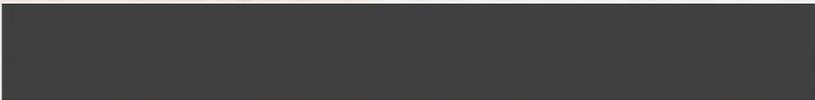


UNITE AND RECOVERY WAVE 3

For Queensland Department of Premier and Cabinet

Prepared by Ipsos
30 June, 2020

For more information contact:



GAME CHANGERS



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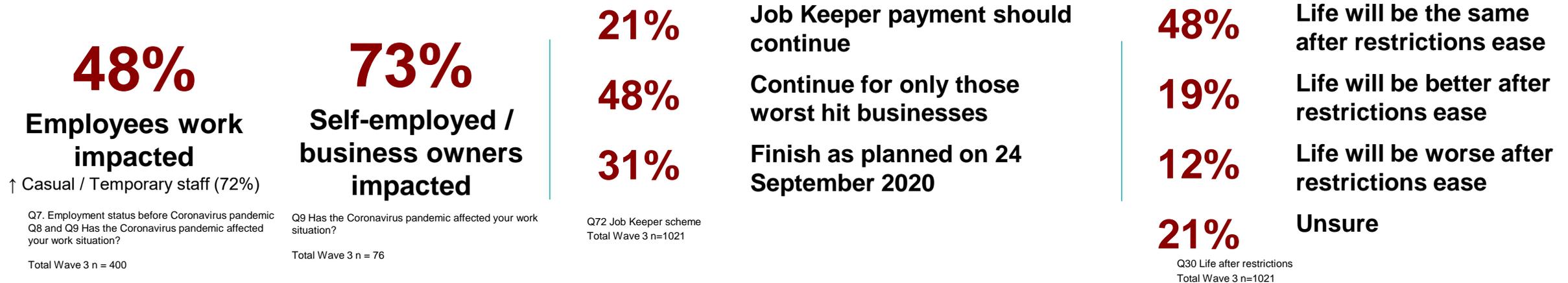
KEY INSIGHTS

1

1

THE IMPACT ON WORK CONTINUES AS DO OUR WORRIES

Less people have their work impacted as things start to go back to normal hours of work, or no longer working from home, forced leave or salary reductions.



Queenslanders feel our response was right but we are most worried about the impact to the Australian Economy.

82%

Feel Queenslanders are responding appropriately to the threat of Covid-19

Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?

Biggest worry about Covid-19

- 32%** Impact on Australian economy
- 23%** Health of friends and family
- 8%** Risk to my health

Q20a In relation to the Covid-19 global pandemic, what are you most worried about?

Biggest worry about Economy

- 41%** Impact on Australian economy
- 9%** Losing my job
- 8%** Health of friends and family
- 8%** Losing income
- 8%** Unable to find a job

Q20b What are you most worried about when it comes to economic impacts from COVID-19?
Total Wave 2 n = 1018; Total Wave 3 n=1021

QUEENSLANDERS' CONFIDENCE REMAINS THE SAME; AWARENESS LOW FOR INITIATIVES AND STRATEGY

Only three in ten are aware of initiatives and one in five the strategy. Those who are aware have significantly higher positive sentiment. A third say they have enough information about how Queensland's economy will recover.

55%

Agree QLD Gov can manage the economic recovery
 ↓ Not aware of Economic Recovery Strategy (48%)

Q25 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the economic recovery?
 Total Wave 3 n=1021

56%

Agree QLD Gov are handling for economic advantage in long run
 ↑ Aware of economic strategy (73%)

Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – How confident that Queensland has handling COVID-19 will be to the State's economic advantage in the long run
 Total Wave 3 n=1021

36%

Agree they have enough information on how the Queensland economy will recover
 ↓ Wave 2 (31%)
 ↑ Aware of Economic Recovery Strategy (52%)

Q1 Have you been getting enough information to feel confident you know about
 Total Wave 2 n = 1018; Total Wave 3 n=1021

30%

Aware of any major economic initiatives
 ↑ Aware of Roadmap (44%)

Q46 Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?
 Total Wave 3 n=1021

21%

Aware of Economic Strategy
 ↑ Aware of Roadmap (35%)

Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
 Total Wave 3 n=1021

52%

Understands very well the State Government's Economic Recovery Strategy

Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
 Total Wave 3 n = 1021

31%

Neutral

Unsure, unaware, uncertain need more information

31%

Neutral

There is no statistical differences between those that have seen the campaign and those that have not in terms agreement about QLD Government handling of the economy.

 Significantly higher / lower than wave 2 – 95%

Confident Queensland Government is a trustworthy information source (Q3)

76% aware Vs **61%** unaware

Queensland Government managed better than other states or territories (Q4)

77% aware Vs **70%** unaware

Good information about current coronavirus level of restrictions (Q1)

83% aware Vs **71%** unaware

Good information about the stages of restrictions (Q1)

72% aware Vs **62%** unaware

Good information about how the economy will recover (Q1)

52% aware Vs **27%** unaware

REASONS FOR SUPPORTING THE STRATEGY AND TYPES OF STRATEGIES TO SUPPORT

Prudent spending to balance the budget.

51% Spending only in targeted areas to reduce unemployment and reduce spending in other areas to minimise the impact on State Budget Deficit

21% Spending which will increase the Queensland State Budget Deficit to reduce unemployment

8% Decrease spending to minimise the Queensland State Budget Deficit

20% Unsure

Q63 In terms of managing the State Budget. Which is most important to you?
Total Wave 3 n = 1021

Those that have seen the campaign are more likely to want to decrease spending to minimise the Queensland State Budget (13%).

↑86%
Queenslanders who were aware of the strategy and understood it well were supportive

↓12%
Queenslanders who aware of the strategy and did not understand it well were supportive.



Local solutions, skills and targeted infrastructure investments rank as most important.

IS QLD GOVERNMENT DOING ENOUGH?

Low positive sentiment and neutral responses indicate that there is a lack of awareness about what Queensland Government is doing and no campaign effect observed.

39%

Enough support from the government as a small business owner or self-employed

Q49 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support"- Are you getting enough support from the government as a small business owner or self-employed?

Total Wave 3 n = 76

42%

Enough support to small business through this pandemic and recovery

Q50 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support small business through this pandemic and recovery?

Total Wave 2 n = 1021

52%

Enough support to the community through this pandemic and recovery

Q51 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support the community through this pandemic and recovery?

Total Wave 3 n = 1021

Awareness of the Economic Strategy is associated with agreement around the level of Qld Gov support being enough.

Enough support for **small business** through this pandemic and recovery
53% aware Vs **32%** unaware

Enough support for **the community** through this pandemic and recovery
61% aware Vs **46%** unaware

Of those aware

65%

Support the Economic strategy.

Those who support the strategy feel it will lift the economy (62%) as well as positive sentiment for handling the restrictions in stages (54%) and creating or keeping people in jobs (54%), doing the right thing by keeping borders closed (49%).

Of those aware

27%

Neither support or oppose the Economic strategy.

Those who are neutral are still uncertain and feel there are too many unknowns and will wait to see how the situation unfolds (70%), whilst others are concerned about taxes increasing (46%) or they do not have enough information (19%) or detail (19%) to form an opinion.

Of those aware

9%

Oppose the Economic strategy.

Those who are opposed don't trust the Government to keep their word (72%) or feel there are too many mixed messages (69%), whilst others don't feel it helps small business (63%), or that some families missed out (51%) and concerned about taxes increasing (50%).

OPENING BORDERS AND EASING RESTRICTIONS

A quarter (24%) say that Queenslanders won't keep to the 4 sq meter rule at public gatherings at home or in public spaces. These new restrictions have seen an increase in concern that Queenslanders won't comply.

47%

Agree that interstate travel should be allowed between states with similar numbers of cases of Covid-19

Q59 If some state and territories have the same number or less cases of Covid-19 than Queensland, should travel between these states be allowed? (i.e. the borders between these states and territories be re-opened)

Those aware of the Economic Recovery Strategy were more likely to agree to open borders between states with hot spots and multiple cases (17%), than those who were not aware of the strategy (8%).

82%

Disagree that travel to QLD from hot spot states and territories should be allowed

Total Wave 3 n = 1021

Those that have seen the campaign were more likely to agree to open borders between states with hot spots and multiple cases (15%), and locations with hot spots (13%).

85%

Disagree that travel to QLD from hot spot towns or regions should be allowed

Total Wave 3 n = 1021

71%

Confident Queensland Government can manage the easing of restrictions.

↓ Wave 1 - May (59%)

↓ Wave 2 (67%)

↑ Aware of Economic Strategy (80%)

↑ Aware of Roadmap (80%)

Q24 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the easing of restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018

Most Queenslanders surveyed felt that it was important to be patient and understanding with service staff in hospitality and other service jobs who are complying with social distancing rules (94%), to keep good distance on public transport (88%), leave 1.5 metre space when queuing (87%) and physically distancing from others outside their household (88%).

A third of Queenslanders feel it is important to leave contact details at restaurants and cafes (68%) and wearing a mask in public if feeling sick (69%).

Q28 How important is it for people to follow the following public health rules while restrictions are easing?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total wave 3 n = 1021

As restrictions are easing the top three things Queenslanders will do is:

- 1** Go out with family and friends,
- 2** Dining out
- 3** Taking a weekend away or mini-break or holiday in Queensland.

INFORMATION FOR QUEENSLANDERS

As Queenslanders get information and their sentiment towards QLD government as trustworthy information and management of the Covid-19 pandemic increases. Important opportunity to increase information about the Economic Strategy as the Roadmap has worked well.

93%
How to prevent the spread of coronavirus

67%
Stages of restrictions easing
↑ Wave 2 (71%)
↑ 65+ years (77%)

76%
Current coronavirus level of restrictions
↑ Aware of Roadmap (81%)
↑ Aware of Economic Recovery Strategy (83%)
↑ 65+ years (86%)

36%
How the Queensland economy will recover
↓ Wave 2 (31%)
↑ Aware of Economic Recovery Strategy (52%)

Q1 Have you been getting enough information to feel confident you know about
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

47%

Aware of the Roadmap
↑ Aware of Economic Strategy (78%)

77%

Roadmap is helpful
↓ Central HHS (47%)

Confident Queensland Government is a trustworthy information source (Q3)
76% aware Vs **56%** unaware

Queensland Government managed better than other states or territories (Q4)
80% aware Vs **60%** unaware

Good information about current coronavirus level of restrictions (Q1)
81% aware Vs **68%** unaware

Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?
Total Wave 1 n = 944; Total Wave 2 n = 530; Total Wave 3 n = 478

  Significantly higher / lower than wave 2– 95%

67%

Queensland Government is a trustworthy information source
↑ Wave 2 (73%)
↑ Aware of Roadmap (76%)
↑ Aware Economic Recovery Strategy (76%)

Q3 QLD Government is a trustworthy information source about the economic recovery after the coronavirus pandemic. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

75%

Queensland Government managed better than other states or territories
↓ Not aware Economic Recovery Strategy (70%)
↓ Central HHS (57%)
↓ Not Aware of Roadmap (60%)

Q4 QLD Government has managed the coronavirus pandemic better than other states or territories. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021



CAMPAIGN RECOGNITION

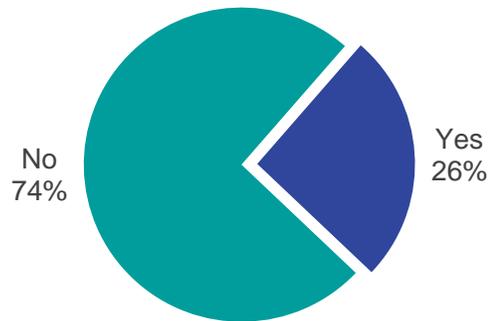
A quarter of Queenslanders recall seeing the campaign (26%) and most recall the TVC (68%)

The campaign prompt had messaging removed to test the message receipt. Only a third who saw the campaign could recall the intended messages of the advertisement (36%).

Seen any of these ads

26% is above Ipsos Norm (25%)

TVC in market on 18 June 2020
(6 days at time of research)



Q68 Have you seen any of these ads?
Total Wave 3 n = 1021

Aware of economic initiatives.

40% seen Vs 27% unseen

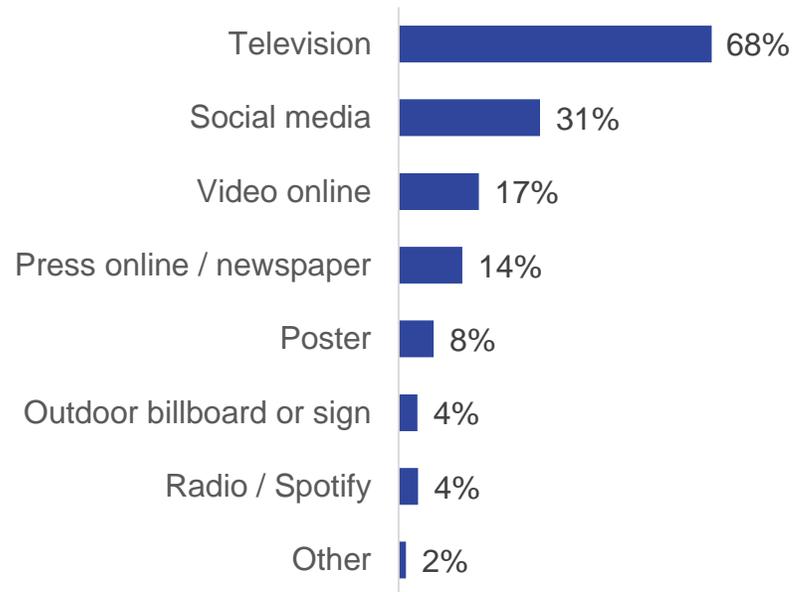
Aware of economic strategy.

35% seen Vs 17% unseen

Aware of Roadmap for easing restrictions.

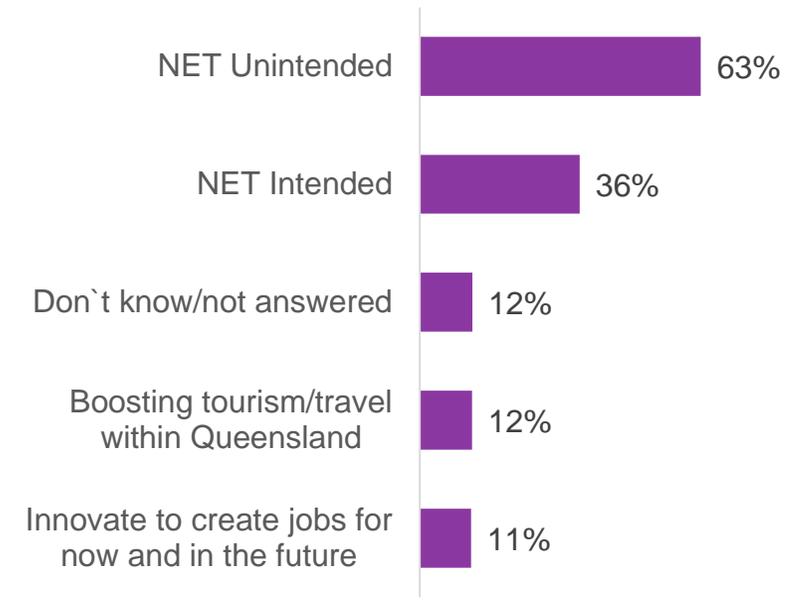
61% seen Vs 43% unseen

Where ads seen



Q69 Where have you seen these ads?
Seen ads Wave 3 n = 265

Messages you can remember from this ad



Q70 What are all the messages you can remember from this ad?
Seen ads Wave 3 n = 265

To aid our analysis and interpretation of executional performance we make reference and comparison to our Ipsos Norms. When looking at advertising recognition scores for each channel we make comparisons to the Ipsos All Advertising (private and public sector) norm because all campaigns compete with each other for audience attention. When looking at diagnostic scores for individual campaign elements, we use the Ipsos government specific norm (public sector only). We use these norms as categories of advertising are very different, and therefore, whenever possible comparisons need to be made within a category when looking at reactions to advertising.

