

RESTRICTIONS & COMPLIANCE WAVE 7

For Queensland Department of Premier and Cabinet

Prepared by Ipsos
18 February, 2021

For more information contact:

GAME CHANGERS



CONTENTS

- 1. Executive summary..... 3
- 2. Background..... 17
- 3. Detailed findings from online survey..... 23
 - 3.1 Impacts 24
 - 3.2 Economic recovery..... 29
 - 3.3 Easing restrictions 41
 - 3.4 Awareness of information 52



EXECUTIVE SUMMARY

1

1

EXECUTIVE SUMMARY – IMPACT AND WORRIES

Wave 7 Survey completed 29 January – 5 February 2021
Border closed to Greater Sydney residents from 20 Dec'20 – 1 Feb'21 and 3-day lockdown (8 Jan'21) to ensure the UK variant of Covid-19 was not circulating in the community.

Impact of COVID on work lessens

46%

Employees work impacted

Overall, Queenslanders who have had their work situation impacted by Covid-19 has significantly declined since Wave 6 (Aug'20). However, those who have lost their job has nearly doubled (9%) since Wave 6 (5%).

59%

Self-employed / business owners impacted

This trend is consistent with SMEs and sole traders. They experience a higher level of disruption compared to the average employee (net impact).

Queenslanders feel we act appropriately to COVID-19 threat but those who feel we are over-reacting has nearly doubled

82%

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. However, significant increase in perception of over-reaction (11%) and decline of under-reacting (7%). This follows the border closure to Greater Sydney and 3-day lockdown in Greater Brisbane.

Lower perceived risk of catching Covid-19

12%

Likely to get COVID-19

Significantly lower perceived risk of them or their families getting Covid-19.

13%

Likely family to get COVID-19

Biggest worry about Covid-19

21% Impact on Australian economy

13% Risk to family and friends

9% Losing their job

9% Risk to their health

9% Lack of health rules compliance

Economy and jobs are a high concern. Covid-19 health risk to their friends and family is mentioned slightly more often than concern for themselves. Non-compliance with health rules ranks in equal third place.

Biggest worry about Economy

32% Impact on Australian economy

10% Losing income

9% Losing my job

Impact on the Australian economy continues to be the top concern, followed by worry over losing job and income.

DASHBOARD – IMPACT

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 6) %	This wave (Wave 7) %	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	45	53	
	Impacted (red)	56	55	46	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	23	33	
	Impacted (red)	79	77	59	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	6	11	
	Appropriate response (green)	78	75	82	
	Under-reacting (orange)	15	19	7	
Q20b Most worried about in regards to economic impacts from COVID-19 (top 5)	Impact on the Aust economy (red)	-	33	32	
	Unable to find a job/employment (blue)	-	6	4	
	Losing my job (purple)	-	9	9	
	Social disadvantage/ poverty / crime / homelessness (yellow)	-	9	13	
	People wont comply with health advice (masks, handwashing, etc.) (green)	-	4	6	

EXECUTIVE SUMMARY – EXPECTATIONS & CONFIDENCE

Wave 7 Survey completed 29 January – 5 February 2021.

Expectations for the economy are polarised

29% The worst is yet to come

19% At its worst now

29% Worst behind us

22% Unsure

Queenslanders' expectations about the economy are polarised, with an equal proportion (29%) perceiving the 'worst is yet to come' and 'the worst is behind us'. However, compared to Wave 6, a significantly greater proportion are feeling optimistic, with 29% stating 'the worst is behind us' versus 9% in Aug'20.

Half are confident about management of economic recovery and economy in long run

50%
Agree QLD Gov can manage the economic recovery

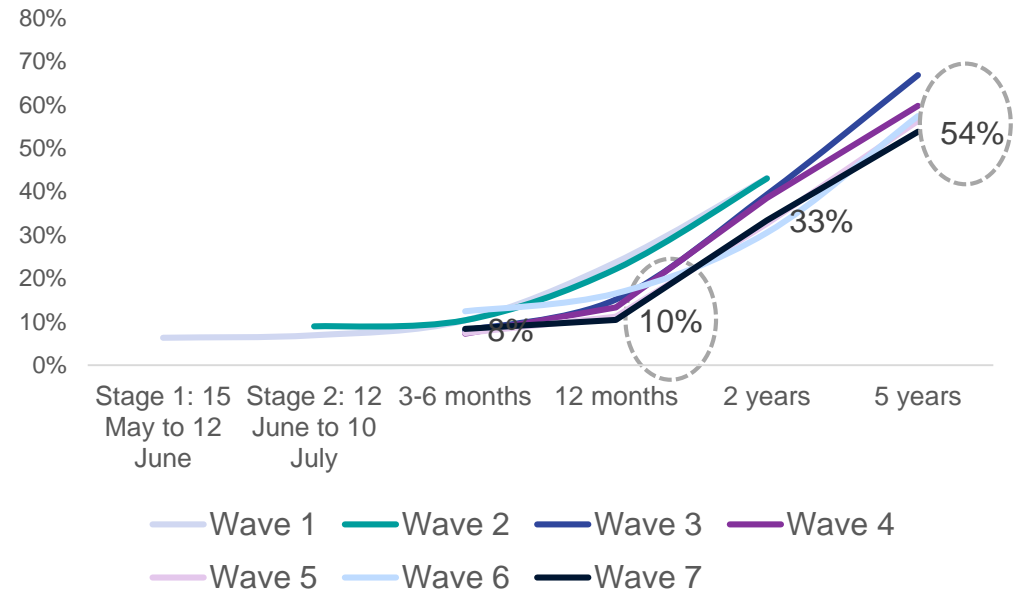
54%
Agree QLD Gov are handling for economic advantage in long run

Queenslanders are split in their confidence of the Queensland Government's management of the economic recovery, with half feeling confident and the other half feeling either neutral (31%) or not confident (19%). Those who are 'not confident' has significantly increased compared to Wave 6 (13%).

Falling to half (54%) of the population who believe that the Government has been handling the COVID-19 crisis to the State's economic advantage in the long run (significant decline from Wave 6 at 64%). Conversely, lack of confidence has significantly increased from 9% in Wave 6 to 16% in Wave 7.

