

UNITE AND RECOVERY WAVE 6

For Queensland Department of Premier and Cabinet

Prepared by Ipsos
13 August, 2020

For more information contact:

GAME CHANGERS



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EXECUTIVE SUMMARY

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EXECUTIVE SUMMARY – IMPACT AND WORRIES

Wave 6 Survey completed 10-11 August 2020 borders closed to VIC and NSW and ACT, as new cases emerge in QLD through community transmission.

Queenslanders work slowly returning to normal

55%

Employees work impacted

Queenslanders are gradually experiencing less work impact from COVID-19 since a peak in wave 2. There are 5% people surveyed who have lost their job, 7% temporarily stood down and 22% working less than they would like.

77%

Self-employed / business owners impacted

The trend is consistent with SMEs and sole traders even though they are experiencing a significantly higher level of disruption compared to the average employee.

Queenslanders feel we act appropriately to COVID-19 threat but we are seeing and increase in those who feel we are underreacting

75%

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

The majority continue to feel Queenslanders are responding appropriately to the COVID-19 threat. There's a slight shift from believing that we are overreacting to under-reacting in (Wave 5, 26% vs Wave 4, 17% vs Wave 3, 12%). This coincides with this week's sharp rise in community transmission in Victoria and new cases in Queensland.

Proximity to risk perceptions increase

23%

Likely to get COVID-19

The proximity to risks at the moment is for others and not too close to home however this has increases since last wave. For people to take protective guidelines seriously they need to consider the risks to themselves and those close to them as much as they do for other Queenslanders.

26%

Likely family to get COVID-19

36%

Community transmission will occur in QLD like VIC and NSW

Biggest worry about Covid-19

19% Impact on Australian economy

19% Losing income/job/ business closure/decline

14% Health of friends and family

Economy and jobs are a high concern. Interestingly, health risk is perceived to be increasingly imminent with Queenslanders more worried about COVID-19's risk to their friends and family as well as community transmission again this wave.

Biggest worry about Economy

33% Impact on Australian economy

9% Losing my job

9% Social disadvantage/ crime

Impact on the Australian economy continues to be the top concern, however this wave we see concerns for social disadvantage, poverty, homelessness and crime being the third biggest concern along with concerns over losing our job.

DASHBOARD – IMPACT

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 5) %	This wave (Wave 6) %	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	49	45	
	Impacted (red)	56	50	55	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	24	23	
	Impacted (red)	79	76	77	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	6	6	
	Appropriate response (green)	78	69	75	
	Under-reacting (orange)	15	26	19	
Q20b Most worried about in regards to economic impacts from COVID-19 (top 5)	Impact on the Aust economy (red)	-	32	33	
	Unable to find a job/employment (blue)	-	8	6	
	Losing my job (purple)	-	8	9	
	Social disadvantage/ poverty / crime / homelessness (yellow)	-	11	9	
	People wont comply with health advice (masks, handwashing, etc.) (green)	-	9	4	

EXECUTIVE SUMMARY – EXPECTATIONS & CONFIDENCE

Wave 6 Survey completed 10-11 August 2020.

Expectations for the Economy

49% The worst is yet to come

22% At its worst now

9% Worst behind us

20% Unsure

Queenslanders' expectations about the economy has remained consistent across the 4 waves but we see a slight increase last wave (Wave, 5 53% vs Wave 4, 46%) then returning back to half (49%) having a negative outlook believing the worst is yet to come. There is still a considerable number still uncertain.

Half confident and while 3 in 10 neutral about management of economic recovery and economy in long run

55%
Agree QLD Gov can manage the economic recovery

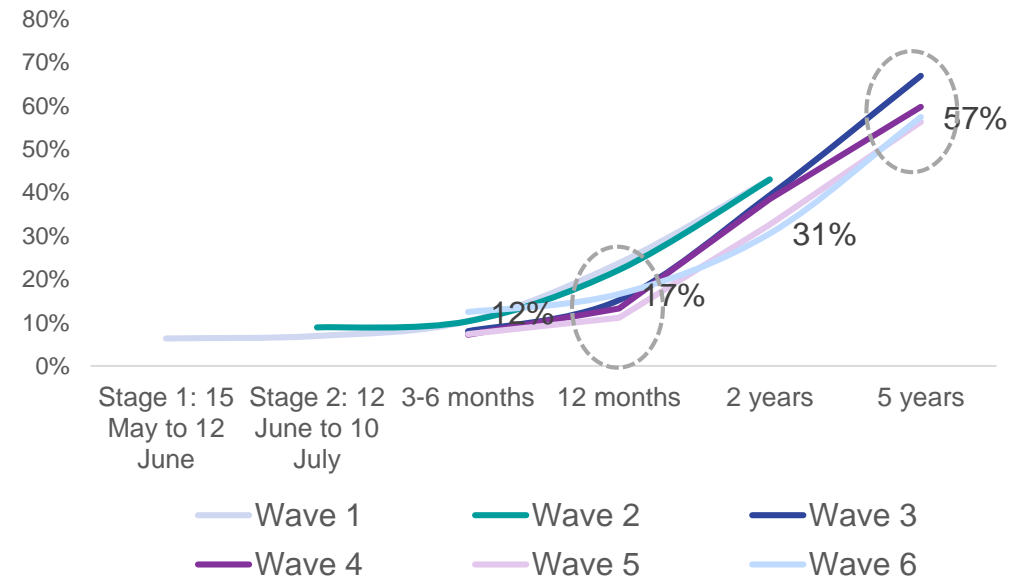
Queenslanders are split in their confidence in the Queensland Government's management of the economic recovery, with half feeling confident and the other half feeling either neutral (31%) or not confident (13%). On a positive note, public confidence grew in Wave 2 to 6 and has maintained a positive momentum.

64%
Agree QLD Gov are handling for economic advantage in long run

Increasing to almost two thirds (64%) of the population believes that the Government has been handling the COVID-19 crisis to the State economic advantage in the long run in Wave 6. There isn't a significant issue with distrust or lack of confidence. Sentiment is driven by a lot of uncertainties with a quarter of the population sitting on the fence, feeling undecided (26%).

Optimism about economic recovery starting to decline

Queenslanders are becoming less optimistic of a speedy economic recovery, with the majority believing that the economy will fully recover in 5 years time (57%). Furthermore, early positive projections of a 12 month recovery in Wave 1 and 2 has decreased in Wave 3 to 5, and the 5 year projection is also declining in Wave 5 and 6.



DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 5) %	This wave (Wave 6) %	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	53	49	
	At their worst now (orange)	19	20	22	
	Worst is behind us (green)	14	11	9	
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	7	12	
	12 months (orange)	24	11	17	
	2 years (blue)	43	33	31	
	5 years (green)	-	56	57	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	52	55	
	Not confident (red)	18	14	13	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	57	64	
	Not confident (red)	-	11	9	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	26	29	

EXECUTIVE SUMMARY – ECONOMIC STRATEGY & INITIATIVES

Wave 6 Survey completed 10-11 August 2020.

Awareness and understanding about economic recovery strategy associated with positive sentiment

41%

Agree they have enough information on how QLD economy will recover

Some improvement this wave with an increase in information about economic recovery.

29%

Aware of any major economic initiatives

The key challenge for the Queensland Government is raising awareness of the State's Recovery Strategy and economic initiatives.

30%

Aware of Economic Strategy

Awareness is increasing, but understanding is moderate and support is relatively strong. Whilst announcements and advertising continuing about the economy from the Government there is a small improvement in overall understanding of the strategy with less saying they don't understand the strategy in Wave 6.

46%

Understands the Economic Recovery Strategy

63%

Support the Economic Recovery Strategy

31% neutral

6% oppose

Awareness needs to be addressed first before improving familiarity and understanding of the Strategy and ultimately convert the fence sitters (31%) to supporters (63%). Those who support the strategy feel it will create or keep people in jobs (41%), lift the economy (48%) as well as positive sentiment for handling the restrictions in stages (47%) as well as doing the right thing to close borders (47%).

Aware / not aware of Economic Recovery Strategy

Confident Queensland Government is a trustworthy information source (Q3)

83% aware Vs **67%** unaware

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

88% aware Vs **72%** unaware

Good information about current coronavirus level of restrictions (Q1)

89% aware Vs **76%** unaware

Good information about how the economy will recover (Q1)

55% aware Vs **30%** unaware

92%

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

15%

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

EXECUTIVE SUMMARY – SUPPORT FOR STRATEGIES

Wave 6 Survey completed 10-11 August 2020.

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

23% Spending which will increase the Queensland State Budget Deficit to reduce unemployment

10% Decrease spending to minimise the Queensland State Budget Deficit

16% Unsure

There's majority support for spending to reduce unemployment. Specifically, half of the Queensland population supports spending smartly in targeted areas while minimising the impact on State Budget Deficit. A shift with a few more people saying there is a need to decrease spending.

Positive sentiment about Gov support is growing.

37%
Enough support from the government as a small business owner or self-employed

45%
Enough support to small business through this pandemic and recovery

55%
Enough support to the community through this pandemic and recovery

Small business and self employed see a shift in increased dissatisfaction with the support they are getting from Government in Wave 6. The majority of Queenslanders continue to be satisfied with Government support for small businesses and the community. This positive sentiment is consistent, with no significant differences appearing.

Perceptions of economic strategy effectiveness.

61% Unite & Recover for Queensland Jobs

71% Backing Queensland Regions: Buy, Visit, Invest in Queensland

68% Backing Queensland: Accelerating Infrastructure Investment building on strengths

69% Protecting Queensland: Plan to safeguard your health and jobs.

69% Building Queensland: Accelerating Infrastructure Investment for future prosperity and resilience

67% Backing Queensland's Small Business

Improving and over half feel the Unite and Recover for Queensland Jobs Economic Strategy overall will be effective in helping the economy recover. Whilst two thirds of Queenslanders feel the individual strategies will be effective. About a quarter are neutral and less than 10% feel they will be ineffective in helping the economy to recover.

DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 5) %	This wave (Wave 6) %	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	26	30	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	40	46	
	Not well (red)	-	20	12	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	57	63	
	Oppose (red)	-	14	6	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	33	37	
	Low support (red)	-	45	21	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	41	45	
	Low support (red)	-	16	13	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	51	55	
	Low support (red)	-	13	11	

EXECUTIVE SUMMARY – BORDERS, TESTING AND COMPLIANCE BEHAVIOURS

Wave 6 Survey completed 10-11 August 2020.

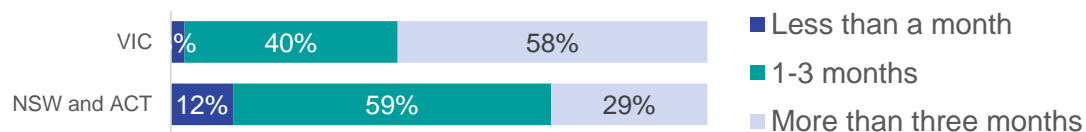
Queenslanders agree with decisions on border opening and are confident we are managing the easing of restrictions.

- 86%** Disagree that travel to QLD from hot spot states and territories should be allowed
- 87%** Disagree that travel to QLD from hot spot towns or regions should be allowed
- 67%** Agree that people arriving from hot spot towns or regions should be turned away at the border
- 92%** People arriving from overseas should be tested for coronavirus as well as quarantine
- 93%** Queenslanders returning home after being in hot spots should be tested for coronavirus as well as quarantine
- 74%** Confident Queensland Government can manage the easing of restrictions

There's almost consensus across Queensland that border should be closed to states that continue to record hot spots or multiple new cases per day. This has decreased slightly in Wave 6 as we manage community transmission. Two thirds of Queenslanders believe that people who are returning from a hot spot region should be turned away and not allowed into Queensland.

Confidence significantly grew again in August and has maintained positive momentum,

Queenslanders believe the borders will be shut for some time, with over half (58%) thinking more than 3 months for Vic and half (59%) thinking it will be 1-3 months for NSW & ACT.



Non compliance is more prevalent when it comes to health advice, particularly the 1.5 metres distancing from others with half observing non-compliance in general (58%), when queuing (58%) and indoors (49%). A third observe a lack of patience for service staff trying to enforce the rules (37%), leaving contact details (32%) and limiting the number of people in a venue (40%). rule e.g. indoors, when queuing and in general.

Physical distancing - 1.5m from others	58%
Physical distancing - 4m2 per person when indoors	49%
Be patient with service staff who are complying with social distancing	37%
Leaving 1.5m in front of you when queuing	58%
Keeping distance while on public transport	32%
Limit the number of people in a venue by the 4m2 rule	40%
Wear a mask in public if they have been feeling sick	31%
Leaving contact details at restaurants and cafes	32%
No dancing or standing around the bar, ordering at the counter in clubs, pubs, etc.	25%
Getting tested if you develop symptoms of Coronavirus	27%

There's reasonable compliance with restriction rules, with the exception of distancing in public spaces and homes with half Queenslanders observing non-compliance (50%). Two in five Queenslanders have observed non-compliance in restaurants, cafes and pubs (40%) or small venues (36%) and a quarter at pools or gyms (28%). At least one in five have observed non compliance in other venues.

4m2 distancing in public spaces and homes	50%
maximum 20 in small venues	38%
4 square meter distancing at religious ceremonies	21%
4m2 distancing at pools/ gyms	28%
4m2 distancing at saunas/ bathhouses	20%
4m2 distancing at open homes/ auctions	19%
4m2 in restaurants, Cafes, pubs, etc.	40%

 Significantly higher / lower than previous wave – 95%

DASHBOARD – RESTRICTIONS

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 5) %	This wave (Wave 6) %	Trend
Q30 Life after restrictions	Worse than before (red)	12	14	13	
	Same as before (orange)	45	38	38	
	Better than before (green)	21	18	20	
Q66 Interstate travel should be allowed between states with hot spots and multiple cases	No (red)	-	88	86	
	Yes (green)	-	6	8	
Q67 Travel allowed to Queensland for towns or regions continuing to record hot spots / multiple new cases per day	No (red)	-	92	87	
	Yes (green)	-	4	6	
Q24 Confidence the Queensland Government can manage the easing of restrictions	Confident (green)	59	65	74	
	Not confident (red)	12	8	7	

EXPOSURE TO RISK

Half Queenslanders have not been exposed to the risk of coronavirus contagion. A quarter of Queenslanders have come into contact with other people on public transport, shopping or workplaces. One in ten have come into contact with people at clubs or pubs, restaurants or other entertainment venues. There were 4% who came into contact with people from Victoria or New South Wales. There were 6% of Queenslanders surveyed who felt unwell, fever, headache and sore throat or cough. There were 16% of Queenslanders surveyed who have taken precautions to minimise their risk by wearing a mask and 3% had a coronavirus test.

Come into contact or been within 1.5 meters from people in public transport, shopping centres or workplace	26%
Come into contact or been within 1.5 meters from people in pubs, clubs, restaurants or other entertainment venues	10%
Wear a mask to stop the spread of coronavirus	16%
Felt unwell, fever, headache, sore throat or cough	6%
Come into contact with people from Victoria or NSW	4%
Get tested for Coronavirus	3%
Come into contact with people who have tested positive to Coronavirus	1%

Of those that had felt unwell over the past week (n=49), 34% were tested for Coronavirus. Of those that had felt unwell over the past week (n=49), 28% reported wearing a mask to limit the spread of the virus.

ACCEPTANCE FOR FURTHER RESTRICTIONS

Most Queenslanders (89%) agree that restrictions should include wearing a mask in public if a community transmission occurs in Queensland and would be willing to wear a mask in public to slow the spread of coronavirus (87%). Females and older people over 65 years are more likely.

89%

Agree restrictions include wearing a mask if an outbreak of community transmitted Coronavirus occurs in QLD.

87%

Willing to wear a mask to slow the spread of Coronavirus.

Most Queenslanders (83%) agree that restrictions should include table service only in clubs, pubs and restaurants if a community transmission occurs in Queensland and would be willing to comply (91%).

83%

Agree restrictions include table service only in clubs, pubs and restaurants if an outbreak of community transmitted Coronavirus occurs in QLD.

91%

Willing to comply with table service only in clubs, pubs and restaurants

EXECUTIVE SUMMARY – ACTIVITIES

Wave 6 Survey completed 28-30 July 2020.

Activities were gradually resuming to normal with less restrictions but in the last two weeks dropped significantly as people became cautious.

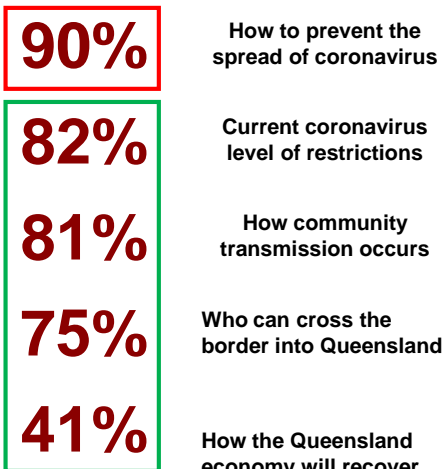
	Done last 7 days	Will do next 7 days
Going out with family / friends	33%	33%
Dining out	31%	28%
Going out to hotel / pub / bar / club or venue	20%	17%
Non urgent medical appointment	18%	15%
Dentist / Eye / Skin and other check-ups or test	12%	10%
Look for a job/employment	11%	9%
Take a trip away from home / travel	9%	10%
Play sport	8%	9%
See councillor / other mental health practitioner	6%	5%
Take a weekend away / mini-break or holiday in Queensland	5%	7%
Going out to see entertainment / music / movies etc	4%	4%
Take a weekend away / mini-break or holiday Overseas	2%	1%
Take a weekend away / mini-break or holiday in Another State	2%	1%
Take a weekend away / mini-break or holiday in New Zealand	1%	2%
Travel across the Queensland border for any other reason	1%	1%
None of these	30%	30%

Social activities declined in the last Wave. Most residents have gone out with family, dined out or gone to a hotel/ pub/ bar in the last week. Only a quarter of residents have not done any of the following activities within the past week. A similar level of activities is planned for the following week.

EXECUTIVE SUMMARY – INFORMATION

Wave 6 Survey completed 10-11 August 2020.

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. The Roadmap has worked well but is declining now with less focus on the stages of restrictions.



Queenslanders are generally satisfied with the information provided by the Government and feel that it's sufficient, especially across level of restriction and how to prevent the virus spread or how community transmission occurs. There's room for improvement when it comes to communicating about economic recovery and restrictions on who can cross the border.

39%
Aware of the Roadmap

83%

Roadmap is helpful

Aware / not aware of Roadmap to Easing Restrictions

Confident Queensland Government is a trustworthy information source (Q3)
82% aware Vs **64%** unaware
Queensland Government managed better than other states or territories (Q4)
89% aware Vs **76%** unaware
Good information about current coronavirus level of restrictions (Q1)
83% aware Vs **75%** unaware
Good information about how the economy will recover (Q1)
45% aware Vs **30%** unaware

The Queensland Government remains a consistently trustworthy source of information. As we see increasing stories of community transmission in southern states the positive perceptions of the Queensland Government's management of the pandemic better than other states continues to make gains, on top of an already strong base.

76%
Queensland Government is a trustworthy information source

81%
Queensland Government managed better than other states or territories

DASHBOARD – INFORMATION

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 5) %	This wave (Wave 6) %	Trend
Q1 Getting enough information to feel confident you know about ... (T2B = 5 very good + 4)	How to prevent the spread (red)	91	92	90	
	Current level of restrictions (orange)	79	78	82	
	How QLD economy will recover (blue)	29	35	41	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	75	76	
	Disagree (red)	11	8	7	
Q4 QLD Govt has managed the pandemic better than other states or territories	Agree (green)	65	84	81	
	Disagree (red)	8	4	4	
Q34 Aware of QLD Govt's Roadmap to Easing Restrictions	Yes, seen, read or heard	59	40	39	
Q36 Helpfulness of Roadmap to Easing Restrictions comms	Helpful (green)	68	77	83	
	Not helpful (red)	5	6	3	
Q68 See ads	Yes	-	35	51	

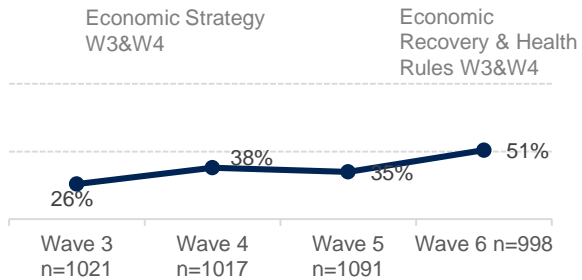
EXECUTIVE SUMMARY – CAMPAIGN RECOGNITION

Wave 6 Survey completed 10-11 August 2020. Campaign launched on 28th July 2020.

Half of Queenslanders recall seeing the campaign (51%), after just launching.

The campaign prompt had messaging removed to test the message receipt. The campaign was launched to market on the day that the survey went into field. Two thirds of those surveyed who had seen the campaign recalled the intended messages of the advertisement (67%), whereas over half (51%) mentioned other messaging. The main channel for viewing the campaign was Television (86%) and social media (31%).

