please indicate if it would be **important to you** in making a decision about where you live, work, locate a business, or socialise.*
Base: All respondents, (n=5,000).

Roads and drinking water supply are most important when deciding where to live

Importance of infrastructure in deciding where people live (%)

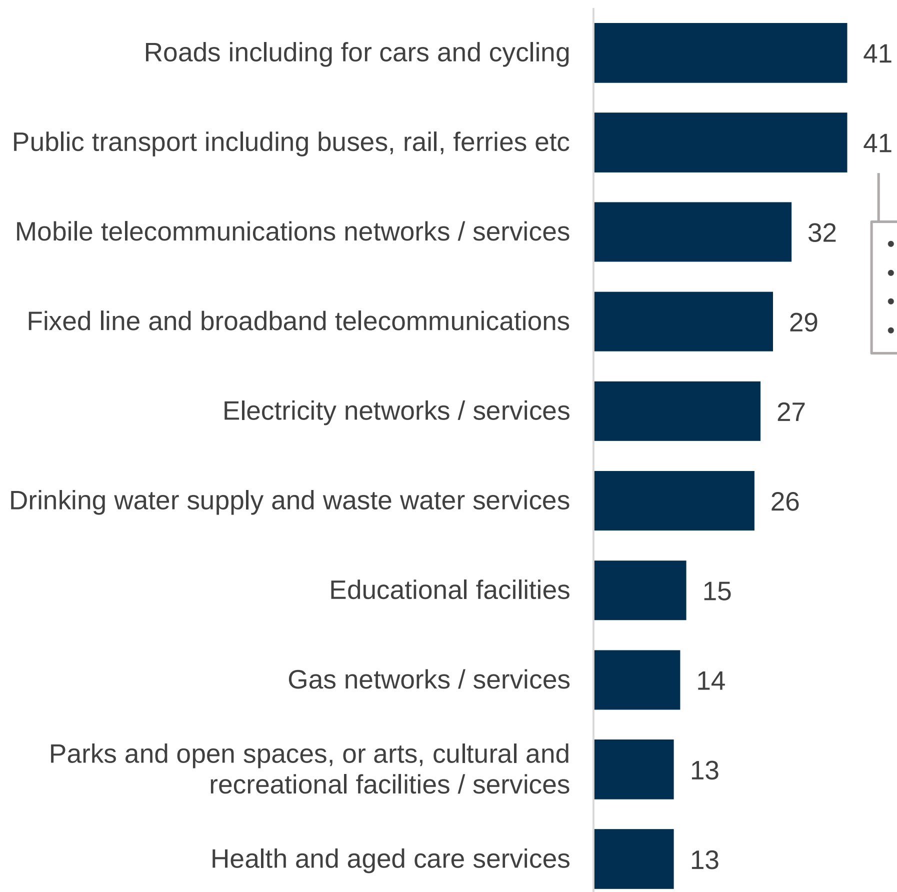


Significant differences only shown where 50% or above of a demographic cohort hold that view

*Q. For each of the following types of infrastructure, please indicate if it would be **important to you** in making a decision about where you live, work, locate a business, or socialise.*
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Roads and public transport are most important when deciding where to work

Importance of infrastructure in deciding where people work (%)



- 18-34 yrs: 58%
- Inner urban: 54%
- Employed: 50%
- CALD: 52%

41% of Australians say **roads** are important in deciding where they **work**. This is significantly higher among:

- 18-34 yrs: 55%
- Employed: 52%
- CALD: 50%
- Children in HH: 50%
- HHI $100K+: 51%

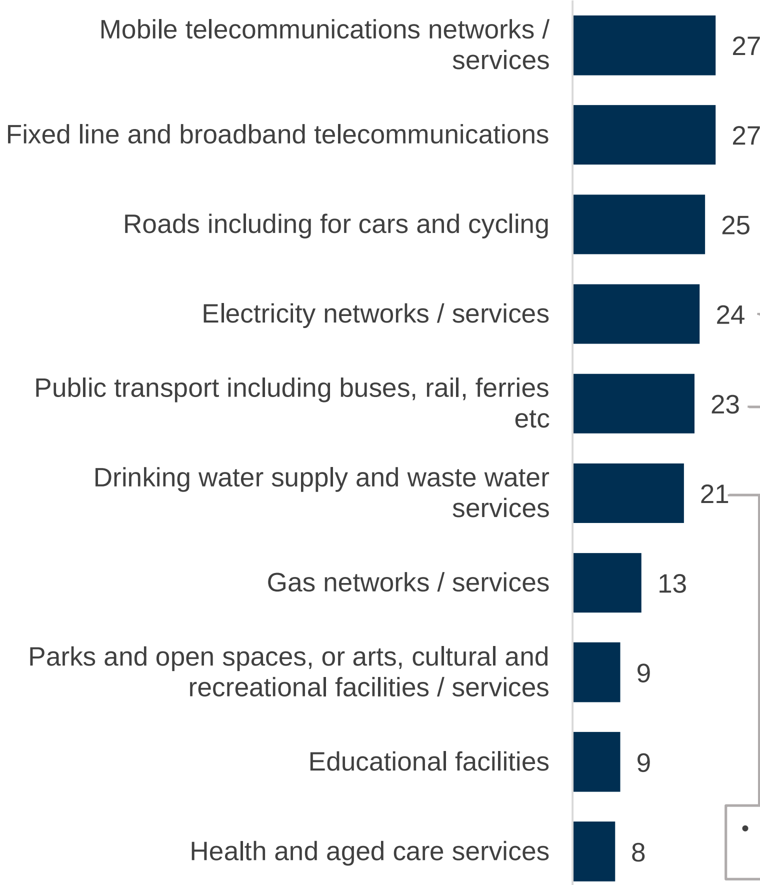
Compared to the total, a significantly higher proportion of **business owners/decision makers** state that all types of infrastructure mentioned are important in their decision about where they work.

Significant differences only shown where 50% or above of a demographic cohort hold that view

*Q. For each of the following types of infrastructure, please indicate if it would be **important to you** in making a decision about where you live, work, locate a business, or socialise.*
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Telecommunications (all) are most important when deciding where to would locate a business

Importance of infrastructure in deciding where people would locate a business (%)



27% of Australians say **mobile telecommunications networks and services** are important in deciding where they **locate a business**. This is significantly higher among:

- 18-34 yrs: 34%
- SA: 33%
- Employed: 30%
- Self-employed: 44%
- Children in HH: 32%
- HHI $100K+: 32%
- Business owner/decision maker: 36%

Fixed line and broadband telecommunications:

- 18-34 yrs: 33%
- SA: 32%
- NT: 36%
- Employed: 30%
- Self-employed: 46%
- Children in HH: 32%
- HHI $100K+: 31%
- Business owner/decision maker: 37%

Roads including for cars and cycling:

- 18-34 yrs: 34%
- SA: 32%
- Self-employed: 40%
- ATSI: 38%
- HHI $100K+: 31%
- Business owner/decision maker: 36%

Electricity networks / services:

- 18-34 yrs: 30%
- SA: 30%
- Self-employed: 37%

Public transport including buses, rail, ferries etc:

- 18-34 yrs: 32%
- Self-employed: 30%
- Business owner/decision maker: 32%

Drinking water supply and waste water services:

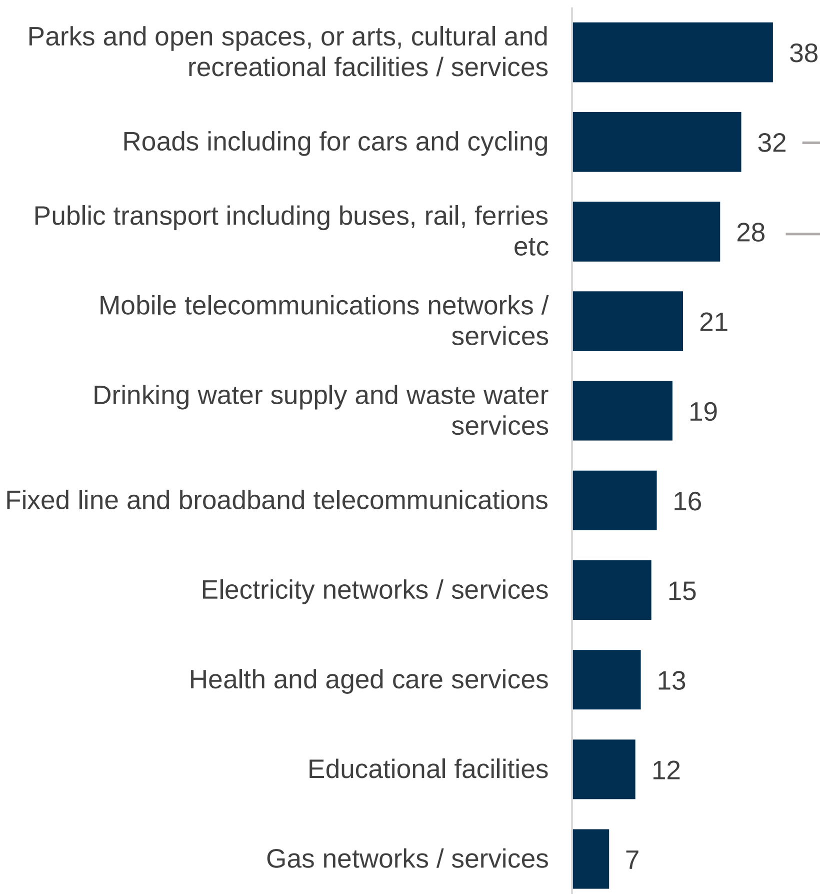
- Business owner/decision maker: 32%

Significant differences only shown where 30% or above of a demographic cohort hold that view