Optimism about economic recovery starting to decline

Queenslanders are becoming less optimistic of a speedy economic recovery, with half (54%) believing that the economy will fully recover in 5 years time. Furthermore, projections of a 12 month recovery has fallen to its lowest among Queenslanders (10%).



DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 6) %	This wave (Wave 7) %	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	49	29	
	At their worst now (orange)	19	22	19	
	Worst is behind us (green)	14	9	29	
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	12	8	
	12 months (orange)	24	17	10	
	2 years (blue)	43	31	33	
	5 years (green)	-	57	54	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	55	50	
	Not confident (red)	18	13	19	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	64	54	
	Not confident (red)	-	9	16	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	29	22	

EXECUTIVE SUMMARY – ECONOMIC INITIATIVES

Wave 7 Survey completed 29 January – 5 February 2021.

Awareness of any major economic initiatives has declined. Strong perception of the importance across all strategies with support of frontline services and focus on rebuilding and investing in the Queensland economy slightly ahead of safeguarding health and protecting the environment.

36%

Agree they have enough information on how QLD economy will recover

Significant decline on agreement they are receiving enough information on how the Queensland economy will recover (41% in Wave 6).

22%

Aware of any major economic initiatives

A key challenge for the Queensland Government continues to be raising awareness of the State's major economic initiatives (further decline from 29% in Wave 6).

85%

Who are aware of the economic initiatives rate them as important for Covid-19 recovery

The majority (85%) who are aware of the economic initiatives rate them as important for recovery. 'Supporting jobs' (30%) and 'building Queensland' (27%) are the initiatives most often recalled.

Top Box 'very important' %

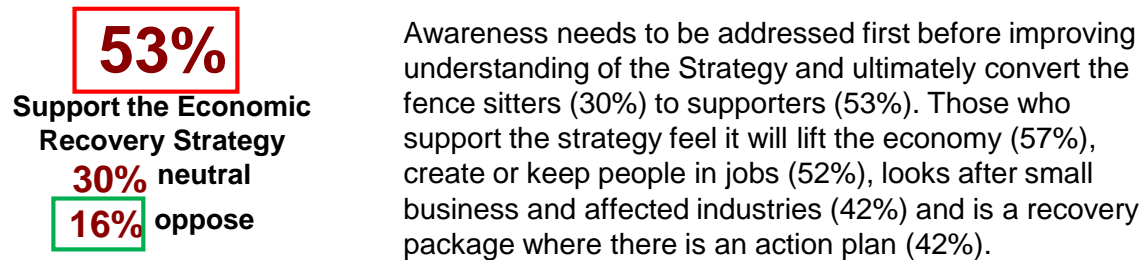
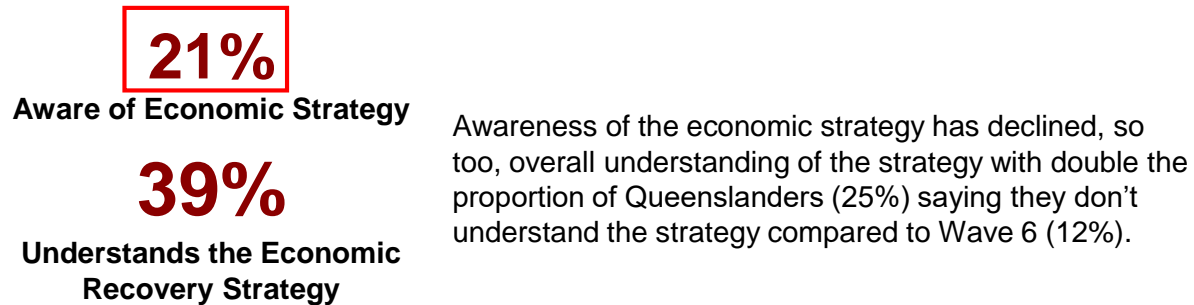
(Rated by all respondents)

61%	Backing our frontline services: <i>Deliver world-class frontline services in key areas such as health, education and community safety</i>
57%	Making it for Queensland: <i>Grow manufacturing across traditional and new industries, making new products in new ways and creating new jobs</i>
56%	Backing small business: <i>Help small business, the backbone of the state's economy, thrive in a changing environment</i>
55%	Investing in skills: <i>Ensure Queenslanders have the skills they need to find meaningful jobs and set up pathways for the future</i>
54%	Supporting jobs: <i>Support increased jobs in more industries to diversify the Queensland economy and build on existing strengths in agriculture, resources and tourism</i>
54%	Building Queensland: <i>Drive investment in the infrastructure that supports our recovery, resilience and future prosperity</i>
54%	Safeguarding our health: <i>Safeguard people's health and jobs by keeping Queensland pandemic-ready</i>
52%	Growing our regions: <i>Help Queensland's regions grow by attracting people, talent and investment, and driving sustainable economic prosperity</i>
44%	Protecting the environment: <i>Protect and enhance our natural environment and heritage for future generations and achieve a 50 per cent renewable energy target by 2030</i>

EXECUTIVE SUMMARY – ECONOMIC STRATEGIES & SUPPORT

Wave 7 Survey completed 29 January – 5 February 2021.

Awareness, understanding and support of the economy strategy has also declined.



87%
Queenslanders who were aware of the strategy and understood it well are supportive

14%
Queenslanders who aware of the strategy and did not understand it well are supportive

Aware / not aware of Economic Recovery Strategy

Confident Queensland Government is a trustworthy information source (Q3)

78% aware Vs **60%** unaware

Good information about current coronavirus level of restrictions (Q1)

83% aware Vs **73%** unaware

Good information about how the economy will recover (Q1)

49% aware Vs **32%** unaware

Increased dissatisfaction with Government support provided to small business and the community.

21%
Enough support from the government as a small business owner or self-employed

34%
Enough support to small business through this pandemic and recovery

46%
Enough support to the community through this pandemic and recovery

Increased dissatisfaction with the support provided by the Government among small business owners/self employed, for small businesses and for the community.