Seen any of these ads



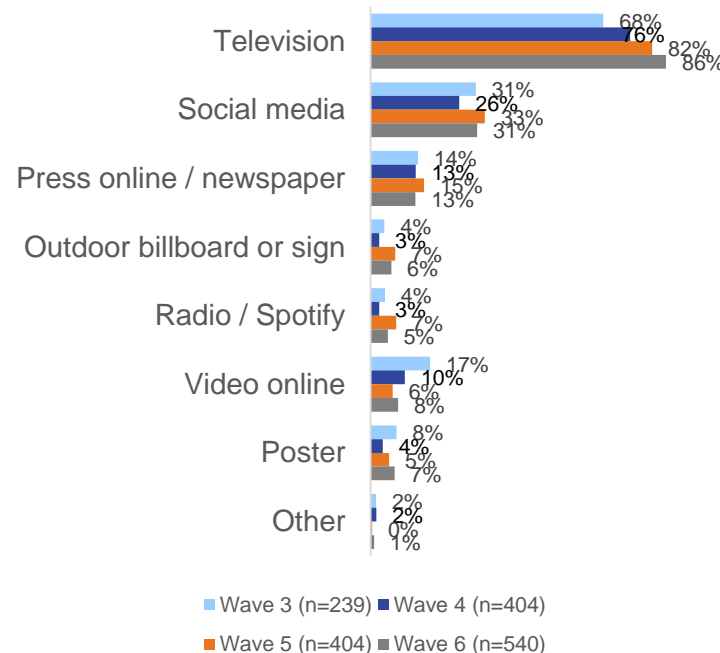
51% is above Ipsos Norm (25%)

TVC in market from 28th July 2020
(Same time as research)

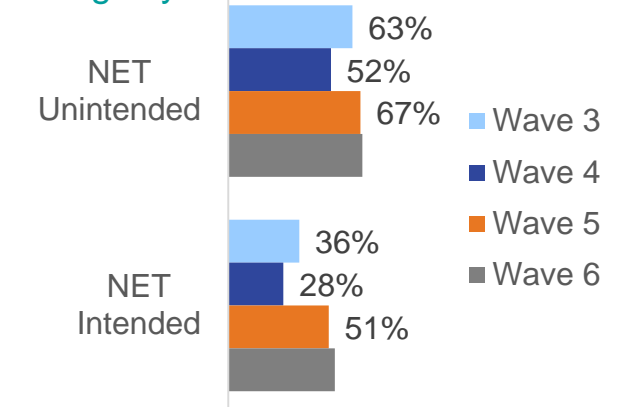
48%

Recalled the campaign after being prompted with the execution

Where ads seen



Messages you can remember from this ad



Aware of economic initiatives.

32% seen

Aware of economic recovery.

31% seen

Aware of Road Restrictions.

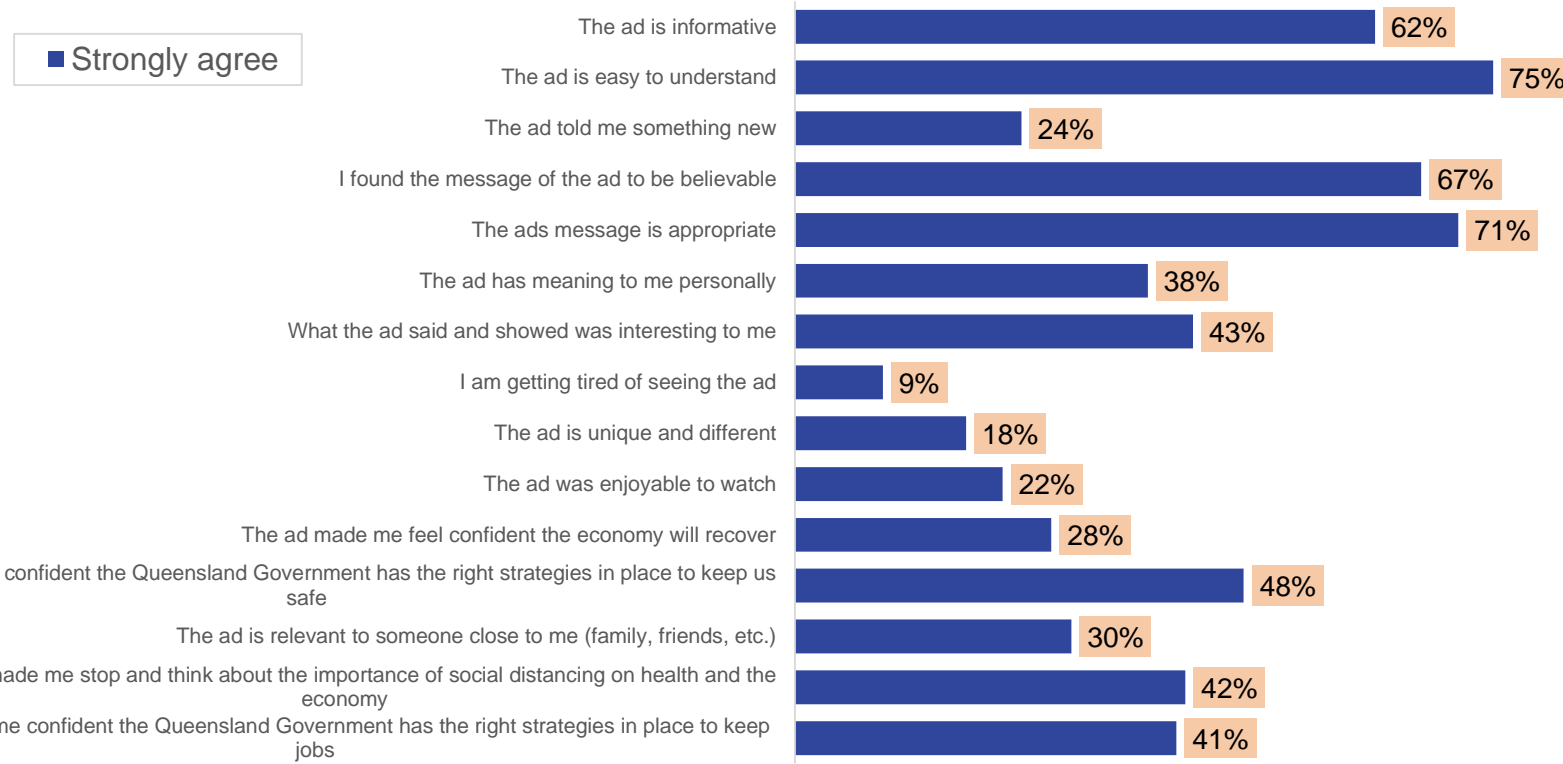
66% seen vs 43% unseen

Still to update these %

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.

CAMPAIGN DIAGNOSTICS

The campaign performs above or at Ipsos norms on all available diagnostics. This campaign has performed significantly better than the previous campaign. It is more informative, easy to understand, appropriate and believable. The message was relevant at a time when media was discussing new cases in Queensland and the increasing restrictions occurring in VIC, NSW and ACT act as a warning as to what could happen if Queenslanders become complacent.



Wave 6	Wave 5	Wave 4	Wave 3	Norms
62%	58%	17%	15%	42%
75%	71%	32%	28%	60%
24%	19%	19%	15%	27%
67%	59%	27%	23%	51%
71%	72%	29%	33%	n/a
38%	32%	16%	19%	34%
43%	38%	26%	19%	35%
9%	7%	12%	12%	15%
18%	18%	18%	16%	32%
22%	26%	15%	11%	36%
28%	23%	15%	12%	n/a
48%	39%	23%	18%	n/a
30%	27%	19%	17%	47%
42%	40%	-	-	n/a
41%	34%	-	-	n/a

Q71. Please rate how much you agree or disagree with the following statements about this ad
 Wave 3 Seen ad n=239, Wave 4 Seen ad n=404, Wave 5 Seen ad (unprompted) n=404, Wave 6 Seen ad (unprompted) n=540

18 – © Ipsos - COVID-19 Key Insights Report

■ Significantly higher or lower than Norm at 95% C.I.

➡➡ Significantly higher or lower than previous wave at 95% C.I.

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.



COMMUNICATION RECOMMENDATIONS

Perceptions of risk increased this wave, however exposure to risk is high but we see the adoption of mask wearing increase and a decrease in social activities.

Governments need to ensure that behavioural strategies are in place that help people functionally navigate their environments, so they feel they are managing risk effectively. Due to the low perception of risk to themselves or their families, Queenslanders will be complacent in following protective guidelines such as social distancing and health rules. This wave the social acceptance for mask wearing saw an increase in people saying that they were either wearing one if feeling sick, and for being tested if feeling sick. Queensland also see the need for border closures to keep community transmission low, and don't see them opening in the immediate future. People continue to see non-compliance with social distancing and health rules but accept that they will need to be in place for some time. Queenslanders are concerned but with the reduction in cases after an initial scare may see some become complacent with protective guidelines. Continual reminders like what is occurring now in New Zealand as well as in Australia with community transmission needs to be a constant reminder to Queenslanders who do not want to go into further lockdowns, to continue to practice good behaviours.

Queenslanders as a social group are less likely to voluntarily adopt these new behaviours unless it is reinforced as a social norm through Government applied restrictions. There will always be an 80:20 rule where most will comply and some won't either because they struggle to (mental or physical limitations to be able to, poverty, homelessness or financial disadvantaged from missing work etc) comply and there will be recalcitrant "Karens". Naming and shaming the 'Karens' may not be effective for population level compliance and potentially this could just encourage more rebellion. However, heavy penalties and law enforcement will be a better deterrent. For most Queenslanders they will want to feel they are doing the right thing (social identity) within the social norm, so defining the norm by stating the rules and then providing positive reinforcement for good behaviour will be a driver of success.

We have seen recently in Queensland is people eagerly resuming normal activities, with, for the most part being comfortable and complying with the social distancing and health rules to mitigate the spread of the virus. However, in the last two weeks, people have reduced their activity, becoming a bit more cautious. The more compliant behaviour they see the more it becomes the norm. More recognition for the contagious nature of this virus has been reinforced with the current number of positive cases arriving in Queensland from recent visits to Victoria. This has increased the willingness for wearing protective equipment like masks, but people are still to unfamiliar and uncomfortable with wearing it and most importantly waiting for "social permission" to do so by it being the new rules. Another important behaviour is making sure people who are not well are taking precaution and getting tested or wearing a mask. This behaviour has improved this wave, but needs to continue to keep Queenslanders safe.

Now is a critical time for Governments to use behavioural science to help inform interventions that will best drive people to comply with protective guidelines. Acknowledging good behaviour, and showing the majority do so, will increase positive emotions and internalisation of the want to be doing the right thing. But motivation is not enough. People are also confused by mixed messages like how to wear a mask properly or if it will work or when to do so. They need help to feel they can manage this new behaviour and feel confident they will stay safe. People are being asked to give up freedoms they took for granted and create new habits and routines, so reminders and prompts need to be in place everywhere they go in all different places and occasions to stay vigilant. Outdoor advertising and signage in heavy people traffic areas would help to remind people of the right behaviour.

CAMPAIGN RECOMMENDATIONS

This campaign has high recognition, good message takeout and high performance on diagnostics

The campaign went into market on 28 June 2020. The campaign is competing in a clutter of COVID-19 communications and has a high cut through at 51% recognition of the campaign which is above the general advertising norm (26%). There is however an improved performance in the creative from the previous execution and against Ipsos Government norms. There is a campaign effect observed for positive sentiment:

- more confident we are managing restrictions well (86% seen vs 76% unseen)
- aware of the Economic Strategy (42% seen vs 16% unseen)
- aware of the Roadmap to Easing Restrictions (55% seen vs 23% unseen)
- confident of handing of COVID-19 to the states economic advantage in the long run (61% seen vs 50% unseen)
- doing enough to support the community (59% seen vs 51% unseen)

This execution had new information, very timely and relevant to the current situation. The message was relevant at a time when media was discussing new cases in Queensland and the increasing restrictions occurring for NSW and ACT as well as VIC, as a warning as to what could happen if Queenslanders become complacent. In addition as the campaign was repeated over the two week period. It may be necessary to add to the messaging, particularly those observations of non-compliant behaviour that were more prevalent. 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 provides positive reinforcement of past good behaviour and demonstrates the requirement to continue to do so to enjoy the freedoms the easing of restrictions have provided, as well as the ability for people to work again and the economy to open. There is good recall for branding, with the look and feel. 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 varying the execution over time to keep it “new info” and changing the still images of people and situations to keep it fresh and relevant to all occasions. Consider adding “get tested” and “wear a mask” when feeling sick as other call to actions in the messaging.

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
- Awareness and effectiveness of communication on current restrictions, Government initiatives, strategies and actions.

This report covers the fourth wave of research which was conducted between Tuesday 28th July to 30th July 2020. Wave 4 took on average 18 minutes to complete the online survey. A sample of n=1017 was sourced from commercial research panels. Subsequent waves of research are included for comparison:

- Wave 1: 12 May to 14 May 2020; average 21 minutes; n=1603
- Wave 2: 3 June to 4 June 2020; average 20 minutes; n=1018
- Wave 3: 23 June to 25 June 2020; average 15 minutes; n=1019
- Wave 4: 7 July to 8 July 2020; average 15 minutes; n=1017
- Wave 5: 28 July to 30 July 2020; average 17 minutes; n=1091
- Wave 6: 10 August to 11 August; average 17 minutes; n=1001

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.

Wave 1: 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.

Wave 2: On Sunday 31 May 2020 the Premier announced an update to ease restrictions to Stage 2 at 12 noon on 1 June 2020, which was 11 days ahead of schedule.

Wave 3: On 23rd June the Queensland Government announced the *Unite and Recover for Queensland Jobs* Economic Recovery Strategy.

Wave 4: On Tuesday, June 30, 2020 the Queensland Government announced a further and faster easing of restrictions across Queensland from 12 noon, Friday July 3, including a clear plan to manage our borders going forward. The state's borders would be opened to visitors from other states excluding Victoria from July 10.

Wave 5: On July 27 The Premier urges people crossing the border to be patient with long queues. In this week new cases logged in Queensland and testing increases. On July 30th Queensland Health Officer declares the whole of Greater Sydney a hot spot and restricted access to Queensland from 1 August 2020.

Wave 6: On 5 August The Premier announces the border closed between NSW, ACT and VIC as more new cases identified with Queenslanders who have travelled south of the border.

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.

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									Wave 4									Wave 5								
	SEQ			ROQ			QLD			SEQ			ROQ			QLD			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	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	273	97	292	389	52	94	146	54	128	182	106	222	328	33	37	70	13	51	64	46	88	134	28	63	91	17	42	59	45	105	150	19	59	78	18	42	60	37	101	138
40-64	159	166	325	152	206	358	311	372	683	82	155	237	80	129	209	162	284	446	114	116	230	97	134	231	211	250	461	89	153	242	90	123	213	179	276	455	102	172	274	132	139	271	234	311	545
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	128	81	209	132	71	203	260	152	412	110	83	193	146	69	215	256	152	408
Total	388	358	746	330	526	856	718	884	1602	204	300	504	206	308	514	410	608	1018	272	236	508	237	274	511	509	510	1019	245	297	542	239	236	475	484	533	1017	231	314	545	296	250	546	527	564	1091

n	Wave 6								
	SEQ			ROQ			QLD		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
18-39	57	62	119	24	44	68	81	106	187
40-64	105	121	226	101	126	227	206	247	453
65+	111	68	179	129	50	179	240	118	358
Total	273	251	524	254	220	474	527	471	998

Diversity

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Aboriginal or Torres Strait Islander	7	23	30	13	26	39	7	11	18	7	8	15	4	17	21	12	16	28
Culturally or linguistically diverse background	67	70	137	72	53	125	42	40	82	39	25	64	43	51	94	36	30	66
Person with disability	113	117	230	56	63	119	81	78	159	75	74	149	81	78	159	76	80	156
Person most at risk	240	242	482	141	152	293	151	172	323	185	167	352	180	190	370	176	164	340



SAMPLE

Survey respondents were from a mix of educational backgrounds, and both in and out of the labour force prior to coronavirus pandemic.

Education Level

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Year 10 or equivalent or below	110	127	237	57	81	138	61	97	158	68	87	155	70	99	169	62	83	145
Year 12 or equivalent or below	123	194	317	84	101	185	87	79	166	84	88	172	82	102	184	92	79	171
Trade/Technical/Vocational training	212	258	470	140	153	293	154	172	326	161	161	322	162	178	340	145	159	304
Undergraduate Degree	184	168	352	134	110	244	131	105	236	146	85	231	152	104	256	126	90	216
Postgraduate Degree	109	99	208	79	63	142	72	52	124	78	50	128	72	56	128	92	61	153
Prefer not to say	8	10	18	10	6	16	3	6	9	5	4	9	7	7	14	7	2	9

Employment status before Coronavirus pandemic

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Employed permanent full-time or part-time	249	279	528	208	193	401	178	139	317	195	143	338	202	175	377	193	147	340
Employed, casual/temporary	48	117	165	59	60	119	40	42	82	49	40	89	39	51	90	56	41	97
Self-employed / business owner	53	53	106	35	34	69	39	37	76	31	29	60	35	34	69	23	25	48
Unemployed (looking for work)	54	68	122	33	29	62	23	29	52	25	17	42	29	23	52	32	23	55
Not working or looking for work	335	329	664	157	186	343	224	250	474	236	240	476	229	252	481	215	232	447
Prefer not to say	7	10	17	12	12	24	4	14	18	6	6	12	11	11	22	5	6	11

QUESTIONS CHANGES PER WAVE

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

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			Wave 4			Wave 5			Wave 6
Screening	SQ1-SQ5	SQ1-SQ5			SQ1-SQ5			SQ1-SQ3			SQ1-SQ3			SQ1-SQ3
Demographics	Q37-Q45	Q37-Q45			Deleted Q37, Q39			Q38, Q40-Q45			Q38, Q40-Q45			Q38, Q40-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				Deleted codes Q1 (3)	Added codes Q1 (5, 6)		
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,			Added Q76, 76a Q77 Q78 Q79 Q80	Deleted Q76, 76a Q77, Q78, Q79, Q80	Added codes Q20a/b (15, 16, 17)	Re-added Q16, Q17 Added Q86, Q87, Q88, Q89, Q90, Q91, Q92, Q93, Q94, Q95	Added Q96
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,	Deleted Q27 Q28 Q29 Q59		Added Q73 Q74 Q75a, b		Added codes Q73 (7), Q74 (12, 13), Q75a/b (19)	Added Q75c Q81, Q82, Q83, Q84, Q84a, Q85, Q85a	

DETAILED FINDINGS

Online survey Wave 5

3

IMPACTS

How has the Coronavirus impacted
Queenslanders work life and their worries

3.1

MAXIMUM
STORE
CAPACITY:

20 PEOPLE

PLEASE OBSERVE
THE NEW SOCIAL
DISTANCING
RULES.

THANK YOU.

WORK CONTINUES TO BE IMPACTED BY CORONAVIRUS

Coronavirus affected work situation EMPLOYED

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	44%	42%	43%	33%	44%	38%	45%	57%	51%	44%	60%	52%	39%	60%	49%	41%	49%	45%
Yes, I am working more	7%	8%	8%	7%	10%	8%	7%	5%	6%	7%	9%	8%	11%	10%	10%	9%	13%	11%
Yes, I am working less than I would like	20%	21%	21%	29%	21%	25%	20%	17%	19%	21%	14%	17%	25%	14%	19%	25%	18%	22%
Yes, I have been stood down temporarily	6%	9%	7%	10%	11%	10%	7%	6%	7%	10%	4%	7%	6%	3%	5%	8%	6%	7%
Yes, I have lost my job	8%	5%	6%	10%	5%	7%	8%	6%	7%	7%	4%	5%	9%	3%	6%	7%	3%	5%
Yes, it has affected my work situation in another way	14%	14%	14%	11%	10%	10%	11%	8%	10%	9%	9%	9%	10%	9%	9%	10%	10%	10%
Prefer not to say	1%	1%	1%	0%	1%	1%	1%	2%	2%	3%	0%	2%	1%	1%	1%	0%	1%	1%
NET employee impact	55%	57%	56%	66%	56%	61%	54%	41%	48%	53%	40%	47%	60%	39%	50%	59%	50%	55%

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; Wave 4 n=1017 Total Employee = 472; Wave 5 n=1091 Total Employee =467; Wave 6 n=998 Total Employee n=437

Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	21%	13%	18%	16%	19%	35%	27%	17%	34%	26%	14%	37%	24%	17%	28%	23%
Yes, I am working more	2%	11%	6%	4%	4%	4%	3%	4%	4%	0%	2%	1%	0%	1%	1%	0%	6%	4%
Yes, my business has less income	56%	38%	47%	43%	51%	47%	39%	44%	42%	54%	46%	50%	57%	41%	50%	50%	25%	36%
Yes, I have had to close my business temporarily	15%	19%	17%	29%	16%	23%	31%	16%	23%	19%	13%	16%	24%	13%	19%	20%	20%	20%
Yes, I have had to shut down my business permanently	1%	3%	2%	0%	2%	1%	0%	0%	0%	2%	4%	3%	4%	5%	4%	8%	9%	9%
Yes, it has affected my work situation in another way	9%	5%	7%	7%	7%	7%	7%	1%	4%	8%	2%	4%	2%	3%	3%	5%	11%	9%
Prefer not to say	0%	0%	0%	4%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NET Impacted SELF / EMPLOYED / BUSINESS OWNER	83%	76%	79%	83%	82%	82%	81%	65%	73%	83%	66%	74%	86%	63%	76%	83%	72%	77%

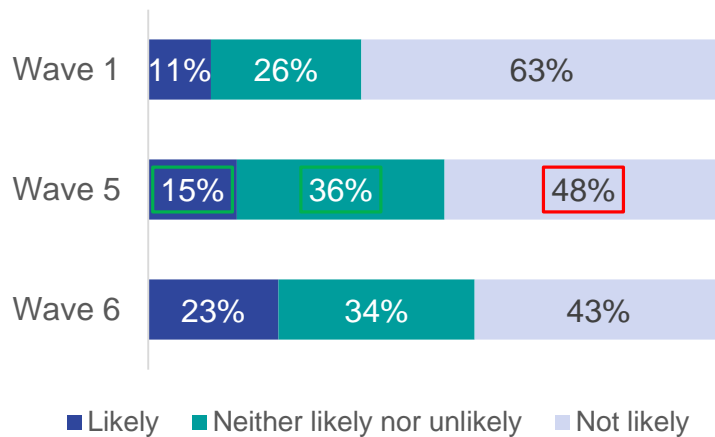
Queenslanders are gradually experiencing less work impact from COVID-19 since a peak in wave 2.

This trend is consistent with SMEs and sole traders even though they are experiencing a significantly higher level of disruption compared to the average employee (net impact 74% vs. 47%).