Q. For each of the following types of infrastructure, please indicate if it would be ***important to you*** *in making a decision about where you live, work, locate a business, or socialise.*
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Parks, cultural and recreational facilities are most important when choosing social activities to participate in

Importance of infrastructure in choosing the types of social activities people participate in (%)



- ACT: 40%
- Disability/Carers/ Family: 35%

- Women: 30%
- 18-34 yrs: 32%
- Inner urban: 32%

38% of Australians say **parks and open spaces or arts, cultural and recreational facilities and activities** are important in deciding the types of **social activities** they participate in. This is significantly higher among:

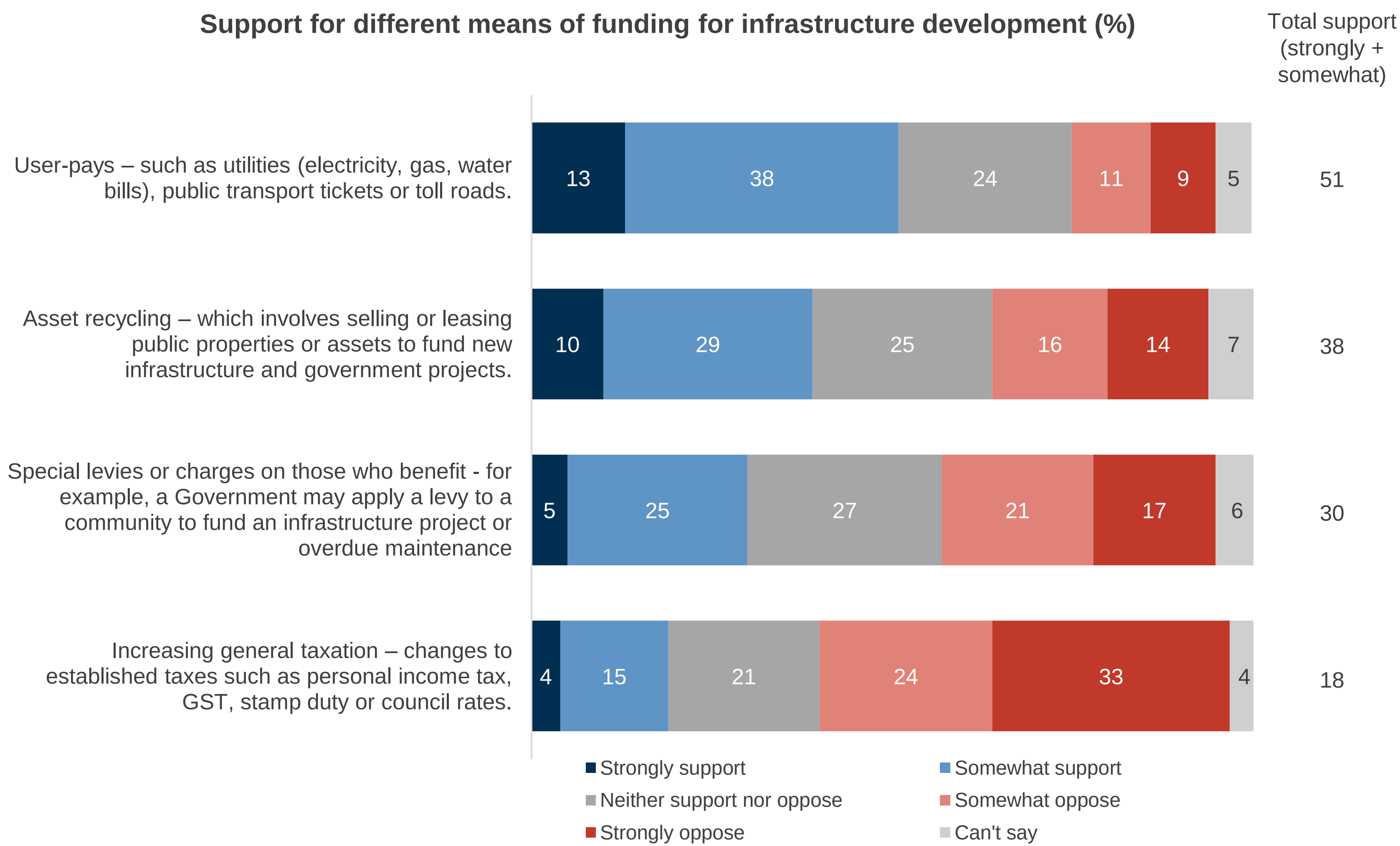
- Women: 42%
- 18-34 yrs: 42%
- ACT: 47%
- NT: 49%
- Disability/Carers/Family: 42%

Significant differences only shown where 30% or above of a demographic cohort hold that view

*Q. For each of the following types of infrastructure, please indicate if it would be **important to you** in making a decision about where you live, work, locate a business, or socialise.*
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

User-pays funding is the most supported means for funding infrastructure development

Support for different means of funding for infrastructure development (%)



Q. Please indicate to what extent you support or oppose the use of each of the following as a means of funding infrastructure development.
Base: All respondents, (n=5,000).

Support for means of funding infrastructure development: significant differences among sub-groups

Support for different means of funding for infrastructure development (%)

Total support (strongly + somewhat)

51% of Australians support **user-pays** as a means of funding infrastructure development. This is significantly different among:

- 55+ yrs: 57%
- QLD: 54%
- ACT: 61%
- HHI $100K+: 57%
- 18-34 yrs: 44%
- CALD: 46%

38% of Australians support **asset recycling** as a means of funding infrastructure development. This is significantly different among:

- Men: 43%
- 18-34 yrs: 45%
- WA: 44%
- TAS: 46%
- Inner urban: 42%
- Employed: 43%
- CALD: 44%
- Children in HH: 42%
- HHI $100K+: 45%
- Women: 34%
- 55+ yrs: 32%
- Regional: 35%
- Not employed: 32%
- HHI <$50K: 34%

30% of Australians support **special levies or charges on those who benefit** as a means of funding infrastructure development. This is significantly different among:

- Men: 32%
- 18-34 yrs: 35%
- ACT: 38%
- Inner urban: 33%
- Employed: 32%
- ATSI: 51%
- Children in HH: 33%
- HHI $100K+: 36%
- Women: 27%
- 55+ yrs: 26%
- Rural: 24%
- Not employed: 27%
- Disability/Carers/Family: 26%
- HHI <$50K: 26%

18% of Australians support **increasing general taxation** as a means of funding infrastructure development. This is significantly different among:

- Men: 23%
- TAS: 25%
- ACT: 32%
- Inner urban: 23%
- Employed: 21%
- ATSI: 37%
- Children in HH: 21%
- HHI $100K+: 23%
- Women: 14%
- WA: 13%
- Not employed: 16%
- HHI <$50K: 15%

Q. Please indicate to what extent you support or oppose the use of each of the following as a means of funding infrastructure development.
Base: All respondents, (n=5,000).
Significantly higher / lower than the total at the 95% confidence interval.

Looking Forward – Adoption and Investment

Looking forward – Adoption and investment: Key findings

Home and personal technologies are most likely to be adopted within the next five years

Half of Australians indicate they are likely to use 5G mobile technology within the next five years. A further 34% indicate they will adopt high-speed broadband, adding to the 46% who already use it. Home electricity storage and connected or smart home appliances are expected to experience proliferation with approximately one in three people intending to use these within the next five years.