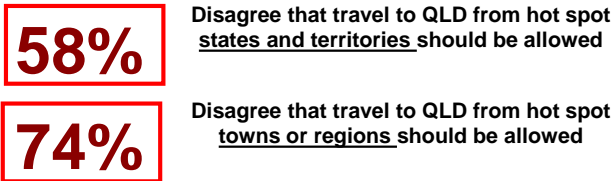
DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 6) %	This wave (Wave 7) %	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	30	21	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	46	39	
	Not well (red)	-	12	25	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	63	53	
	Oppose (red)	-	6	16	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	37	21	
	Low support (red)	-	21	46	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	45	34	
	Low support (red)	-	13	23	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	55	46	
	Low support (red)	-	11	19	

EXECUTIVE SUMMARY – BORDERS, QUARANTINE AND TRAVEL

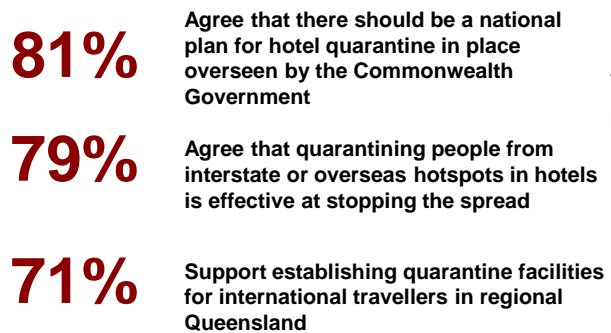
Wave 7 Survey completed 29 January – 5 February 2021.

Less appetite for closing border to states/territories and towns/regions.



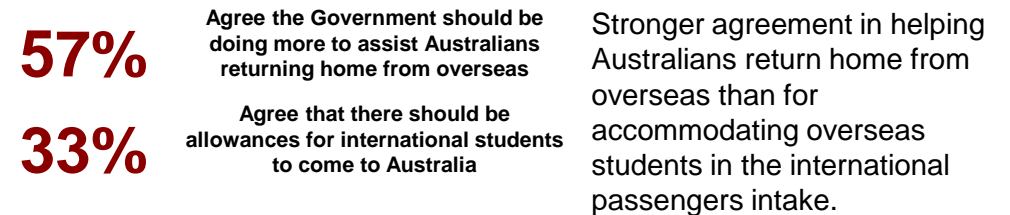
While the proportion of Queenslanders who support border closure with states/territories and towns/regions that record hot spots has significantly declined since Wave 6, the decline is not as pronounced for the latter.

Strong support for hotel quarantine and a national plan for quarantine which is run by the Federal government.

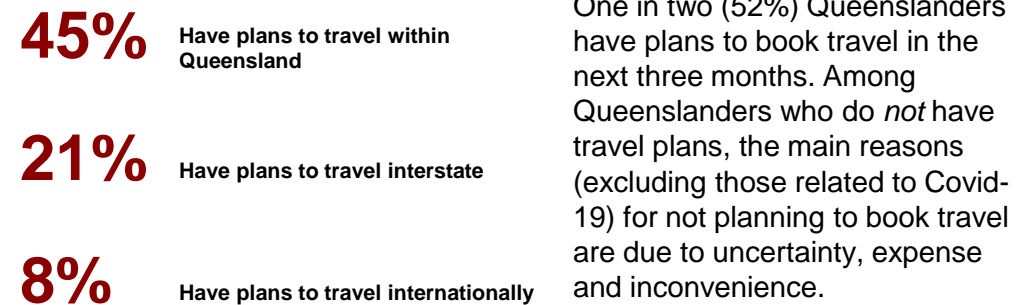


There is high consensus among Queenslanders regarding quarantine issues.

Support is higher for helping Australians get back to Australia than providing allowances for international students.



Uncertainty, expense and inconvenience are the main non Covid-19 related reasons for not planning to travel.



EXECUTIVE SUMMARY – TESTING, COMPLIANCE AND RESTRICTIONS

Wave 7 Survey completed 29 January – 5 February 2021.

Confidence in the Government's ability to manage restrictions declined.

66%

Confident Queensland Government can manage restrictions

There has been a significant decline in confidence since Wave 6 with two in three (66%) Queenslanders now stating they have confidence in the Government (75% in Aug'20).

One in four Queenslanders have been tested for Covid-19.

27%

Have ever been tested for Covid-19

One in four (27%) have been tested for Covid-19, including 7% who have been tested in the last month.

81%

Agree it was easy to find a testing site

Perceptions of the testing experience are generally positive.

60%

Disagree they had to wait a long time to get tested

Observed non-compliance remains steady.

Compared to Wave 6, there has been a higher level of observed non-compliance with leaving contact details at restaurants and bars. Other measures remain steady.

Physical distancing - 1.5m from others	57%
Leaving 1.5m in front of you when queuing	57%
Physical distancing - 4m2 per person when indoors	49%
Leaving contact details at restaurants and cafes	43%
Be patient with service staff who are complying with social distancing	41%
Limit the number of people in a venue by the 4m2 rule	40%
Keeping distance while on public transport	30%
Getting tested if you develop symptoms of Coronavirus	27%
No dancing or standing around the bar, ordering at the counter in clubs, pubs, etc.	23%

Lower incidence of agreement for behaviours that are perceived to be more permanent.

I would provide details for contact tracing if asked	94%
I would stay at home if feeling unwell	94%
I understand the mask-wearing rules	85%
People should wear masks on public transport	79%
I am willing to wear a mask in the long term	66%
I will voluntarily get a COVID-19 vaccine when it is available to me	60%

Cautious approach to what restrictions should be implemented.