Norm for TV 500 TARPS is 25% and this campaign is 450 TARPS.

CAUGHT IN THE COVID-19 CLUTTER

The campaign messaging needs to cut through clearer with the audience.

Queenslanders were more likely to recall other messages from other campaigns, particularly those around restrictions and health rules.

The clearest message coming through from the campaign is boosting tourism/trave within Queensland (12%), to innovate to create jobs for now and in the future (11%) and invest in industries for our state (9%).

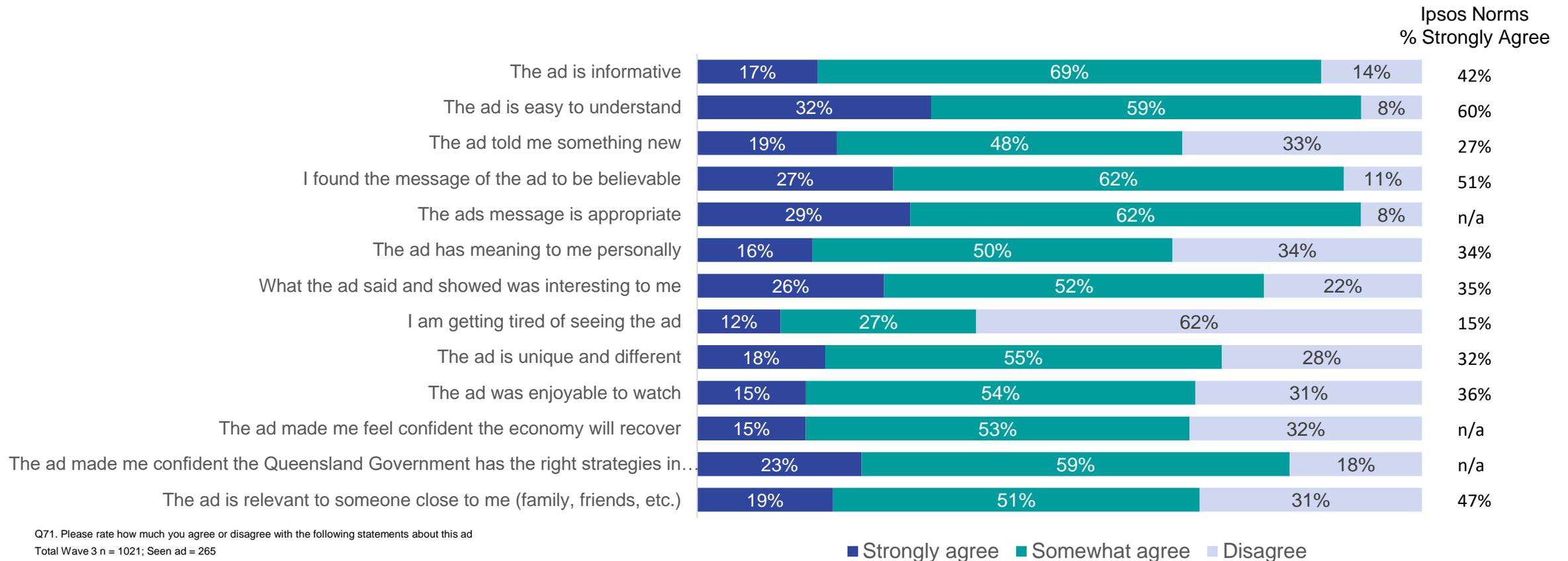


Q70 What are all the messages you can remember from this ad?
Seen ads Wave 3 n = 265

Unite and recover	2%
Covid-19/coronavirus	2%
We are on the road to recovery	5%
We have protected Queenslanders and saved lives	0%
Invest in industries for our state	9%
Innovate to create jobs for now and in the future	11%
Work better and smarter	0%
Boosting tourism/travel within Queensland	12%
Economic recovery	6%
Queensland is getting back to business/is open for business	3%
Total intended messages	63%
Remember the safety rules/be safe/COVID-19 safe	8%
Remember to social distance	9%
Wash your hands	2%
Stay home	2%
Restrictions are easing	9%
We are doing well/better	4%
Recovery/covid recovery	4%
We are in this together	2%
Move forward/get Queensland moving again	3%
Queensland/support Queensland	6%
Positive attitude/positive future for Queensland	2%
Pictures/images on the ad	4%
Get tested/get tested if you are feeling unwell	1%
Building/building Queensland	2%
Information about what is happening/a chart of where we are headed	2%
Get going again/Queensland is going again	1%
The stages of opening Queensland	2%
We're with you/we're here to help/you're not alone	2%
General positive comments e.g. It's a good ad, I liked it etc.	3%
None/nothing	6%
Other – unintended messages	8%
Don't know/not answered	12%
Total unintended messages	63%

CAMPAIGN DIAGNOSTICS

The campaign has fallen below Ipsos norms on all available diagnostics. The topic of COVID-19 cuts through but if it is not immediately distinguished as new information, important or relevant people are switching off and not taking out the message content.



Q71. Please rate how much you agree or disagree with the following statements about this ad
Total Wave 3 n = 1021; Seen ad = 265

To aid our analysis and interpretation of executional performance we make reference and comparison to our Ipsos Norms. When looking at advertising recognition scores for each channel we make comparisons to the Ipsos All Advertising (private and public sector) norm because all campaigns compete with each other for audience attention. When looking at diagnostic scores for individual campaign elements, we use the Ipsos government specific norm (public sector only). We use these norms as categories of advertising are very different, and therefore, whenever possible comparisons need to be made within a category when looking at reactions to advertising.

RECOMMENDATIONS

Awareness and understanding increases sentiment for support.

Communication of the Roadmap for Easing Restrictions has been received positively and high awareness is also associated with positive sentiment, however as these final stages have altered, awareness and confidence in compliance is reducing slightly. Queensland Government is seen as a trustworthy information source about Covid-19.

With the outbreaks in other states and regions Queenslanders continue to be aligned with the way Queensland Government is making decisions about border closure and easing restrictions with health risks as a priority. There is confidence amongst Queenslanders in how the Queensland Government is managing the restrictions easing and that we are responding appropriately. However, don't overlook the need to **continue to talk about health risks** as there is still some concern with a second wave forcing another lockdown.

There continues to be less confidence in how Queensland Government is managing the economic recovery because people are unaware of what is being done. Awareness about the Economic Recovery has increased slightly. Those that are aware of the Economic Strategy agree there is support from Queensland Government and have more positive sentiment for Queensland Government. Awareness of the strategy is not enough as people need to understand it well enough to be supportive.

CAMPAIGN RECOMMENDATIONS

Tweak creative to ensure the message receipt is on target

The campaign went to market on 18 June 2020, only 6 days before this research was completed. The campaign is competing in a clutter of COVID-19 communications and has cut through at 26% recognition of the campaign which is above the norm (26%). There is however an observed underperformance in the creative that is evidenced against a range of norms for advertising diagnostics. Whilst those that have seen the campaign are more likely to have also seen the other government communications (i.e. Initiatives, Economic Strategy and Roadmap) there is no campaign effect observed in relation to sentiment or support. Additional time in market may see the performance improve with repeated viewing, however the execution may need to strive to deliver the “newest information” first and reinforce that the topic communicated is distinctly about the economic recovery. In addition as the campaign will be repeated over time, the creative may need to have a change of device, colour or message up front to draw attention to any new information or messaging.

The media buy strategy appears to be aiming to reach 55-60% 18+ years with each person on average seeing the ad 1.5 times. This low frequency high reach strategy may account for higher recall of the campaign but lower message receipt. With COVID-19 related communications we see instant attention but also quick switch off if the information is not new or relevant to the here and now situation. The campaign delivers high level statements about investing for the future and this type of messaging may not be resonating with the audience who are looking for some immediacy in the solutions, particularly around employment solutions and business reopening. Queenslanders are keen to hear about the economy but this may be too early for this type of long term thinking, people are still very focussed on planning for now:

- Are businesses re-opening, if so will I get my job back or will there be jobs?
- How well are these businesses managing social distancing and hygiene, will I be safe?
- Do I feel comfortable returning towards normal?
- When will borders re-open, will I be safe?
- How do we support Queensland businesses and each other to get things back on track, what can I do to help?

There is good recall for branding, with the look and feel, but low recognition on what the campaign was trying to message. Those who did take out the messaging are also more likely to want borders opened, and we hypothesise they may be frustrated that there is little action for the economy to restart now, and little more than motherhood statements without supporting detail for the future investment. Considering the preferences for local level investments, Queenslanders may be wanting to hear – “*what’s in it for me in my area*”.

DASHBOARD – IMPACT

Question	Measure	Benchmark (wave 1)	Last wave (wave 2)	This wave (wave 3)	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	38	51	
	Impacted (red)	56	61	48	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	16	27	
	Impacted (red)	79	82	73	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	9	5	
	Appropriate response (green)	78	79	82	
	Under-reacting (orange)	15	12	12	
Q20b Most worried about in regards to economic impacts from COVID-19 (top 5)	Impact on the Aust economy (red)	-	36	41	
	Losing my job (orange)	-	10	9	
	Losing income due to salary reductions or investments (green)	-	12	8	
	Unable to find a job/unemployment (purple)	-	7	8	
	Risk to my friends/family health (blue)	-	7	8	

DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (wave 1)	Last wave (wave 2)	This wave (wave 3)	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	48	46	
	At their worst now (orange)	19	17	23	
	Worst is behind us (green)	14	17	14	
Q22 As restrictions are relaxed, confidence that Queensland's economy will have made a full recovery to pre-COVID-19 levels in	3-6 months (red)	10	10	8	
	12 months (orange)	24	22	15	
	2 years (blue)	43	43	39	
	5 years (green)	-	-	67	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	51	55	
	Not confident (red)	18	16	14	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	54	56	
	Not confident (red)	-	15	12	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	35	30	

DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (wave 1)	Last wave (wave 2)	This wave (wave 3)	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	26	21	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	-	52	
	No well (red)	-	-	11	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	65	65	
	Oppose (red)	-	9	9	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	34	39	
	Low support (red)	-	39	31	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	39	42	
	Low support (red)	-	20	17	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	49	54	
	Low support (red)	-	16	11	

DASHBOARD – RESTRICTIONS

Question	Measure	Benchmark (wave 1)	Last wave (wave 2)	This wave (wave 3)	Trend
Q30 Life after restrictions	Worse than before (red)	12	14	12	
	Same as before (orange)	45	45	48	
	Better than before (green)	21	18	19	
Q66 Interstate travel should be allowed between states with hot spots and multiple cases	No (red)	-	-	83	
	Yes (green)	-	-	9	
Q67 Travel allowed to Queensland for towns or regions continuing to record hot spots / multiple new cases per day	No (red)	-	-	85	
	Yes (green)	-	-	7	
Q24 Confidence the Queensland Government can manage the easing of restrictions	Confident (green)	59	67	71	
	Not confident (red)	12	12	10	

DASHBOARD – INFORMATION

Question	Measure	Benchmark (wave 1)	Last wave (wave 2)	This wave (wave 3)	Trend
Q1 Getting enough information to feel confident you know about ... (T2B = 5 very good + 4)	How to prevent the spread (red)	91	91	93	
	Current level of restrictions (orange)	79	78	76	
	Stages of restrictions easing (green)	71	71	67	
	How QLD economy will recover (blue)	29	31	36	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	73	67	
	Disagree (red)	11	8	10	
Q4 QLD Govt has managed the pandemic better than other states or territories	Agree (green)	65	72	75	
	Disagree (red)	8	9	7	
Q34 Aware of QLD Govt's Roadmap to Easing Restrictions	Yes, seen, read or heard	59	52	47	
Q36 Helpfulness of Roadmap to Easing Restrictions comms	Helpful (green)	68	71	77	
	Not helpful (red)	5	7	5	
Q68 See ads	Yes	-	-	26	

BACKGROUND

2

BACKGROUND AND OBJECTIVES

Findings will be used to inform communications for the recovery phase.

This research is to understand Queenslanders' sentiment and views on the impact of the COVID-19 pandemic. Extending on this, the Department of Premier and Cabinet also want to uncover Queenslanders' expectations and preferences for the journey Queensland should take out of the response phase into recovery – in particular, the staged easing of restrictions. The research will be used to shape the government's approach and communication for the COVID-19 recovery phase. The research covers:

- The impact of the COVID-19 pandemic on Queenslanders lives, their jobs and the economy
- The community's views around the economic impact and economic recovery
- The community's views about easing restrictions

This report covers the third wave of research which was conducted between Tuesday 23rd June to 25th June 2020. Wave 3 took on average 15 minutes to complete the online survey. A sample of n=1021 was sourced from commercial research panels. Subsequent waves of research are included for comparison:

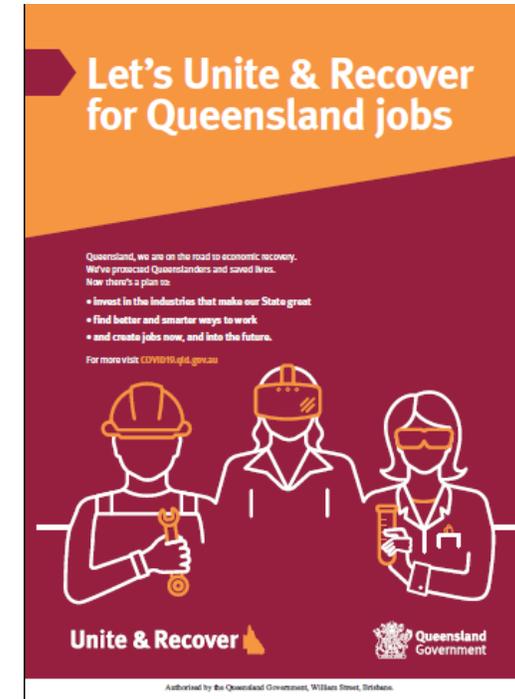
- Wave 1: 12th May to 14th May 2020; average 21 minutes; n=1603
- Wave 2: 3rd June to 4th June 2020; average 20 minutes; n=1018

The composition of survey respondents is displayed in the table on the next page. The responses in this report have been weighted to reflect the Queensland's population using 2016 ABS Census data.

The limitations for this methodology include:

- Biased towards those with internet and/or computer literacy
- Timing of the fieldwork in relation to the announcements of restriction easing
- Limited time in field may bias to those with more availability
- Vulnerable Queenslanders are less likely to be included in the sample frame and therefore participate in this mode of research.

On Friday 8 May 2020 the Premier Anastacia Palaszczuk released Queensland's Roadmap to Easing COVID-19 restrictions (the Roadmap). The Roadmap outlines a staged approach to giving Queenslanders more freedom to travel, participate in more activities and hold more gatherings. The Roadmap provides sensible and gradual steps to a COVID recovery that will reconnect our communities and keeps our economy moving by supporting business, industry and Queensland jobs. On Sunday 31st May the Premier announced an update to ease restrictions to Stage 2 at 12 noon on 1st June 2020, which was 11 days ahead of schedule.



SAMPLE

Survey respondents were from across Queensland with a range of age, gender and diversity of individuals and households.

n	Wave 1									Wave 2									Wave 3								
	SEQ			ROQ			QLD			SEQ			ROQ			QLD			SEQ			ROQ			QLD		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
18-39	54	62	116	43	230	274	97	292	390	52	94	146	54	128	182	106	222	328	33	37	70	13	51	64	46	88	134
40-64	159	166	325	152	206	358	311	372	683	82	155	237	80	129	209	162	284	446	114	116	232	97	134	231	211	250	463
65+	175	130	305	135	90	225	310	220	530	70	51	121	72	51	123	142	102	244	125	83	208	127	89	216	252	172	424
Total	388	358	746	330	526	857	718	884	1,603	204	300	504	206	308	514	410	608	1,018	272	236	510	237	274	511	509	510	1,021

Diversity

n	Wave 1			Wave 2			Wave 3		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Aboriginal or Torres Strait Islander	7	23	30	13	26	39	7	11	18
Culturally or linguistically diverse background	67	70	137	72	53	125	42	40	82
Person with disability	113	117	230	56	63	119	82	78	160
Person most at risk	240	242	482	141	152	293	151	172	323

Education Level

n	Wave 1			Wave 2			Wave 3		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Year 10 or equivalent or below	110	127	237	57	81	138	61	97	158
Year 12 or equivalent or below	123	195	318	84	101	185	88	79	167
Trade/Technical/Vocational training	212	258	470	140	153	293	154	172	326
Undergraduate Degree	184	168	352	134	110	244	131	105	236
Postgraduate Degree	109	99	208	79	63	142	72	52	124
Prefer not to say	8	10	18	10	6	16	4	6	10

SAMPLE

Survey respondents were from all industries and both in and out of labour force prior to coronavirus pandemic.