Health services is a stand-out in preference for more investment

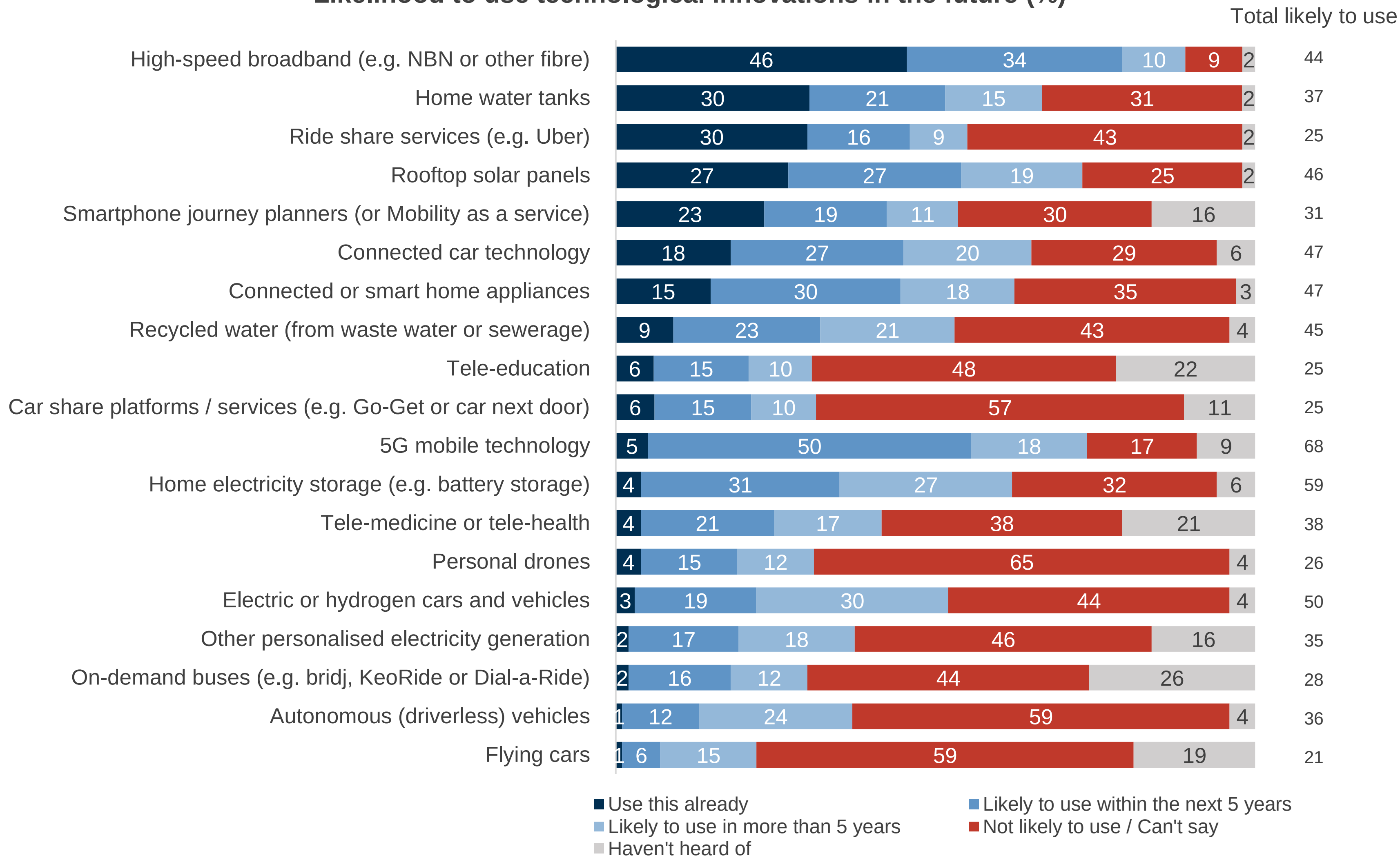
A majority of Australians want to see more investment in a number of types of infrastructure, however health and aged care services is the number one priority, with more than three quarters indicating they want to see more investment in this area. Local roads and broadband telecommunications are prioritised next, followed by mobile telecommunications and educational facilities.

Population growth is a concern

A majority of Australians are at least 'somewhat concerned' about population growth in their area. One in five are 'extremely concerned'. Those living in the more populous states such as Victoria and New South Wales are more likely to be concerned about population growth. The issue is of less concern for people in rural and regional areas.

High-speed broadband, home water tanks and ride share services are most used already

Likelihood to use technological innovations in the future (%)



Q. The provision of infrastructure is changing due to technological innovations and changing costs, giving consumers greater choice in the type of infrastructure they use. Which of the following innovations do you use or are you likely to use in the future?
Base: All respondents, (n=5,000).
**Note: Some categories have been shortened for reporting purposes*

Current use of technological innovations: significant differences among sub-groups

Current use of technological innovations (%)
(Only innovations used among at least 10% of total)

46% of Australians use **high-speed broadband**. This is significantly higher among:
- TAS: 69%
- ACT: 55%
- NT: 71%
- Regional: 59%
- Rural: 60%
- Children in HH: 49%
- HHI $100K+: 50%

30% of Australians use **home water tanks**. This is significantly higher among:
- 55+ yrs: 36%
- QLD: 37%
- SA: 50%
- Regional: 44%
- Self-employed: 38%
- Not employed: 33%

30% of Australians use **ride share services**. This is significantly higher among:
- 18-34 yrs: 50%
- WA: 39%
- ACT: 47%
- Inner urban: 43%
- Employed: 40%
- CALD: 35%
- Children in HH: 33%
- HHI $100K+: 46%

27% of Australians use **rooftop solar panels**. This is significantly higher among:
- 55+ yrs: 35%
- QLD: 36%
- WA: 34%
- SA: 40%
- NT: 39%
- Regional: 35%
- Rural: 32%
- Not employed: 30%

23% of Australians use **smartphone journey planners**. This is significantly higher among:
- Men: 26%
- 18-34 yrs: 31%
- WA: 27%
- Inner urban: 31%
- Employed: 28%
- CALD: 27%
- ATSI: 42%
- HHI $100K+: 31%

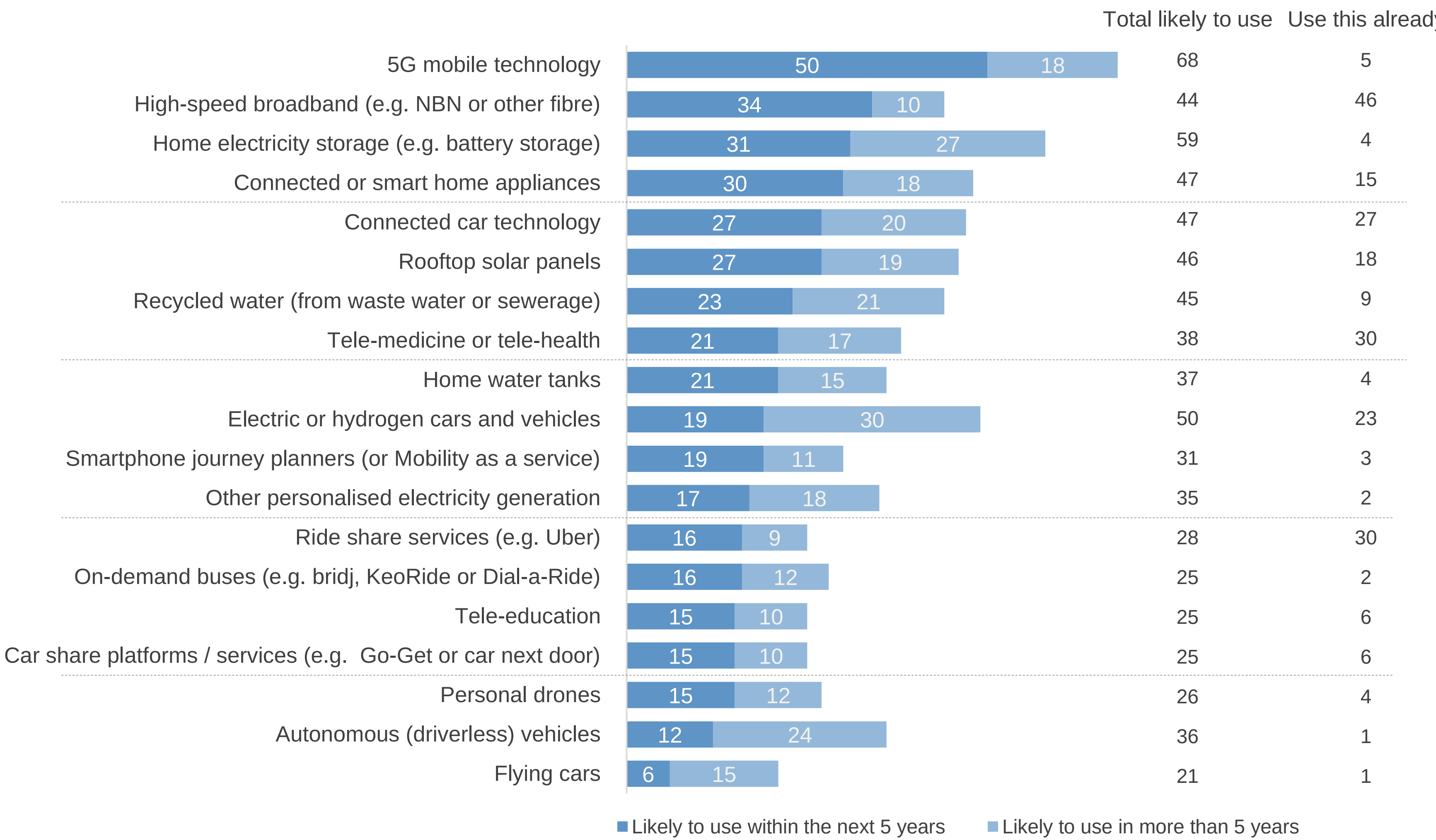
18% of Australians use **connected car technology**. This is significantly higher among:
- 18-34 yrs: 22%
- SA: 24%
- Employed: 21%
- CALD: 21%
- ATSI: 32%
- Children in HH: 21%
- HHI $100K+: 24%