I support quick lockdowns	80%
Disagree there are too many COVID-19 restrictions	57%
More restrictions are necessary because of the new UK strain of COVID-19	54%
We should wait to see if there is community spread before increasing restrictions / lockdown	52%

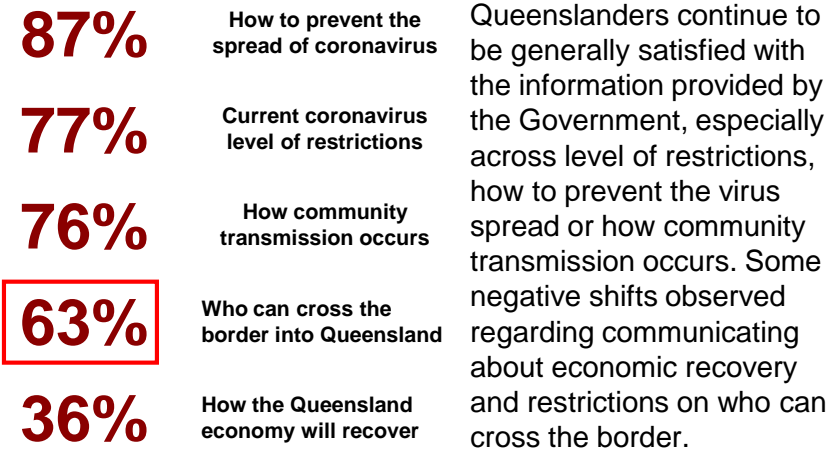
DASHBOARD – RESTRICTIONS

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 6) %	This wave (Wave 7) %	Trend
Q66 Interstate travel should be allowed between states with hot spots and multiple cases	No (red)	-	86	58	
	Yes (green)	-	8	24	
Q67 Travel allowed to Queensland for towns or regions continuing to record hot spots / multiple new cases per day	No (red)	-	87	74	
	Yes (green)	-	6	14	
Q24 Confidence the Queensland Government can manage restrictions	Confident (green)	59	74	66	
	Not confident (red)	12	7	11	

EXECUTIVE SUMMARY – INFORMATION

Wave 7 Survey completed 29 January – 5 February 2021.

Agreement that the Queensland government is a trustworthy source of information has declined. Awareness of and its perceived helpfulness of the Roadmap has also declined.



19%
Aware of the Roadmap

48%
Roadmap is helpful

Aware / not aware of Roadmap to Easing Restrictions

Good information about how the economy will recover (Q1)
42% aware Vs **29%** unaware

The Queensland Government remains a consistently trustworthy source of information, however, this represents a significant decline in agreement compared to Wave 6.

69%
Queensland Government is a trustworthy information source

73%
Can find the information they need around border closures

DASHBOARD – INFORMATION

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 6) %	This wave (Wave 7) %	Trend
Q1 Getting enough information to feel confident you know about ... (T2B = 5 very good + 4)	How to prevent the spread (red)	91	90	87	
	Current level of restrictions (orange)	79	82	77	
	How QLD economy will recover (blue)	29	41	36	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	76	69	
	Disagree (red)	11	7	12	
Q34 Aware of QLD Govt's Roadmap	Yes, seen, read or heard	59	39	19	
Q36 Helpfulness of Roadmap communications	Helpful (green)	68	83	48	
	Not helpful (red)	5	3	21	

COMMUNICATION RECOMMENDATIONS

Balance building a strong backbone for the future and immediate economic measures that empathise with the worries and concerns of Queenslanders. Make it everyone's job to help recover Queensland.

Queenslanders perceive the Government is responding is appropriately and agree with the quick lockdown measures to contain community contagion. However, not everyone feels the restrictions are necessary or appropriate and we start to see a decline in confidence about managing restrictions and support for border closure. The lockdown of Greater Brisbane snapped Queenslanders out of a holiday bliss and false sense of security. The proximity to risk of COVID-19 however decreases, complacency with preventive measures increases, and uncertainty about when the economic recover is becoming more of a concern. Whilst there are mixed views on whether the worst is yet to come or behind us, certainly Queenslanders are feeling more optimistic in 2021 but the worry about the long term economic impact continues to grow. Between August 2020 (Wave 6) and January 2021 (Wave 7) many of the Federal Government support through Job Keeper and other business measures were reducing or finishing, was reflected in an increase in those impacted through job loss or small business losses.

It is increasingly more important to connect Queenslanders concerns, with the economic strategies that could address them. Queenslanders are starting to worry about an increase in crime and social disadvantage as a consequence of job losses. In addition, Queenslanders place the highest importance in human services and community safety as part of keeping our community healthy, safe and strong. The creation of jobs in the health, education and community safety initiatives must be clearly linked to placating these increasing concerns. Queenslanders worry we are not self sufficient, and this drives the sentiment for increasing the need to make it here in Queensland. Small business owners are not feeling supported by State Government, yet they are the third most important strategy to Queenslanders. Queenslanders worry about our youth, and what kind of a future they will have when they head into the workforce. There is a sense of hopelessness and in some cases entitlement to welfare, so investing in the skills needed for future jobs the Government is creating needs to have clear and rational alignment. Short term strategies (what we do right now) must demonstrate a sense of capability to be able to step-by-step get to the long term investment strategies (plan to build for the future).

Communicating economic strategies should aim to:

- Build a sense of capability (step by step and process orientated – know how to get there)
- Build awareness **and understanding** of the Plan – with a sensible, strategic and steady stages (show the logic of your decision making which empathises with their concerns)
- Manage outcome expectations over time (be realistic about what can be achieved now and what are foundations for the future)
- Avoid abstract and use concrete terms (Construal Level effects are important, minimize the fluff and puff words that sound like spin)
- Understand the impact profile of the target audience (for many life has never changed or is back to normal, but for others they are living day by day and feeling overwhelmed)

Now is a critical time for Queensland Government to change the mood. It feels like the quiet after a storm. People are not sure if we are still in the eye of the cyclone waiting to be hit again, or if it is all over. But what Queenslanders do well is pick themselves up and get straight into the clean up. In using this storm analogy to reflect on the pandemic, and for those who have been hit hard, they may think “where is the mud army”? For those not impacted, feeling helpless, they may think “how do I help?”. A tone of determination, optimism and pride may be used in conjunction with a realistic sensible plan, to inspire Queenslanders. Give people (not affected who can help) a role in the recovery to help their fellow Queenslanders.

BACKGROUND

2



BACKGROUND AND OBJECTIVES

Findings will be used to inform communications.

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

This report covers the seventh wave of research which was conducted between 29th January to 12th February 2021. The sample 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
- Wave 7: 29 January to 12 February, average 17 minutes; n=1019

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 Annastacia 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.

Wave 7: Queensland border closed to Greater Sydney residents during 20 December 2020 to 1 Feb 2021 due to Northern Beaches/Berala outbreaks over Christmas. On 8 January, the Premier announced a three day lockdown in Greater Brisbane which allowed contact tracers to work to ensure the UK variant of COVID-19 was not circulating in the community.