Employment status before Coronavirus pandemic

n	Wave 1			Wave 2			Wave 3		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Employed permanent full-time or part-time	249	280	529	208	193	401	178	139	317
Employed, casual/temporary	48	117	165	59	60	119	41	42	83
Self-employed / business owner	53	53	106	35	34	69	39	37	76
Unemployed (looking for work)	54	68	122	33	29	62	23	29	52
Not working or looking for work	335	329	664	157	186	343	224	250	474
Prefer not to say	7	10	17	12	12	24	5	14	19

QUESTIONS CHANGES PER WAVE

Focus this wave is on easing restrictions, economic recovery, awareness of campaign, and border closure.

Questions no longer relevant were removed and new questions added, and some existing questions were edited. Where questions are repeated comparisons are made in the results that are statistically significant.

Section	Wave 1	Wave 2			Wave 3		
Screening	SQ1-SQ5	SQ1-SQ5			SQ1-SQ5		
Demographics	Q37-Q45	Q37-Q45					
Personal impacts	1-15	Deleted Q6 Q14 Q15	Edited Q3 – text edit Q11 – add code 6/7 Q13 – add code 13/14		Deleted Q2, Q5, Q10, Q11, Q12, Q13,		Added Q72
Future perceptions and goals / Economic Recovery	16-26	Delete Q16 Q17 Q20 Q21 Q23 Q26	Edits Q22 – delete code 1 change timing of code 2	Add new questions Q20a Q20b Q47-Q58	Delete Q52, Q53, Q54, Q56, Q57, Q58,	Added Codes Wave 3 Q27 (1,2,3,4,5,6) Q28 (10, 11) Q22 (6) Deleted codes Q22 (1,2)	Added Q63, Q64, Q65, Q68, Q70, Q71,
Restrictions	27-36	Delete Q31 Q32 Q33	Edit Q27 – change to stage 3 statements Q28 – delete code 3,4,5 and add 5, 6, 7, 8, 9 Q29 – add code 15/16/17	Add new questions Q59-Q62	Q35, Q37, Q39, Q60, Q62	Edits Wave 3 Q28, Q28 (1) Q48a, Q48b, Q48c (added code frame) Deleted codes Q28 (3,4,5) Q29 (1,2,3) Q22 (1,2)	Added Q66, Q67,

DETAILED FINDINGS

Online survey Wave 3

3

IMPACTS

How has the Coronavirus impacted
Queenslanders work life and their worries

3.1



WORK CONTINUES TO BE IMPACTED BY CORONAVIRUS

Coronavirus affected work situation EMPLOYED

Column %	Wave 1			Wave 2			Wave 3		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	44%	42%	43%	33%	44%	38%	45%	57%	51%
Yes, I am working more	7%	8%	8%	7%	10%	8%	7%	5%	6%
Yes, I am working less than I would like	20%	21%	21%	29%	21%	25%	20%	17%	19%
Yes, I have been stood down temporarily	6%	9%	7%	10%	11%	10%	7%	6%	7%
Yes, I have lost my job	8%	5%	6%	10%	5%	7%	8%	6%	7%
Yes, it has affected my work situation in another way	14%	14%	14%	11%	10%	10%	11%	8%	10%
Prefer not to say	1%	1%	1%	0%	1%	1%	1%	2%	2%
NET employee impact	55%	57%	56%	66%	56%	61%	54%	41%	48%

Q8 Has the Coronavirus pandemic affected your work situation?

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Employee n=520; Wave 3 n=1021 Total Employee = 551

Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

Column %	Wave 1			Wave 2			Wave 3		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	21%	13%	18%	16%	19%	35%	27%
Yes, I am working more	2%	11%	6%	4%	4%	4%	3%	4%	4%
Yes, my business has less income	56%	38%	47%	43%	51%	47%	39%	44%	42%
Yes, I have had to close my business temporarily	15%	19%	17%	29%	16%	23%	31%	16%	23%
Yes, I have had to shut down my business permanently	1%	3%	2%	0%	2%	1%	0%	0%	0%
Yes, it has affected my work situation in another way	9%	5%	7%	7%	7%	7%	7%	1%	4%
Prefer not to say	0%	0%	0%	4%	0%	2%	0%	0%	0%
NET Impacted SELF / EMPLOYED / BUSINESS OWNER	83%	76%	79%	83%	82%	82%	81%	65%	73%

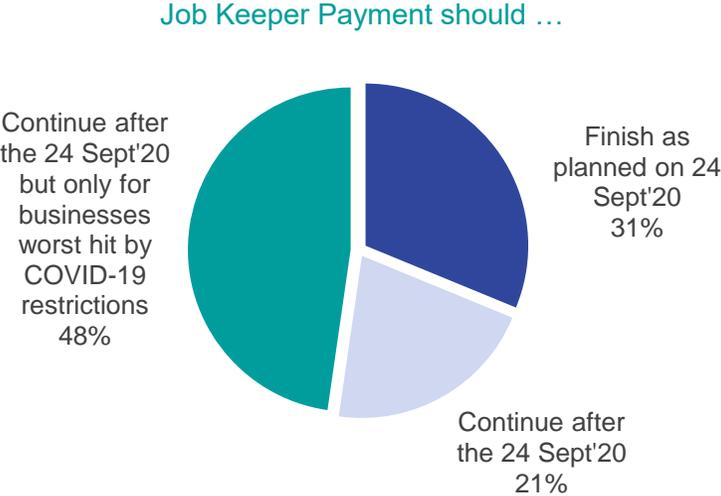
Of those Queenslanders surveyed in Wave 3 who were employed had their work impacted (48%) which is less than in previous waves (Wave 1 56%; Wave 2 61%) but this was not statistically significant. Queenslanders seem to be getting hours back with less working less hours than they would like to (Wave 3 19%; Wave 2 25% ; Wave 1 21%), or stood down temporarily (Wave 3 7%; Wave 2 10%; Wave 1 7%). But less were affected in other ways like working from home, salary reductions or forced annual leave (10% June vs 14% May).

The impact on self-employed or business owners is less but this is not statistically significant (Wave 3 73%; Wave 2 82%; Wave 1 79%).

JOB KEEPER SHOULD KEEP GOING

More support for those hard hit businesses

Queenslanders surveyed feel that the Job Keeper payment should continue (21%) or continue for only those worst hit businesses (48%). Almost a third (31%) feel it should finish as planned on 24 September 2020. No statistically significant differences observed across demographics or regions.

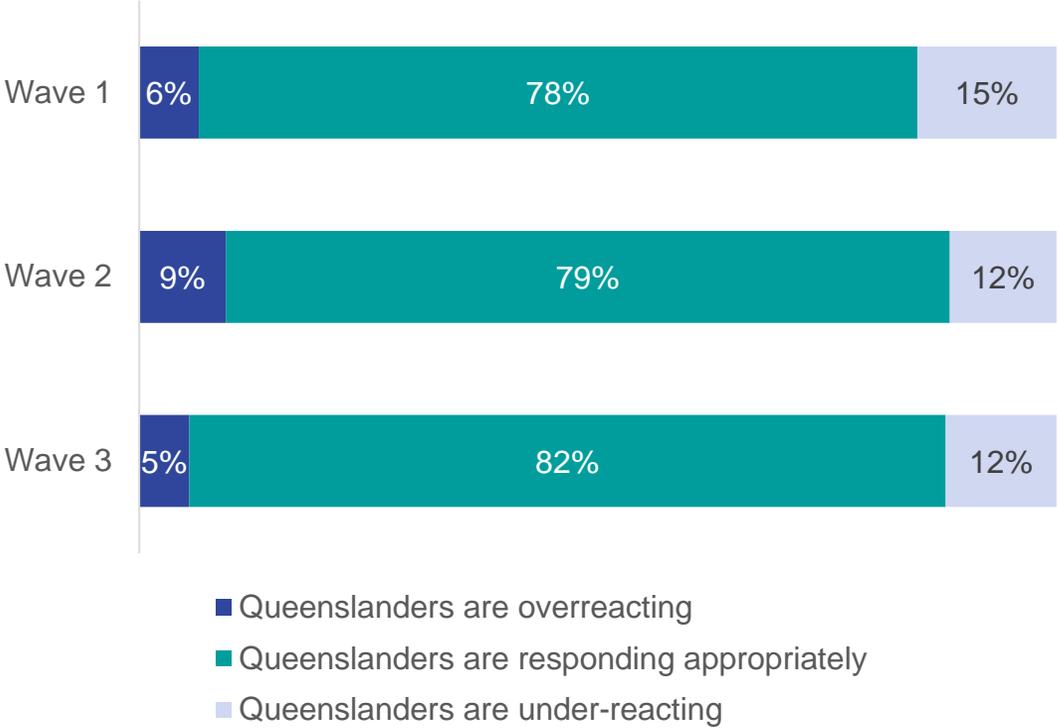


Q72 The Federal Government's Job Keeper payment is open to eligible employers to enable them to pay their eligible employee's salary or wages of at least \$1,500 (before tax) per fortnight ends on 24th September 2020. Which of the following do you agree with most?
Total Wave 3 n = 1021

QUEENSLANDERS STILL FEEL WE GOT IT RIGHT

Majority continue to feel Queenslanders are responding appropriately.

In Wave 3 eight out of ten (82%) Queenslanders in the survey felt that Queenslanders are responding appropriately to the threat of Coronavirus, which is the similar to previous waves (Wave 2 79%; Wave 1 78%). Employees with their work impacted are more likely to say that Queenslanders are overreacting (9%) than employees that have not had their work impacted (2%).



Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

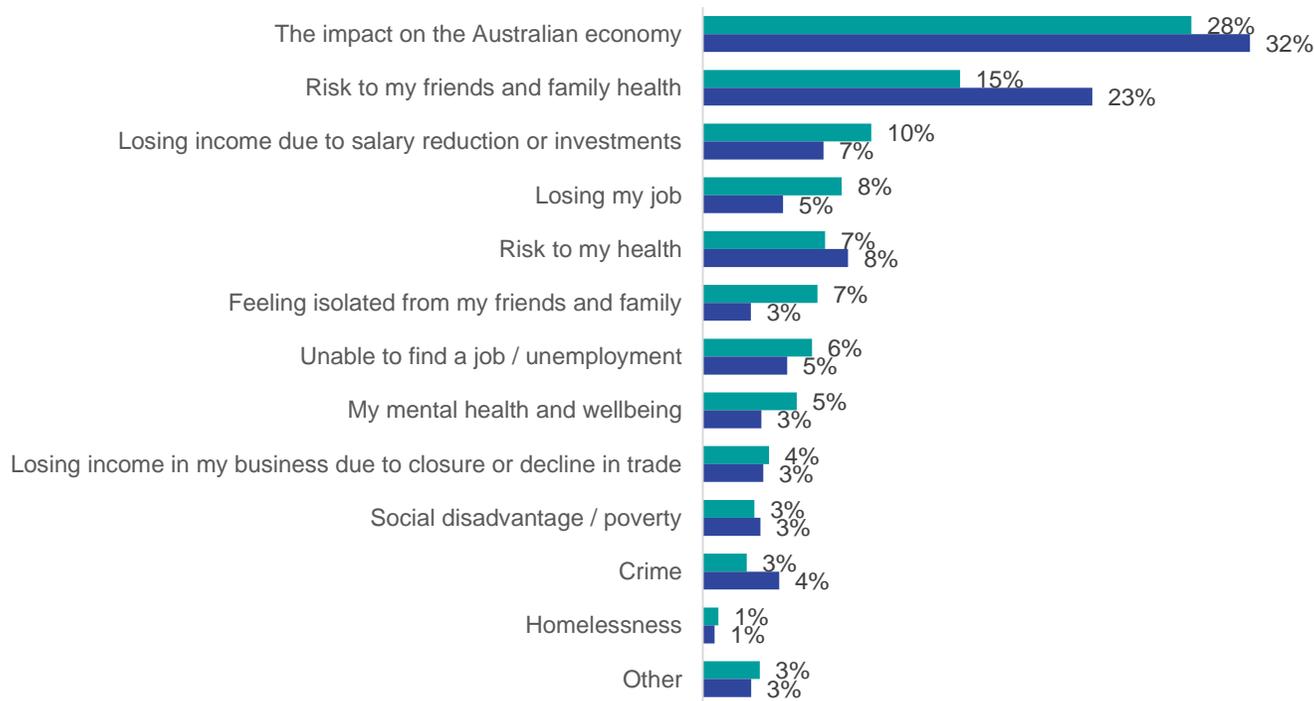


IMPACT ON ECONOMY IS TOP CONCERN

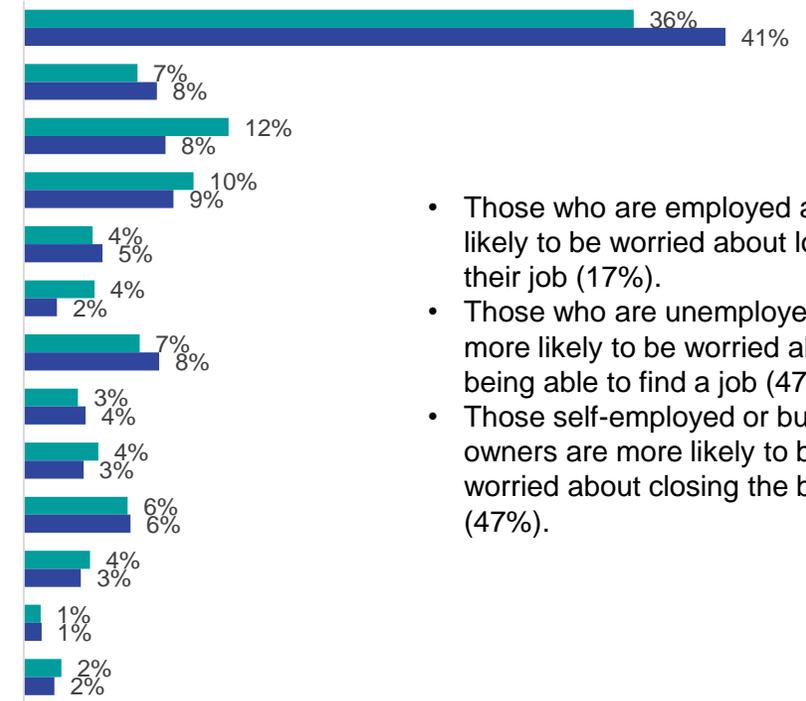
Queenslanders are most worried about the impact on the Australian Economy.

When asked in general about the global Covid-19 pandemic, a third of those surveyed said that the impact on Australian economy was their biggest worry (32%) and some said the risk to friends and family health (23%) or risk to my health (8%) as the top reasons. A similar response when asked specifically what worries them most about the economic impacts of the Covid-19, four in ten Queenslanders surveyed worry about the impact on the Australian Economy (41%), whilst some worry about direct impacts like losing their job (9%), and are worried about losing income due to salary reduction or investments (8%), the risk to friends and family health (8%) or unable to find employment (8%). There are statistical differences between Wave 3 and Wave 2 with more people worried about a health risk to family of friends (Wave 3 23%; Wave 2 15%) and less people feeling isolated from family (Wave 3 3%; Wave 2 7%).

Most worried about in relation to the Covid-19 global pandemic



Most worried about in relation to economic impacts from Covid-19



- Those who are employed are more likely to be worried about losing their job (17%).
- Those who are unemployed are more likely to be worried about not being able to find a job (47%).
- Those self-employed or business owners are more likely to be worried about closing the business (47%).