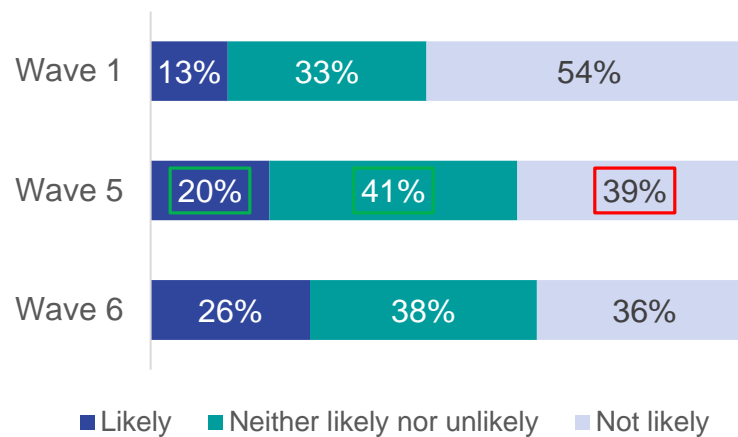
RISK OF CORONAVIRUS & COMMUNITY TRANSMISSION

With the recent increase of cases in southern states, Queenslanders perception of risk has increased since May. However there is still almost half that don't perceive a risk to themselves (43%) or to their family (36%) but do perceive Queensland will have community transmission like the southern states (36%). The proximity to risks is for others but not close to home. For people to take protective guidelines seriously they need to consider the risks to themselves and those close to them as much as they do for other Queenslanders.

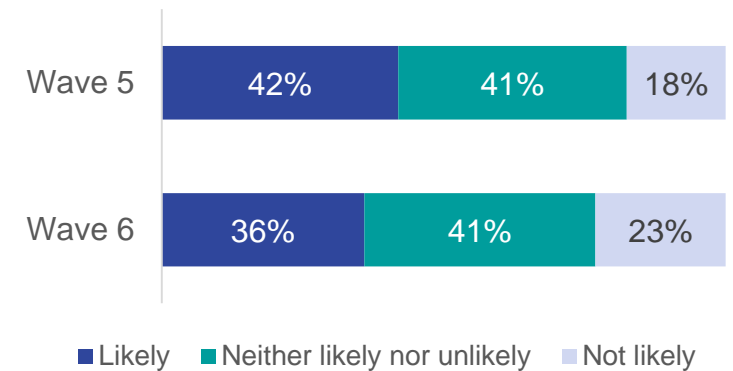
Perceived likelihood of you getting Coronavirus



Perceived likelihood someone in your family getting Coronavirus



Perceived likelihood Queensland will have community transmission like VIC and NSW



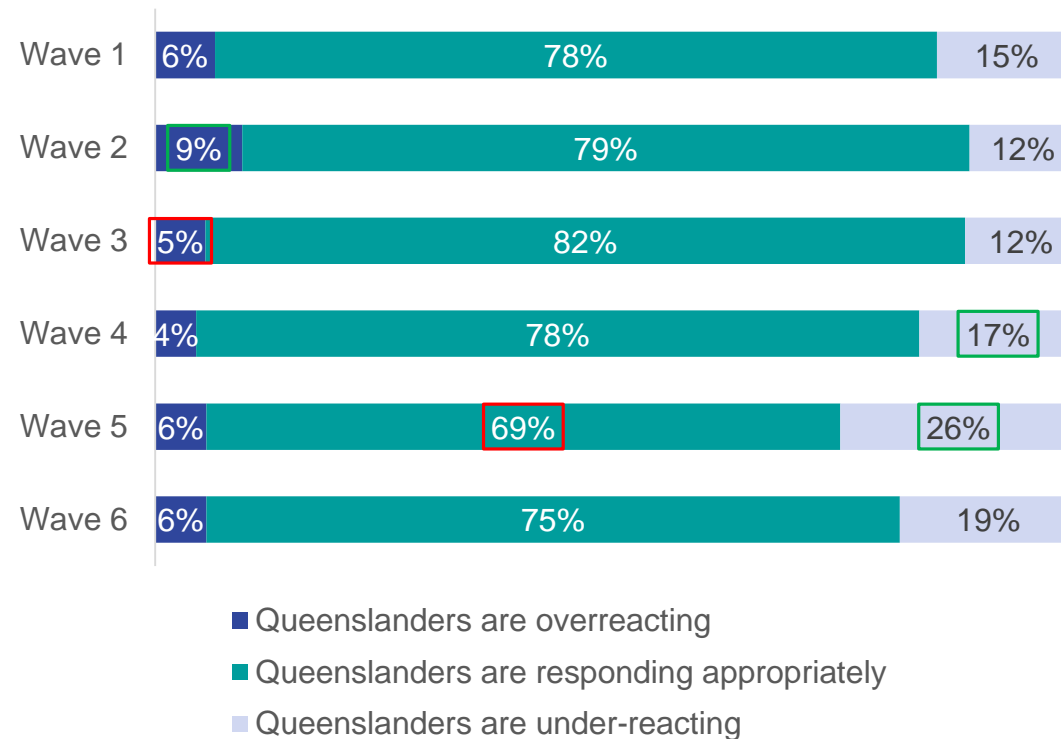
Q16 How likely do you feel it is that you will get Coronavirus, on a scale of 1 to 10 where 1 is not at all likely and 10 is definitely likely?
Total: Wave 1 n = 1603, Wave 5 n=1091, Wave 6 n=998

Q17 How likely do you feel it is that someone in your family will get Coronavirus, on a scale of 1 to 10 where 1 is not at all likely and 10 is definitely likely?
Total: Wave 1 n = 1603, Wave 5 n=1091, Wave 6 n=998

Q86 How likely do you feel it is that Queensland will have community transmissions or hot spots of Coronavirus like Victoria and New South Wales, on a scale of 1 to 10 where 1 is not at all likely and 10 is definitely likely?
Total: Wave 5 n=1091, Wave 6 n=998

QUEENSLANDERS FEEL WE GOT IT RIGHT BUT MORE WORRY

The majority continue to feel Queenslanders are responding appropriately to the COVID threat. There's a slight shift from believing that we are reacting accordingly at 75% increasing from two weeks ago. This coincides with the border closures and the anticipation of community contagion.



With new cases in QLD this wave, it is a waiting game to see what happens next but as the week progresses people felt more confident there would be no new cases.

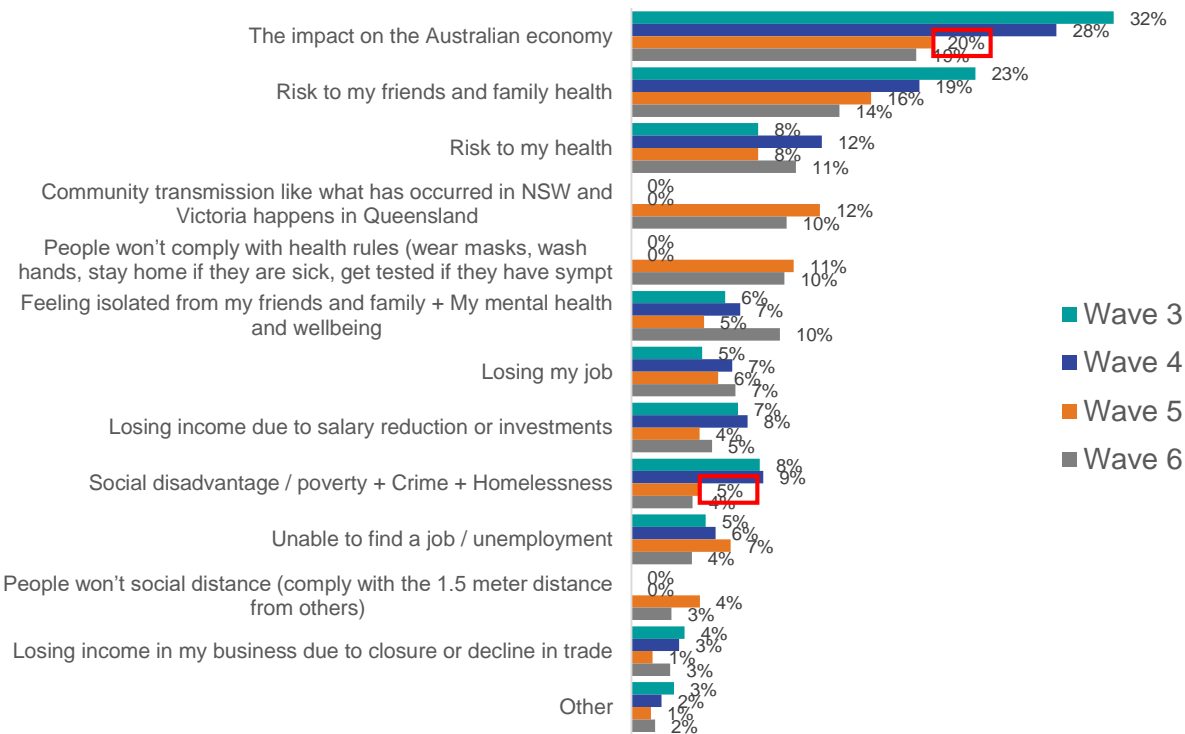
Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998

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

IMPACT ON ECONOMY IS TOP CONCERN

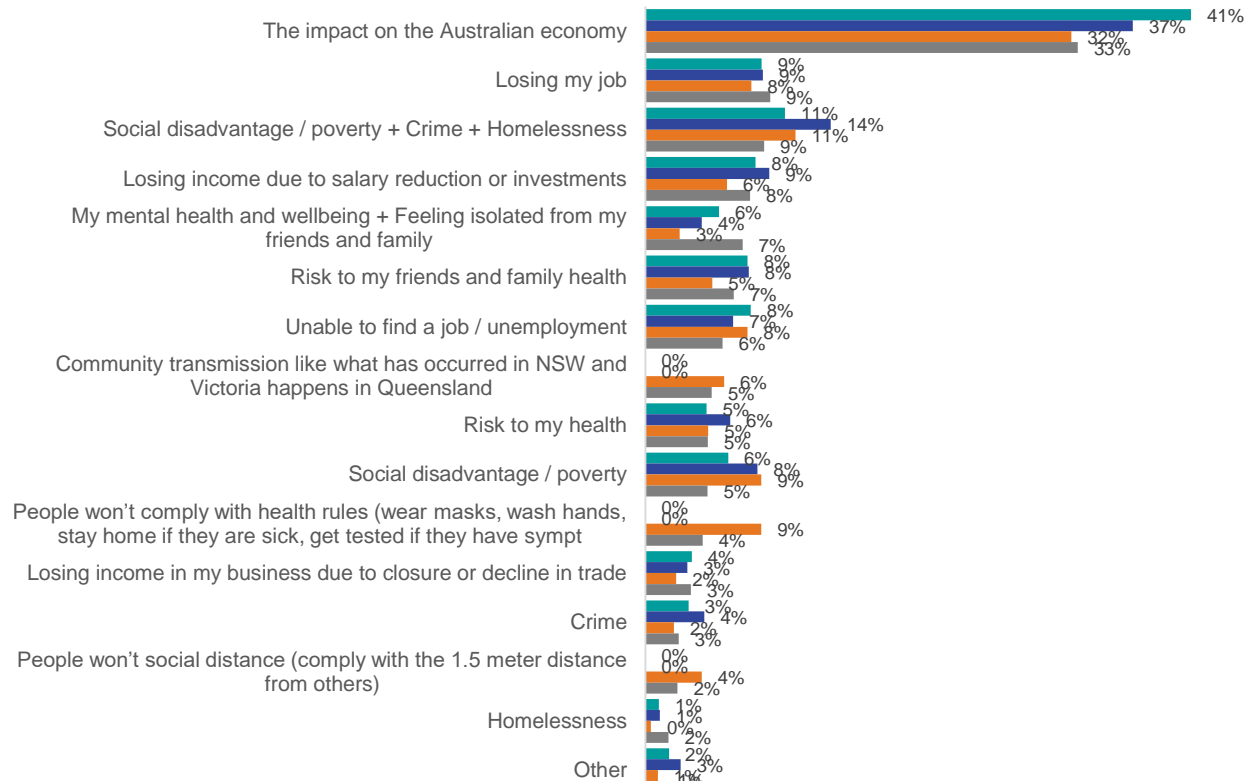
Impact on the Australian economy continues to be the top concern (19%), followed by risk to family and friends (14%), and the risk of community transmission (10%) and lack of compliance with health rules (10%). In terms of concern for the economy people are also worried about social disadvantage (9%), before non compliance with health rules (9%) as well as losing income (8%) or losing their job (9%).

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



Q20a In relation to the Covid-19 global pandemic, what are you most worried about?
Total Wave 3 n=1021, Total Wave 4 n=1017, Total Wave 5 n=1091, Total Wave 6 n=998

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



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, Total Wave 4 n=1017, Total Wave 5 n=1091

ECONOMY

Queenslanders views
on economic recovery

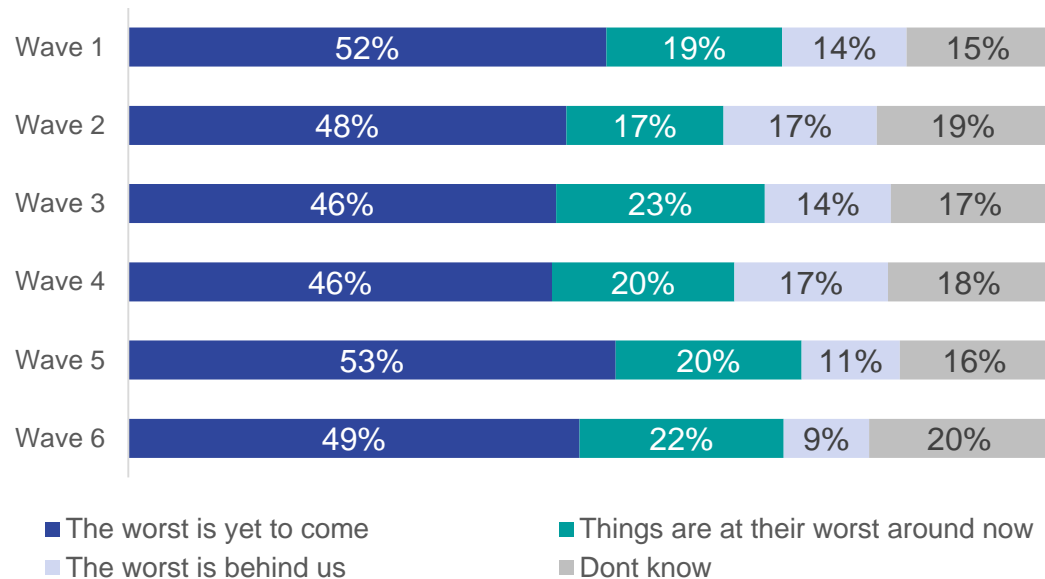


3.2



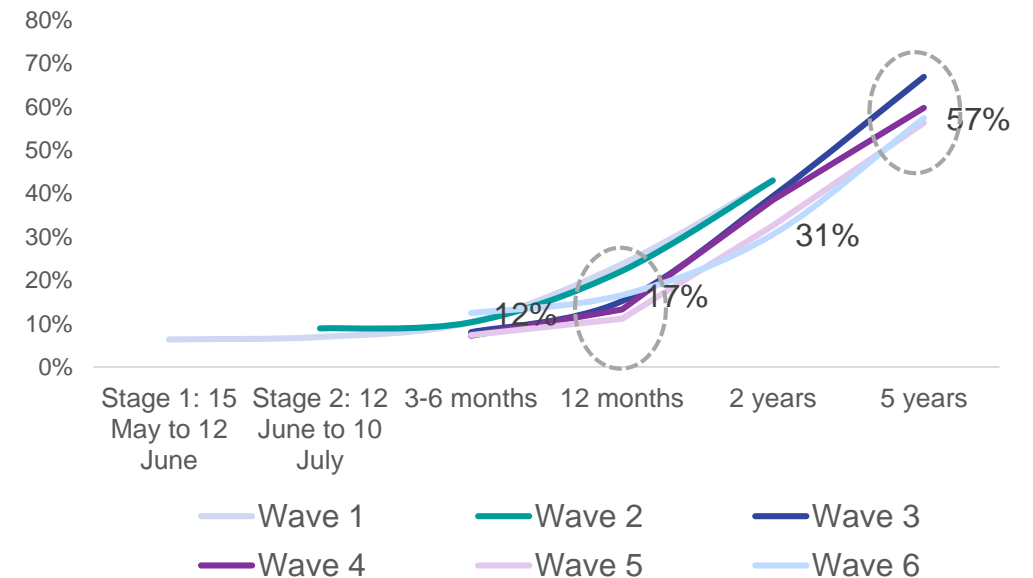
QUEENSLANDERS EXPECTATIONS ABOUT THE ECONOMY

Queenslanders' expectations about the economy has remained consistent across the 6 waves to date, with just under half having a negative outlook (49% believing that the worst is yet to come in W5). There's considerable uncertainties with 1/5 of the population not knowing what to expect.



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; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

Queenslanders are becoming less optimistic of a speedy economic recovery, with the majority believing that the economy will fully recover in 5 years time (57%). Furthermore, early positive projections of a 12 month recovery in Wave 1 and 2 has decreased in Wave 3 to 6, and the 5 year projection is also declining in Wave 5 to 6.

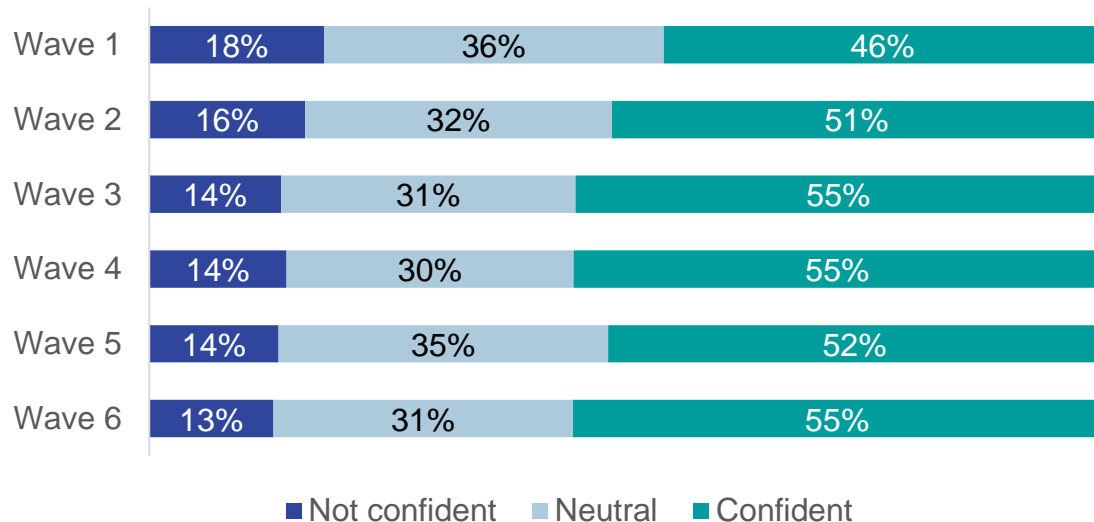


Q22 As restrictions are relaxed, how confident are you that Queensland's economy will have made a full recovery to pre-COVID-19 levels in...?:
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n = 1017; ; Total Wave 5 n=1091; Total Wave 6 n=998

QUEENSLANDERS CONFIDENCE

Queenslanders are split in their confidence in the Queensland Government's management of the economic recovery, with half feeling confident and the other half feeling either neutral or not confident.

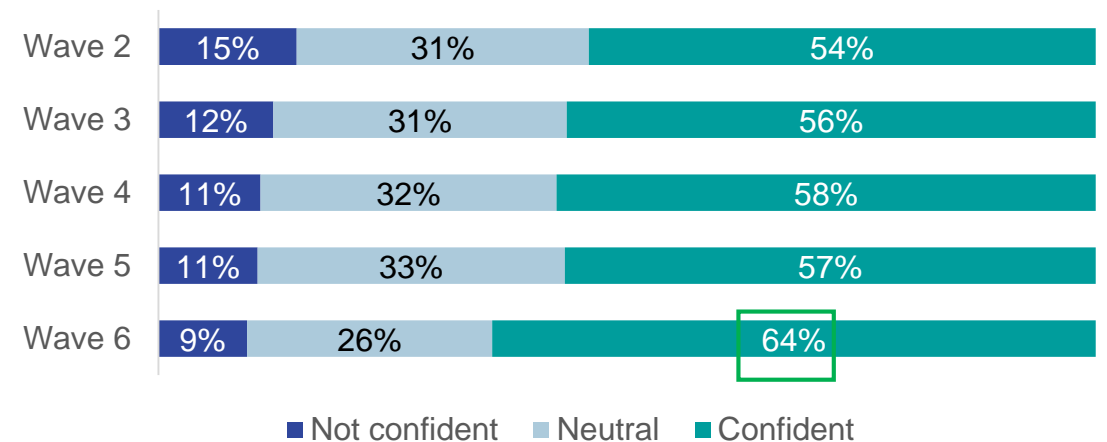
The public confidence that grew in Wave 2 to Wave 4 has dropped slightly in Wave 5 but this is not statistically significant, and has regained ground to 55% in Wave 6.



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 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

Similarly, half of the population believes that the Government has been handling the COVID-19 crisis to the State economic advantage in the long run. This has increased in Wave 6 to almost two thirds (64%).

There isn't a significant issue with distrust or lack of confidence. Sentiment is driven by a lot of uncertainties with a third of the population sitting on the fence, feeling undecided.