15% of Australians use **connected or smart home appliances**. This is significantly higher among:
- 18-34 yrs: 22%
- WA: 18%
- SA: 21%
- NT: 22%
- Inner urban: 17%
- Employed: 19%
- CALD: 19%
- ATSI: 29%
- Children in HH: 20%
- HHI $100K+: 21%

Q. The provision of infrastructure is changing due to technological innovations and changing costs, giving consumers greater choice in the type of infrastructure they use. Which of the following innovations do you use or are you likely to use in the future?
Base: All respondents, (n=5,000).
**Note: Some categories have been shortened for reporting purposes*
Significantly higher than the total at the 95% confidence interval.

5G mobile technology and high-speed broadband are most likely to be adopted within the next five years

Likelihood to use technological innovations in the future (%)



Q. The provision of infrastructure is changing due to technological innovations and changing costs, giving consumers greater choice in the type of infrastructure they use. Which of the following innovations do you use or are you likely to use in the future?
Base: All respondents, (n=5,000).
**Note: Some categories have been shortened for reporting purposes*

Likelihood to use technological innovations in the future: significant differences among sub-groups

Likelihood to use technological innovations in the future (%)

Total likely to use (within five or 10 years)

68% of Australians are likely to use **5G mobile technology** in the future. This is significantly higher among:
- Men: 75%
- 18-34 yrs: 72%
- ACT: 80%
- Inner urban: 72%
- Employed: 72%
- Self-employed: 75%
- CALD: 72%
- HHI $100K+: 76%

50% of Australians are likely to use **electric or hydrogen cars and vehicles** in the future. This is significantly higher among:
- Men: 58%
- 18-34 yrs: 62%
- ACT: 63%
- Inner urban: 59%
- Employed: 58%
- CALD: 60%
- Children in HH: 56%
- HHI $100K+: 61%

47% of Australians are likely to use **connected or smart home appliances** in the future. This is significantly higher among:
- Men: 52%
- 18-34 yrs: 57%
- ACT: 55%
- Inner urban: 52%
- Employed: 53%
- CALD: 52%
- Children in HH: 52%
- HHI $100K+: 55%

45% of Australians are likely to use **recycled water** in the future. This is significantly higher among:
- Men: 48%
- 18-34 yrs: 51%
- VIC: 48%
- Inner urban: 51%
- Employed: 50%
- CALD: 50%
- HHI $50K-$100K: 48%
- HHI $100K+: 50%

59% of Australians are likely to use **home electricity storage** in the future. This is significantly higher among:
- Men: 64%
- 35-54 yrs: 64%
- SA: 65%
- TAS: 67%
- Employed: 65%
- Self-employed: 65%
- Children in HH: 67%
- HHI $100K+: 69%

47% of Australians are likely to use **connected car technology** in the future. This is significantly higher among:
- Men: 51%
- 18-34 yrs: 54%
- Inner urban: 52%
- Employed: 51%
- CALD: 51%
- Children in HH: 53%
- HHI $50K-$100K: 51%
- HHI $100K+: 53%

46% of Australians are likely to use **rooftop solar panels** in the future. This is significantly higher among:
- 18-34 yrs: 60%
- 35-54 yrs: 49%
- VIC: 52%
- Inner urban: 55%
- Employed: 54%
- CALD: 55%
- Children in HH: 54%
- HHI $50K-$100K: 49%
- HHI $100K+: 54%

44% of Australians are likely to use **high-speed broadband** in the future. This is significantly higher among:
- VIC: 49%
- Inner urban: 52%
- Outer urban: 51%
- CALD: 49%

38% of Australians are likely to use **tele-medicine or tele-health** in the future. This is significantly higher among:
- Men: 43%
- TAS 46%
- Inner urban: 44%
- Employed: 42%
- CALD: 44%
- HHI $100K+: 44%

Q. The provision of infrastructure is changing due to technological innovations and changing costs, giving consumers greater choice in the type of infrastructure they use. Which of the following innovations do you use or are you likely to use in the future?
Base: All respondents, (n=5,000).
**Note: Some categories have been shortened for reporting purposes*
Significantly higher than the total at the 95% confidence interval.

Likelihood to use technological innovations in the future: significant differences among sub-groups

Likelihood to use technological innovations in the future (%)

Total likely to use (within five or 10 years)

37% of Australians are likely to use **home water tanks** in the future. This is significantly higher among:
- 18-34 yrs: 46%
- 35-54 yrs: 41%
- NT: 48%
- Inner urban: 44%
- Employed: 43%
- CALD: 45%
- Children in HH: 45%
- HHI $100K+: 42%

36% of Australians are likely to use **autonomous vehicles** in the future. This is significantly higher among:
- Men: 43%
- 18-34 yrs: 50%
- ACT: 46%
- Inner urban: 48%
- Employed: 44%
- CALD: 50%
- Children in HH: 43%
- HHI $100K+: 47%

35% of Australians are likely to use **other personalised electricity generation** in the future. This is significantly higher among:
- Men: 41%
- 18-34 yrs: 45%
- 35-54 yrs: 39%
- Inner urban: 40%
- Employed: 42%
- CALD: 45%
- Children in HH: 42%
- HHI $50K-$100K: 39%
- HHI $100K+: 42%

31% of Australians are likely to use **smartphone journey planners** in the future. This is significantly higher among:
- Men: 34%
- 18-34 yrs: 34%
- Inner urban: 34%
- Outer urban: 34%
- Employed: 35%
- CALD: 38%
- Children in HH: 37%
- HHI $50K-$100K: 34%

28% of Australians are likely to use **on-demand buses** in the future. This is significantly higher among:
- Men: 32%
- 18-34 yrs: 37%
- NSW: 31%
- ACT: 36%
- Inner urban: 37%
- Outer urban: 31%
- Employed: 34%
- CALD: 40%
- Children in HH: 35%
- HHI $50K-$100K: 32%
- HHI $100K+: 32%

26% of Australians are likely to use **personal drones** in the future. This is significantly higher among:
- Men: 33%
- 18-34 yrs: 39%
- 35-54 yrs: 30%
- Inner urban: 33%
- Employed: 34%
- CALD: 38%
- Children in HH: 35%
- HHI $100K+: 32%