ECONOMY

Queenslanders views
on economic recovery



3.2

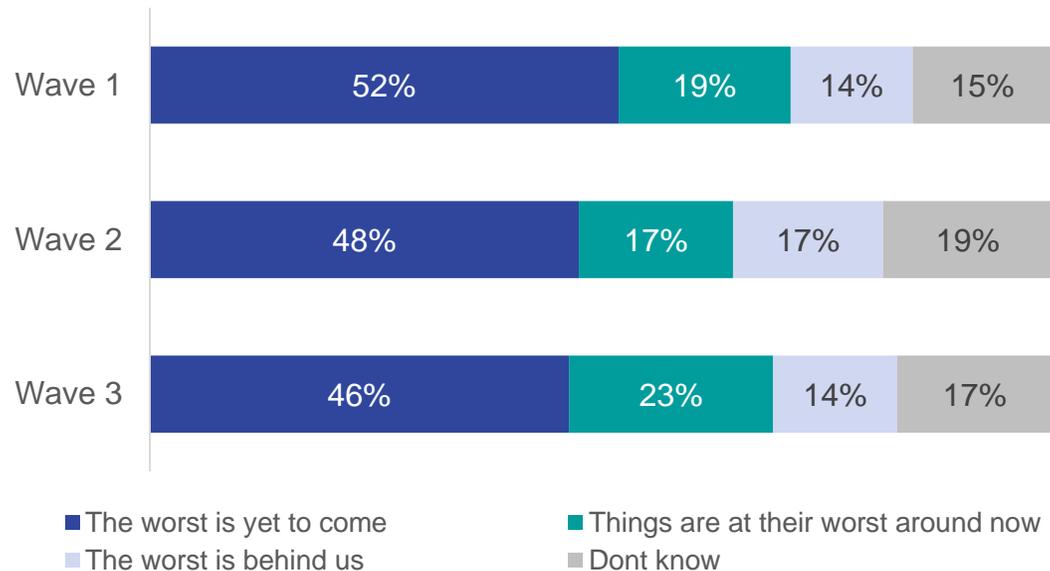


QUEENSLANDERS EXPECTATIONS ABOUT THE ECONOMY

Half continue to feel the worst is yet to come.

In Wave 3 almost half of those surveyed (46%) feel that the worst is yet to come with the economy in Queensland.

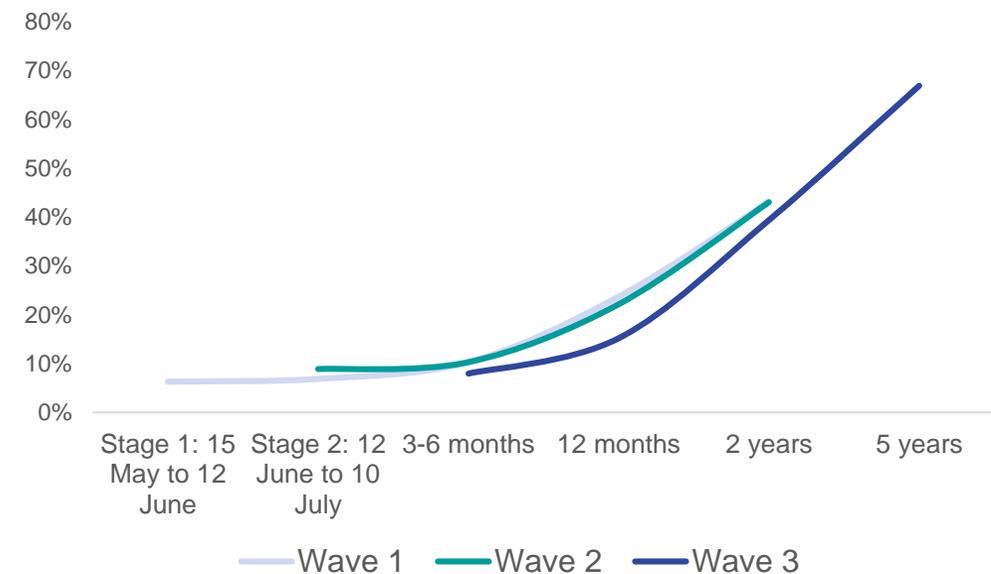
- Adults aged 18-34 years were the least likely to feel that the worst is yet to come (32%).
- Adults aged over 65 years were more likely to feel that the worst is yet to come (60%).



Half continue to feel full recovery in two years.

As restrictions are relaxed, Queensland's confidence that the economy will have made a full recovery to pre-COVID-19 levels increases in time, however just over a third feel that will be in two years time (39%) with two thirds feeling that it will be 5 years (67%). No statistically significant differences by region.

- Adults 18-34 year old Queenslanders surveyed are more likely to say 5 years (79%).
- Adults aged over 65 years old Queenslanders surveyed are less likely to say 5 years (55%).



Q19 What do you expect will happen with the economy in Queensland?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

Q22 As restrictions are relaxed, how confident are you that Queensland's economy will have made a full recovery to pre-COVID-19 levels in...?:
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

QUEENSLANDERS CONFIDENCE

Half agree that QLD Government can manage the economic recovery.

In Wave 3 half of Queenslanders surveyed (55%) felt confident that the Queensland Government can manage the economic recovery. This is a statistically significant increase in Wave 3.

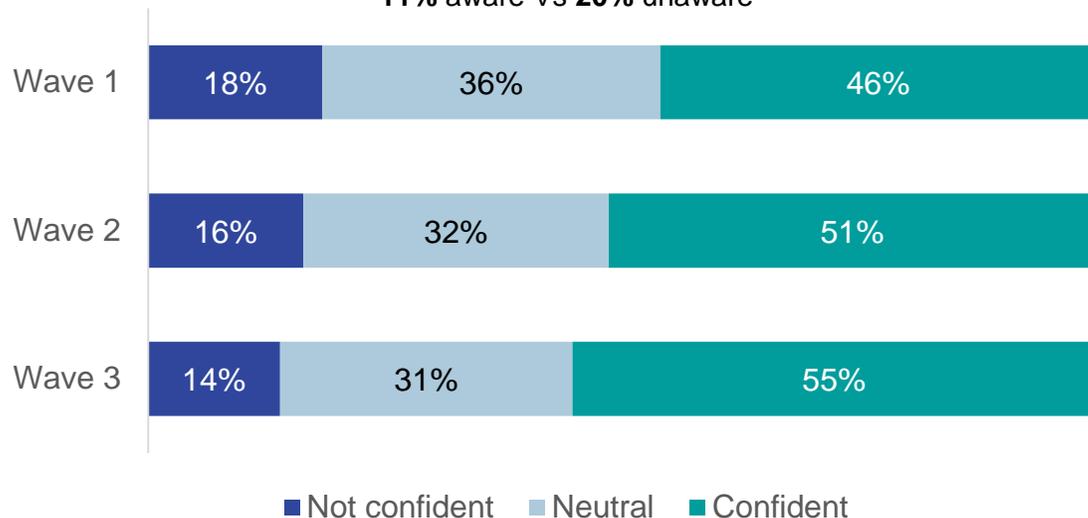
Adults aged 65 years or older were more likely not to feel confident (22%).

Those aware of the Economic Strategy are more likely to feel confident QLD Gov can manage the economy.

73% aware Vs 48% unaware

Those unaware of the Roadmap to Easing Restrictions are more likely not to feel confident that QLD Gov can manage the economy.

11% aware Vs 20% unaware



Half agree that QLD Government has handled Covid-19 for economic advantage in the long run.

As restrictions are relaxed, just over half (56%) Queensland's confidence that the Queensland Government has handled Covid-19 will be to the State's economic advantage in the long run.

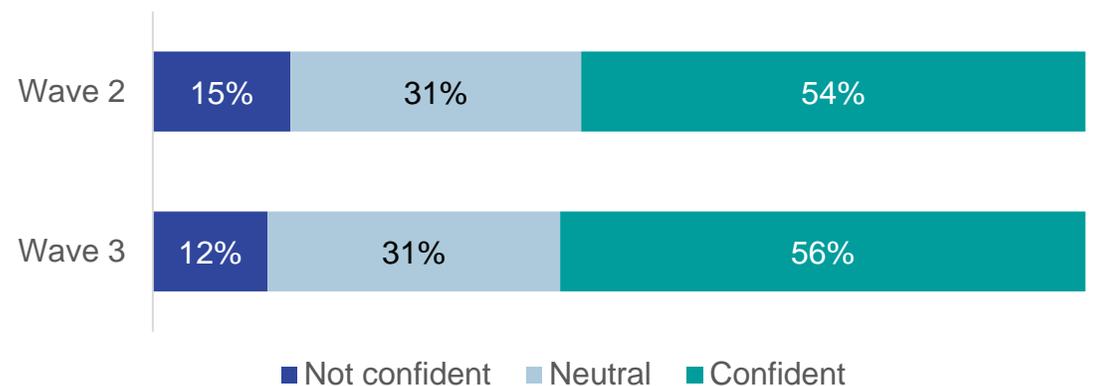
Adults aged 65 years or older were more likely not to feel confident (20%).
Self-employed and small business were more likely not to feel confident (27%)
Those most at risk of Coronavirus were more likely not to feel confident (18%)

Those aware of the Economic Strategy are more likely to agree QLD Gov are handling for economic advantage in long run.

73% aware Vs 46% unaware

Those aware of the Roadmap to Easing Restrictions are more likely to agree that QLD Gov are handling for economic advantage in long run.

66% aware Vs 43% unaware



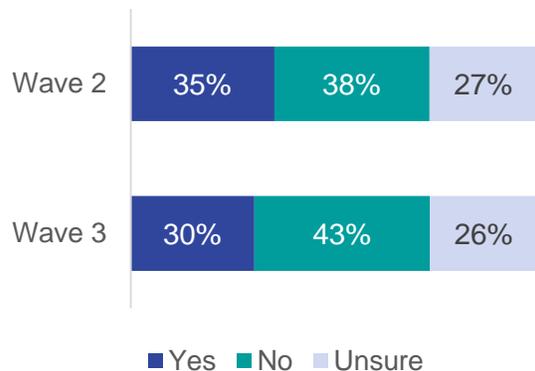
SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Only one in three have heard about the Economic Initiatives, and a fifth aware of the Economic Strategy. Of those aware of the strategy two thirds are supportive.

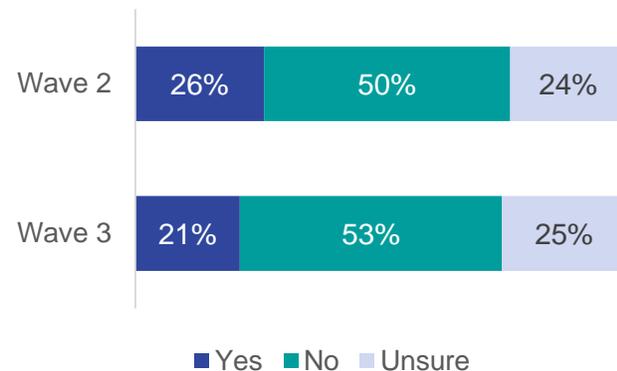
Those Queenslanders surveyed who were aware of the Roadmap to Easing Restrictions were more aware of initiatives (44%) and the strategy (35%) than if not (14%, 8% respectively). Full time employees more aware of major economic initiatives than females (37%) than others.

Of the 211 Queenslanders who were aware of the Economic Strategy, half said they understood it well (52%) and a third were neutral (37%) and 11% said not well. Two thirds (65%) of those aware of the Economic Strategy were supportive. No statistically significant differences observed.

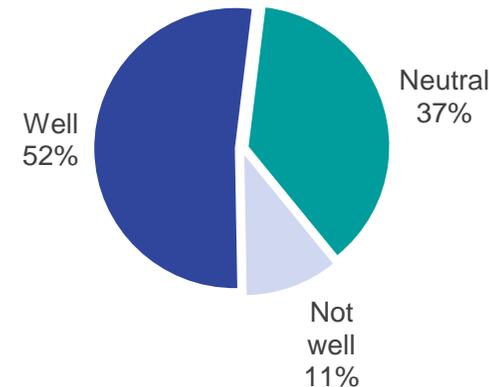
Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?



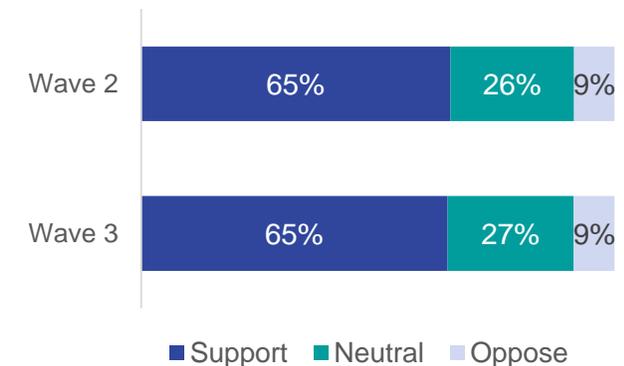
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



How well do you understand the State Government's Economic Recovery Strategy?



Do you support the direction of State Government's Economic Recovery Strategy?



Q46 Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?
Total Wave 2 n = 1018, Wave 3 n=1021; Total Wave 3 n=1021

Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
Total Wave 2 n = 1018

Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
Wave 2 n = 252; Wave 3 n = 211

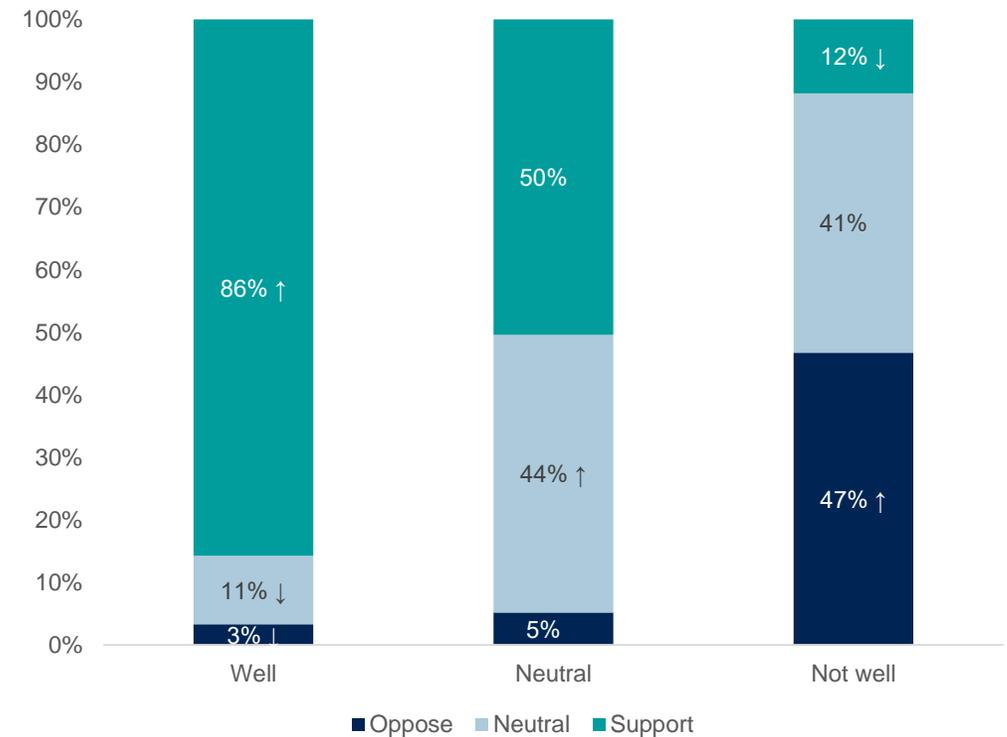
Q48 On a scale of 1 to 10, where 1 is "strongly oppose" and 10 is "strongly support" – Do you support the direction of State Government's Economic Recovery Strategy?
Wave 2 n = 252; Wave 3 n=211

UNDERSTANDING ASSOCIATED WITH SUPPORT

Awareness is not enough, people need to understand the strategy better before they can support it.