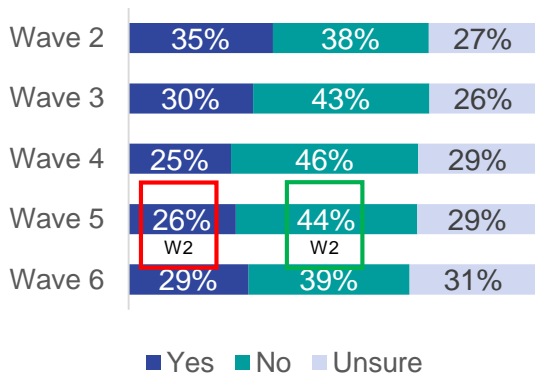


Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" –How confident that Queensland has handling COVID-19 will be to the State's economic advantage in the long run
 Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

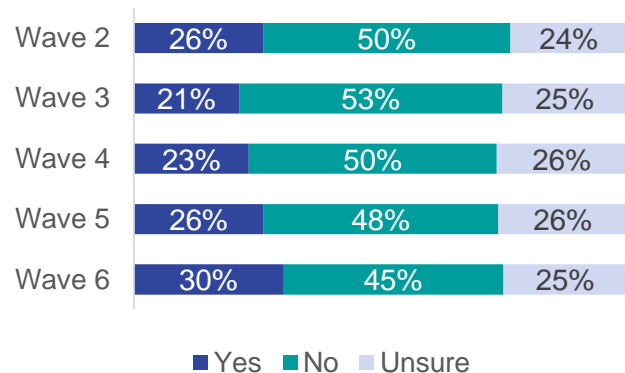
AWARENESS OF ECONOMIC INITIATIVES AND RECOVERY STRATEGY

The key challenge for the Queensland Government is raising awareness of the State's Recovery Strategy. There are signs of decreasing awareness from Wave 2 to Wave 5 but a bounce back to 29% in Wave 6. Once awareness is achieved, understanding is moderate and support is relatively strong. Whilst announcements and advertising continuing about the economy from the Government there has been some improvement in the overall understanding of the strategy since Wave 5 with one in ten saying they don't understand the strategy in Wave 6. Awareness needs to be addressed first before improving familiarity and understanding of the Strategy and ultimately convert the fence sitters (31%) to supporters (63%).

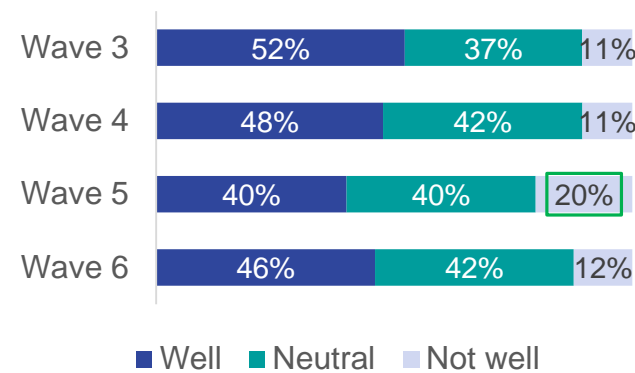
Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?



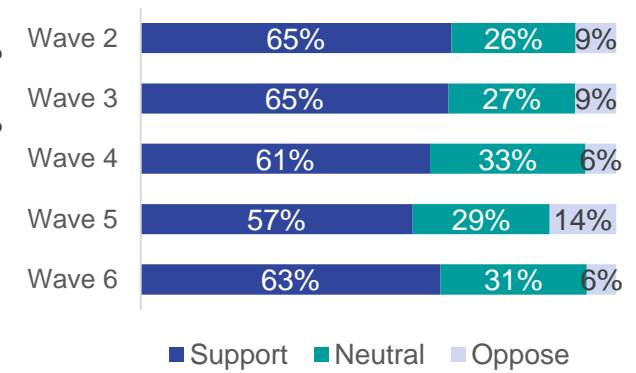
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



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; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 N=1017; Total Wave 5 n=1091; Total Wave 6 n=998

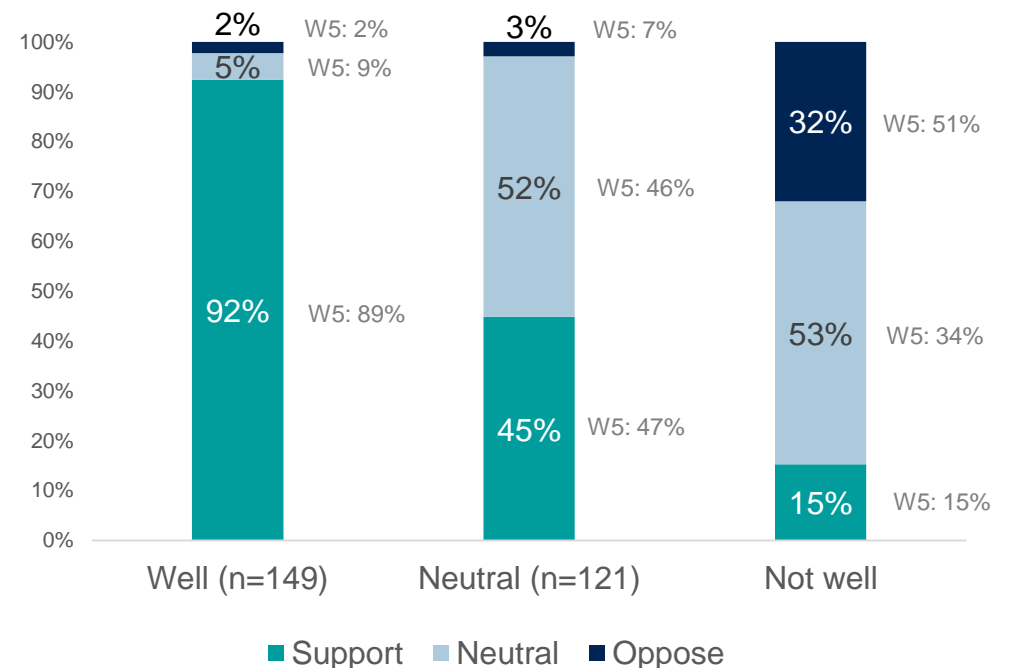
Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
Wave 3 n = 211; Wave 4 = 237; Wave 5 n=282; Total Wave 6 n=998

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; Wave 4 n=237; Wave 5 n=282; Total Wave 6 n=998

UNDERSTANDING ASSOCIATED WITH SUPPORT

The next stepping stone in building support is to improve familiarity and understanding. Awareness is not enough, people need to understand the strategy better before they can support it.

As evident in the data, those who understand the strategy well are significantly more likely to support it (92% vs. 45% neutral and 15% not well).



W5: x%
Wave 5 %

Q48 by Q64
(Wave 6)

SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Queenslanders support the Strategy mainly for managing restrictions in stages, its step-by-step approach, keeping borders closed and consideration for health and wellbeing. Mentions of keeping people in jobs and creating jobs has continued to increase from Wave 3 to 4 and now Wave 5 with almost half (41%) supporting the strategy for this reason.

The fence sitters are mainly unsure and acknowledge that there are still uncertainties to be dealt with and are waiting to see what unfolds. Dropping is the need for more detailed analysis but people still don't know enough to have an opinion.

Opposers remain either sceptical pending more information or have a distrust towards Government. This is however a small group. We see concerns specifically about small business and tourism suffering increasing this wave.

66%

SUPPORT	W4	W5	W6
Restrictions are being gradually lifted, and it has been handled in stages	54%	51%	47%
Will help lift the economy	46%	48%	47%
They have done the right thing by keeping our borders closed	40%	44%	47%
Keeps people in jobs or creates more jobs	33%	48%	41%
It supports tourism and promotes local tourism	32%	41%	36%
It looks after small business and helps affected industries	37%	36%	42%
Right approach as it keeps us safe and looks after our health and well being	40%	35%	40%
Its a good strategy for all Queenslanders	25%	29%	36%
It is a recovery package where they have an action plan	37%	26%	28%
It is doing the right things and heading in the right direction	24%	26%	30%
Need to get things moving and get back on track	26%	23%	21%
The strategy is detailed, well thought out and logical	27%	19%	20%
Developed with specialised knowledge and experts	19%	16%	18%
It will be for the best	13%	14%	15%

31%

NEUTRAL	W4	W5	W6
So many unknowns still to be faced and I will have to see how the situation goes	45%	70%	64%
I would need to analyse it in more detail and I would need more information	37%	26%	16%
I don't know enough to say	44%	23%	32%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	34%	23%	28%
I don't trust them to keep their word	14%	11%	12%
Some families missed out completely and some people get no support	21%	10%	14%
Not enough real information available and too many mixed messages	19%	10%	16%
We are on the right track and then other times we are not	11%	2%	8%

6%

OPPOSE (Caution: small base)

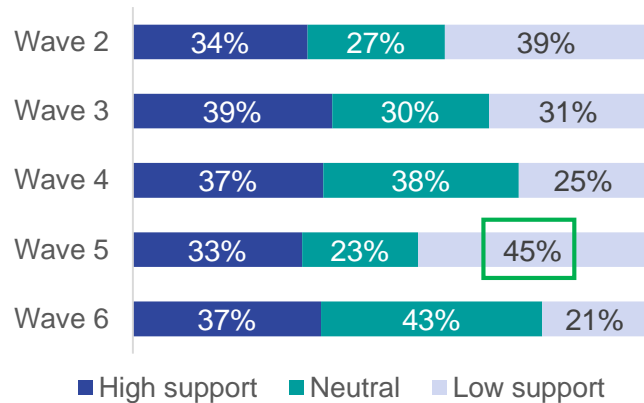
	W4	W5	W6
Not enough real information available and too many mixed messages	48%	59%	57%
I don't trust them to keep their word	51%	44%	55%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	30%	33%	44%
Doesn't address core businesses concerns and small business are suffering	45%	23%	39%
Restrictions should have been eased and we have stayed in lock down too long	3%	13%	7%
Doesn't address core tourism concerns and tourism is suffering	13%	13%	24%
Too little, too late, too slow to act	20%	9%	19%
Some families missed out completely and some people get no support	44%	7%	24%
I feel we should open our borders	3%	5%	2%

Significantly higher / lower than previous wave unless otherwise noted – 95% CI.

QLD GOVERNMENT SUPPORT

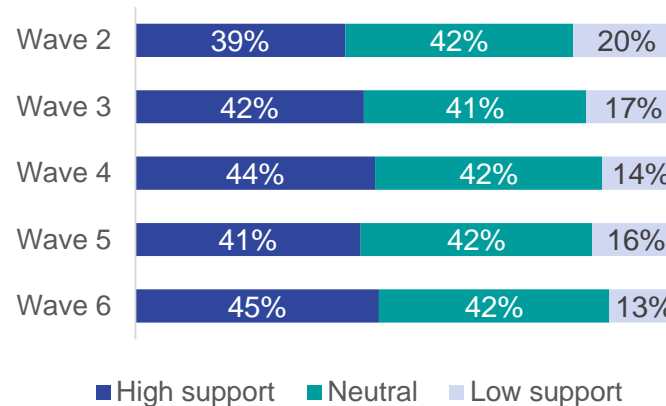
Small business and self employed see a shift in increased dissatisfaction with the support they are getting from Government in Wave 5 but this returns to previous sentiment in Wave 6. The majority of Queenslanders continue to be satisfied with Government support for small businesses and the community. This positive sentiment is consistent, with no significant differences appearing.

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



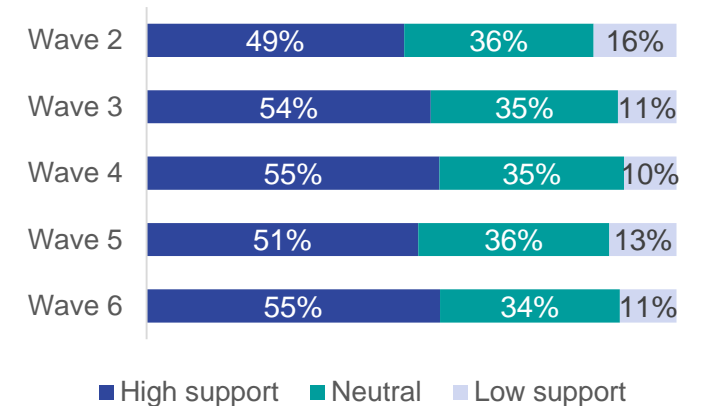
Q49 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support"- Are you getting enough support from the government as a small business owner or self-employed? Total Wave 2 n = 69; Total Wave 3 n=76; Total Wave 4 n=60; Total Wave 5 n = 69; Total Wave 6 n=48

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; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n = 1091; Total Wave 6 n=998

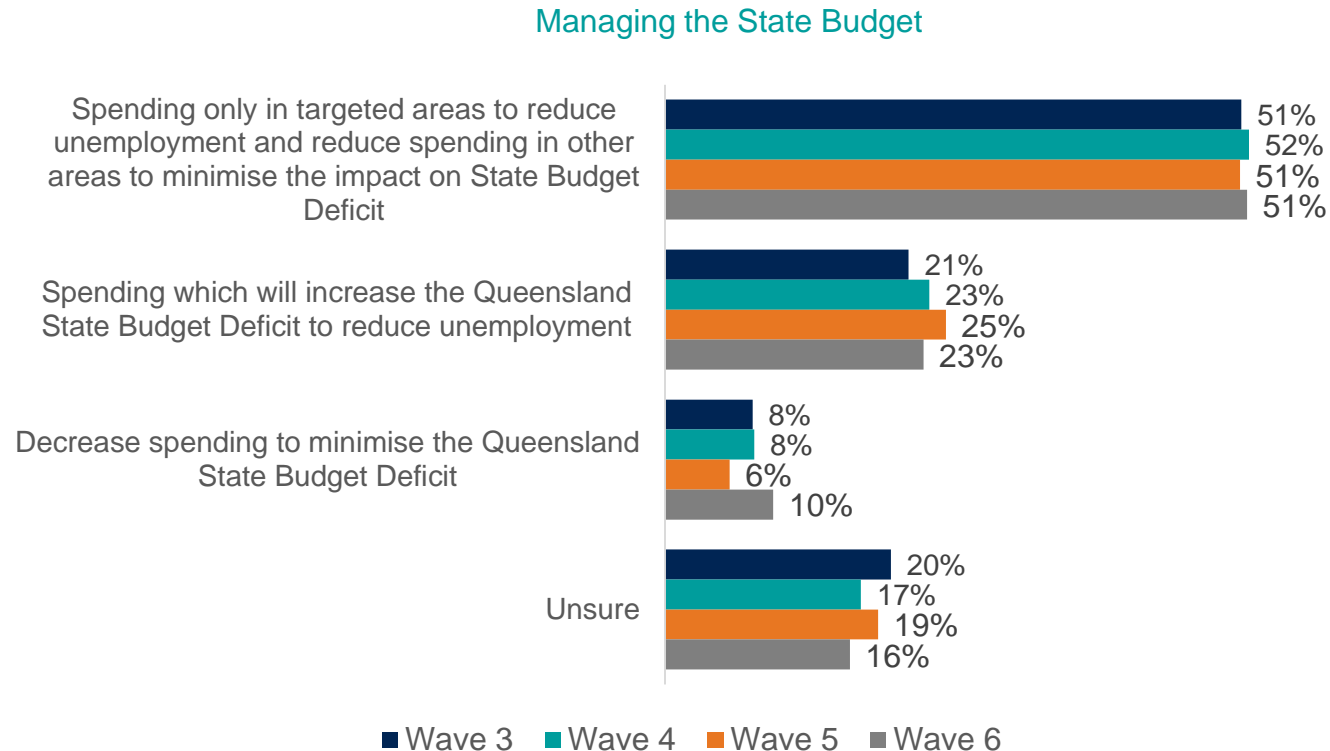
Is the Queensland Government is doing enough to support **the community** through this pandemic and recovery?



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; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n = 1091; Total Wave 6 n=998

SPENDING WISELY AND WATCHING THE DEFICIT

There's majority support for spending to reduce unemployment. Specifically, half of the Queensland population supports spending smartly in targeted areas while minimising the impact on State Budget Deficit. Only few support inaction to preserve the budget and around 1 in 5 feeling undecided.

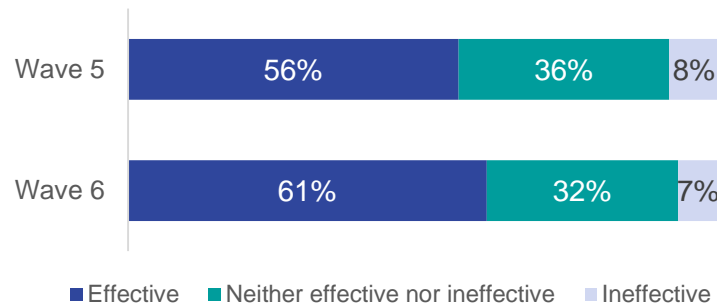


Q63 In terms of managing the State Budget. Which is most important to you?
Total Wave 3 n = 1021 Total Wave 4 n = 1017; Total Wave 5 n = 1091; Total Wave 6 n=998

ECONOMIC STRATEGIES PERCEIVED EFFECTIVENESS

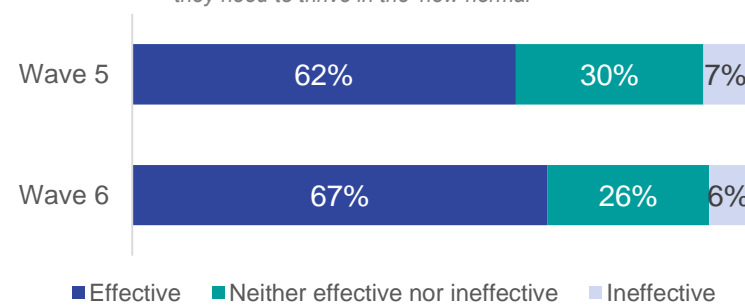
Just over half feel the Unite and Recover for Queensland Jobs Economic Strategy overall will be effective in helping the economy recover. Whilst over two thirds of Queenslanders feel the individual strategies will be effective. About a quarter are neutral and less than 7% feel they will be ineffective in helping the economy to recover.

Unite & Recover for Queensland Jobs



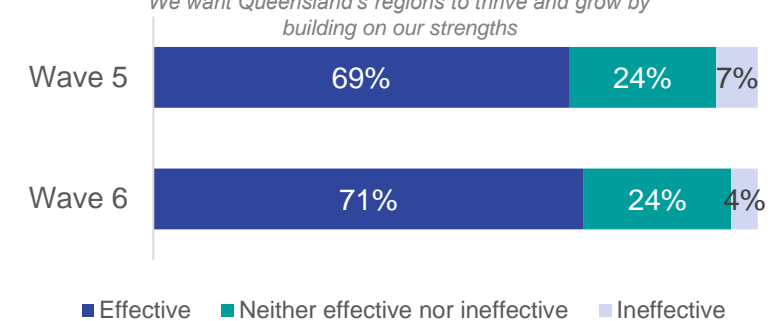
Backing Queensland's Small Business

We want Queensland's small businesses to have what they need to thrive in the 'new normal'



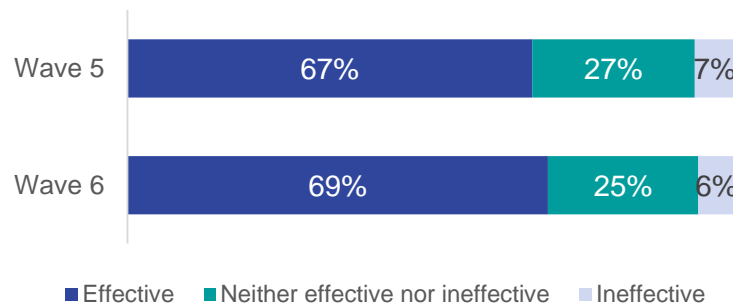
Backing Queensland's Regions: Buy, Visit, Invest Queensland

We want Queensland's regions to thrive and grow by building on our strengths



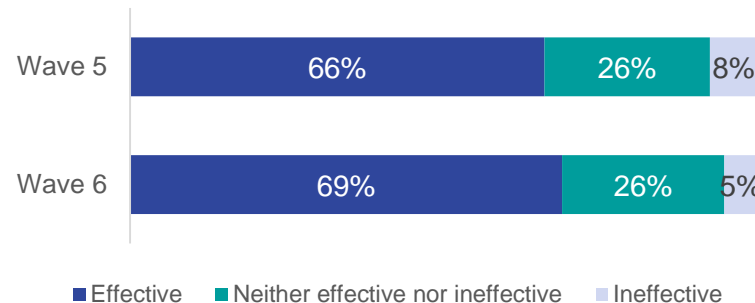
Protecting Queensland: Our Plan to Safeguard Your Health and Jobs

We want a prepared and ready health system that protects Queenslanders as the economy recovers and grows



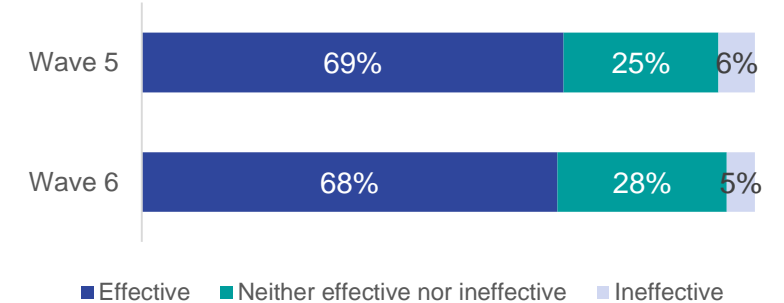
Building Queensland: Accelerating Infrastructure Investment

We want investment in infrastructure to support Queensland's economic recovery, future prosperity and resilience



Building Queensland: Accelerating Infrastructure Investment

We want Queensland's regions to thrive and grow by building on our strengths



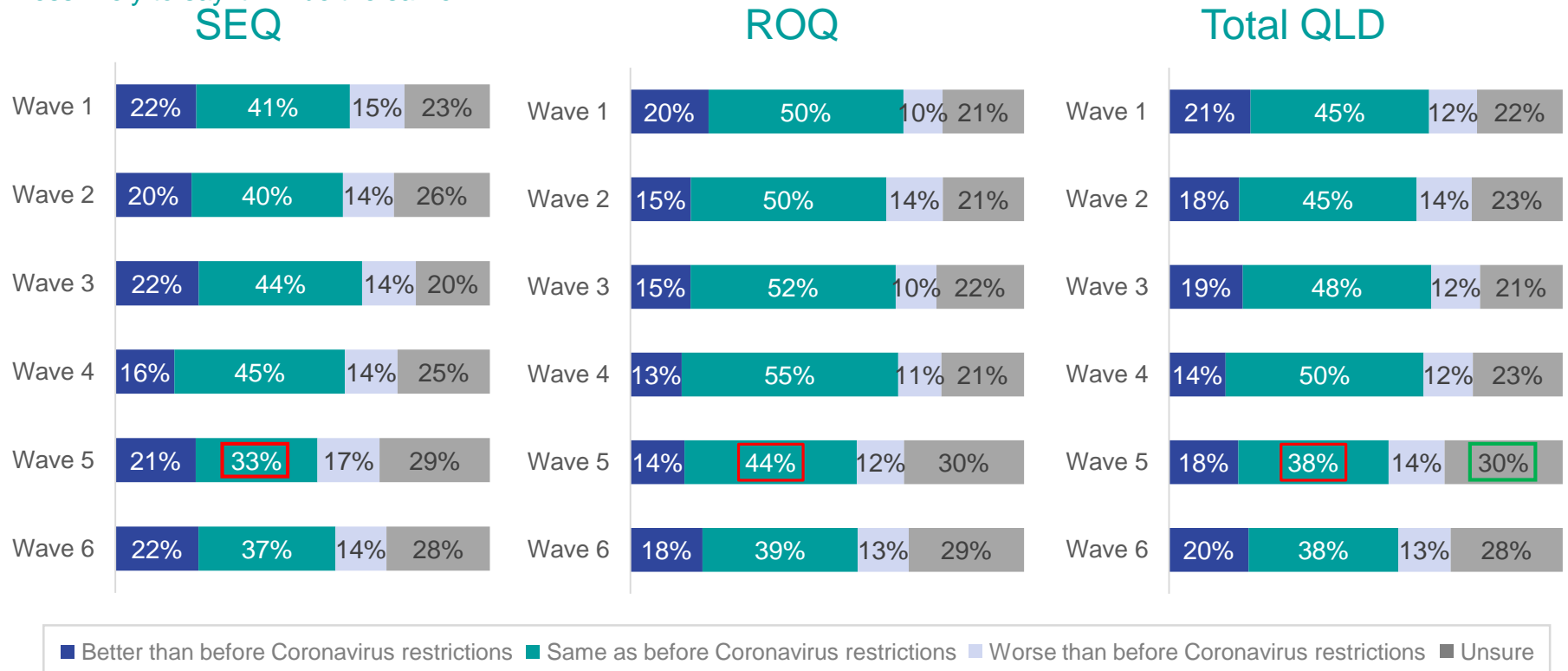
RESTRICTIONS

3.3



INCREASING INSECURITY ABOUT WHETHER LIFE WILL BE THE SAME

About half of Queenslanders surveyed felt that the Coronavirus is not seen to have a lasting impact on quality of life. However as restrictions ease but hot spots increase in southern states but not in Queensland, people have become more uncertain about the future. An equal number of residents believe life will be better as do believe it will be worse. Similar to Wave 5 more people this wave are unsure. People living in South East Queensland are the most optimistic about it being better and less likely to say it will be the same.