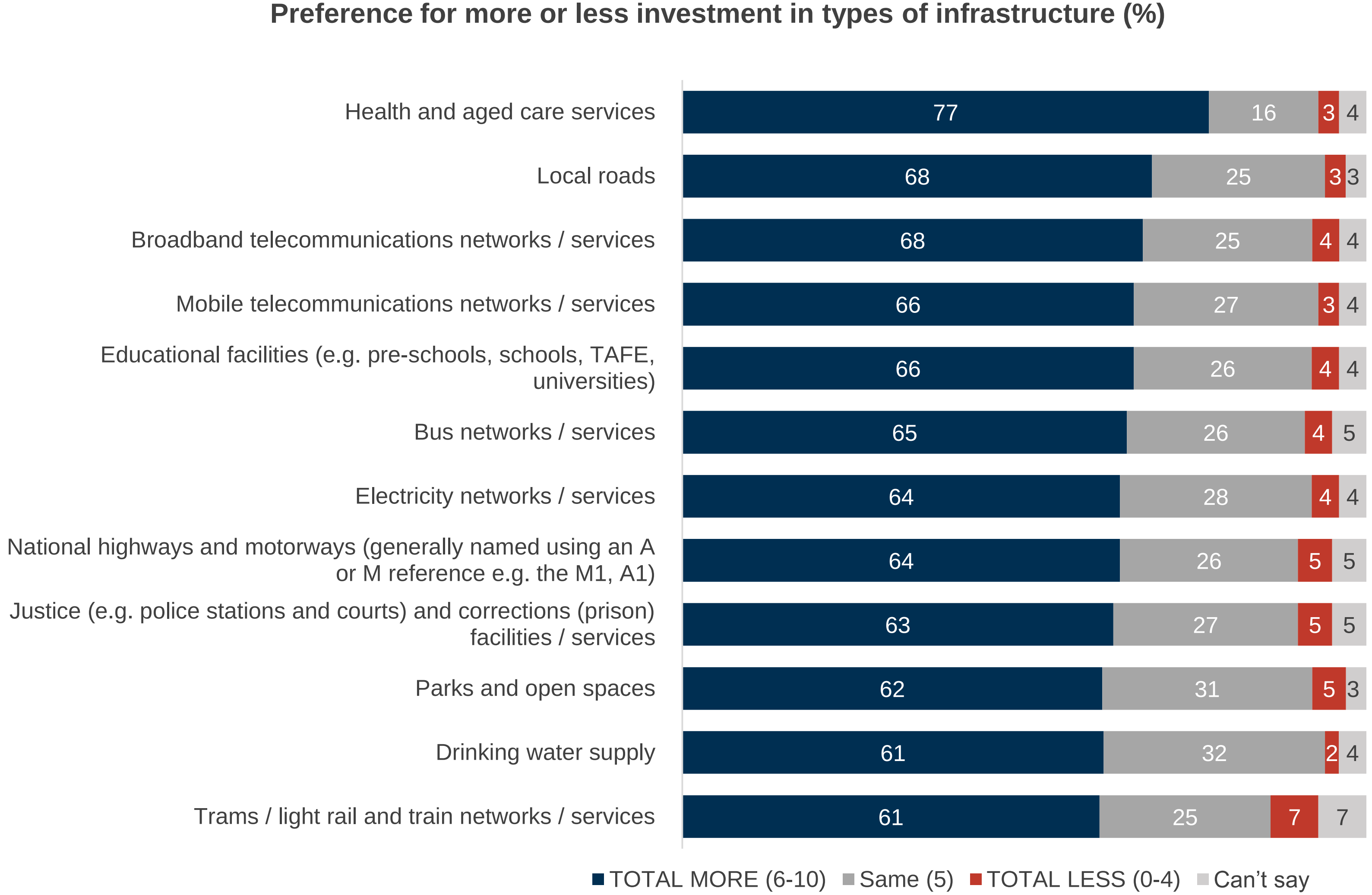
25% of Australians are likely to use **car share platforms or services** in the future. This is significantly higher among:
- Men: 28%
- 18-34 yrs: 35%
- 35-54 yrs: 27%
- Inner urban: 32%
- Employed: 31%
- CALD: 38%
- Children in HH: 32%
- HHI $100K+: 28%

25% of Australians are likely to use **tele-education** in the future. This is significantly higher among:
- Men: 28%
- 18-34 yrs: 34%
- 35-54 yrs: 29%
- Inner urban: 31%
- Employed: 31%
- CALD: 38%
- Children in HH: 35%
- HHI $50K-$100K: 29%
- HHI $100K+: 28%

21% of Australians are likely to use **flying cars** in the future. This is significantly higher among:
- Men: 26%
- 18-34 yrs: 32%
- 35-54 yrs: 24%
- Inner urban: 30%
- Employed: 27%
- CALD: 33%
- ATSI: 37%
- Children in HH: 27%
- HHI $100K+: 26%

Q. The provision of infrastructure is changing due to technological innovations and changing costs, giving consumers greater choice in the type of infrastructure they use. Which of the following innovations do you use or are likely to use in the future?
Base: All respondents, (n=5,000).
**Note: Some categories have been shortened for reporting purposes*
Significantly higher than the total at the 95% confidence interval.

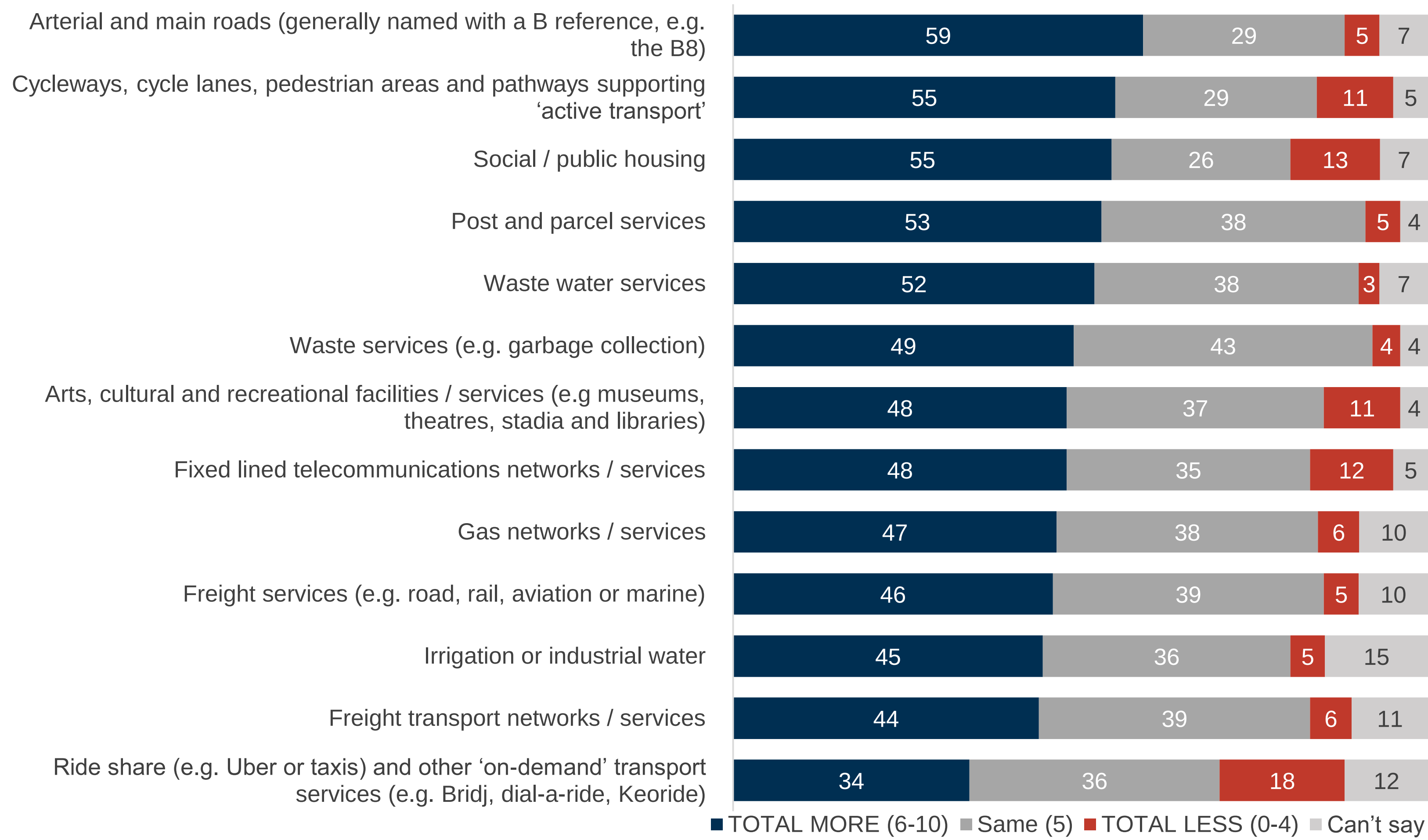
Investment in health, roads, telecommunications and education is prioritised



Q. Thinking about the current capacity and condition of major infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live], would you like to see more or less investment in the following types of infrastructure? Please use a 0-10 scale, where 0 is a lot less investment, 10 is a lot more investment, and 5 is the amount of investment there is currently.
Base: All respondents, (n=5,000).

Ride share and other ‘on-demand’ transport services are a relatively lower investment priority

Preference for more or less investment in types of infrastructure (%) (cont’d)



Q. Thinking about the current capacity and condition of major infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live], would you like to see more or less investment in the following types of infrastructure? Please use a 0-10 scale, where 0 is a lot less investment, 10 is a lot more investment, and 5 is the amount of investment there is currently.
Base: All respondents, (n=5,000).