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											
	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									Wave 7								
	SEQ			ROQ			QLD			SEQ			ROQ			QLD		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
18-39	57	62	119	24	44	68	81	106	187	9	61	70	17	47	64	26	108	134
40-64	105	121	226	101	126	227	206	247	453	57	190	247	60	123	183	117	313	430
65+	111	68	179	129	50	179	240	118	358	138	108	246	130	79	209	268	187	455
Total	273	251	524	254	220	474	527	471	998	204	359	563	207	249	456	411	608	1019

Diversity

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7		
	SEQ	ROQ	QLD	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	12	17	29
Culturally or linguistically diverse background	67	70	137	72	53	125	42	40	82	39	25	64	43	51	94	36	30	66	35	26	61
Person with disability	113	117	230	56	63	119	81	78	159	75	74	149	81	78	159	76	80	156	81	79	160
Person most at risk	240	242	482	141	152	293	151	172	323	185	167	352	180	190	370	176	164	340	196	169	365

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			Wave 7		
	SEQ	ROQ	QLD	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	88	97	185
Year 12 or equivalent or below	123	194	317	84	101	185	87	79	166	84	88	172	82	102	184	92	79	171	108	91	199
Trade/Technical/Vocational training	212	258	470	140	153	293	154	172	326	161	161	322	162	178	340	145	159	304	164	132	296
Undergraduate Degree	184	168	352	134	110	244	131	105	236	146	85	231	152	104	256	126	90	216	114	82	196
Postgraduate Degree	109	99	208	79	63	142	72	52	124	78	50	128	72	56	128	92	61	153	76	50	126
Prefer not to say	8	10	18	10	6	16	3	6	9	5	4	9	7	7	14	7	2	9	13	4	17

Employment status before Coronavirus pandemic

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7		
	SEQ	ROQ	QLD	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	181	143	324
Employed, casual/temporary	48	117	165	59	60	119	40	42	82	49	40	89	39	51	90	56	41	97	38	35	73
Self-employed / business owner	53	53	106	35	34	69	39	37	76	31	29	60	35	34	69	23	25	48	36	22	58
Unemployed (looking for work)	54	68	122	33	29	62	23	29	52	25	17	42	29	23	52	32	23	55	32	21	53
Not working or looking for work	335	329	664	157	186	343	224	250	474	236	240	476	229	252	481	215	232	447	266	220	486
Prefer not to say	7	10	17	12	12	24	4	14	18	6	6	12	11	11	22	5	6	11	10	15	25

QUESTIONS CHANGES PER WAVE

Focus of this wave is on compliance and economic recovery.

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 7		
Screening	SQ1-SQ3		
Demographics	Q38, Q40-Q45		
Personal impacts	Deleted	Edited	
Future perceptions and goals / Economic Recovery	Delete Q86 Q63 Q68-Q71 Q87-Q94	Edits Q22 – revise question	Add new questions Q46a Q46b Q97a Q97b
Restrictions	Delete Q73 Q75a-Q75c Q30 Q96 Q81-Q85a	Edit Q74 – revise question, delete statement #10, Q34 – revise question Q36 – revise question	Add new questions Q98 Q99 Q100 Q100a Q101 Q102 Q103

QUESTIONS CHANGES PER WAVE

Waves 1-6

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 7

3

IMPACTS

How has the Coronavirus impacted
Queenslanders work life and their worries

3.1



WORK CONTINUES TO BE IMPACTED BY CORONAVIRUS

Coronavirus affected work situation EMPLOYED

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7		
	SEQ	ROQ	QLD	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%	51%	55%	53%
Yes, I am working more than I would like	7%	8%	8%	7%	10%	8%	7%	5%	6%	7%	9%	8%	11%	10%	10%	9%	13%	11%	5%	11%	8%
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%	21%	18%	19%
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%	2%	4%	3%
Yes, I have lost my job	8%	5%	6%	10%	5%	7%	8%	6%	7%	7%	4%	5%	9%	3%	6%	7%	3%	5%	13%	4%	9%
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%	6%	8%	7%
Prefer not to say	1%	1%	1%	0%	1%	1%	1%	2%	2%	3%	0%	2%	1%	1%	1%	0%	1%	1%	1%	0%	1%
NET employee impact	55%	57%	56%	66%	56%	61%	54%	41%	48%	53%	40%	47%	60%	39%	50%	59%	50%	55%	47%	45%	46%

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; Wave 7 n=1019 Total Employee n=397

Overall, Queenslanders who have had their work situation impacted by COVID-19 has significantly declined since wave 6 (Aug'20). However, those who have lost their jobs has nearly.

Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

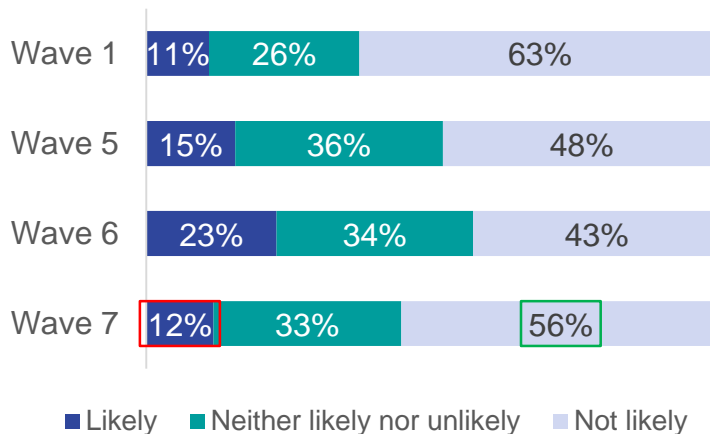
Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	21%	13%	18%	16%	19%	35%	27%	17%	34%	26%	14%	37%	24%	17%	28%	23%	40%	25%	33%
Yes, I am working more	2%	11%	6%	4%	4%	4%	3%	4%	4%	0%	2%	1%	0%	1%	1%	0%	6%	4%	7%	8%	8%
Yes, my business has less income	56%	38%	47%	43%	51%	47%	39%	44%	42%	54%	46%	50%	57%	41%	50%	50%	25%	36%	36%	28%	32%
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%	8%	12%	10%
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%	6%	10%	8%
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%	4%	0%	2%
Prefer not to say	0%	0%	0%	4%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	16%	7%
NET Impacted SELF / EMPLOYED / BUSINESS OWNER	83%	76%	79%	83%	82%	82%	81%	65%	73%	83%	66%	74%	86%	63%	76%	83%	72%	77%	60%	58%	59%

This trend is consistent with SMEs and sole traders. Though they experience a higher level of disruption compared to the average employee (net impact), the difference between those who are employees and self-employed and have been impacted has declined over subsequent waves.