38%
Life will be same

20%
Life will be better

13%
Life will be worse

28%
Unsure

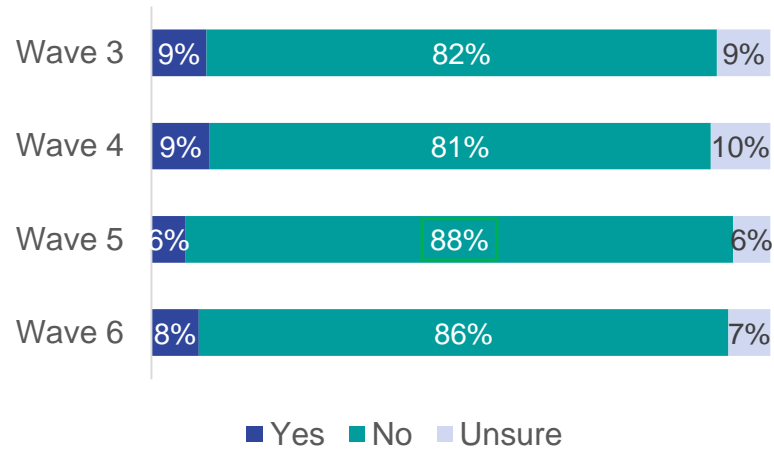
Q30 What will your life be like after restrictions ease?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

OPEN BORDERS BETWEEN STATES WITH HOT SPOTS

Survey completed 10-11 August 2020

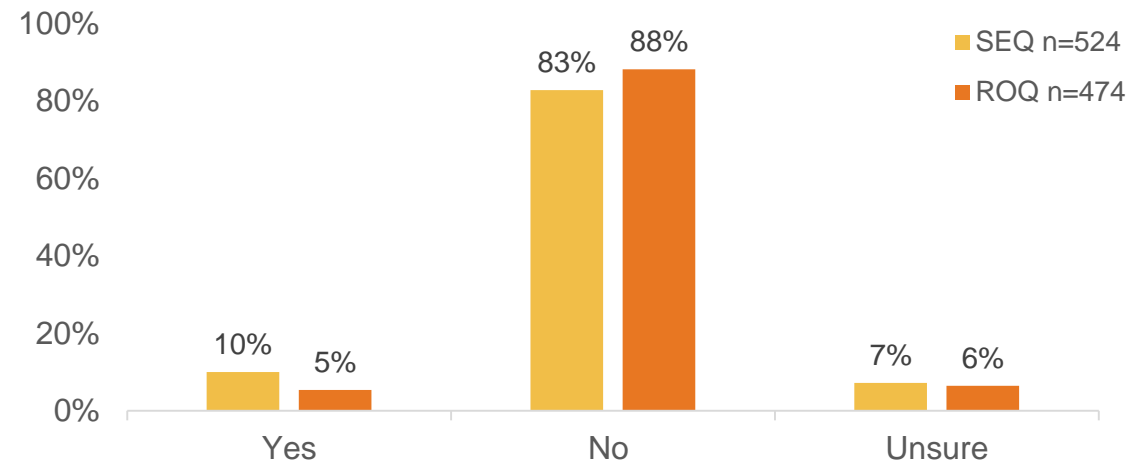
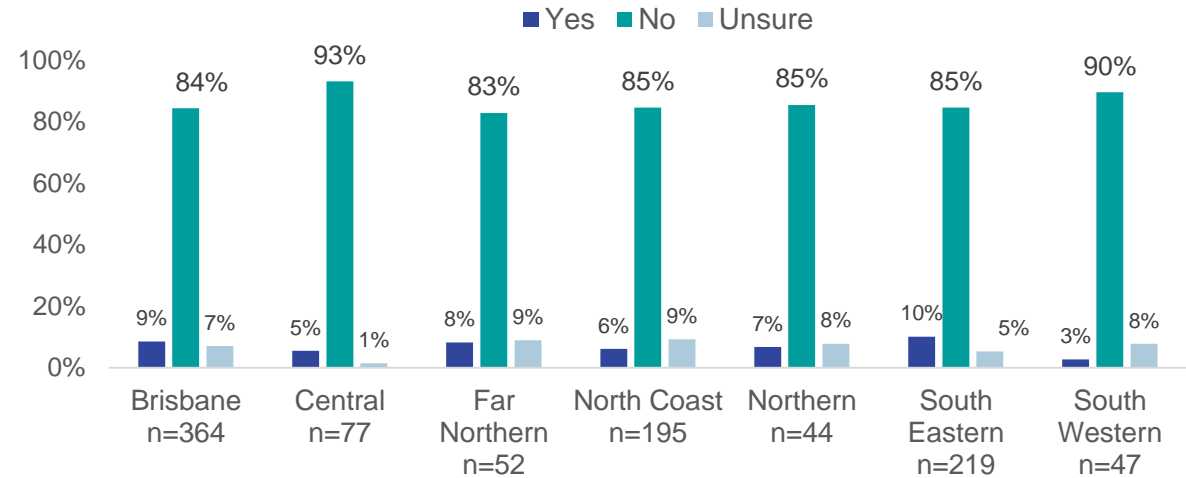
There's almost consensus across Queensland that border should be closed to states that continue to record hot spots or multiple new cases per day. This is consistent in Wave 6 as we see community transmission numbers increasing in New South Wales. Slightly more people in rural and regional Queensland wanting to keep borders shut than south east Queensland but this is not statistically significant.

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; Total Wave 4 n = 1017; Total Wave 5 n=1091; Total Wave 6 n=998



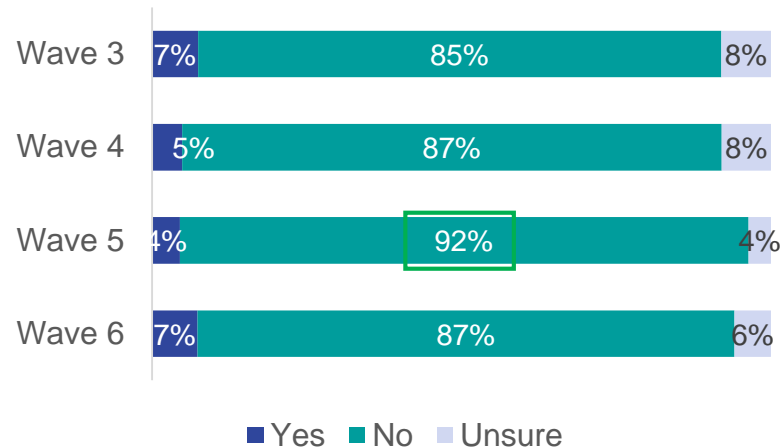
Significantly higher / lower than previous wave unless otherwise noted – 95% CI.

OPEN BORDERS BETWEEN TOWNS/REGIONS WITH HOT SPOTS

Survey completed 10-11 August 2020

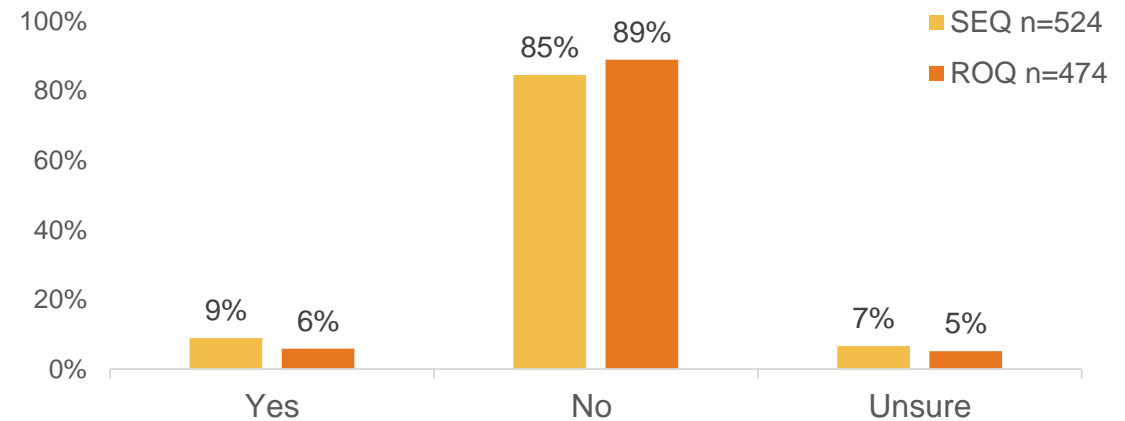
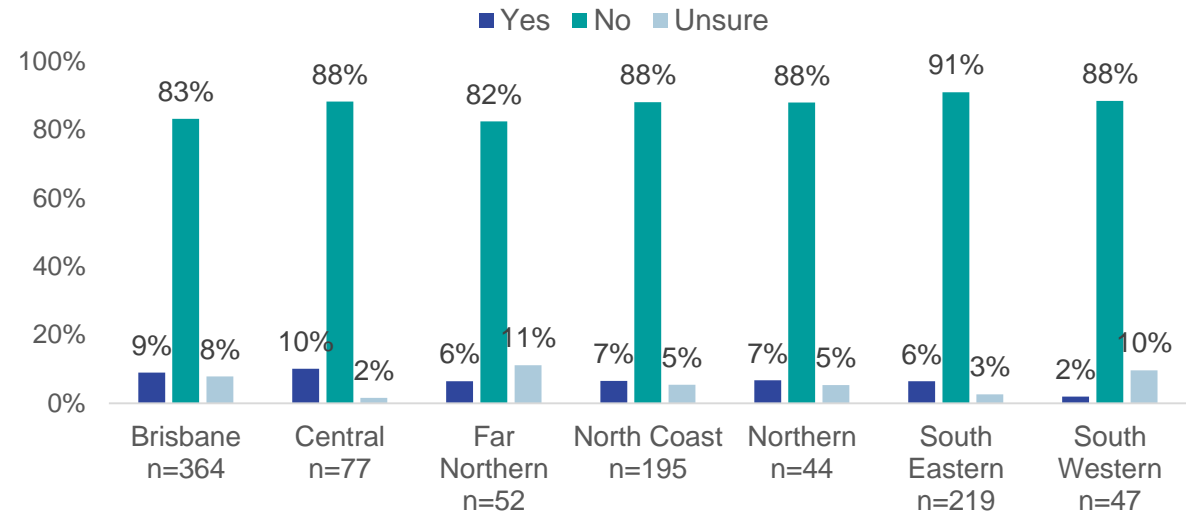
Similarly, a majority supports border closure with towns/regions that record hot spots. This is true across Queensland. Slightly more people in rural and regional Queensland wanting to keep borders shut than south east Queensland but this is not statistically significant.

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). NB. 'be reopened' deleted from question in Wave 5.

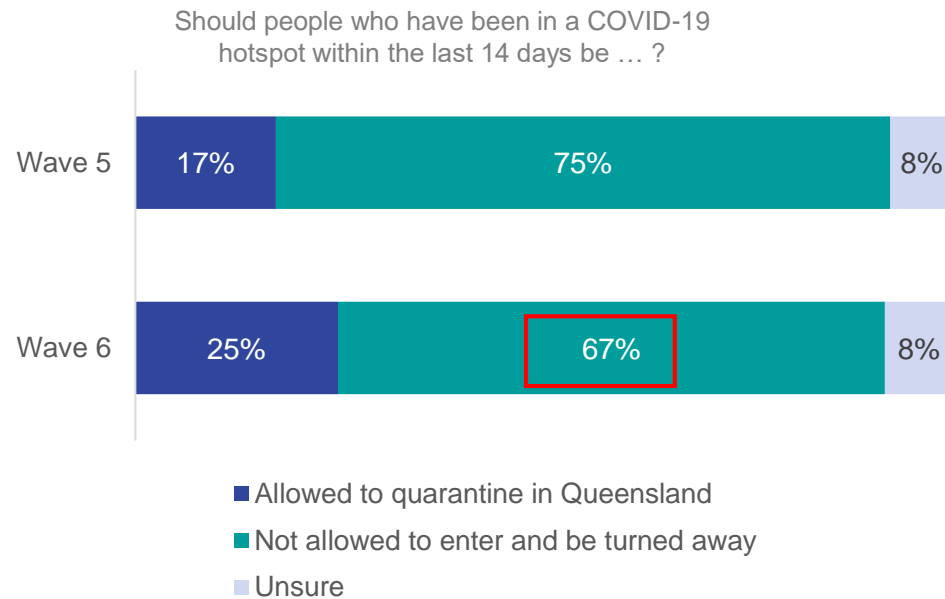
Total Wave 3 n=1021; Total Wave 4 n = 1017; Total Wave 5 n = 1091 ; Total Wave 6 n=998



OPEN BORDERS TO THOSE FROM HOT SPOTS

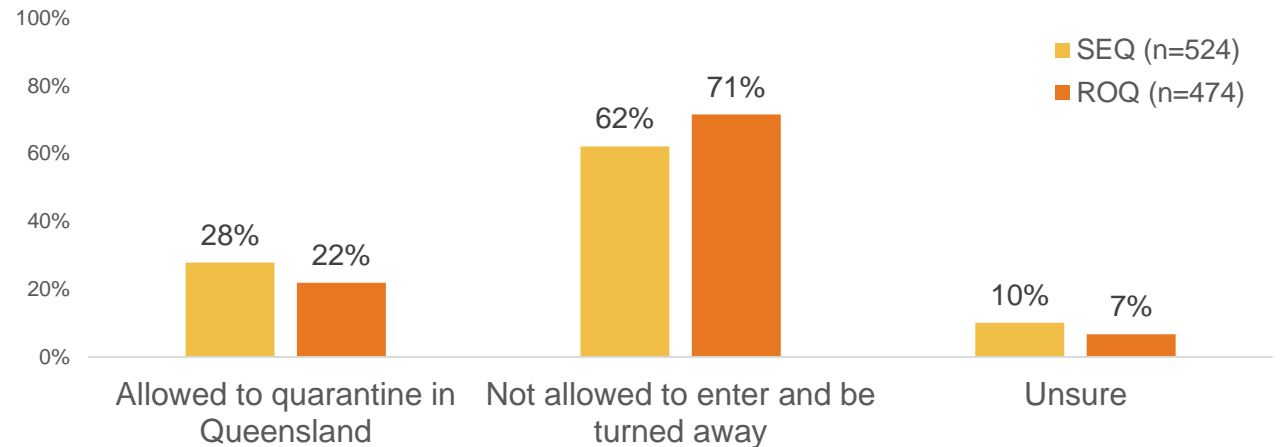
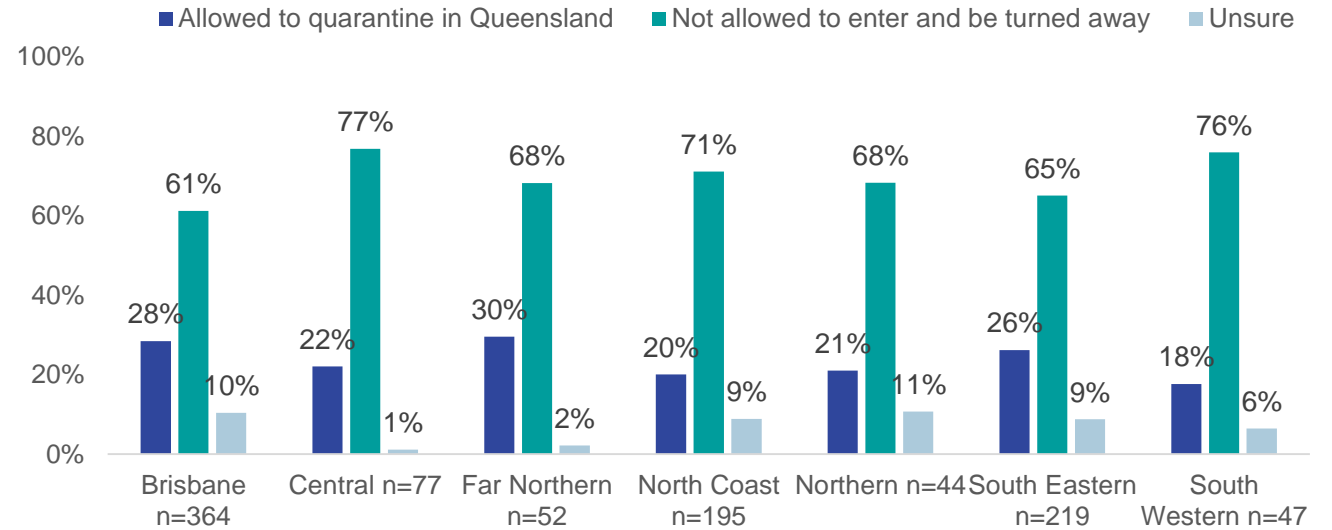
Survey completed 10-11 August 2020

Two thirds of Queenslanders believe that people who are returning from a hot spot region should be turned away and not allowed into Queensland and turned away at the border. A quarter (25%) say that they should be allowed to quarantine in Queensland. Brisbane are more likely than other locations to agree to quarantining in QLD (28%).



Q81 Anyone can enter Queensland from interstate unless they have been in a COVID-19 hotspot in the last 14 days. Should people who have been in a COVID-19 hotspot within the last 14 days be able to quarantine in Queensland or be turned away at our border?

Total Wave 5 n = 1091 ; Total Wave 6 n=998



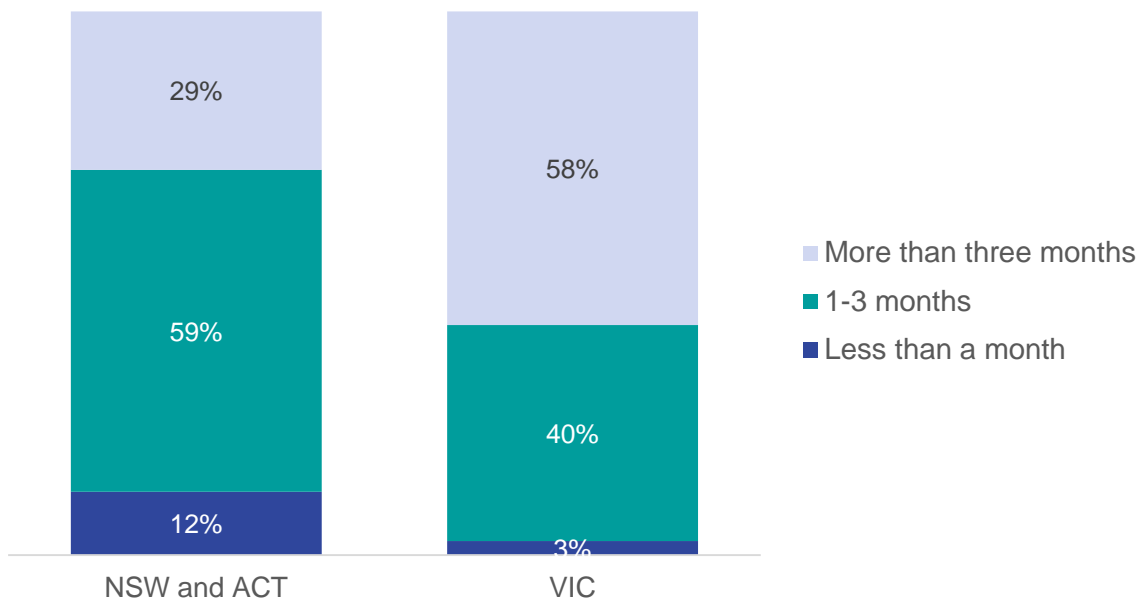
SEQ n=515, ROQ n=516

ANTICIPATED BORDER CLOSURE TO NSW, ACT

Survey completed 10-11 August 2020

Queenslanders surveyed believe that borders will be closed for some time between NSW and the ACT with over half (59%) stating it will be 1-3 months and a quarter (29%) thinking it will be much longer and over 3 months. There is less optimism for Victoria with over half (58%) of people saying that borders won't open for over three months and the others (40%) saying it will be at least 1-3 months.