Preference for more or less investment in types of infrastructure: significant differences among sub-groups

Preference for more or less investment in types of infrastructure

Total more investment (ratings 6-10)

77% of Australians would like to see more investment in **health and aged care services**. This is significantly higher among:
- Women: 80%
- 55+ years: 88%
- TAS: 85%
- NT: 88%
- Regional: 80%
- Not employed: 82%
- Disability/Carers/Family: 81%

68% of Australians would like to see more investment in **broadband telecommunications networks and services**. This is significantly higher among:
- Children in HH: 71%
- HHI $100K+: 71%

68% of Australians would like to see more investment in **local roads**. This is significantly higher among:
- 55+ years: 75%
- VIC: 72%
- Regional: 72%
- Disability/Carers/Family: 73%

66% of Australians would like to see more investment in **educational facilities**. This is significantly higher among:
- VIC: 70%
- Children in HH: 76%

65% of Australians would like to see more investment in **bus networks and services**. This is significantly higher among:
- 55+ years: 69%
- ACT: 73%
- Inner urban: 71%

64% of Australians would like to see more investment in **electricity networks and services**. This is significantly higher among:
- 55+ years: 68%
- NT: 76%
- Disability/Carers/Family: 68%
- Children in HH: 67%

64% of Australians would like to see more investment in **national highways and motorways**. This is significantly higher among:
- 55+ years: 69%
- VIC: 68%
- QLD: 70%
- HHI $100K+: 68%

63% of Australians would like to see more investment in **justice and corrections facilities and services**. This is significantly higher among:
- 55+ years: 69%
- VIC: 69%
- Disability/Carers/Family: 67%

62% of Australians would like to see more investment in **parks and open spaces**. This is significantly higher among:
- VIC: 66%
- Inner urban: 67%
- Children in HH: 65%

61% of Australians would like to see more investment in **drinking water supply**. This is significantly higher among:
- Inner urban: 65%
- CALD: 66%
- Children in HH: 66%

61% of Australians would like to see more investment in **trams / light rail and train networks and services**. This is significantly higher among:
- VIC: 69%
- Inner urban: 72%
- Employed: 64%
- CALD: 66%
- HHI $100K+: 65%

59% of Australians would like to see more investment in **arterial and main roads**. This is significantly higher among:
- Men: 63%
- 55+ years: 66%
- VIC: 63%
- QLD: 64%

Q. Thinking about the current capacity and condition of major infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live], would you like to see more or less investment in the following types of infrastructure? Please use a 0-10 scale, where 0 is a lot less investment, 10 is a lot more investment, and 5 is the amount of investment there is currently.
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Preference for more or less investment in types of infrastructure: significant differences among sub-groups

Preference for more or less investment in types of infrastructure (cont'd)

Total more investment (ratings 6-10)

55% of Australians would like to see more investment in **cycleways, cycle lanes, pedestrian areas and pathways supporting 'active transport'**. This is significantly higher among:

- TAS: 65%
- Inner urban: 63%
- Employed: 60%
- CALD: 60%
- Children in HH: 61%
- HHI $100K+: 60%

55% of Australians would like to see more investment in **social and public housing**. This is significantly higher among:

- 55+ yrs: 62%
- VIC: 62%
- TAS: 69%
- Inner urban: 60%
- Not employed: 60%
- ATSI: 69%
- Disability/Carers/Family: 64%
- HHI <$50K: 64%

53% of Australians would like to see more investment in **post and parcel services**. This is significantly higher among:

- VIC: 57%
- NT: 62%
- Disability/Carers/Family: 57%

52% of Australians would like to see more investment in **waste water services**. This is significantly higher among:

- VIC: 57%
- Inner urban: 56%
- CALD: 57%
- Children in HH: 58%
- HHI $50K-$100K: 56%

49% of Australians would like to see more investment in **waste services**. This is significantly higher among:

- VIC: 54%
- Inner urban: 53%
- Employed: 52%
- Children in HH: 56%
- HHI $50K-$100K: 52%

48% of Australians would like to see more investment in **arts, cultural and recreational facilities and services**. This is significantly higher among:

- 18-34 yrs: 52%
- TAS: 58%
- Inner urban: 56%
- CALD: 53%

48% of Australians would like to see more investment in **fixed lined telecommunications networks and services**. This is significantly higher among:

- CALD: 52%
- Children in HH: 52%

47% of Australians would like to see more investment in **gas networks and services**. This is significantly higher among:

- VIC: 56%
- Inner urban: 53%
- Employed: 50%
- CALD: 55%
- Children in HH: 53%

Q. Thinking about the current capacity and condition of major infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live], would you like to see more or less investment in the following types of infrastructure? Please use a 0-10 scale, where 0 is a lot less investment, 10 is a lot more investment, and 5 is the amount of investment there is currently.
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Preference for more or less investment in types of infrastructure: significant differences among sub-groups

Preference for more or less investment in types of infrastructure (cont'd)

Total more investment (ratings 6-10)

46% of Australians would like to see more investment in **freight services**. This is significantly higher among:
- VIC: 50%
- TAS: 56%
- NT: 62%
- Employed: 49%
- CALD: 53%

45% of Australians would like to see more investment in **irrigation or industrial water**. This is significantly higher among:
- VIC: 49%
- Inner urban: 50%
- CALD: 51%
- Children in HH: 50%
- HHI $50K-$100K: 49%

44% of Australians would like to see more investment in **freight transport networks and services**. This is significantly higher among:
- VIC: 48%
- TAS: 53%
- NT: 55%
- Inner urban: 48%
- Employed: 47%
- CALD: 51%

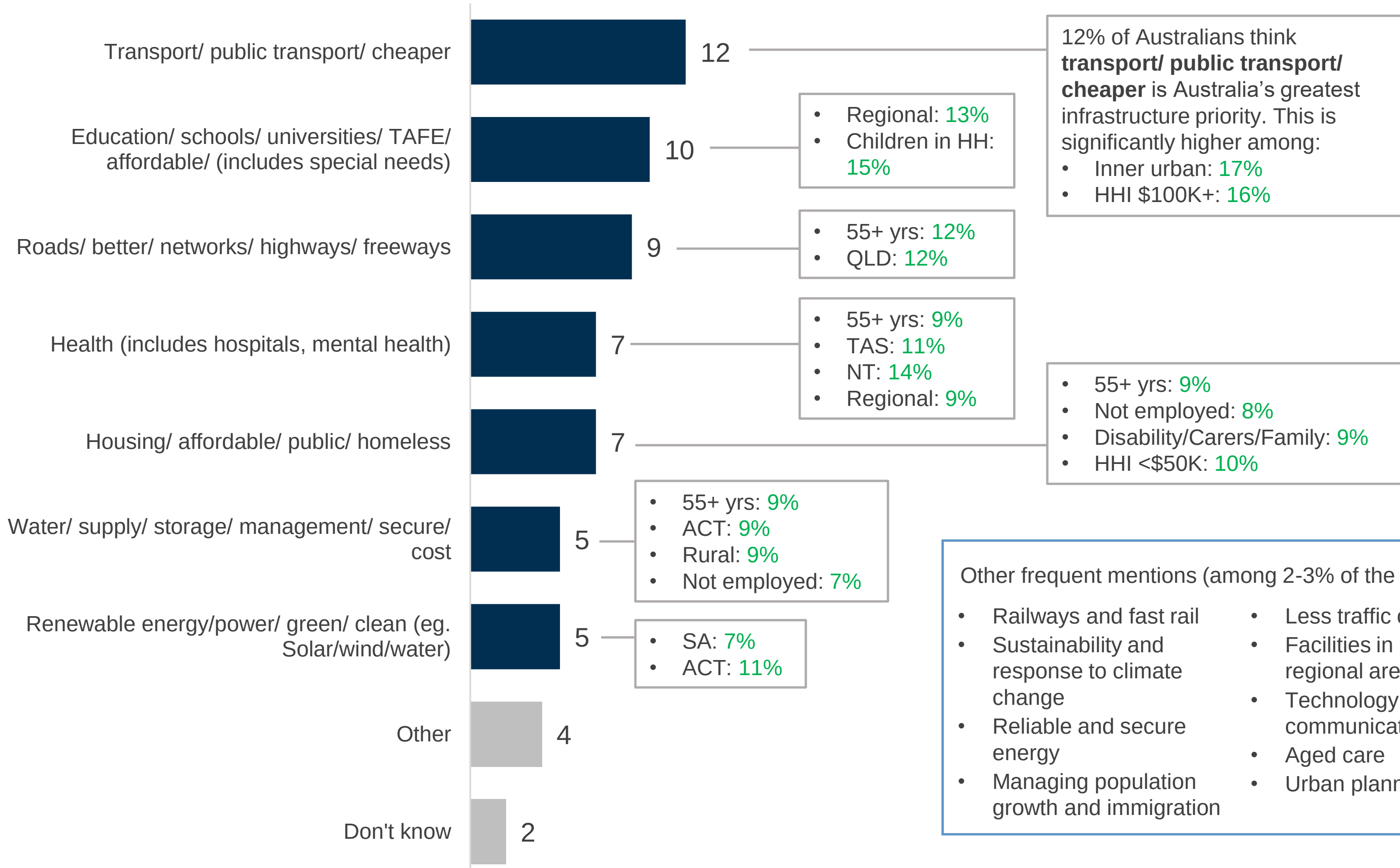
34% of Australians would like to see more investment in **ride share and other 'on-demand' transport services**