Queenslanders who were aware of the strategy and said they understood it were more likely to be supportive (86%) than those who said they did not understand the strategy (12%).

Those that are opposed to the strategy are more likely to say that they do not understand it very well (47%).



SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Those who support the strategy feel it will lift the economy (62%) as well as positive sentiment for handling the restrictions in stages (54%) and creating or keeping people in jobs (54%), doing the right thing by keeping borders closed (49%).

SUPPORT

65%

Will help lift the economy	62%
Restrictions are be gradually lifted, and it has been handled in stages	54%
Keeps people in jobs or creates more jobs	54%
They have done the right thing by keeping our borders closed	49%
Right approach as it keeps us safe and looks after our health and well being	46%
It supports tourism and promotes local tourism	41%
It looks after small business and helps affected industries	41%
Its a good strategy for all Queenslanders	33%
It is doing the right things and heading in the right direction	31%
It is a recovery package where they have an action plan	30%
Need to get things moving and get back on track	27%
Developed with specialised knowledge and experts	22%
The strategy is detailed, well thought out and logical	19%
It will be for the best	18%

Those who are neutral are still uncertain and feel there are too many unknowns and will wait to see how the situation unfolds (70%), whilst others are concerned about taxes increasing (46%) or they do not have enough information (19%) or detail (19%) to form an opinion.

NEUTRAL

27%

So many unknowns still to be faced and I will have to see how the situation goes	70%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	46%
Not enough real information available and too many mixed messages	19%
I would need to analyse it in more detail and I would need more information	19%
I don't know enough to say	17%
We are on the right track and then other times we are not	17%
Some families missed out completely and some people get no support	14%
I don't trust them to keep their word	11%

Those who are opposed don't trust the Government to keep their word (72%) or feel there are too many mixed messages (69%), whilst others don't feel it helps small business (63%), or that some families missed out (51%) and concerned about taxes increasing (50%).

OPPOSE

9%

I don't trust them to keep their word	72%
Not enough real information available and too many mixed messages	69%
Doesn't address core businesses concerns and small business are suffering	63%
Some families missed out completely and some people get no support	51%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	50%
Too little, too late, too slow to act	38%
Doesnt address core tourism concerns and tourism is suffering	33%
Restrictions should have been eased and we have stayed in lock down too long	25%
I feel we should open our borders	25%

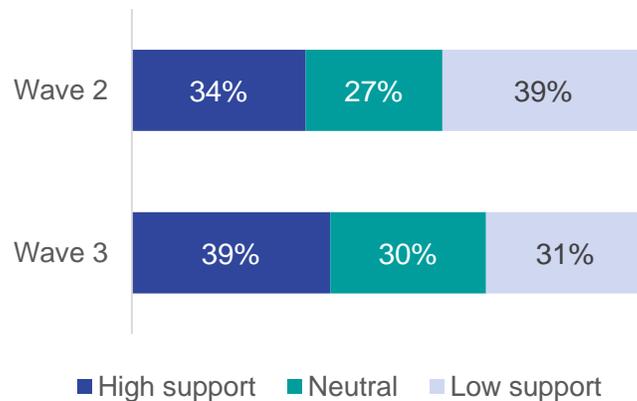
QLD GOVERNMENT SUPPORT

Awareness of how Queensland Government is supporting Queenslanders needs to increase.

Only a third of self employed or small business owners (39%) feel supported by Government and four out of ten (42%) Queenslanders surveyed feel Queensland Government is supporting small business. Half feel the Queensland Government are supporting the community (54%). Neutral responses indicate that there is a lack of awareness about what Queensland Government is doing. No statistically significant differences observed between waves, demographics or location.

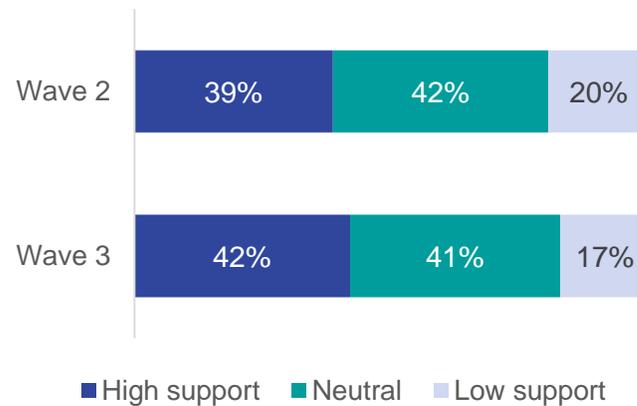
Awareness of the Economic Strategy is associated with more agreement that there is enough support from Qld Gov.
 Enough support for small business through this pandemic and recovery
53% aware Vs **32%** unaware
 Enough support for the community through this pandemic and recovery
61% aware Vs **46%** unaware

Are you getting enough support from the government as a **small business owner or self-employed**?



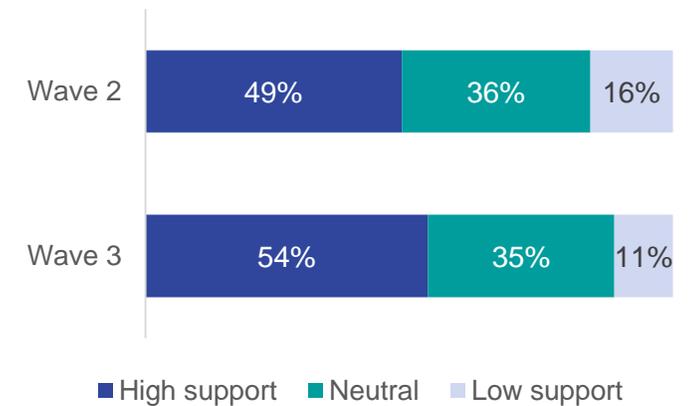
Q49 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support"- Are you getting enough support from the government as a small business owner or self-employed?
 Total Wave 2 n = 69; Wave 3 n=76

Is the Queensland Government is doing enough to support **small business** through this pandemic and recovery?



Q50 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support small business through this pandemic and recovery?
 Total Wave 2 n = 1018; Wave 3 n=1021

Is the Queensland Government is doing enough to support **the community** through this pandemic and recovery?

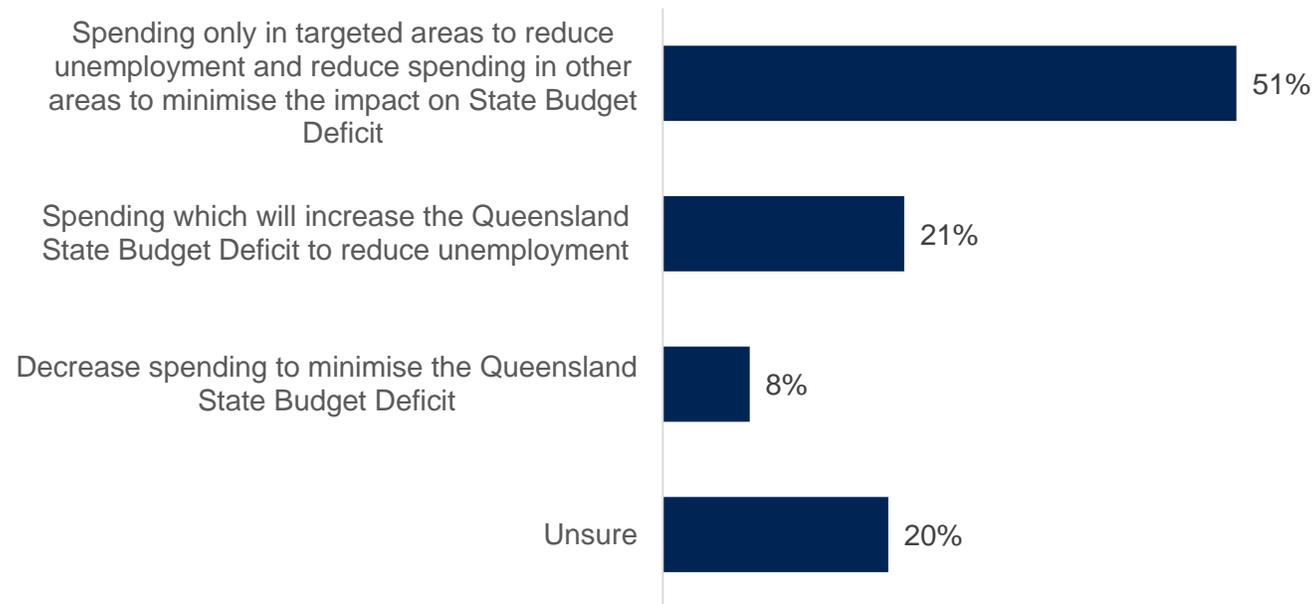


Q51 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support the community through this pandemic and recovery?
 Total Wave 2 n = 1018; Wave 3 n=1021

SPENDING WISELY AND WATCHING THE DEFICIT

Over half feel spending in target areas should be balanced with saving in others

Managing the State Budget



Queenslanders surveyed are wanting spending to occur to reduce unemployment. Half (51%) would like to see that spending in targeted areas to reduce unemployment but also reducing spending in other areas to minimise the impact on the State Budget Deficit. A fifth (21%) want spending to increase knowing the deficit will increase. Only one in ten don't want additional spending to increase the State Budget Deficit. A fifth (20%) are also unsure.

Q63 In terms of managing the State Budget. Which is most important to you?
Total Wave 3 n = 1021

ECONOMIC STRATEGIES TO FOCUS ON FOR RECOVERY

Local solutions, skills and targeted infrastructure investments rank as most important.

Almost two thirds (62%) of Queenslanders surveyed chose locally tailored economic, infrastructure and workforce solutions in their top three strategies. Over half (59%) of Queenslanders surveyed selected building skills capacity of the workforce to attract and retain talent within their top three strategies and just under half (47%) want targeted infrastructure investments to leverage previous investment and catalyse economic development top opportunities. Younger Queenslanders (18-39 years old) were more likely to rank “providing a competitive business environment to enable investment” lower than other age groups. Older Queenslanders (65 years and older) were more likely to rank “Enabling digital connectivity and literacy” lower than other age groups. No statistically significant differences observed across regions.

Row %	Top 3 Rank	Rank 1 - most important	2	3	4	5	6	7	8	Rank 9 - least important
Developing locally tailored economic, infrastructure and workforce solutions	62%	26%	23%	13%	8%	9%	6%	6%	6%	4%
Building the skills capacity of the Queensland workforce to attract and retain talent	59%	24%	18%	17%	13%	9%	5%	7%	3%	4%
Targeting infrastructure investments that leverage previous investment and catalyse economic development opportunities	47%	20%	16%	11%	11%	8%	12%	8%	8%	7%
Providing a competitive business environment to enable investment	38%	9%	14%	14%	16%	11%	10%	7%	10%	9%
Investing in research development and innovation	33%	6%	10%	17%	10%	15%	15%	11%	11%	5%
Facilitating growth in clean energy and technology	33%	11%	10%	12%	10%	9%	8%	11%	14%	15%
Accessing global markets to reinforce key existing markets and consider opportunities to diversify	24%	7%	7%	11%	8%	10%	10%	11%	11%	26%
Enabling digital connectivity and literacy	21%	4%	8%	9%	11%	9%	11%	15%	18%	14%
Investing in smart technologies, devices and industries	19%	4%	6%	9%	11%	15%	16%	18%	12%	9%

Q65 In relation to the following economic strategies, please rank the following in order of most important to least important for the Queensland Government to focus on for the Economic Recovery?
Total Wave 3 n = 1021

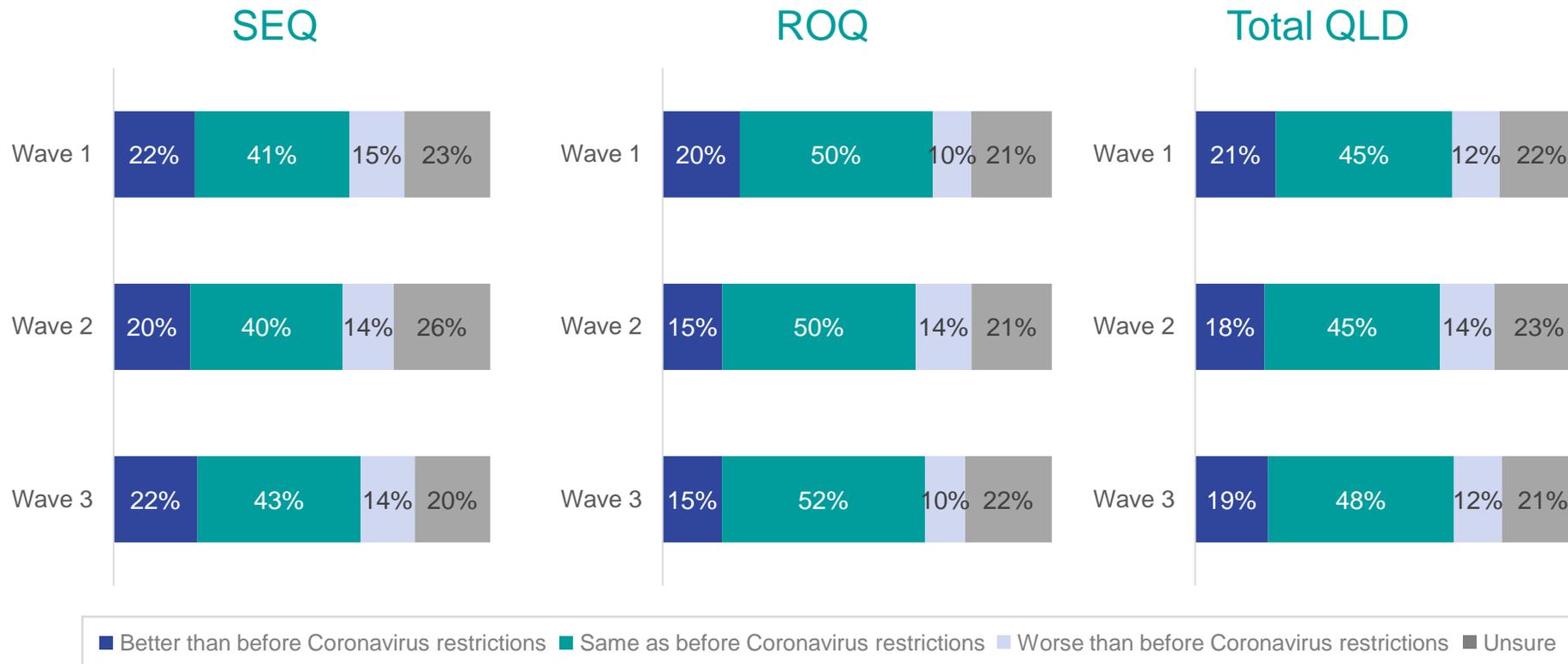
RESTRICTIONS

3.3



MOST FEEL LIFE WILL BE THE SAME OR BETTER AFTER RESTRICTIONS EASE

Life will be worse for those whose work has been impacted or casual and temporary employees.



48% Life will be same
 ↑ 65+ years (58%)
 ↑ Work not impacted employee (54%)
 ↑ Not working or looking for a job (57%)

19% Life will be better
 ↑ 18-39 years (27%)

12% Life will be worse
 ↑ Work impacted employee (20%)
 ↑ Casual employee (22%)

21% Unsure

Q30 What will your life be like after restrictions ease?
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021



BORDER CLOSURES BY REGIONAL BREAKDOWN

Survey completed 23 – 24 June 2020

Almost half Queenslanders surveyed (47%) agree to open borders with other states with similar number of COVID-19 cases as Queensland. This is consistent with the last wave of research in early June (51%). Almost a third (34%) disagree about opening the borders between states with similar number of cases.

Overall the Queenslanders surveyed do not want to open the borders between states (82%) or towns or regions (85%) where there are hot spots or multiple new cases.

There are no statistically significant differences in these results between South East Queensland and the rest of Queensland. There are no statistically significant differences in these results between the QLD Health HHS regions. There are no statistically significant differences observed between age, gender and location.

The only statistically significant difference observed was Queenslanders surveyed who are aware of the Economic Recovery Strategy (↑17) were more likely to agree to open borders between states with hot spots and multiple cases, than those who were not aware of the strategy (8%).