How long do you think this closure will be for?

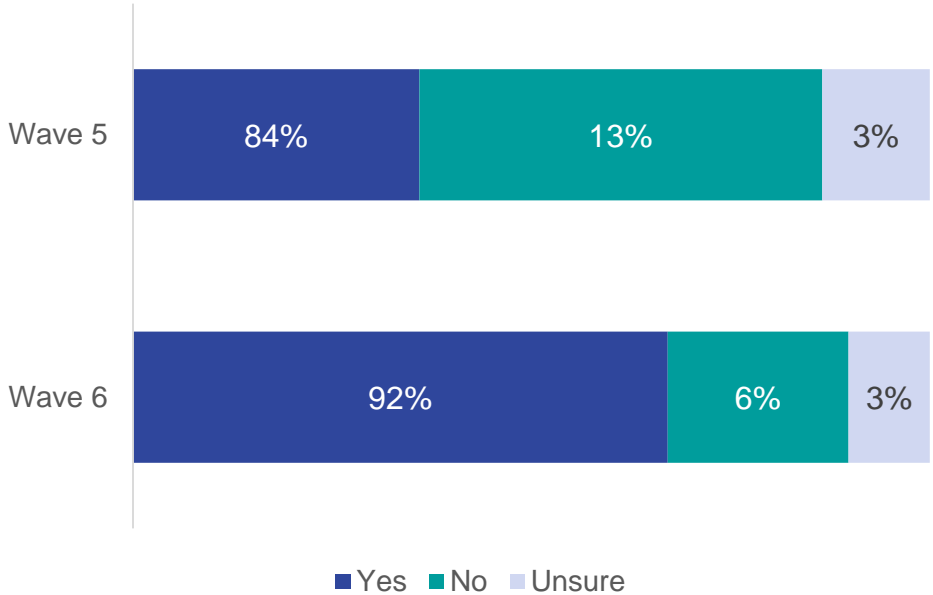


Q96 Currently Queensland has its border closed to NSW, ACT and Victoria. How long do you think this closure will be for?
Total Wave 6 n = 998

TESTING FOR CORONAVIRUS AT THE BORDER

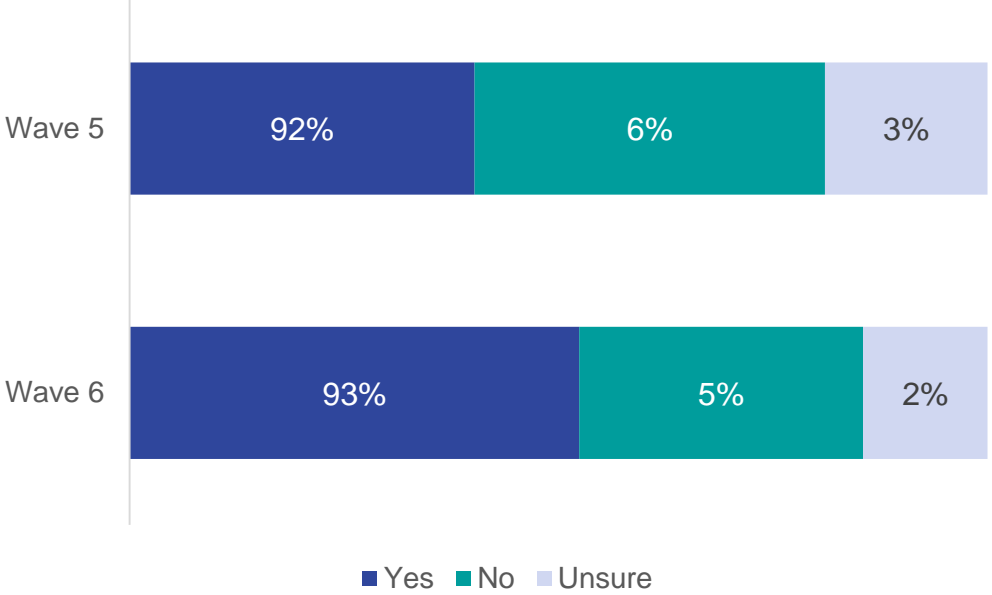
Most Queenslanders agree that people arriving from overseas or from a COVID-19 hot spot in Australia should be tested for coronavirus as well as being placed in Quarantine at their own expense.

Should people from overseas also be tested for Coronavirus on arrival?



Q82 Anyone can enter Queensland from overseas, but they must quarantine for 14 days at their own expense. Should people from overseas also be tested for Coronavirus on arrival?
Total Wave 5 n=1091; Total Wave 6 n=998

Should Queenslanders arriving home from COVID-19 hotspots also be tested for Coronavirus on arrival?

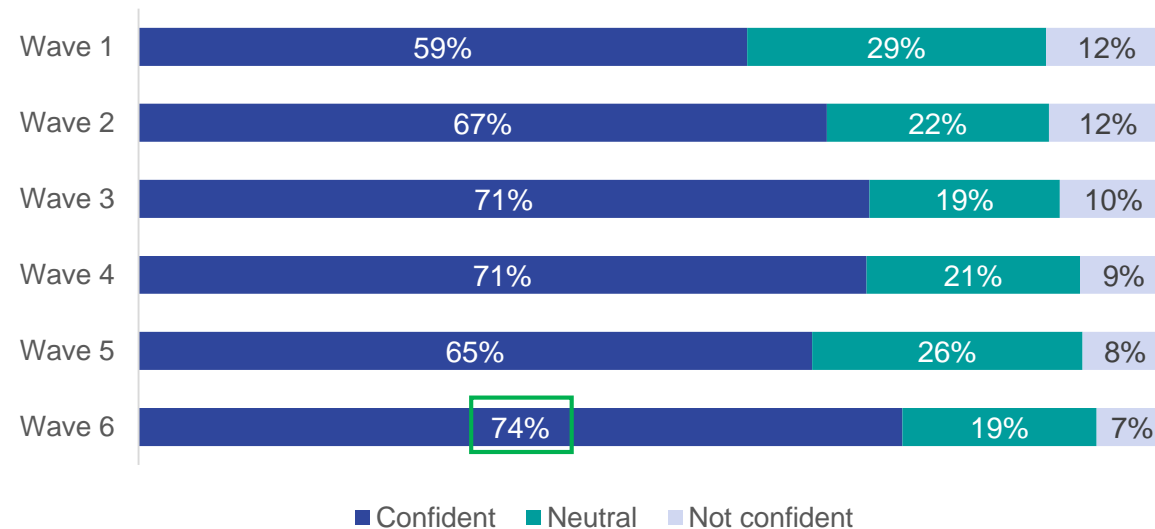


Q83 Queenslanders arriving home from COVID-19 hotspots, must quarantine for 14 days at their own expense. Should they also be tested for Coronavirus on arrival?
Total Wave 5 n=1091; Total Wave 6 n=998



CONFIDENCE ON MANAGING RESTRICTIONS DECLINES

The Queensland Government have enjoyed public confidence in managing the easing of restrictions over the past two months. This confidence significantly grew in June and has maintained positive momentum, however less people are as confident as we see non compliance occurring at the borders, in pubs and clubs and new cases in Queensland during May. This confidence has increased in August with three quarters agreeing they are confident.



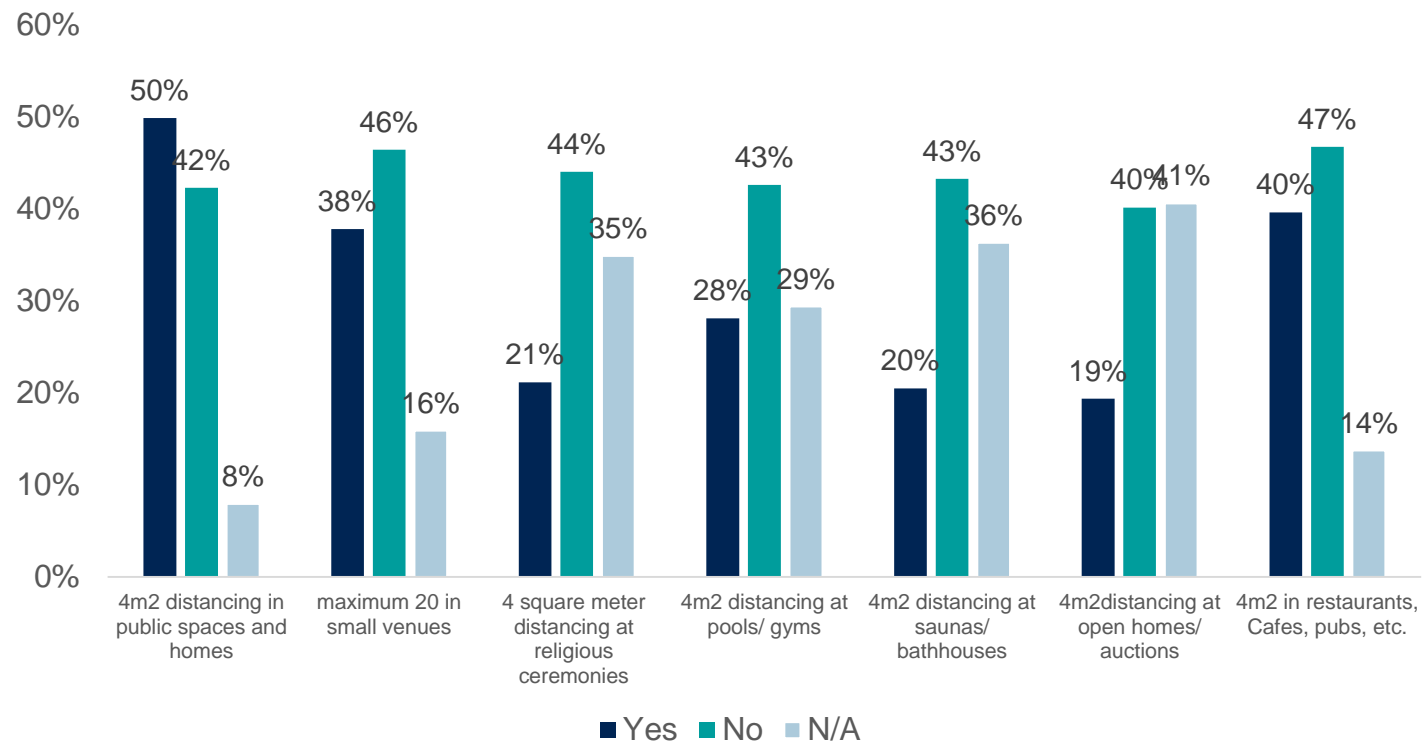
Q24 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the easing of restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998

74% 19% 7% Significantly higher / lower than previous wave unless otherwise noted – 95% CI.

NON-COMPLIANCE WITH RESTRICTIONS

There's reasonable compliance with restriction rules, with the exception of distancing in public spaces and homes with half Queenslanders observing non-compliance (50%). A third of Queenslanders have observed non-compliance in restaurants, cafes and pubs (40%) or small venues (38%) and a quarter at pools or gyms (28%). At least one in five have observed non compliance in other venues.

Wave 6



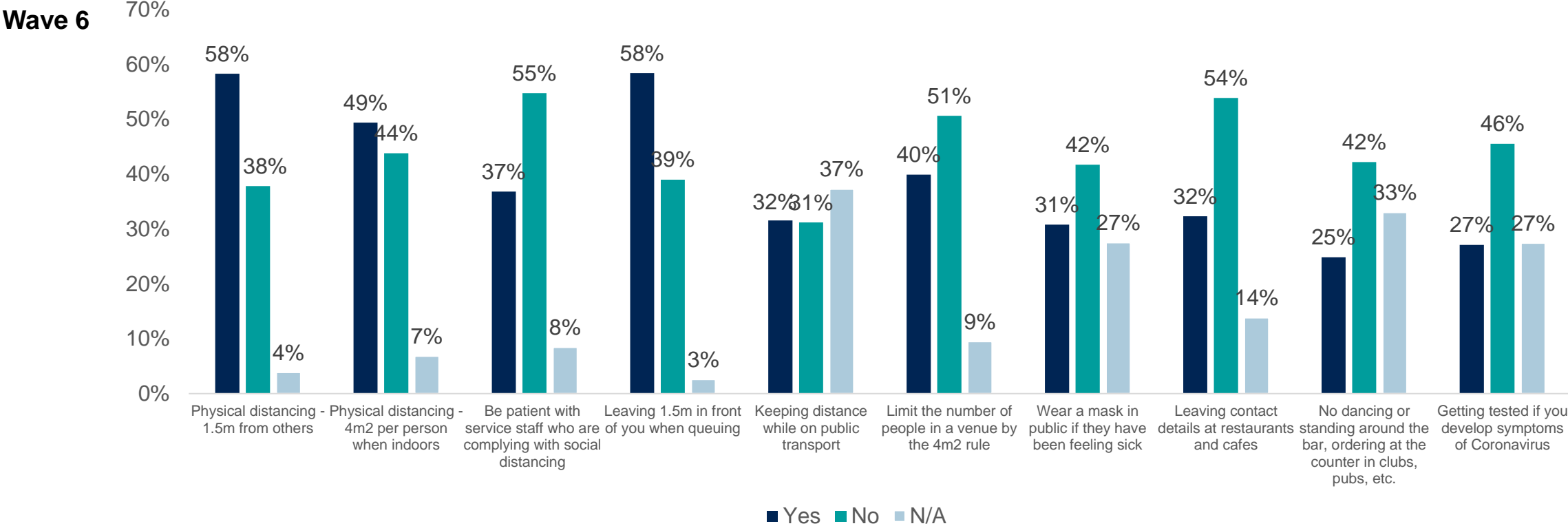
Personally seen non-compliance (Yes %)	Wave 4	Wave 5	Wave 6
4m2 distancing in public spaces and homes	51%	52%	50%
maximum 20 in small venues	39%	36%	38%
4 square meter distancing at religious ceremonies	22%	20%	21%
4m2 distancing at pools/ gyms	24%	25%	28%
4m2 distancing at saunas/ bathhouses	20%	21%	20%
4m2 distancing at open homes/ auctions	20%	19%	19%
4m2 in restaurants, cafes, pubs, etc.	n/a	37%	40%

Total Wave 4 n = 1017; Total Wave 5 n = 1091 ; Total Wave 6 n=998

Q73: for each one please indicate if you have personally seen Queenslanders not complying with the restriction within the last week (7 days).
Total Wave 6 n=998

COMPLIANCE WITH HEALTH RULES IS NOT GOOD ENOUGH TO STOP COMMUNITY TRANSMISSION.

Non compliance is more prevalent when it comes to health advice, particularly the 1.5 metres distancing from others with half observing non-compliance in general (58%), when queuing (58%) and indoors (49%). A third observe a lack of patience for service staff trying to enforce the rules (37%), leaving contact details (32%) and limiting the number of people in a venue (40%). rule e.g. indoors, when queuing and in general. At least a quarter of Queenslanders have seen other non-compliance such as keeping distance on public transport, not wearing a mask if sick, dancing and standing at the bar, or not getting tested if symptoms present.



Q74: Within the last week (7 days), have you personally seen Queenslanders not complying with the following health rules while restrictions are easing?
Total Wave 6 n=998



COMPLIANCE WITH HEATH RULES

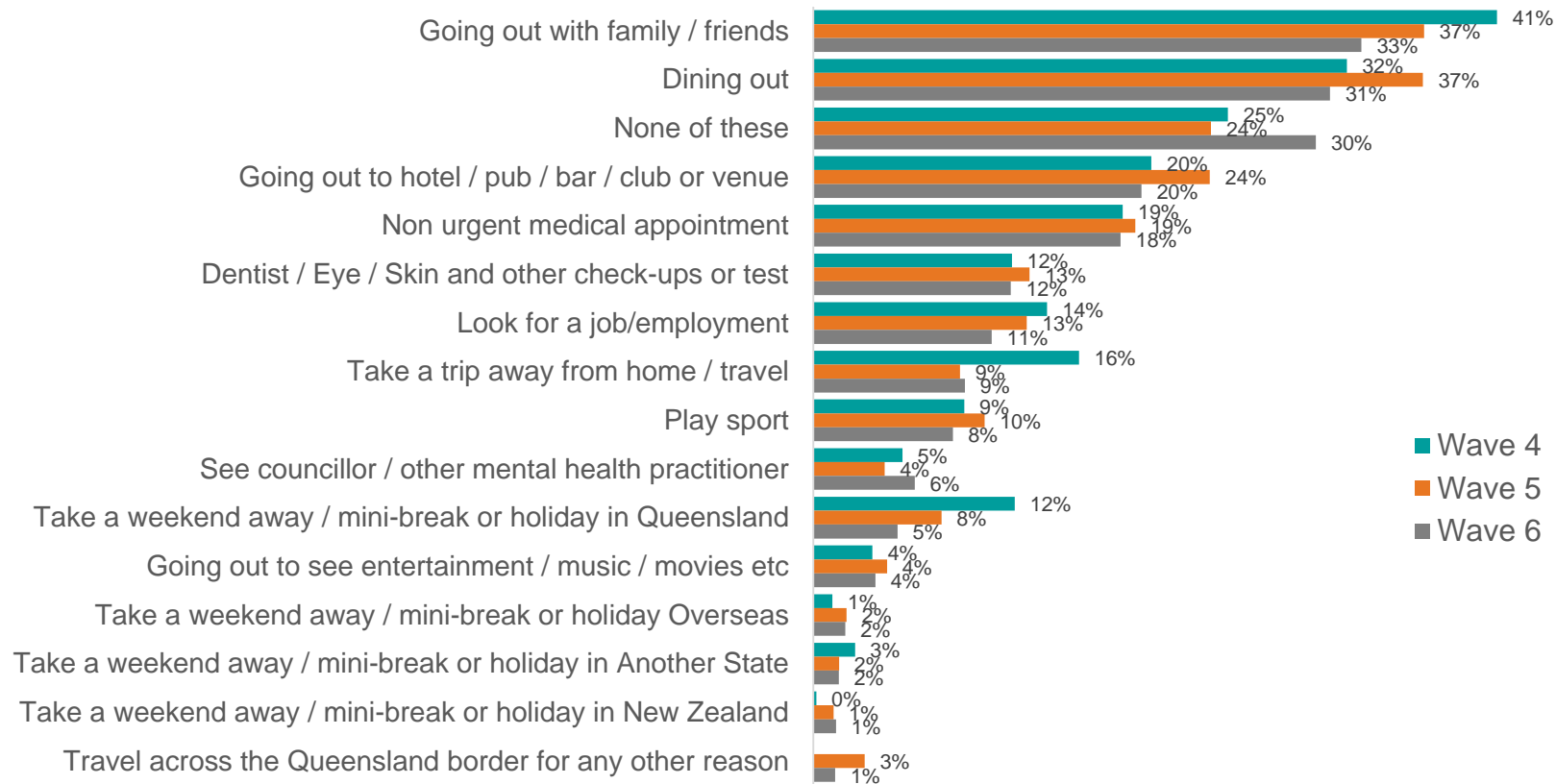
Those behaviours they see that they do not to comply with are the physical distancing (1.5m from others) whether that is in general (58%), queuing (58%) and in a 4m2 indoor space (49%).