. This is significantly higher among:
- 18-34 yrs: 45%
- Inner urban: 44%
- Employed: 40%
- CALD: 45%
- ATSI: 61%
- Children in HH: 43%
- HHI $100k+: 40%

Q. Thinking about the current capacity and condition of major infrastructure in [CAPITAL / the region of [STATE/TERRITORY where you live], would you like to see more or less investment in the following types of infrastructure? Please use a 0-10 scale, where 0 is a lot less investment, 10 is a lot more investment, and 5 is the amount of investment there is currently.
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Transport, education and roads the greatest infrastructure priorities for future generations

Australia's greatest infrastructure priority for future generations (%)
(Only those mentioned by least 5% of total)

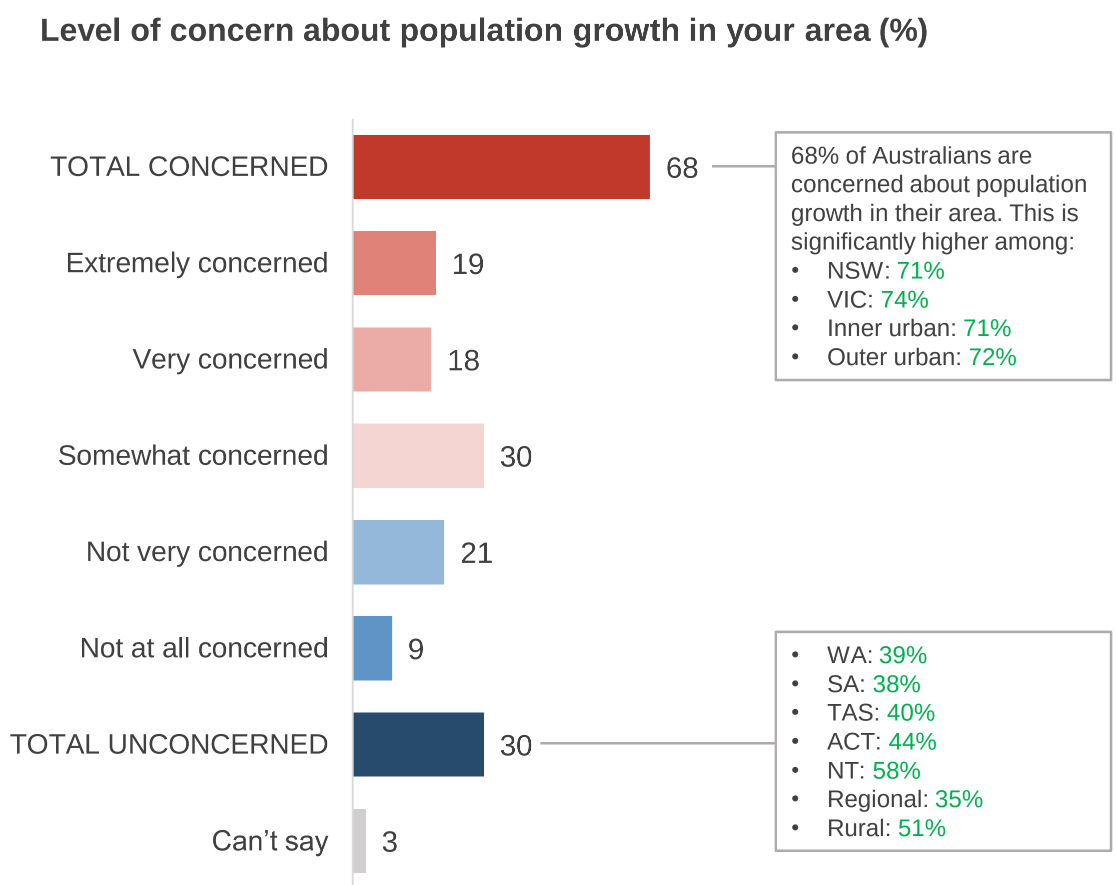


Other frequent mentions (among 2-3% of the total) include:

- Railways and fast rail
- Sustainability and response to climate change
- Reliable and secure energy
- Managing population growth and immigration
- Less traffic congestion
- Facilities in rural and regional areas
- Technology and communications networks
- Aged care
- Urban planning

Q. Thinking about the type of Australia you would like to see for your children or future generations, what would you say is Australia's greatest infrastructure priority?
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

The majority of Australians are at least somewhat concerned about population growth in their area



Q. Australia's population is growing. How concerned are you about the issue of population growth in your area?
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Consideration of Community Views

Consideration of community views: Key findings

Consideration of community views is highly important

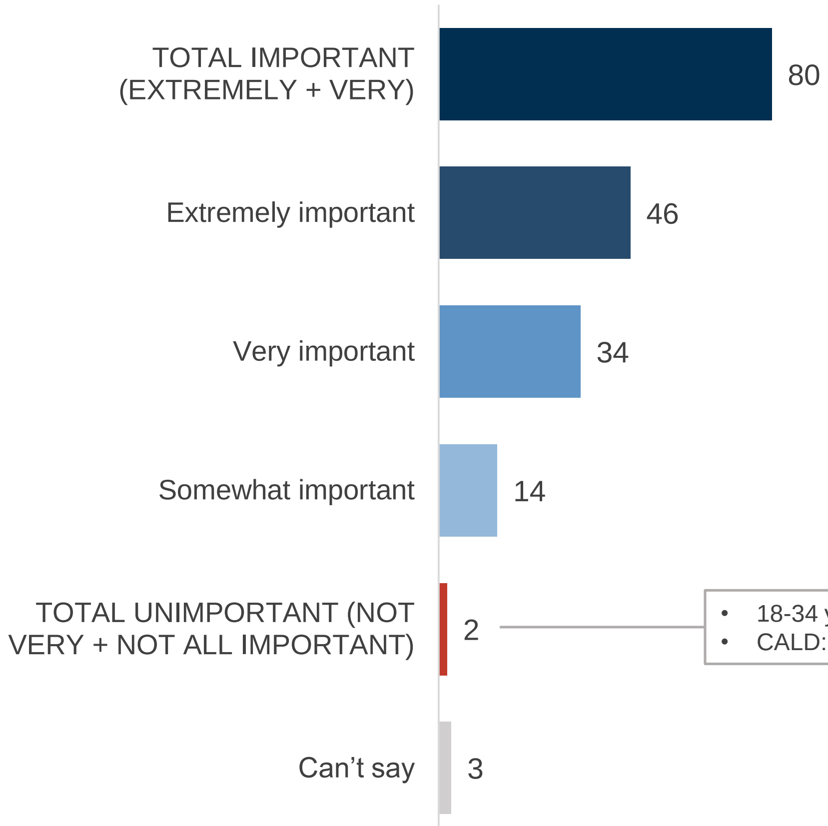
The vast majority of Australians believe it is important (very or extremely) for government to consider the views of the community when planning and investing in major infrastructure. Almost half (46%) feel it is ‘extremely important’, an indication of the strong views on this issue.

Those directly affected by infrastructure the most important to consider

While all community views are seen to be important when planning and investing in major infrastructure, to Australians, the community living in close proximity to that infrastructure and those who are impacted by the construction of that infrastructure are most important.