LOWER PERCEIVED RISK OF CORONAVIRUS

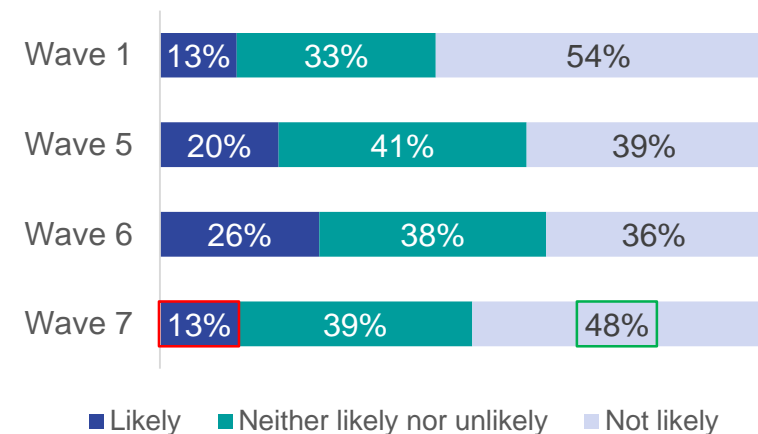
Queenslanders perception of risk has significantly decreased since Wave 6 (Aug'20). One in two don't perceive a risk to themselves (56%) or to their family (48%).

Perceived likelihood of you getting Coronavirus



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, Wave 7 n=1019

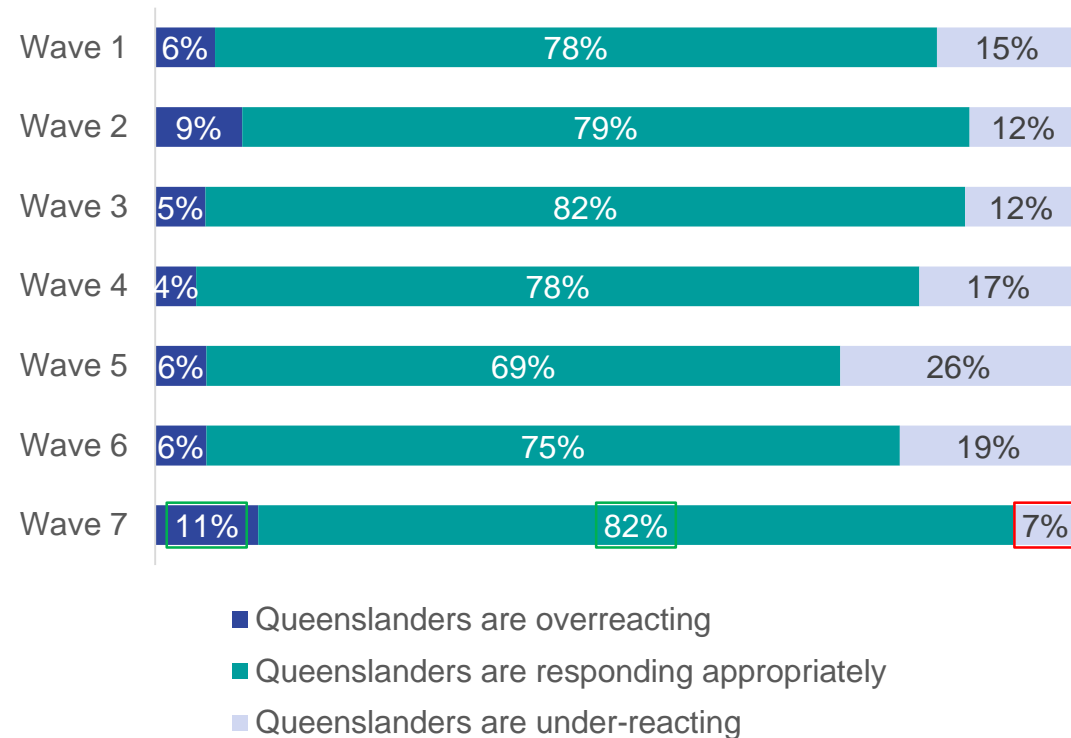
Perceived likelihood someone in your family getting Coronavirus



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, Wave 7 n=1019

MAJORITY OF QUEENSLANDERS FEEL WE GOT IT RIGHT

Four in five (82%) perceive that Queenslanders are responding appropriately to the COVID threat. However, compared to August 2020, nearly double (11%) believe that Queenslanders are over-reacting (with this research undertaken after the border closure to Greater Sydney and 3-day lockdown in Dec'20-Jan'21).