OPEN BORDERS BETWEEN STATES WITH SIMILAR CASES

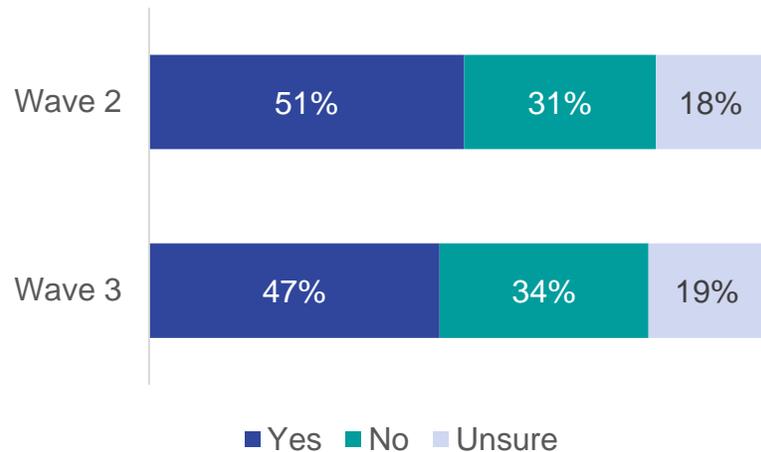
Survey completed 23 – 24 June 2020

47%

Agree that interstate travel should be allowed between states with similar cases of Covid-19

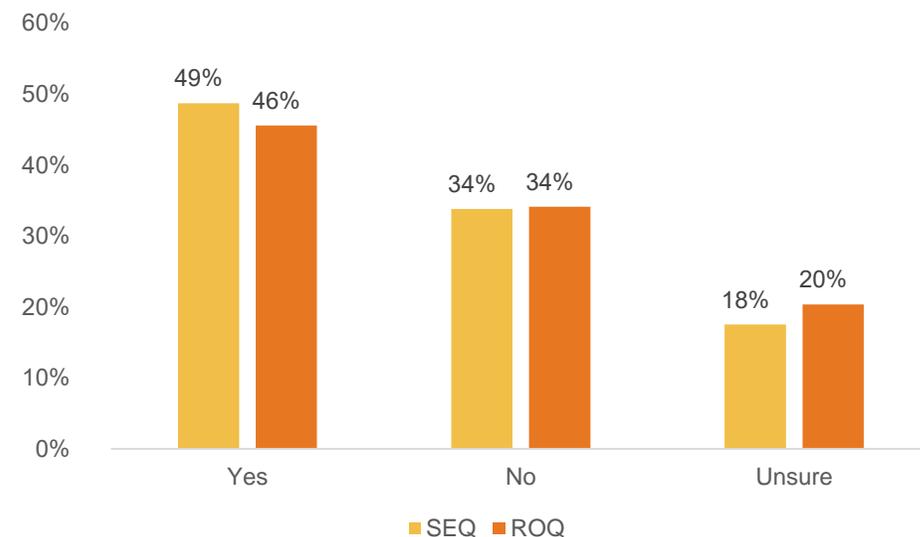
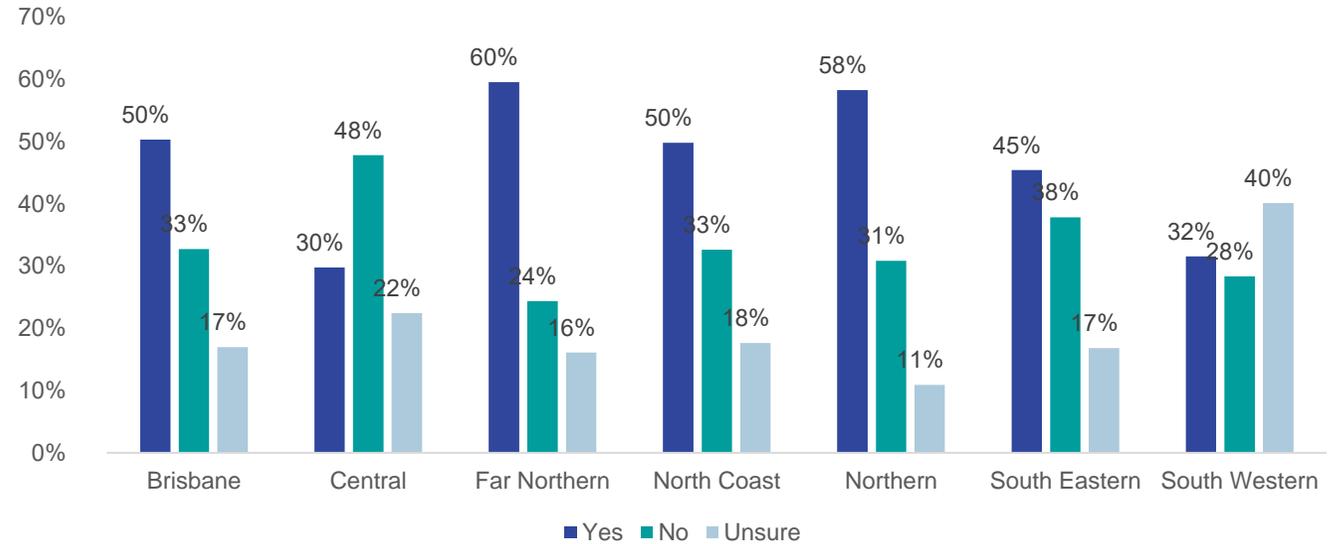
No significant differences age/gender/location
No significant difference between waves.

If some state and territories have the same number or less cases of Covid-19 than Queensland, should travel between these states be allowed?



Q59 If some state and territories have the same number or less cases of Covid-19 than Queensland, should travel between these states be allowed? (i.e. the borders between these states and territories be re-opened)

Total Wave 2 n = 1018, Total Wave 3 n = 1021



OPEN BORDERS BETWEEN STATES WITH HOT SPOTS

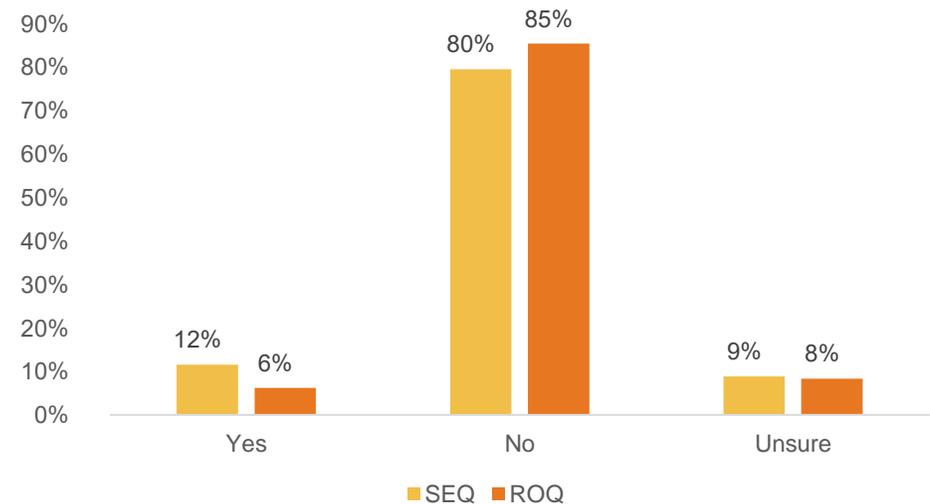
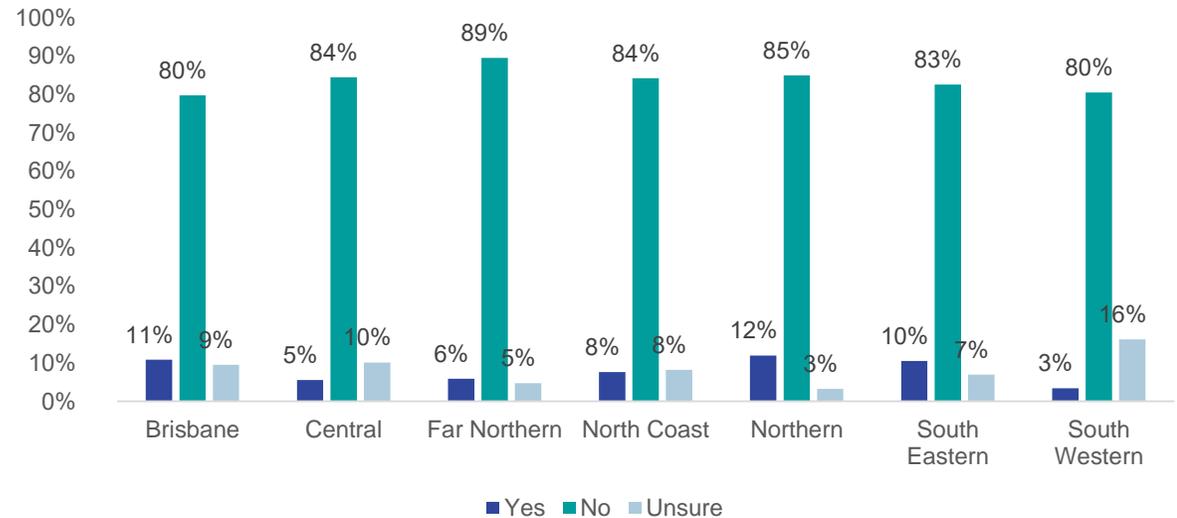
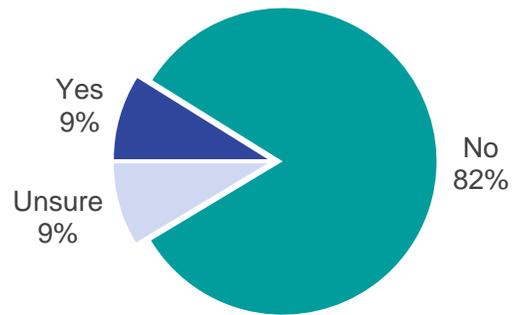
Survey completed 23 – 24 June 2020

9%

Agree that interstate travel should be allowed between states with hot spots and multiple cases

No significant differences age/gender/location
 ↑ 17% Heard/Seen Economic Recovery Strategy

For states and territories continuing to record hot spots or multiple new cases per day, should travel be allowed to Queensland?



Q66 For states and territories continuing to record hot spots or multiple new cases per day, should travel be allowed to Queensland? (i.e. the borders between these states and territories be re-opened)

Total Wave 3 n = 1021



OPEN BORDERS BETWEEN TOWNS/REGIONS WITH HOT SPOTS

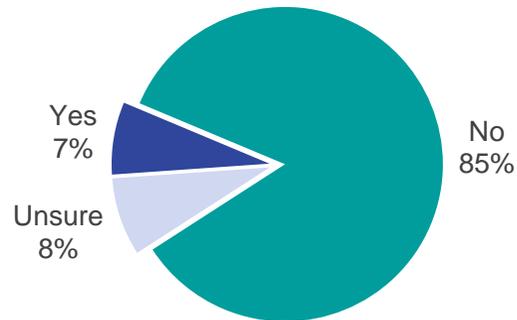
Survey completed 23 – 24 June 2020

7%

Agree that interstate travel should be allowed between towns or regions with hot spots and multiple cases

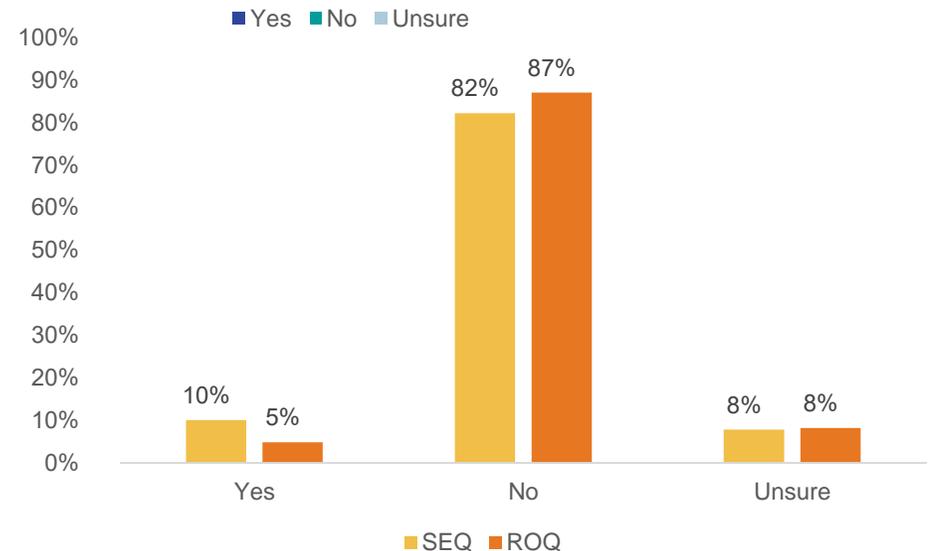
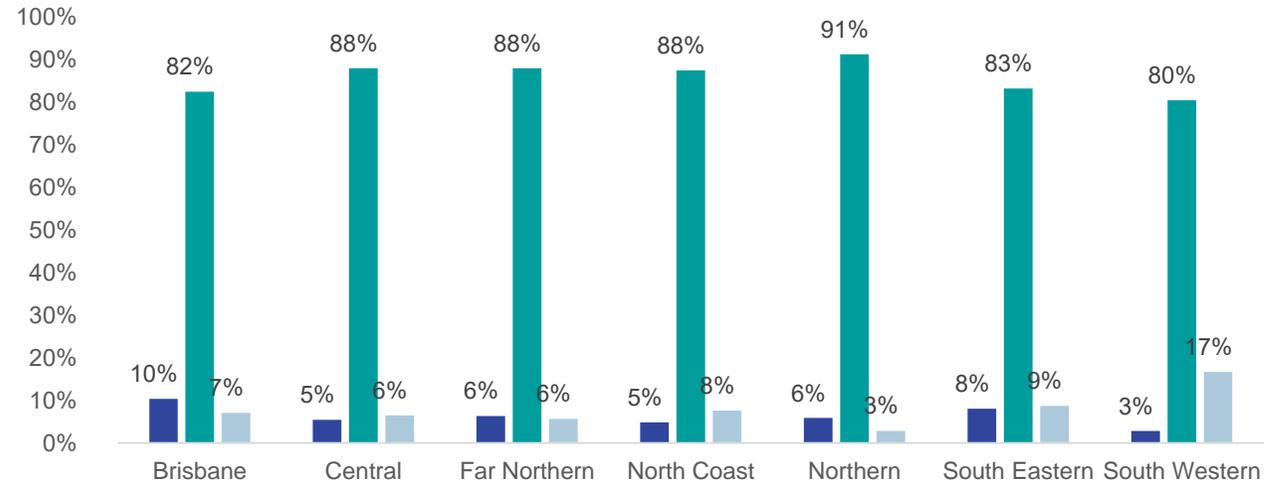
No significant differences age/gender/location

For towns or regions continuing to record hot spots / multiple new cases per day, should travel be allowed to Queensland?



Q67 For towns or regions continuing to record hot spots / multiple new cases per day, should travel be allowed to Queensland? (i.e. the borders open for people coming from these specific areas be re-opened)

Total Wave 3 n = 1021



CONFIDENCE CONTINUES TO INCREASE ON MANAGING THE EASING OF RESTRICTIONS

Those aware of the Roadmap and the Economic Strategy are more confident.

Seven in ten (71%) Queenslanders surveyed in Wave 3 are confident that Queensland Government can manage the easing of restrictions which has increased since Wave 1 (59%) and Wave 2 (67%).

Those aware of the Economic Strategy are more likely to feel confident QLD Gov can manage easing restrictions (**80%** aware Vs **65%** unaware)

Those aware of the Roadmap to Easing Restrictions are more likely to feel confident that QLD Gov can manage easing restrictions (**80%** aware Vs **58%** unaware).