The vast majority feel it is important for the government to consider community views when building infrastructure

Importance of government considering community views when planning and investing in major infrastructure (%)



80% of Australians think it is important that government considers the views of the community when planning and investing in major infrastructure. This is significantly higher among:

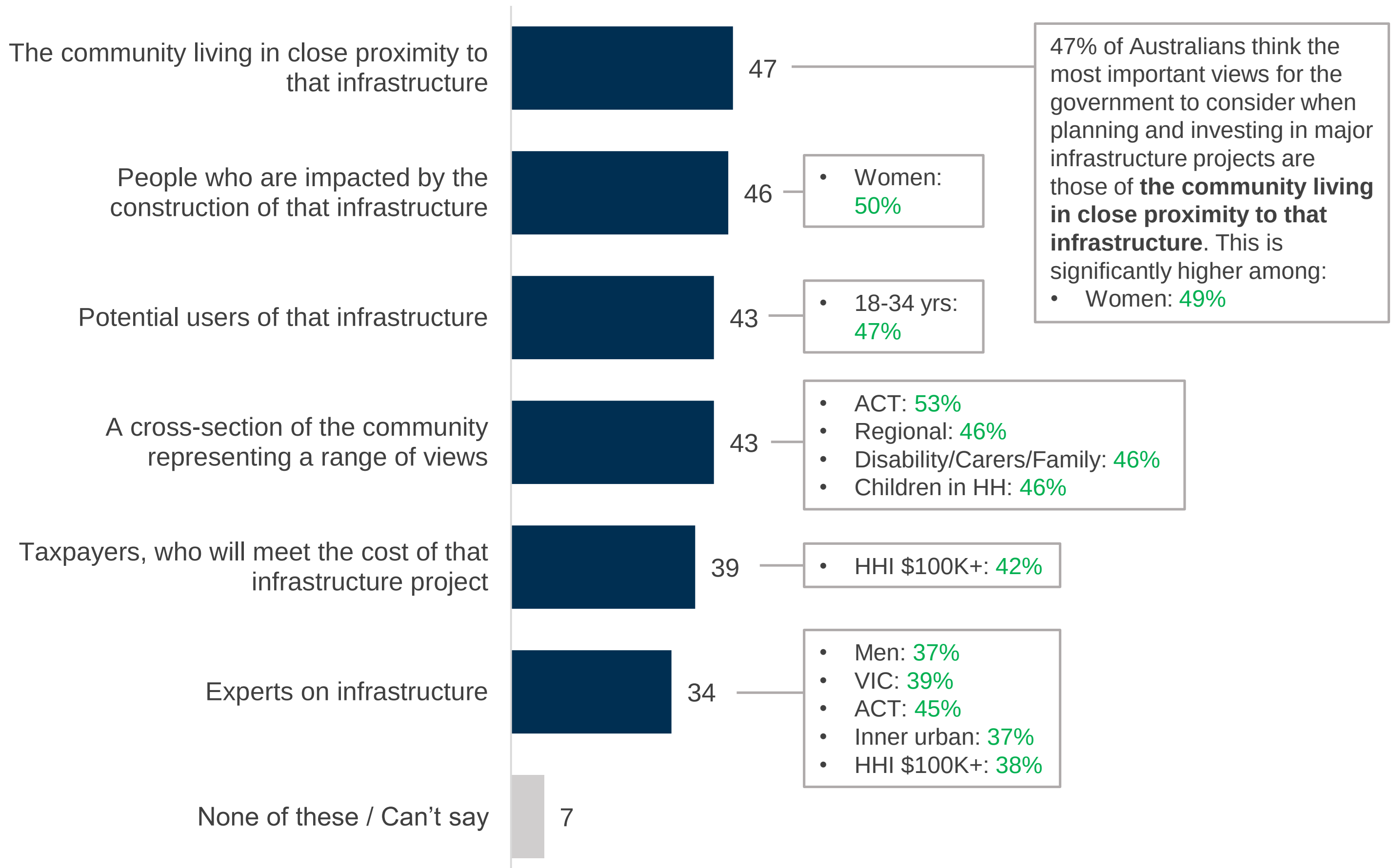
- Women: 82%
- 55+ yrs: 89%
- Regional: 85%
- Rural: 87%
- Not employed: 83%
- Disability/Carers/Family: 83%
- HHI <$50K: 83%

- 18-34 yrs: 4%
- CALD: 4%

Q. How important is it that government considers the views of the community when planning and investing in major infrastructure?
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Those directly affected by infrastructure are the most important views for government to consider

Most important community views to consider when planning and investing in major infrastructure (%)
(Multiple response allowed)

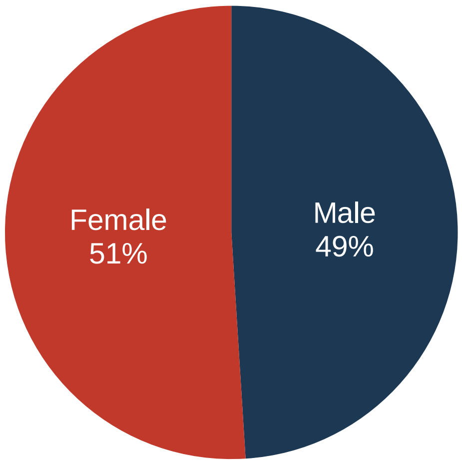


*Q. Please indicate which community views it is **most important** for government to consider when planning and investing in major infrastructure projects?*
Base: All respondents, (n=5,000).
Significantly higher than the total at the 95% confidence interval.

Appendix: Demographics

Demographics

Gender



Age	%
18-34 years	30
35-54 years	34
55+ years	35

Employment Status	%
Total full-time + part-time employed	**53**
Employed full-time	37
Employed part-time or casual	15
Self employed	6
At home / Home duties	8
Retired – fully self-funded	8
Retired – part self-funded, part pension	4
Retired – full pensioner	10
Not retired – pensioner or benefits	3
Unemployed	4
Student	5
Prefer not to say	1

Children under 17 in household	%
Yes	26
No	72
Prefer not to say	2

Q. Please indicate your gender: Q. To which of the following age groups do you belong? Q. Which one of the following best describes your current employment status? Q. Are there any children aged 17 years or younger living in your household?
Base: All respondents (n=5,000).

Demographics (cont'd)

Small business owner or decision maker	Sample %
Yes, owner or financial partner	9
Yes, main decision maker	11
Yes, both owner or financial partner and main decision maker	5
No, None	71
Prefer not to say	4

Disability status	Sample %
I have a temporary/long-term disability or impairment	13
I care for a person with a temporary/long-term disability or impairment	5
I have an immediate family member or close friend who has a temporary/long-term disability or impairment	8
I employ or work with a person or people with a disability or impairment	3
None of the above	71
Prefer not to say	3

Household income before tax	Sample %
Less than $25,000	9
$25,000 to less than $50,000	17
$50,000 to less than $75,000	15
$75,000 to less than $100,000	15
$100,000 to less than $150,000	15
$150,000 to less than $200,000	8
$200,000 plus	6
Prefer not to say	14

Aboriginal or Torres Strait Islander descent	Sample %
Yes	1
No	97
Prefer not say	2

Q. Are you the owner, financial partner or main decision maker in an Australian business turning over more than $75,000 per annum? Q. Which of the following best describes you? Q. Which of the following best describes your annual household income before tax? Q. Are you of Aboriginal or Torres Strait Islander descent?
Base: All respondents (n=5,000).

Demographics (cont'd)

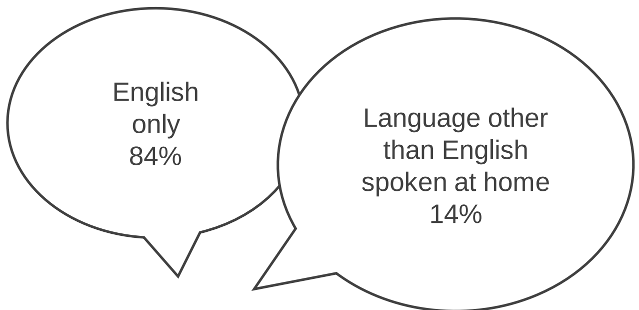
Frequency of Transport Use (%)					
	Daily	**Several times a week**	**About once a week**	**Less than once a week**	**Never**
Car	50	32	9	5	4
Bus	5	11	9	35	40
Tram or light rail	2	6	6	29	57
Train	6	10	10	39	35
Truck	1	2	3	6	87
Motorcycle or scooter	1	3	4	6	85
Bicycle	2	6	7	19	65
Ferry	1	2	3	23	71
Walk	43	27	11	10	9

Q. Please indicate how frequently you use each of the following modes of transport, either for work or personal reasons.
Base: All respondents (n=5,000).

Demographics: Culturally and linguistically diverse (CALD)

CALD: 19%

Languages



Prefer not say: 2%

- Chinese 4%
- Hindi 2%
- Italian 1%
- German 1%
- Greek 1%
- French 1%
- Spanish 1%

Other languages mentioned by less than 1% of respondents include Vietnamese, Russian, Korean, Japanese, Hungarian, Dutch, Croatian and Arabic.

Note: 4% of people indicated their language spoken at home as 'other'.

Country of Birth

Born in a country other than Australia 24%

Prefer not say: 2%

- United Kingdom 8%
- New Zealand 2%
- India 2%
- Other Asian 2%
- Other European 2%
- China 1%
- Germany 1%
- United States 1%

Other countries mentioned by less than 1% of respondents Canada, Hungary, Greece, France, Korea, Japan and other Americas.

Note: 5% of people indicated their country of birth as 'other'.

Q. Which languages, other than English, are spoken regularly in your home? Q. In which country you were born?
Base: All respondents (n=5,000).

THERE ARE OVER 25 MILLION PEOPLE IN AUSTRALIA…

FIND OUT WHAT THEY'RE THINKING.

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