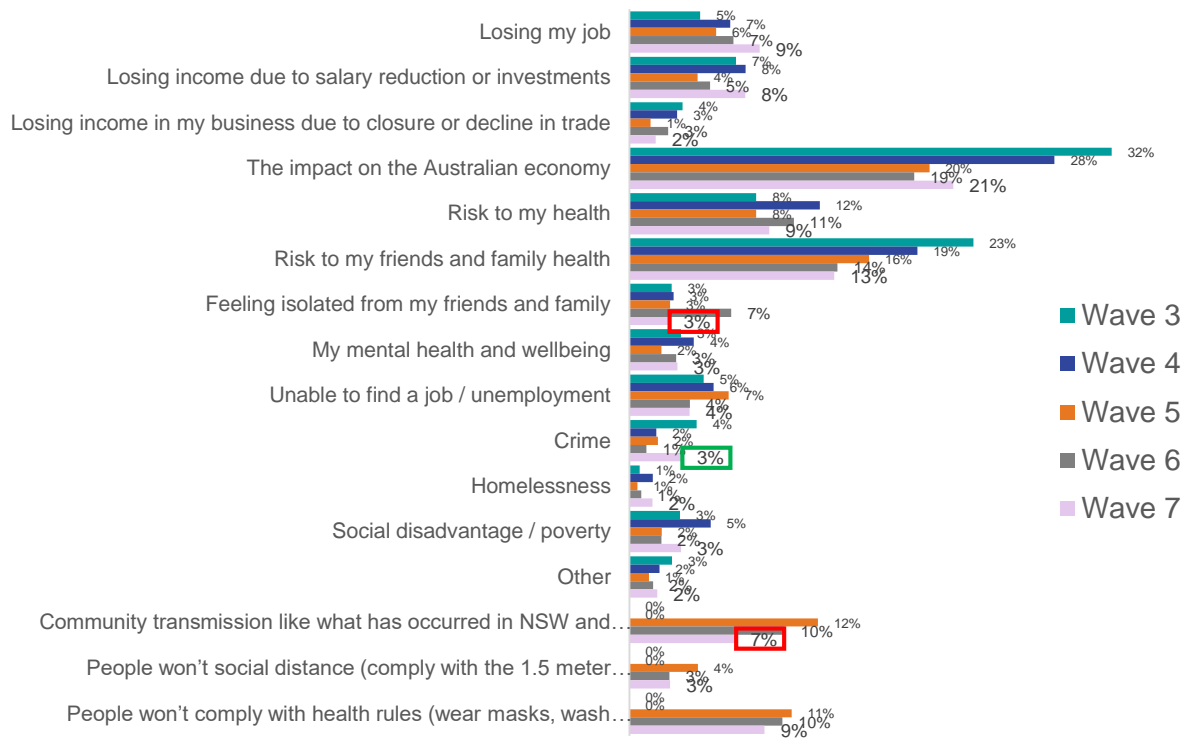
Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998, Total Wave 7 n=1019

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

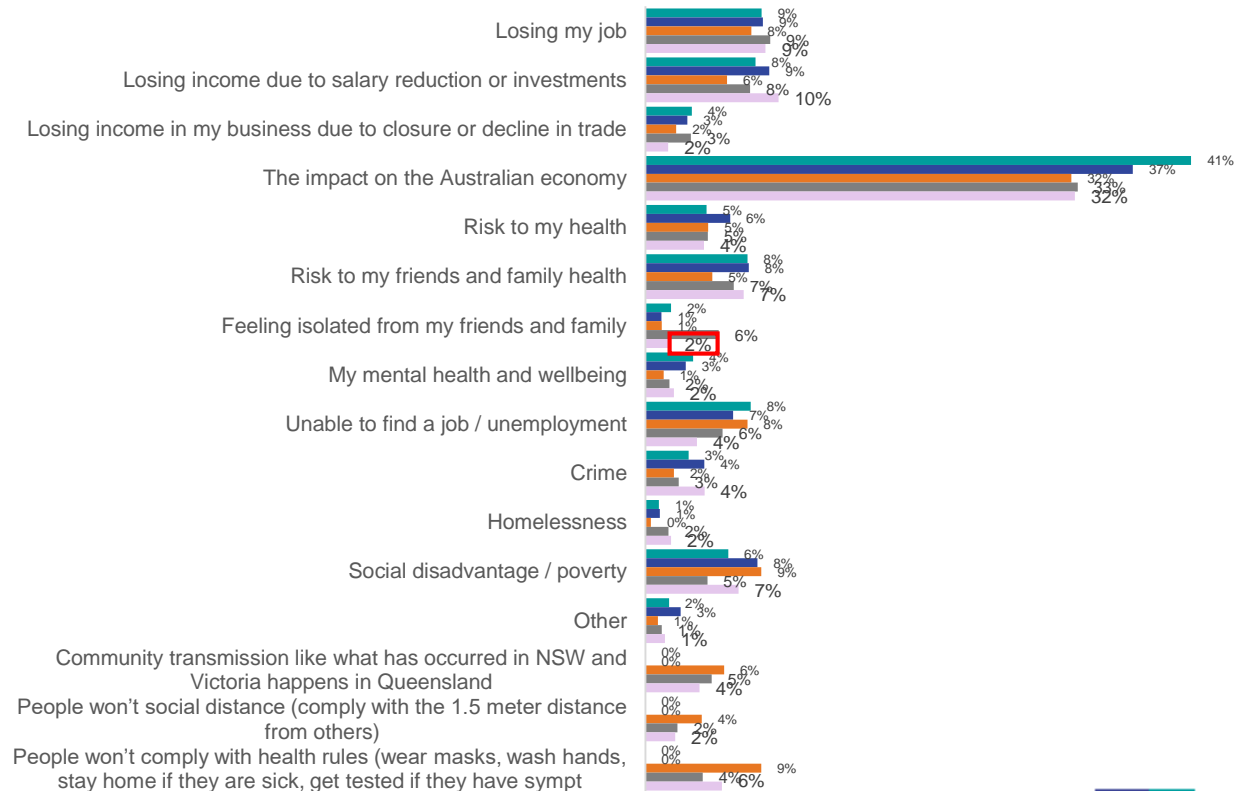
IMPACT ON ECONOMY REMAINS TOP CONCERN

The impact on the Australian economy continues to be the top concern (21%), followed by risk to family and friends (13%), losing their job (9%), risk to their health (9%) and lack of compliance with health rules (9%). In terms of concern for the economy, Queenslanders are worried about their personal financial situation including losing income due to salary reductions or investments (10%) or losing their job (9%).