Personally seen non-compliance with health rules (Yes %)	Wave 4	Wave 5	Wave 6
Physical distancing - 1.5m from others	60%	56%	58%
Physical distancing - 4m2 per person when indoors	51%	48%	49%
Be patient with service staff who are complying with social distancing	40%	36%	37%
Leaving 1.5m in front of you when queuing	59%	55%	58%
Keeping distance while on public transport	27%	29%	32%
Limit the number of people in a venue by the 4m2 rule	42%	41%	40%
Wear a mask in public if they have been feeling sick	25%	24%	31%
Leaving contact details at restaurants and cafes	29%	38%	32%
No dancing or standing around the bar, ordering at the counter in clubs, pubs, etc.	n/a	24%	25%
Getting tested if you develop symptoms of Coronavirus	n/a	24%	27%

Q74: Within the last week (7 days), have you personally seen Queenslanders not complying with the following health rules while restrictions are easing?
Total Wave 4 n = 1017; Total Wave 5 n = 1091 ; Total Wave 6 n=998

ACTIVITIES IN LAST WEEK

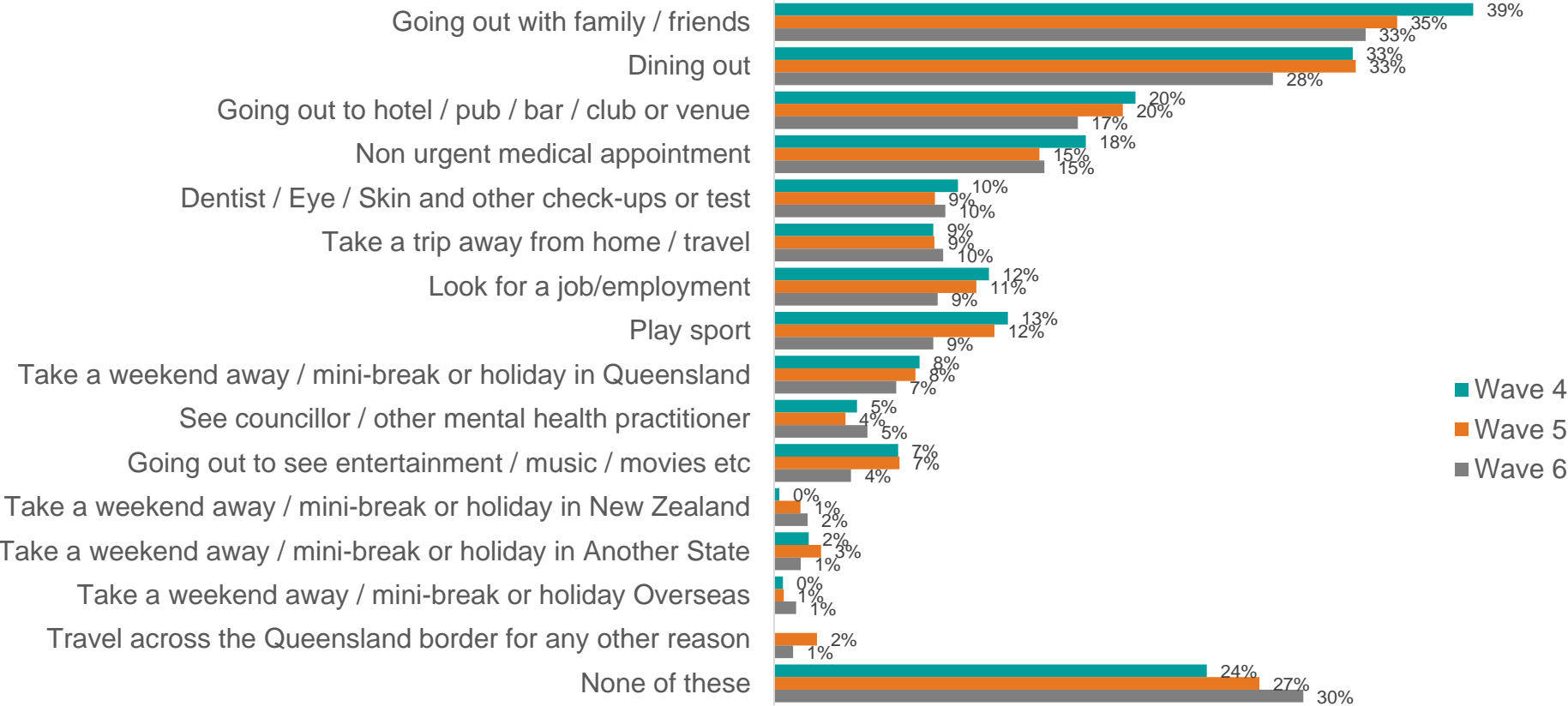
Social activities are gradually resuming. Most residents have gone out with family, dined out or gone to a hotel/ pub/ bar in the last week. We see an increase this wave with people not doing any of these things, perhaps just staying at home to be cautious.



Q75a: Within the last week (7 days) have you done any of the following activities?
 Total Wave 4 n=1017; Total wave 5 n=1091; Total wave 6 n=998

ACTIVITIES NEXT WEEK

A similar level of activities is planned for the following week, again with more people not opting to do any of these activities.



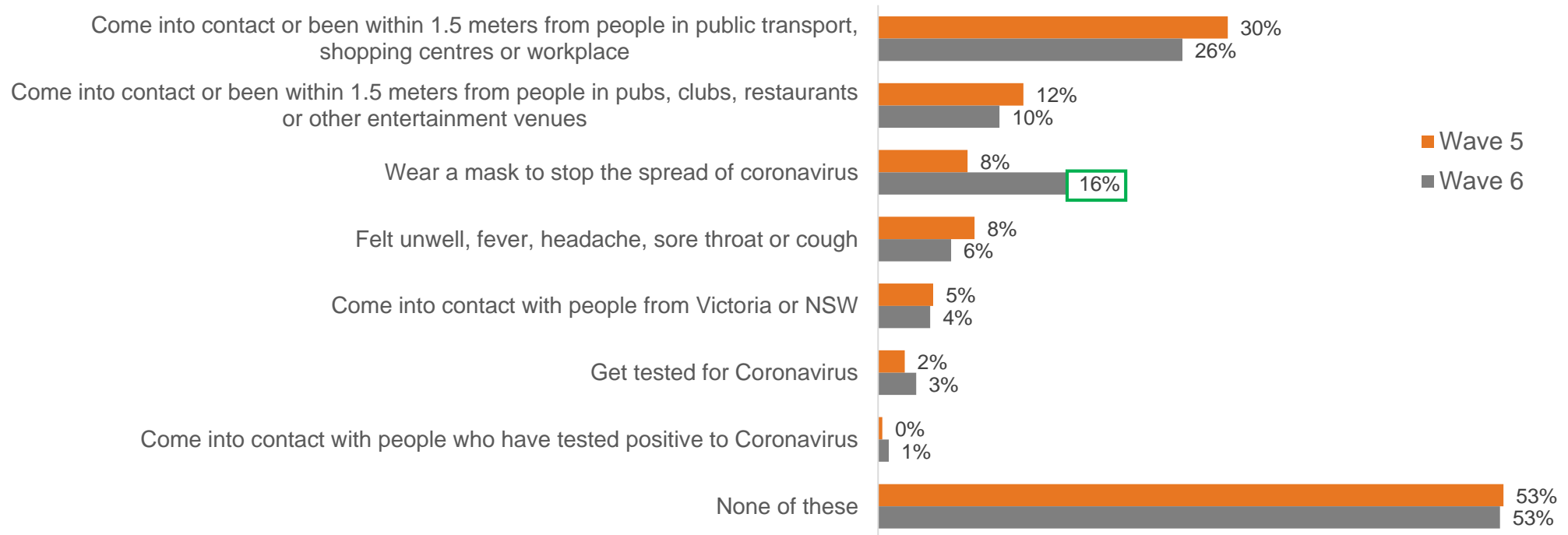
Q75b: Within the next week (7 days) do you intend to do any of the following activities?
 Total wave 4 n=1017; Total wave 5 n=1091; Total wave 6 n=998



EXPOSURE TO RISK

Half Queenslanders have not been exposed to the risk of coronavirus contagion. A quarter (26%) Queenslanders have come into contact with other people on public transport, shopping or workplaces. One in ten have come into contact with people at clubs or pubs, restaurants or other entertainment venues. There were 4% who came into contact with people from Victoria or New South Wales. There were 8% of Queenslanders surveyed who felt unwell, fever, headache and sore throat or cough.

There more Queenslanders 16% this wave who have taken precautions to minimise their risk by wearing a mask and 3% had a coronavirus test.

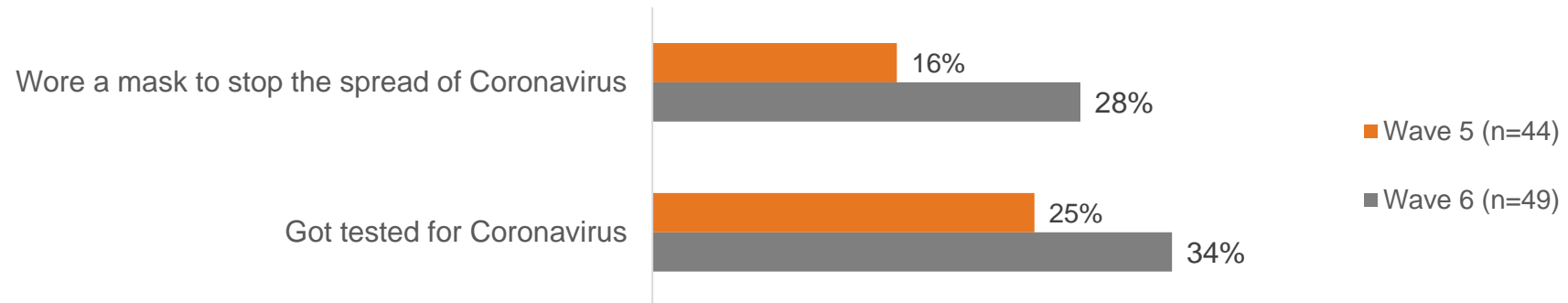


Q75c: Within the last week (7 days) have you done any of the following?
Total wave 5 n=1091; Total wave 6 n=998

EXPOSURE TO RISK AND DOING THE RIGHT THING

Those that felt unwell were more likely this wave to wear a mask (28%) and get tested (34%).

Of those that had felt unwell over the past week, did you ... ?



Q75c. Within the last week (7 days) have you done any of the following?

Q75c_3. felt unwell, fever, headache, sore throat or cough

Q75c_2. get tested for Coronavirus

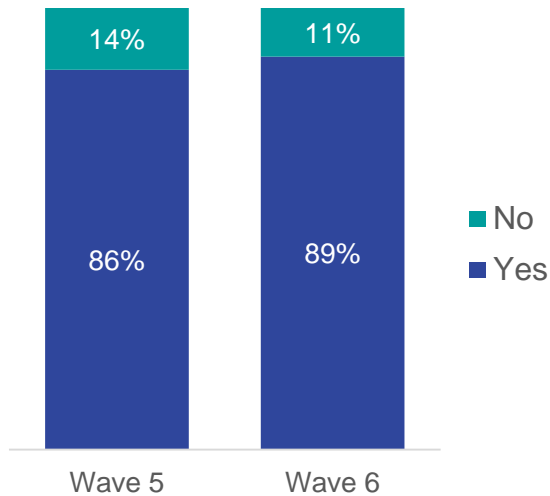
Q75c_1. Wore a mask to stop the spread of the Coronavirus

Wave 5 n=44, Wave 6 n=49

WEARING OF MASKS

Most Queenslanders (89%) agree that restrictions should include wearing a mask in public if a community transmission occurs in Queensland and would be willing to wear a mask in public to slow the spread of coronavirus (87%).

If outbreak of community transmitted Coronavirus occurs in Queensland, should restrictions include wearing a mask in public?



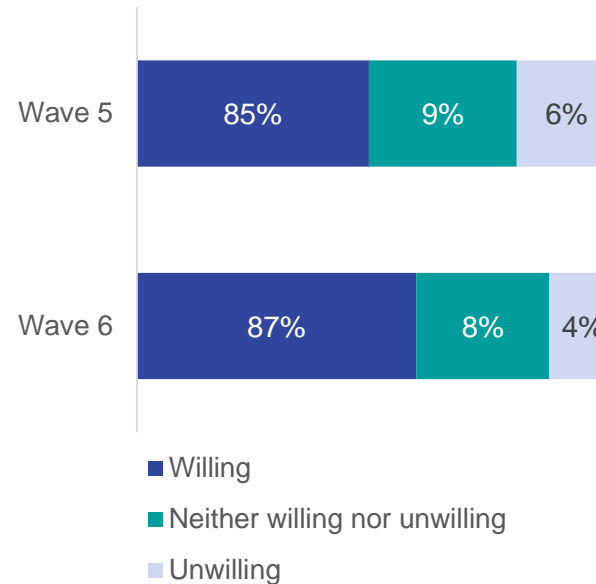
Agree to wearing a face mask in public (wave 6)

90% of SEQ vs. **88%** of ROQ

85% of Men vs. **93%** of Women

86% of 18-34 vs. **90%** of 35-64 vs. **91%** of 65+

Willingness to wear a mask in public to slow the spread of Coronavirus if there was community transmission



Willingness to wear a mask in public (wave 6)

88% of SEQ vs. **87%** of ROQ

83% of Men vs. **92%** of Women

85% of 18-34 vs. **87%** of 35-64 vs. **92%** of 65+

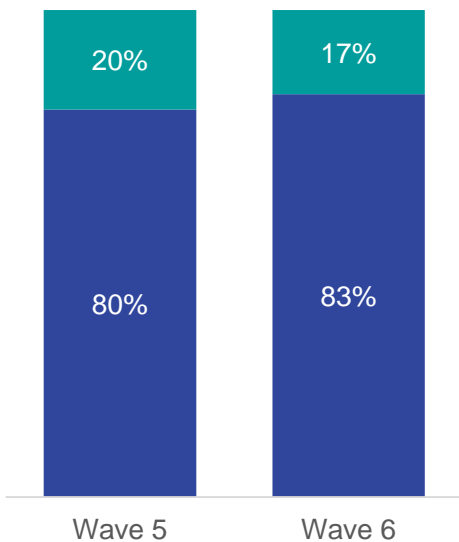
Q84 If we were to have an outbreak of community transmitted Coronavirus in Queensland should restrictions include wearing a mask in public? Total Wave 5 n=1091; Total Wave 6 n=998

Q84a On a scale of 1 to 10, where 1 is "definitely not" and 10 is "definitely will" – how willing are you to wear a mask in public to slow the spread of Coronavirus if there was community transmission? Total Wave 5 n=1091; Total Wave 6 n=998

TABLE SERVICE ONLY

Most Queenslanders (83%) agree that restrictions should include table service only in clubs, pubs and restaurants if a community transmission occurs in Queensland and would be willing to comply (91%).

If outbreak of community transmitted Coronavirus occurs in Queensland, should restrictions table service only in clubs, pubs and restaurants?



Agree to table service restrictions in clubs, pubs and restaurants (wave 6)

84% of SEQ vs. **81%** of ROQ

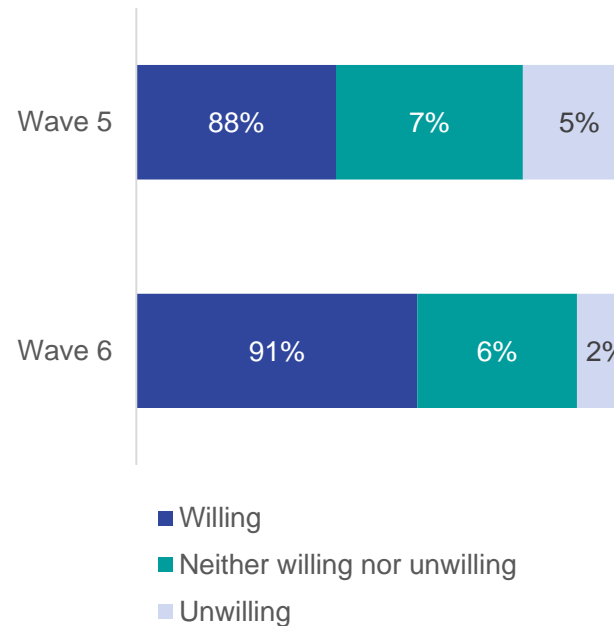
81% of Men vs. **85%** of Women

78% of 18-34 vs. **84%** of 35-64 vs. **85%** of 65+

■ No
■ Yes

Q85 If we were to have an outbreak of community transmitted Coronavirus in Queensland should restrictions include table service only in clubs, pubs and restaurants?
Total Wave 5 n=1091; Total Wave 6 n=998

Willingness to comply with table service only in clubs, pubs and restaurants



Willingness to comply with table service restrictions in clubs, pubs and restaurants (wave 6)

93% of SEQ vs. **89%** of ROQ

87% of Men vs. **96%** of Women

87% of 18-34 vs. **93%** of 35-64 vs. **94%** of 65+

■ Willing
■ Neither willing nor unwilling
■ Unwilling

Q85a On a scale of 1 to 10, where 1 is "definitely not" and 10 is "definitely will" – how willing are you to comply with table service only in clubs, pubs and restaurants?
Total Wave 5 n=1091; Total Wave 6 n=998

AWARENESS OF INFORMATION 3.4

INFORMATION GAPS FOR ECONOMY AND BORDER RESTRICTIONS

Queenslanders are generally satisfied with the information provided by the Government and feel that it's sufficient, especially across level of restriction and how to prevent the virus spread or how community transmission occurs. There's room for improvement when it comes to communicating about economic recovery and restrictions on who can cross the border.

90%

How to prevent the spread of coronavirus

76%

Who can cross the border into Queensland

82%

Current coronavirus level of restrictions

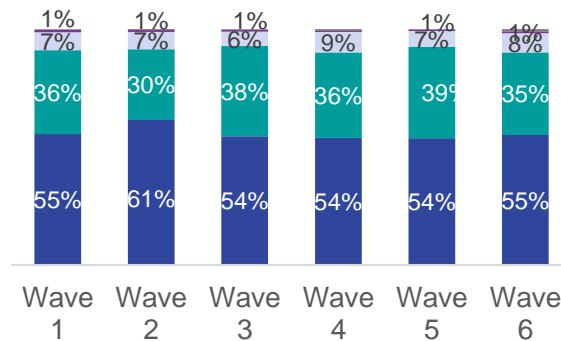
80%

How community transmissions occur

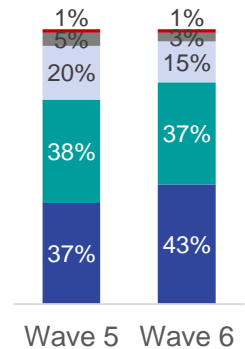
41%

How the Queensland economy will recover

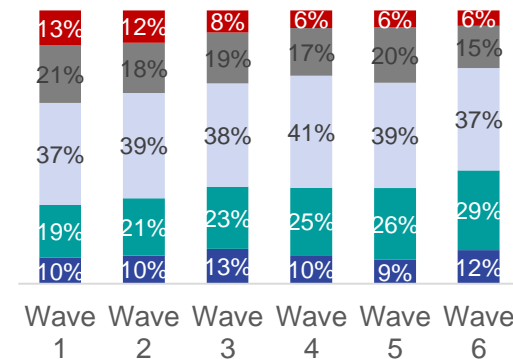
How to prevent the spread of coronavirus



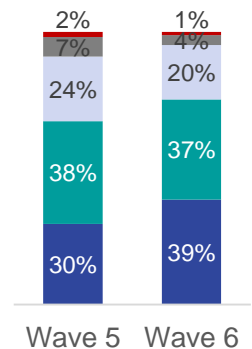
How community transmissions occur



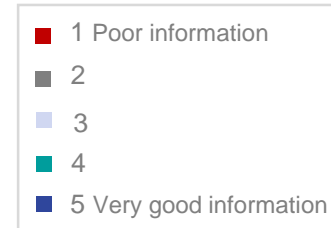
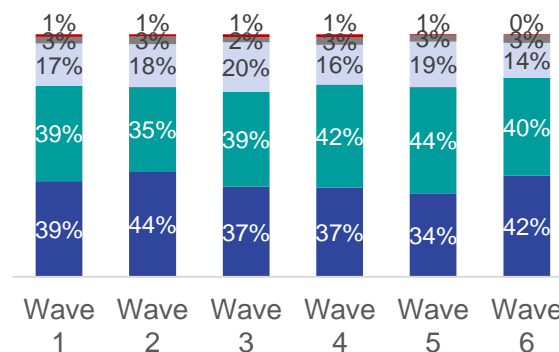
How the Queensland economy will recover



Who can cross into Queensland



Current coronavirus level of restrictions



Q1 Have you been getting enough information to feel confident you know about

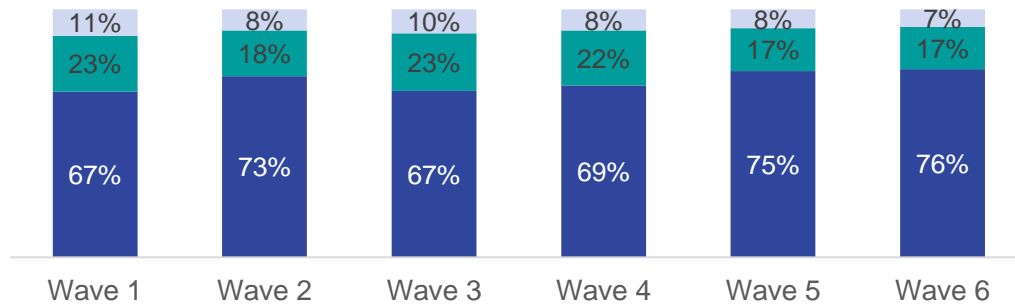
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017, Total Wave 5 n=1091, Total Wave 6 n=998



QUEENSLANDERS STAYING INFORMED AND SENTIMENT IMPROVED

The Queensland Government remains a consistently trustworthy source of information. As we see increasing stories of community transmission in southern states the positive perceptions of the Queensland Government's management of the pandemic better than other states continues to make gains, on top of an already strong base.