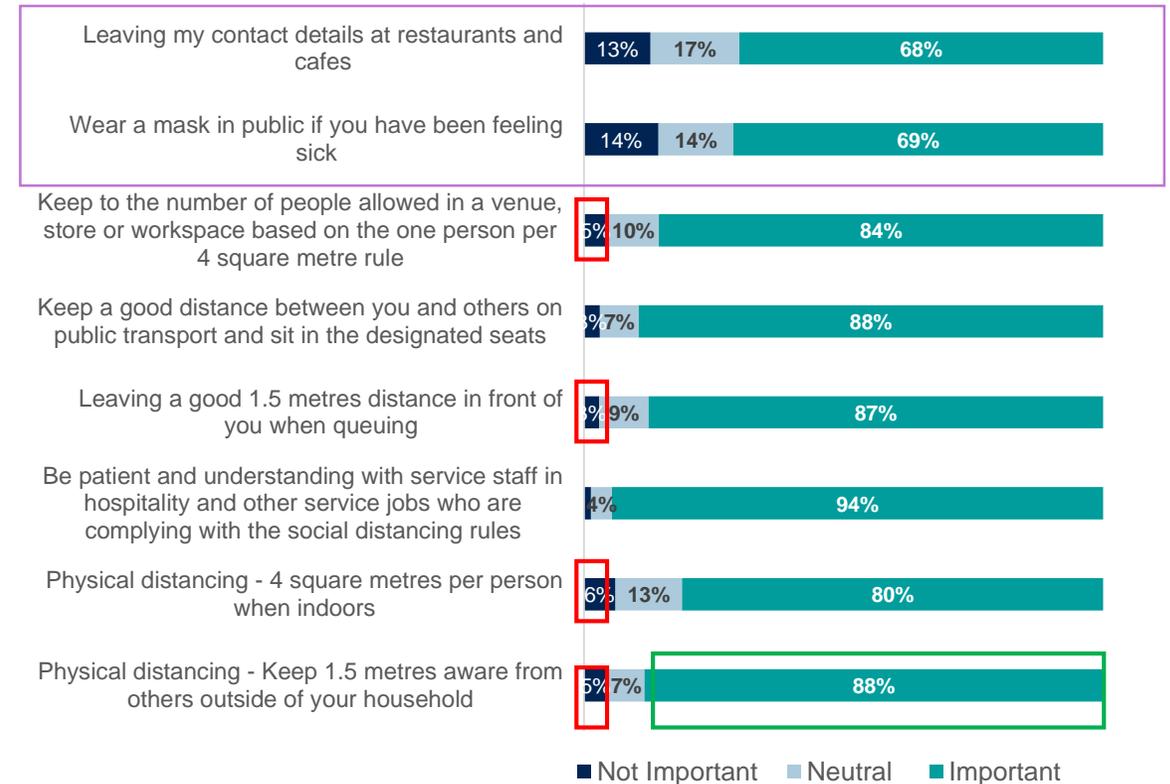
Q24 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the easing of restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

IMPORTANCE OF HEALTH RULES AND SOCIAL DISTANCING

Health rules and social distancing etiquette important to most Queenslanders.

Most Queenslanders surveyed felt that it was important to be patient and understanding with service staff in hospitality and other service jobs who are complying with social distancing rules (94%), to keep good distance on public transport (88%), leave 1.5 metre space when queuing (87%) and physically distancing from others outside their household (88% increasing from Wave 2).

A third of Queenslanders feel it is important to leave contact details at restaurants and cafes (68%) and wearing a mask in public if feeling sick (69%).



Q28 How important is it for people to follow the following public health rules while restrictions are easing?

Total Wave 1 n = 1603; Total Wave 2 n = 1018 Total Wave 3 n=1021

NB. : No comparison with W1 due to questionnaire changes

Statements added in W3

Significantly higher / lower than wave 2 – 95% CI.

LESS CONFIDENCE COMPLIANCE WITH RESTRICTIONS

A quarter (24%) say that Queenslanders won't keep to the 4 sq meter rule at public gatherings at home or in public spaces.

Unlimited number of people as long there is one person per 4 square metres	I agree with this restriction in place to keep us safe from coronavirus spread			I can comply with this restriction			I understand what this restriction mean			In different contexts of my life this restriction can be interpreted differently			Queenslanders will not comply with this restriction		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Gatherings in public spaces and homes	49%	47%	48%	56%	54%	55%	54%	52%	53%	17%	11%	14%	21%	26%	24%
Going out (pubs, clubs, cafes etc) maximum of 20 people in small venue	45%	51%	48%	56%	55%	55%	52%	50%	51%	12%	9%	10%	17%	22%	20%
Museums, art galleries and historic sites, weddings, funerals, libraries	47%	49%	48%	48%	49%	48%	52%	53%	53%	13%	11%	12%	14%	19%	17%
Community sport, gyms, health clubs and yoga studios, outdoor amusement parks, zoos and arcades	44%	47%	46%	45%	48%	47%	52%	51%	51%	12%	8%	10%	20%	21%	20%
Beauty therapy, tanning, nail salons and spas, tattoo parlours and non-therapeutic massage parlours	41%	45%	43%	42%	41%	41%	52%	48%	50%	9%	7%	8%	21%	19%	20%
Open homes and auctions	45%	51%	48%	46%	49%	48%	53%	53%	53%	8%	6%	7%	14%	14%	14%

Approximately half of Queenslanders agree with, understand and will comply with the restrictions. This is slightly less than in previous waves where Stage 2 and Stage 3 restrictions were tested.

One in five feel that Queenslanders will not comply with the four square metre rule when going out to pubs, clubs, cafes, sport or gyms or at beauty therapy salons. This is a significant increase (almost double) from Wave 2 where Stage 3 restrictions were tested.

Q27 You will now be shown a list of restrictions about Stage 3 easing of restrictions in Queensland. For each one please indicate if you agree with the statement by selecting the box next to the for each restriction if it applies.

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n = 1021

NB. : No comparison with W1 due to questionnaire changes

QUEENSLANDERS WILL START SPENDING AS RESTRICTIONS EASE

As restrictions are easing the top three things Queenslanders will do is go out with family and friends, dining out and taking a weekend away or mini-break or holiday in Queensland.

Activities	QLD Rank score
Going out with family / friends	3.7
Dining out	3.9
Take a weekend away / mini-break or holiday in Queensland	4.1
Take a trip away from home / travel	4.3
Look for a job/employment	4.8
Going out to hotel / pub / bar / club or venue	4.8
Going out to see entertainment / music / movies etc	4.9
Dentist / Eye / Skin and other check-ups or test	5.3
Play sport	5.5
Non urgent medical appointment	5.7
Take a weekend away / mini-break or holiday Overseas	5.7
Take a weekend away / mini-break or holiday in Another State	5.7
Take a weekend away / mini-break or holiday in New Zealand	6.3
See councillor / other mental health practitioner	6.5
None of these	4.1

Q29. Rank in order of priority, what you would like to do when restrictions are eased.
Total Wave 3 n=1021

NB: No comparison with W1 due to questionnaire changes

AWARENESS OF INFORMATION 3.4

INFORMATION ABOUT HOW THE ECONOMY WILL RECOVER IS NOT SO GOOD BUT IMPROVING

Most Queenslanders have good information about how to prevent the spread of coronavirus (93%), what the current levels of restrictions are (76%), and stages of restrictions (67%), but only a third have good information about how the Queensland economy will recover (36%). Good information about the stages of restrictions easing has decreased from Wave 2 (71%), whilst good information about the economy has improved since Wave 2 (31%).

93%

How to prevent the spread of coronavirus

67%

Stages of restrictions easing

↑ Wave 2 (71%)
↑ 65+ years (77%)

76%

Current coronavirus level of restrictions

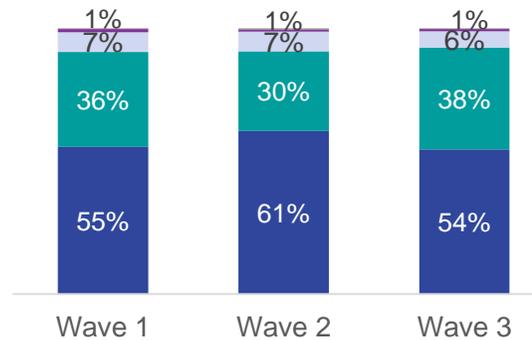
↑ Aware of Roadmap (81%)
↑ Aware of Economic Recovery Strategy (83%)
↑ 65+ years (86%)

36%

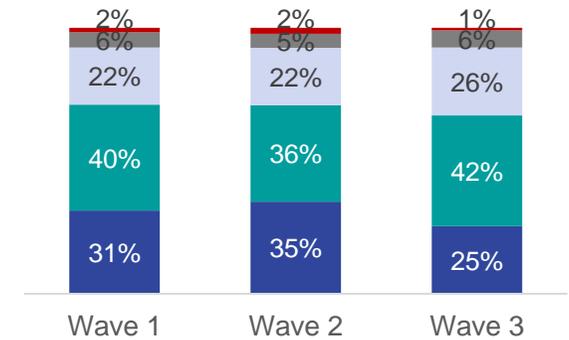
How the Queensland economy will recover

↓ Wave 2 (31%)
↑ Aware of Economic Recovery Strategy (52%)

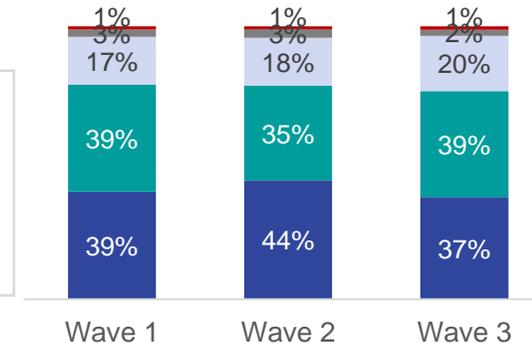
How to prevent the spread of coronavirus



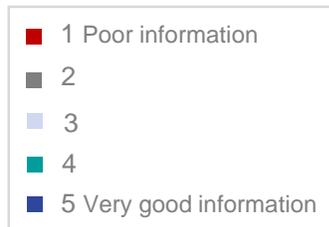
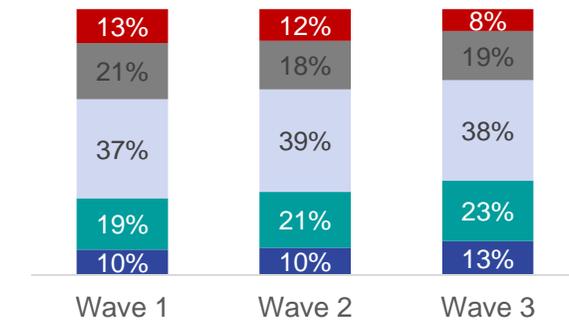
The stages of restrictions easing



Current coronavirus level of restrictions



How the Queensland economy will recover



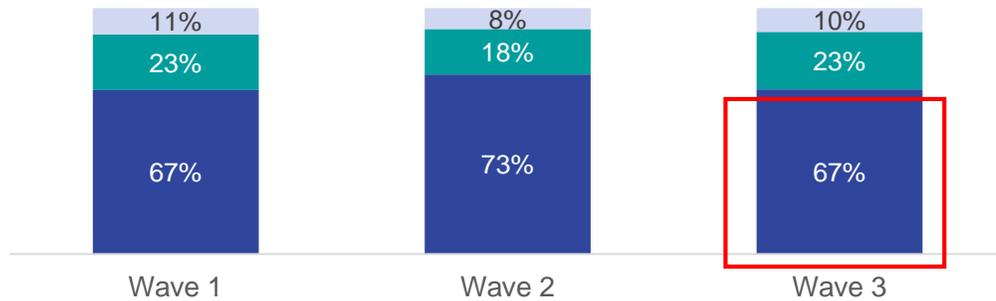
Q1 Have you been getting enough information to feel confident you know about
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

QUEENSLANDERS STAYING INFORMED AND SENTIMENT IMPROVED

In Wave 3 a third (67%) of Queenslanders surveyed think Queensland Government is a trustworthy source of information which has decreased since Wave 2 (73%). Queenslanders continue to feel that Queensland Government has managed better than other states (75%) which has increased since Wave 1 (65%).

Trustworthy information source

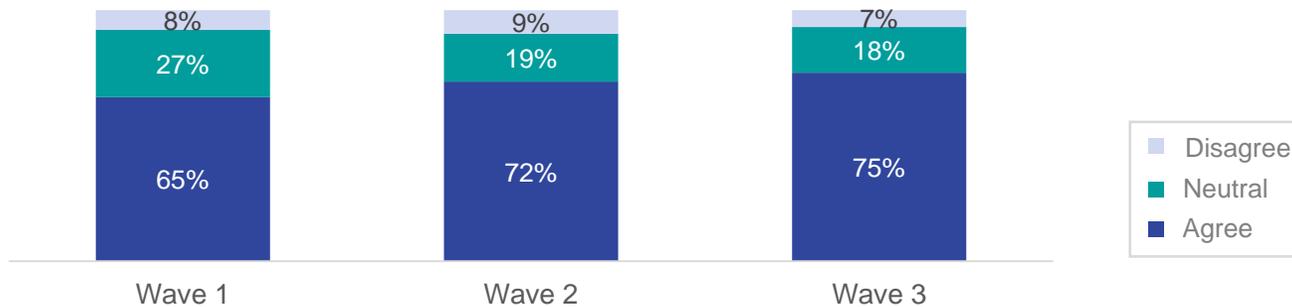


67%
Queensland Government is a trustworthy information source

↑ Wave 2 (73%)
 ↑ Aware of Roadmap (76%)
 ↑ Aware Economic Recovery Strategy (76%)

Q3 QLD Government is a trustworthy information source about the economic recovery after the coronavirus pandemic. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

Managed the coronavirus pandemic better than other states or territories



75%
Queensland Government managed better than other states or territories

↓ Not aware Economic Recovery Strategy (70%)
 ↓ Central HHS (57%)
 ↓ Not Aware of Roadmap (60%)

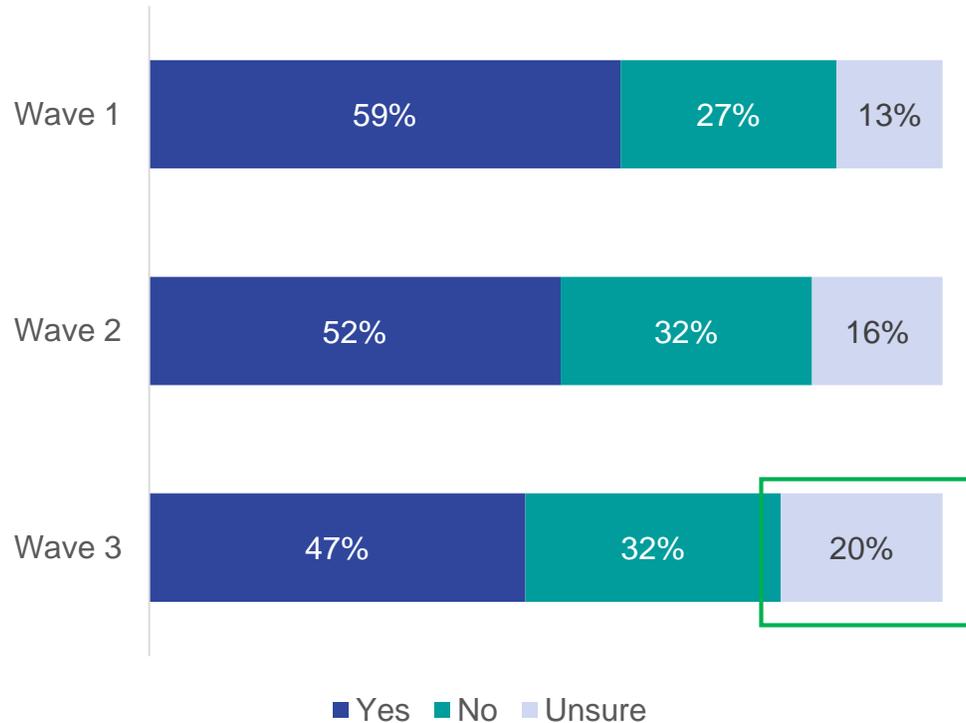
Q4 QLD Government has managed the coronavirus pandemic better than other states or territories. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

ROADMAP FOR EASING RESTRICTIONS

Fewer people are aware of the roadmap (47%) than when released in May (Wave 1 59%).