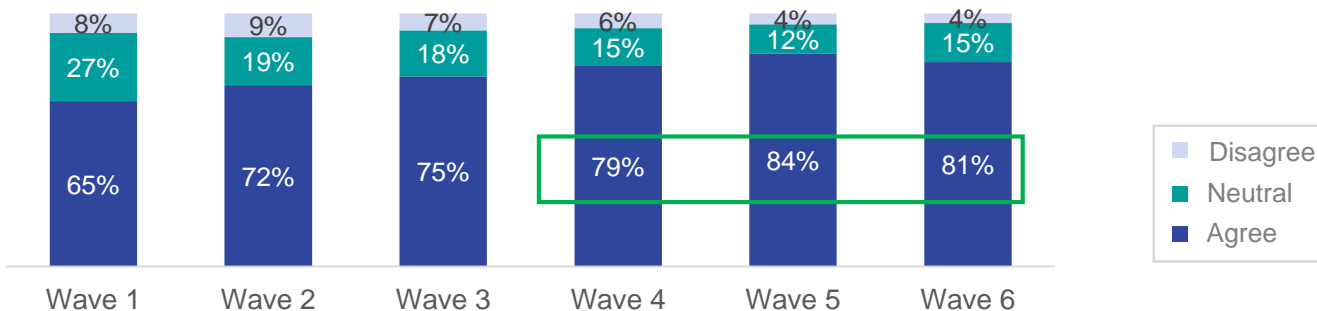
Trustworthy information source



76%
Queensland Government is a trustworthy information source

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; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998

Managed the coronavirus pandemic better than other states or territories



81%
Queensland Government managed better than other states or territories

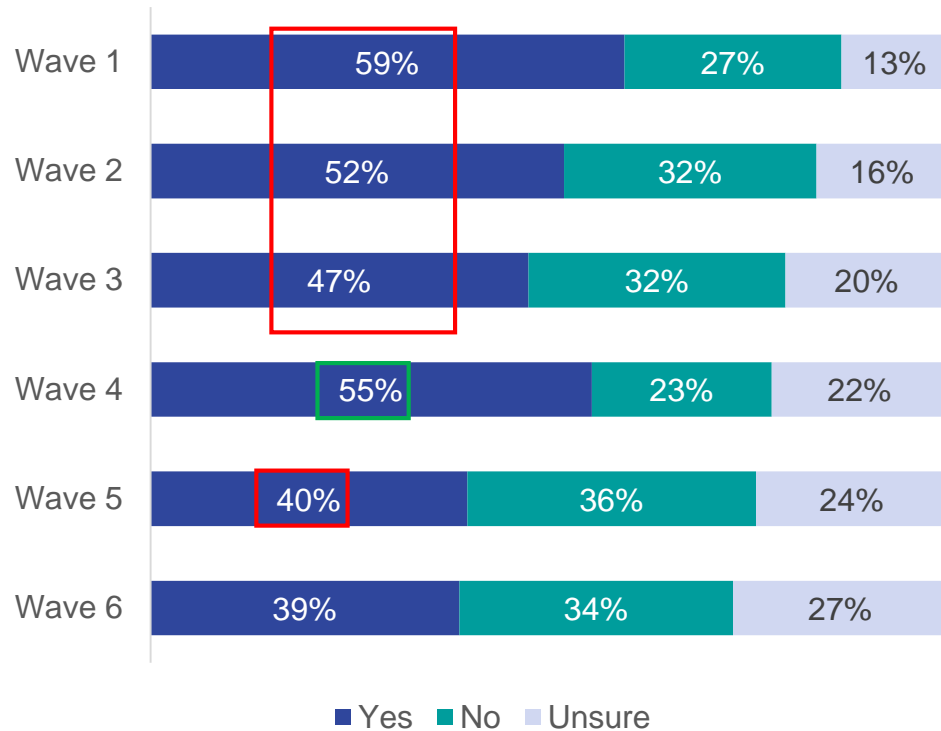
Q4 QLD Government has managed the coronavirus pandemic better than other states or territories. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998

ROADMAP FOR EASING RESTRICTIONS

People's awareness of the roadmap for restrictions is declining as communications focus has shifted from this topic (Wave 6, 39%) as 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, that Queensland has managed better than other states or territories and have good information about the current level of restrictions. No geographic differences were observed.



39%

Aware of the Roadmap

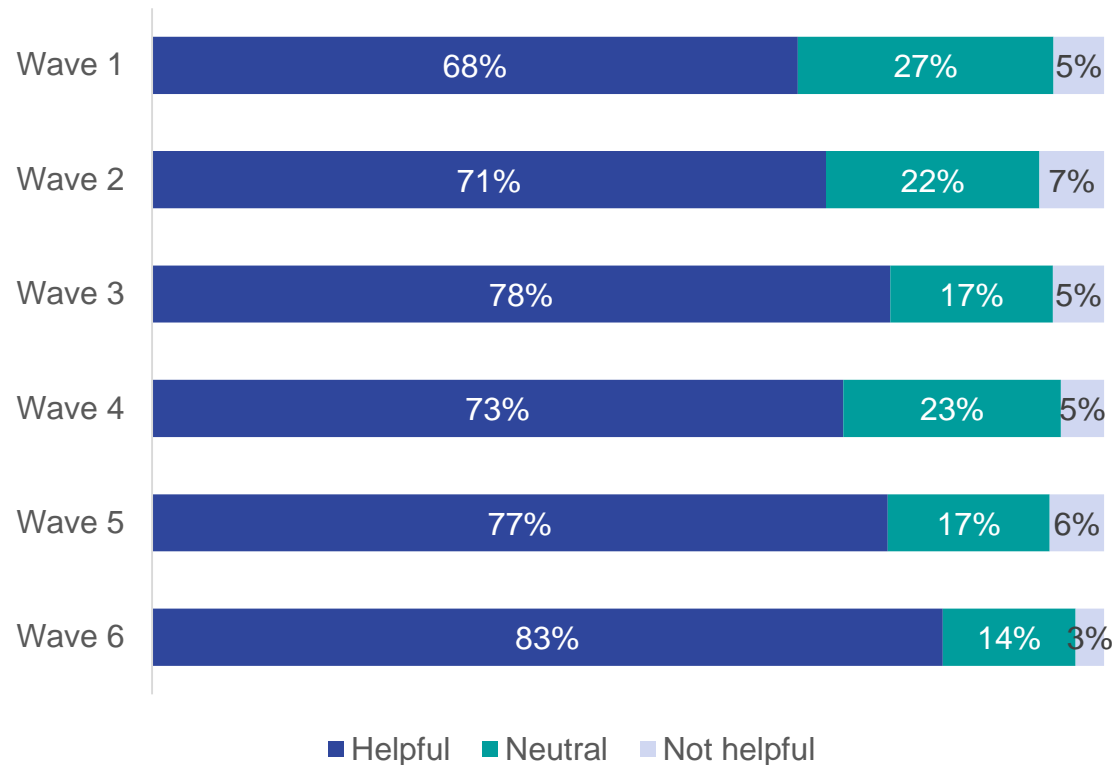
Wave 6

- Confident Queensland Government is a trustworthy information source (Q3)
84% aware Vs 62% unaware
- Queensland Government managed better than other states or territories (Q4)
88% aware Vs 66% unaware
- Good information about current coronavirus level of restrictions (Q1)
86% aware Vs 73% unaware
- Good information about how the economy will recover (Q1)
47% aware Vs 30% unaware

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; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6

ROADMAP IS HELPFUL COMMUNICATION

Three quarters of Queenslanders who saw or heard about the Roadmap to Easing Restrictions said they felt it was helpful (83%).



83%
Roadmap is helpful

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?

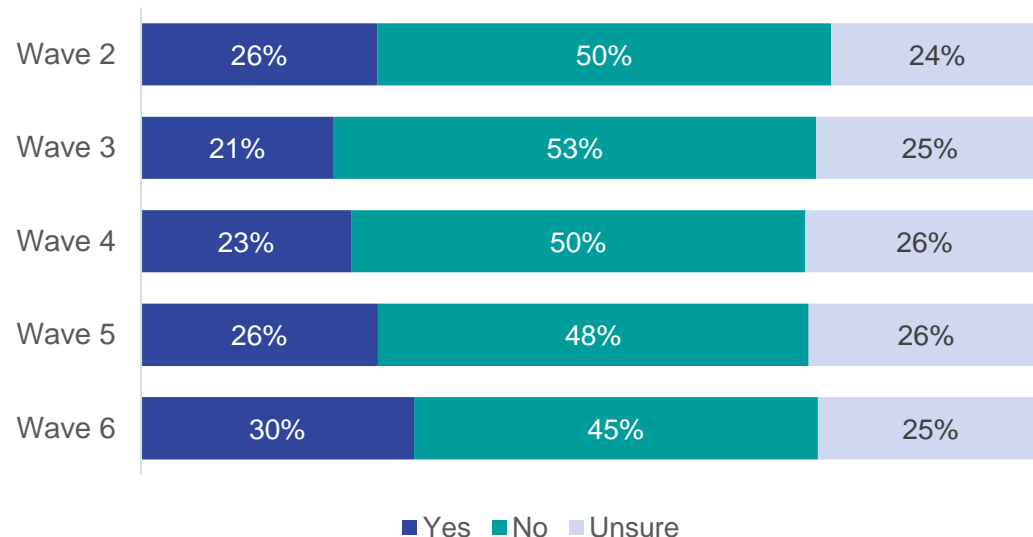
Wave 1 n=960; Wave 2 n=530; Wave 3 n=477; Wave 4 n=538; Wave 5 n=460; Wave 6 n=382

COVID-19 ECONOMIC RECOVERY STRATEGY

Only one quarter of Queenslanders are 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 (83%), and that Queensland has managed better than other states or territories (88%). Those aware are also more likely to say they have good information about the level of restrictions (90%) and how the economy will recover (55%). No geographic differences were observed.

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



26%

Aware of the COVID-19 Economic Recovery Strategy

- Confident Queensland Government is a trustworthy information source (Q3)
83% aware Vs **67%** unaware
- Queensland Government managed better than other states or territories (Q4)
88% aware Vs **72%** unaware
- Good information about current coronavirus level of restrictions (Q1)
90% aware Vs **76%** unaware
- Good information about how the economy will recover (Q1)
55% aware Vs **29%** unaware

Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
Total Wave 2 n = 1018; Total Wave 3 n = 1021; Total Wave 4 n = 1017; Total Wave 5 n = 1091

CAMPAIGN RECOGNITION

3.5

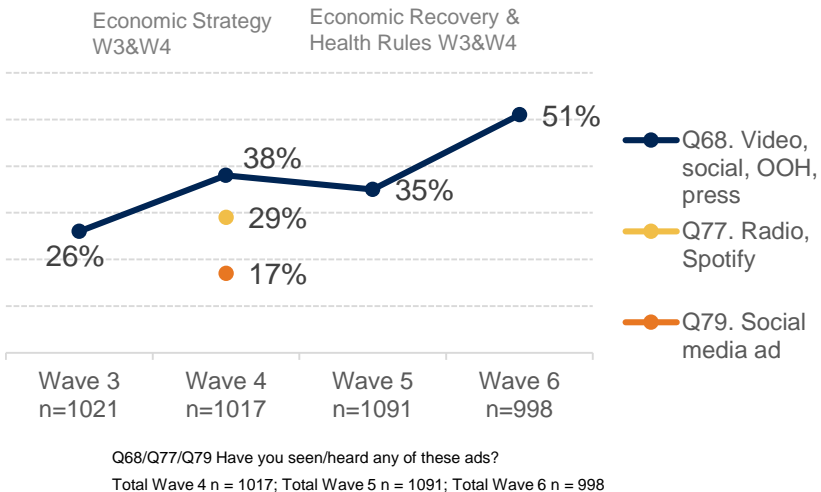


CAMPAIGN RECOGNITION

Half of Queenslanders recall seeing the campaign (51%).

The campaign prompt had messaging removed to test the message receipt. The campaign has been in market for just over two weeks. Two thirds of those surveyed who had seen the campaign recalled the intended messages of the advertisement (68%), whereas over half (54%) mentioned other messaging. The main channel for viewing the campaign was Television (86%) and social media (31%).

Seen any of these ads

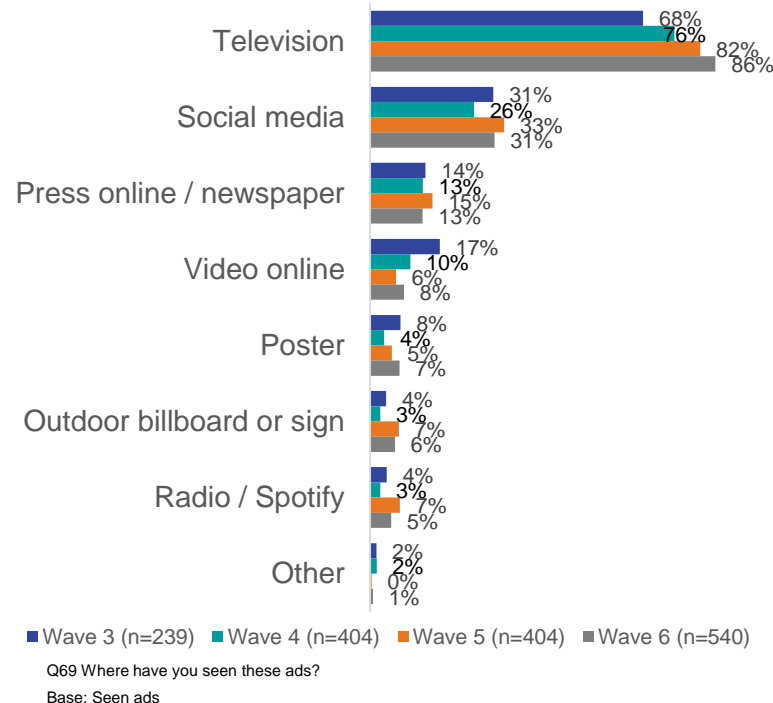


This is well above IPSOS norm (25%) for TVC.

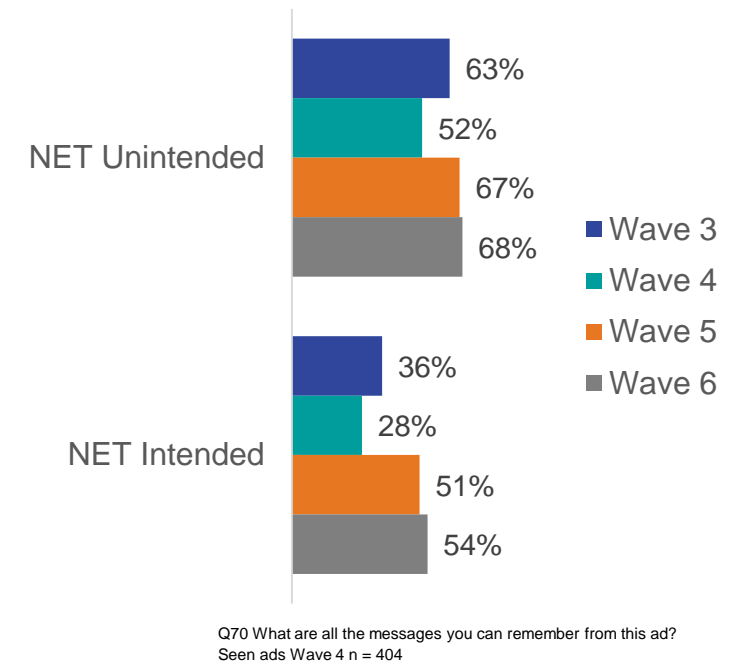
48%

Recalled the campaign after being prompted with the execution

Where ads seen



Messages you can remember from this ad



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.

Significantly higher / lower previous wave – 95%

CAMPAIGN MESSAGES

The campaign messaging was clear about social distancing.

Queenslanders were also recall other messages from other campaigns, particularly those around economic recovery.

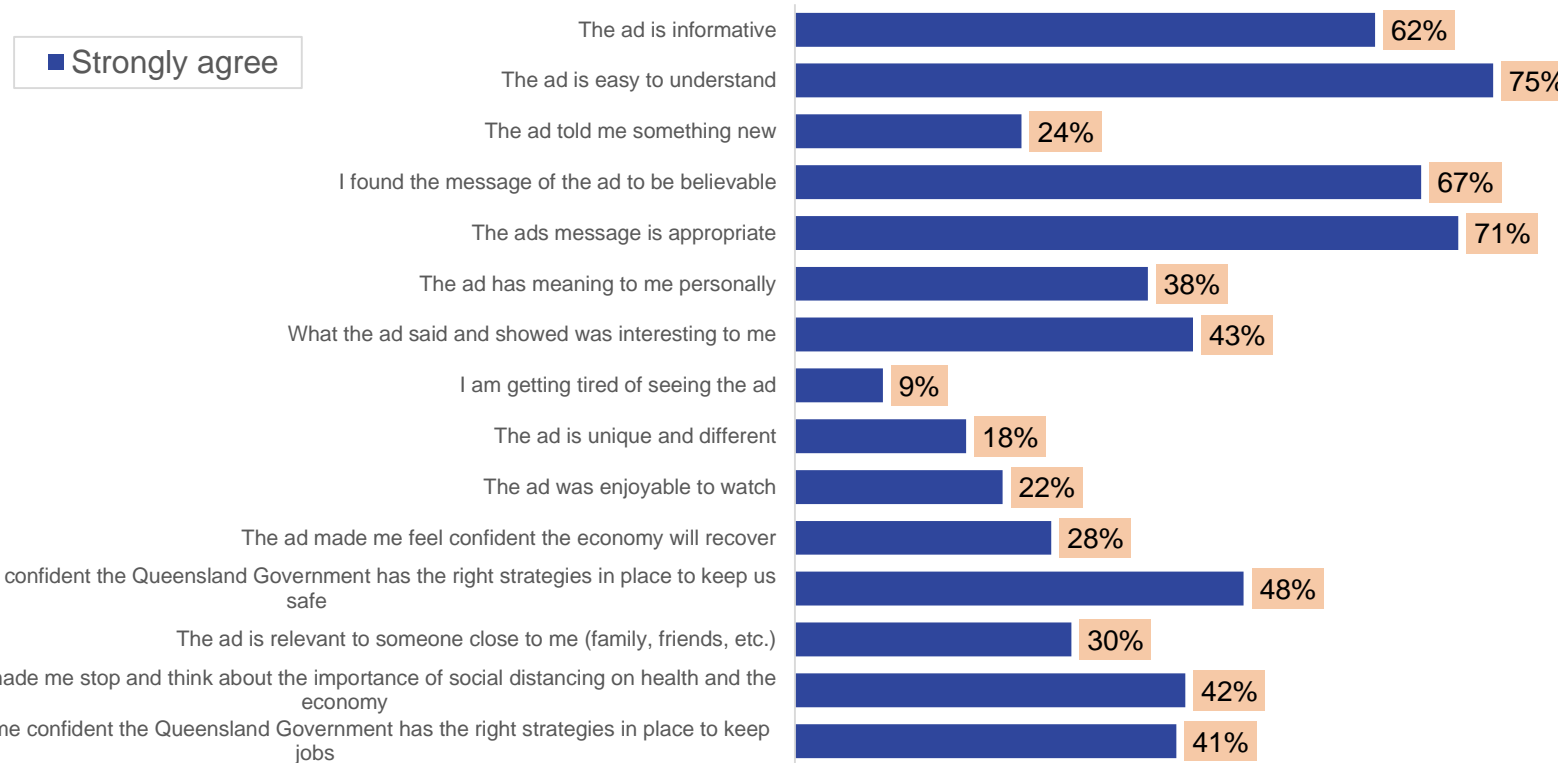
The images were partly disguised.



	Wave 5	Wave 6
Remember to social distance	47%	47%
We are on the road to recovery	6%	8%
We have protected Queenslanders and saved lives	1%	3%
Covid-19 / coronavirus	1%	0.1%
Unite and recover	0.3%	1%
Total intended messages	51%	54%
Wash your hands	20%	21%
Information about what is happening/a chart of where we are headed	18%	21%
Remember the safety rules/be safe/covid safe	18%	18%
We are in this together	7%	7%
We are doing well/better	7%	11%
Economic recovery	5%	6%
Recovery/covid recovery	4%	1%
Queensland is getting back to business/is open for business	3%	1%
Innovate to create jobs for now and in the future	3%	1%
Stay home	2%	2%
Move forward/get Queensland moving again	2%	1%
Restrictions are easing	2%	1%
Get tested/get tested if you are feeling unwell	2%	2%
Get going again/Queensland is going again	1%	0.4%
General positive comments e.g. It's a good ad, I liked it etc.	1%	2%
Boosting tourism/travel within Queensland	1%	1%
Building/building Queensland	1%	1%
Queensland/support Queensland	1%	0%
We're with you/we're here to help/you're not alone	0.2%	1%
Other unintended messages	3%	1%
Total unintended messages	67%	68%
Don't know/not answered	11%	9%
None/nothing	2%	2%

CAMPAIGN DIAGNOSTICS

The campaign performs above or at Ipsos norms on all available diagnostics. This campaign has performed significantly better than the previous campaign in Wave 3 and 4. It is more informative, easy to understand, appropriate and believable. The message was relevant at a time when media was discussing new cases in Queensland and the increasing restrictions occurring in Victoria act as a warning as to what could happen if Queenslanders become complacent.



Wave 6	Wave 5	Wave 4	Wave 3	Norms
62%	58%	17%	15%	42%
75%	71%	32%	28%	60%
24%	19%	19%	15%	27%
67%	59%	27%	23%	51%
71%	72%	29%	33%	n/a
38%	32%	16%	19%	34%
43%	38%	26%	19%	35%
9%	7%	12%	12%	15%
18%	18%	18%	16%	32%
22%	26%	15%	11%	36%
28%	23%	15%	12%	n/a
48%	39%	23%	18%	n/a
30%	27%	19%	17%	47%
42%	40%	-	-	n/a
41%	34%	-	-	n/a

Q71. Please rate how much you agree or disagree with the following statements about this ad
 Wave 3 Seen ad n=239, Wave 4 Seen ad n=404, Wave 5 Seen ad (unprompted) n=404; Wave 6 Seen ad (unprompted) n=540

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CAMPAIGN DIAGNOSTICS

Those that recognised the campaign consistently rate the performance of the campaign diagnostics higher than those that recalled the campaign when prompted or those that saw the campaign for the first time in the questionnaire.

Ad diagnostics – wave 5	Recognised ad (intended)	Recalled ad (prompted)	Did not recall ad	Total	Norms
N=	540	77	381	998	
The ad is informative	62%	65%	30%	49%	42%
The ad is easy to understand	75%	81%	46%	64%	60%
The ad told me something new	24%	32%	18%	22%	27%
I found the message of the ad to be believable	67%	67%	36%	54%	51%
The ads message is appropriate	71%	71%	43%	60%	n/a
The ad has meaning to me personally	38%	40%	22%	32%	34%
What the ad said and showed was interesting to me	43%	50%	24%	36%	35%
I am getting tired of seeing the ad	9%	1%	9%	9%	15%
The ad is unique and different	18%	34%	12%	17%	32%
The ad was enjoyable to watch	22%	30%	16%	20%	36%
The ad made me feel confident the economy will recover	28%	32%	14%	22%	n/a
The ad made me confident the Queensland Government has the right strategies in place to keep us safe	48%	51%	24%	38%	n/a
The ad is relevant to someone close to me (family, friends, etc.)	30%	31%	20%	26%	47%
The ad made me stop and think about the importance of social distancing on health and the economy	42%	53%	25%	36%	n/a
The ad made me confident the Queensland Government has the right strategies in place to keep jobs	41%	51%	17%	32%	n/a

Q71. Please rate how much you agree or disagree with the following statements about this ad
Wave 6 only; Q68 Have you seen any of these ads?/Q95 Have you seen or heard this Television ad before today?

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THANK YOU



GAME CHANGERS