Those that are aware of the Roadmap to Easing Restrictions are more likely to feel confident that the Queensland Government is a trustworthy source of information (76%), that Queensland has managed better than other states or territories (80%) and have good information about the level of restrictions (81%). No geographic differences were observed. Roadmap for easing restrictions may be fading into old news as the uncertainty of recall increases this wave (20%).



Q34 Have you seen, read or heard about the Queensland Government's Roadmap to Easing Restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n = 1021

47%

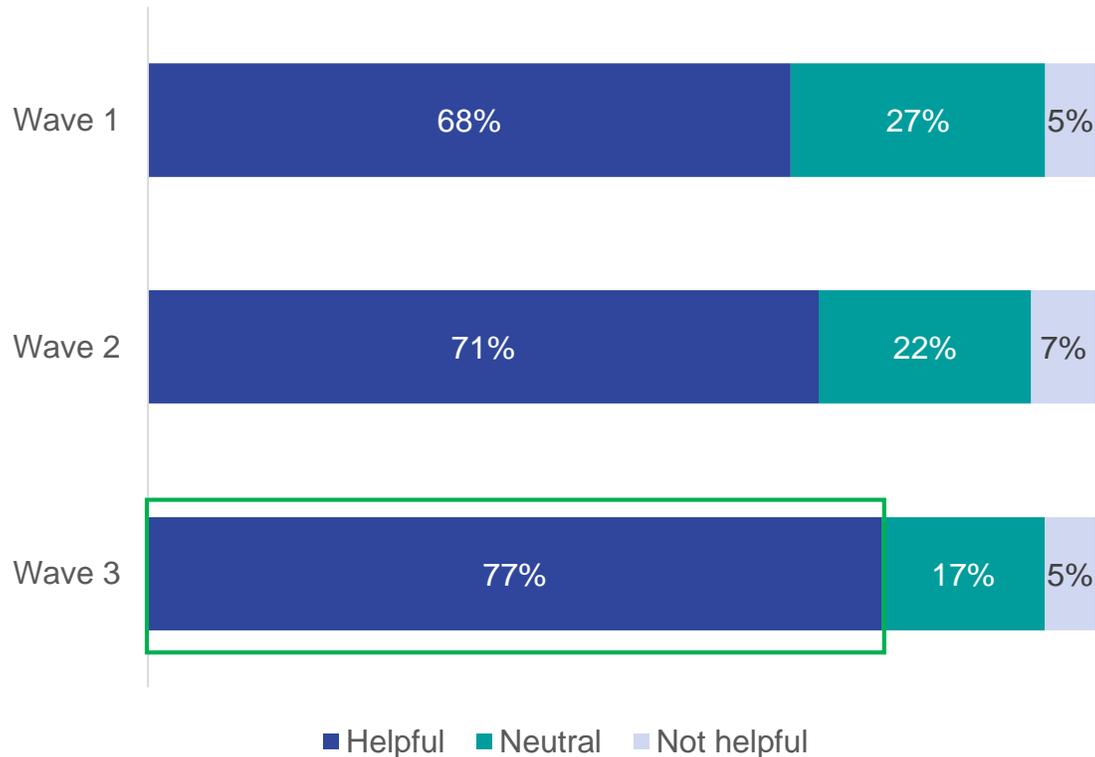
Aware of the Roadmap

↑ Aware of Economic Strategy (78%)

- Confident Queensland Government is a trustworthy information source (Q3)
76% aware Vs **56%** unaware
- Queensland Government managed better than other states or territories (Q4)
80% aware Vs **60%** unaware
- Good information about current coronavirus level of restrictions (Q1)
81% aware Vs **68%** unaware

ROADMAP IS HELPFUL COMMUNICATION

Three quarters of Queenslanders who saw or heard about the Roadmap to Easing Restrictions said they felt it was helpful (77%). Whilst awareness has decreased those that have seen it have found it more helpful than in previous waves.



77%
Roadmap is helpful
↓ Central HHS (47%)

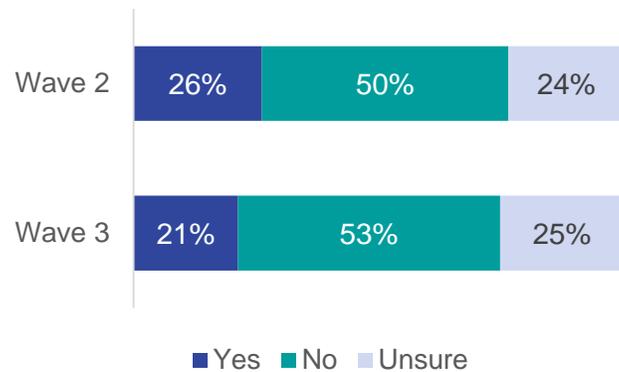
Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?
Total Wave 1 n = 944; Total Wave 2 n = 530; Total Wave 3 n = 478

COVID-19 ECONOMIC RECOVERY STRATEGY

Only one in five aware of the Economic Recovery Strategy

Those that are aware of the Queensland Government COVID-19 Economic Recovery Strategy are more likely to feel confident that the Queensland Government is a trustworthy source of information (76%), and that Queensland has managed better than other states or territories (77%). Those aware are also more likely to say they have good information about the level of restrictions (83%), stages of restrictions (72%) and how the economy will recover (52%). No geographic differences were observed.

Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
Total Wave 2 n = 1018

- Confident Queensland Government is a trustworthy information source (Q3)
76% aware Vs **61%** unaware
- Queensland Government managed better than other states or territories (Q4)
77% aware Vs **70%** unaware
- Good information about current coronavirus level of restrictions (Q1)
83% aware Vs **71%** unaware
- Good information about the stages of restrictions (Q1)
72% aware Vs **62%** unaware
- Good information about how the economy will recover (Q1)
52% aware Vs **27%** unaware

CAMPAIGN RECOGNITION

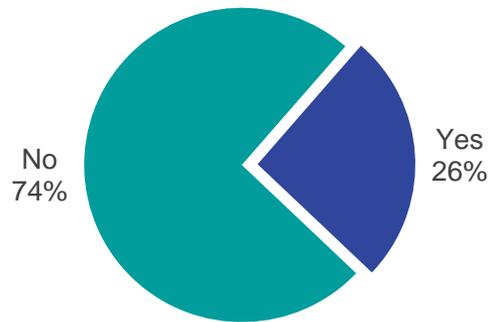
3.5

CAMPAIGN RECOGNITION

A quarter of Queenslanders recall seeing the campaign (26%) and most recall the TVC (68%)

The campaign prompt had messaging removed to test the message receipt. Only a third who saw the campaign could recall the intended messages of the advertisement (36%).

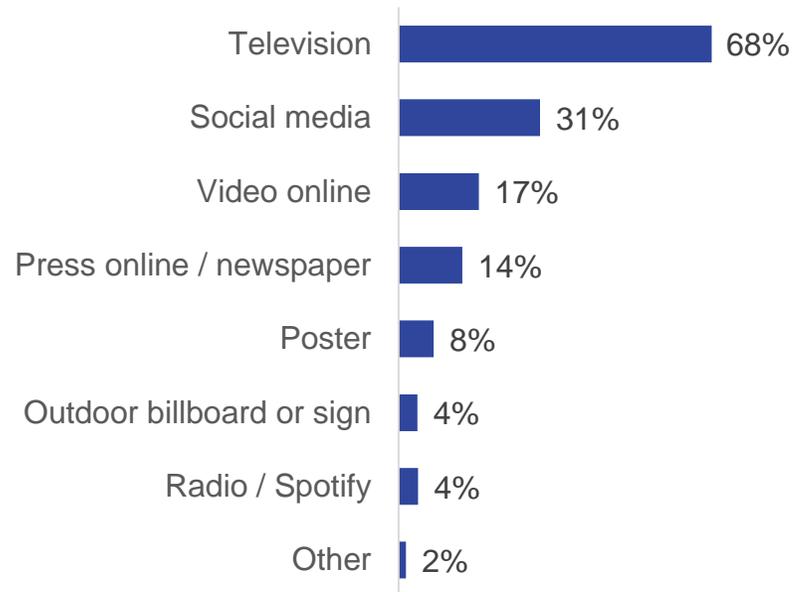
Seen any of these ads



Q68 Have you seen any of these ads?
Total Wave 3 n = 1021

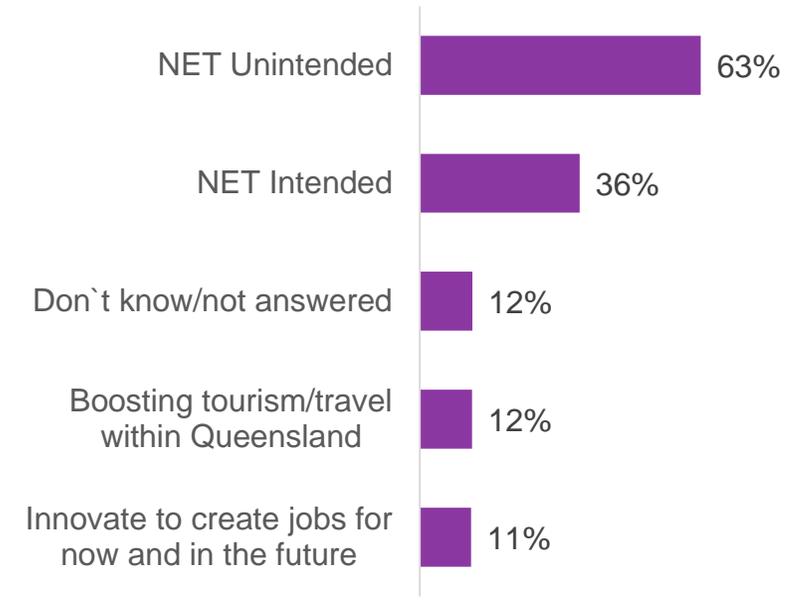
**This is just above
IPSOS norm (25%)
for TVC.**

Where ads seen



Q69 Where have you seen these ads?
Seen ads Wave 3 n = 265

Messages you can remember from this ad



Q70 What are all the messages you can remember from this ad?
Seen ads Wave 3 n = 265

To aid our analysis and interpretation of executional performance we make reference and comparison to our Ipsos Norms. When looking at advertising recognition scores for each channel we make comparisons to the Ipsos All Advertising norm (private and public sector) because all campaigns compete with each other for audience attention. When looking at diagnostic scores for individual campaign elements, we use the Ipsos government specific norm (public sector only). We use these norms as categories of advertising are very different, and therefore, whenever possible comparisons need to be made within a category when looking at reactions to advertising. Norm for TV 500 TARPS is 25% and this campaign is 450 TARPS.

CAUGHT IN THE COVID-19 CLUTTER

The campaign messaging needs to cut through clearer with the audience.

Queenslanders were more likely to recall other messages from other campaigns, particularly those around restrictions and health rules.

The clearest message coming through from the campaign is boosting tourism/trave within Queensland (12%), to innovate to create jobs for now and in the future (11%) and invest in industries for our state (9%).



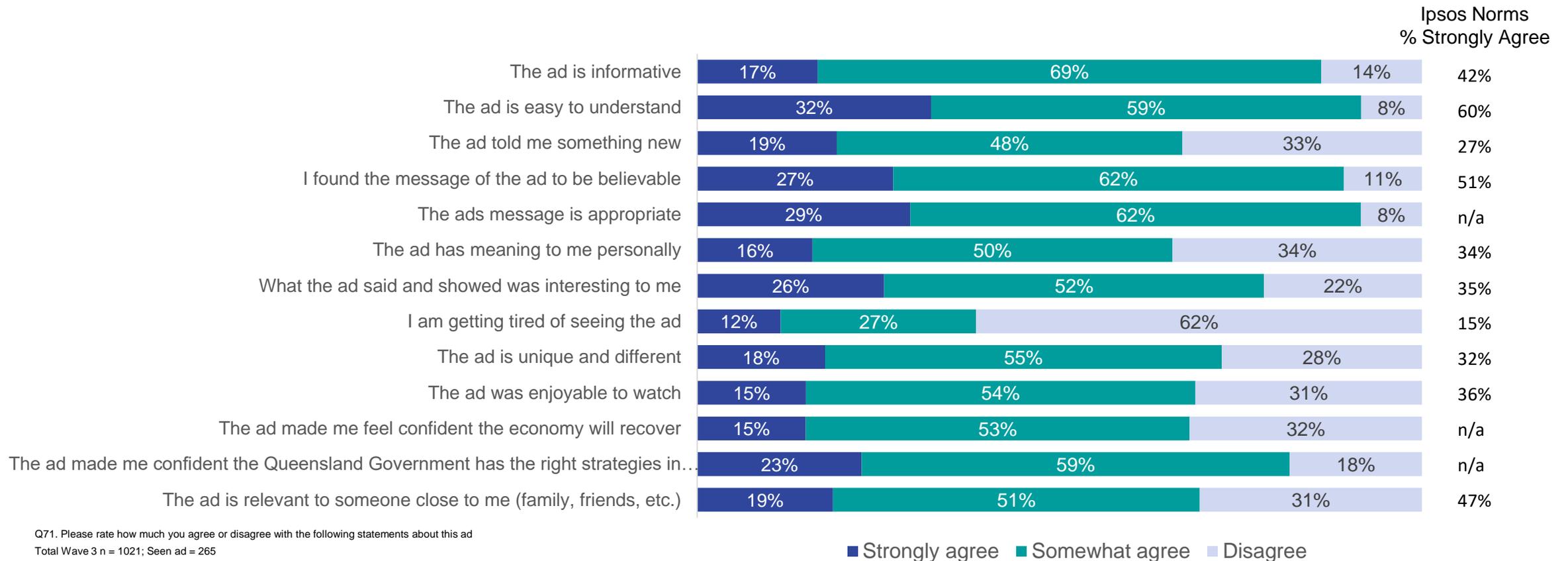
Q70 What are all the messages you can remember from this ad?

Seen ads Wave 3 n = 265

Unite and recover	2%
Covid-19/coronavirus	2%
We are on the road to recovery	5%
We have protected Queenslanders and saved lives	0%
Invest in industries for our state	9%
Innovate to create jobs for now and in the future	11%
Work better and smarter	0%
Boosting tourism/travel within Queensland	12%
Economic recovery	6%
Queensland is getting back to business/is open for business	3%
Total intended messages	63%
Remember the safety rules/be safe/COVID-19 safe	8%
Remember to social distance	9%
Wash your hands	2%
Stay home	2%
Restrictions are easing	9%
We are doing well/better	4%
Recovery/covid recovery	4%
We are in this together	2%
Move forward/get Queensland moving again	3%
Queensland/support Queensland	6%
Positive attitude/positive future for Queensland	2%
Pictures/images on the ad	4%
Get tested/get tested if you are feeling unwell	1%
Building/building Queensland	2%
Information about what is happening/a chart of where we are headed	2%
Get going again/Queensland is going again	1%
The stages of opening Queensland	2%
We're with you/we're here to help/you're not alone	2%
General positive comments e.g. It's a good ad, I liked it etc.	3%
None/nothing	6%
Other – unintended messages	8%
Don't know/not answered	12%
Total unintended messages	63%

CAMPAIGN DIAGNOSTICS

The campaign has fallen below Ipsos norms on all available diagnostics. The topic of COVID-19 cuts through but if it is not immediately distinguished as new information, important or relevant people are switching off and not taking out the message content.



Q71. Please rate how much you agree or disagree with the following statements about this ad
Total Wave 3 n = 1021; Seen ad = 265

CAMPAIGN EFFECT

Those that have seen the campaign are more likely to be aware of other communications.

Aware of economic initiatives.

40% seen Vs **27%** unseen

Aware of economic strategy.

35% seen Vs **17%** unseen

Aware of Roadmap for easing restrictions.

61% seen Vs **43%** unseen

But there are little other campaign effects observed or associated with positive sentiment or support.

THANK YOU



GAME CHANGERS