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



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



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, Total Wave 7 n=1019

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, Total Wave 6 n=998, Total Wave 7 n=1019

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

ECONOMY

Queenslanders views
on economic recovery

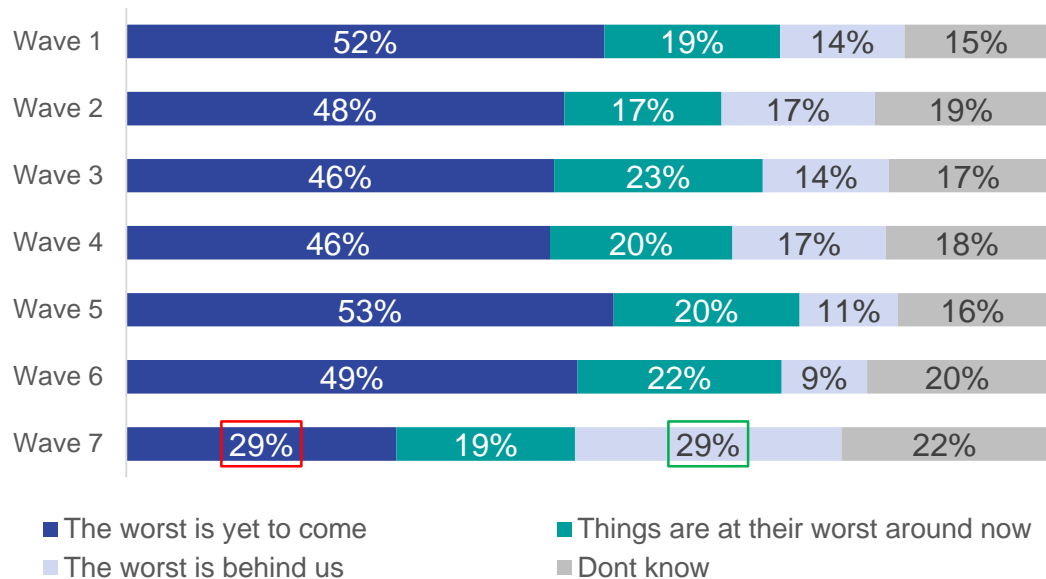


3.2

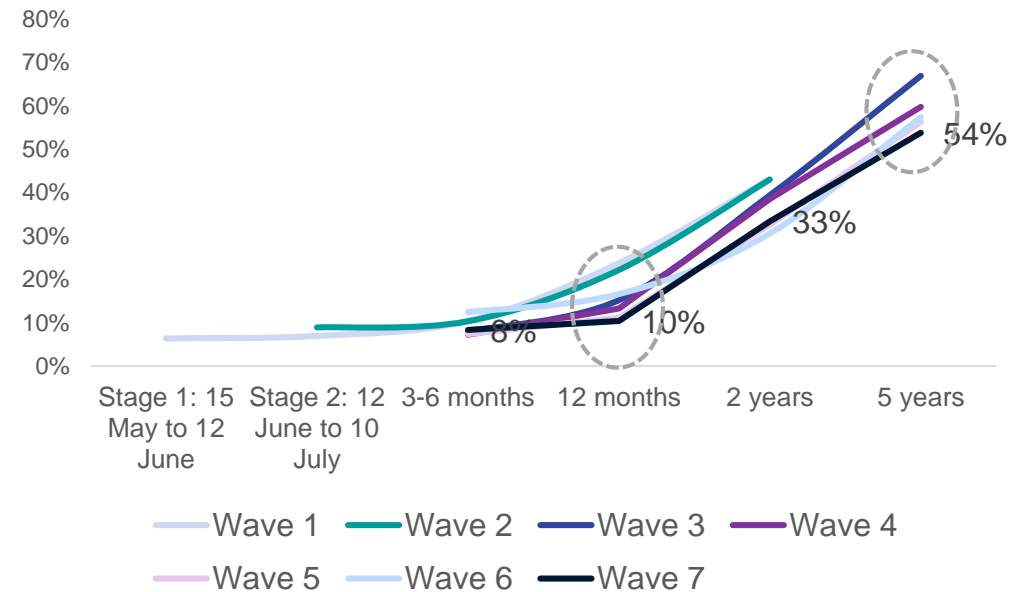


RECOVERY EXPECTATIONS REMAIN LONG TERM

Queenslanders' expectations about the economy is polarised with an equal proportion (29%) perceiving the 'worse is yet to come' and 'the worst is behind us'. However, compared to wave 6, a significantly greater proportion are feeling optimistic, with 29% stating 'the worst is behind us' versus 9% in Aug'20.



Queenslanders are becoming less optimistic of a speedy economic recovery, with half (54%) believing that the economy will fully recover in 5 years time. Furthermore, projections of a 12 month recovery has fallen to its lowest among Queenslanders (10%).



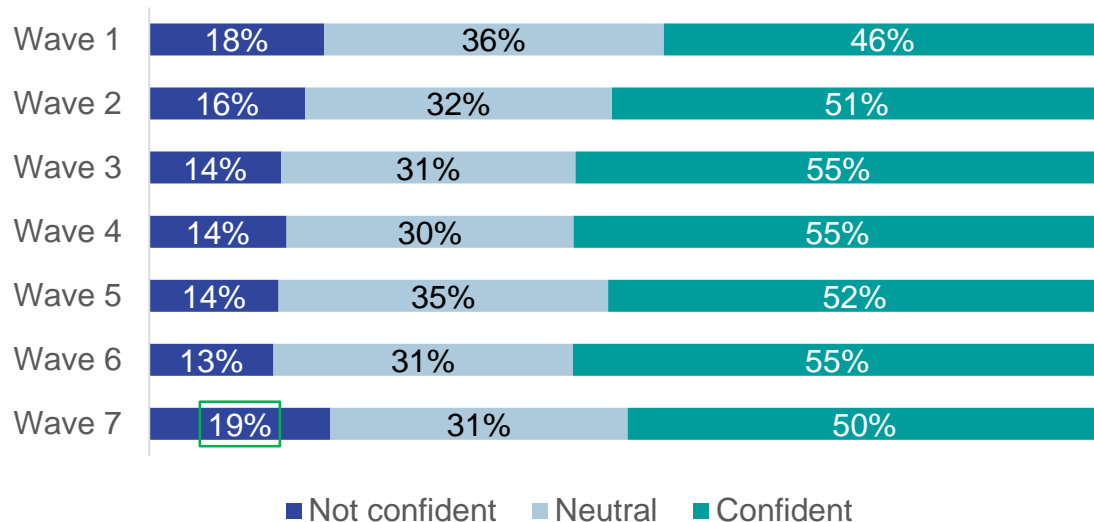
Q19 What do you expect will happen with the economy in Queensland?
 Total Wave 1 n = 1603, Total Wave 2 n = 1018, Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019

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, Total Wave 7 n=1019
 NB: Wave 7 – "As restrictions are relaxed" deleted from question wording

NOT CONFIDENT IN ECONOMIC MANAGEMENT ON THE RISE

Queenslanders who are 'confident' in the Queensland Government's management of the economic recovery remains steady at 50%.

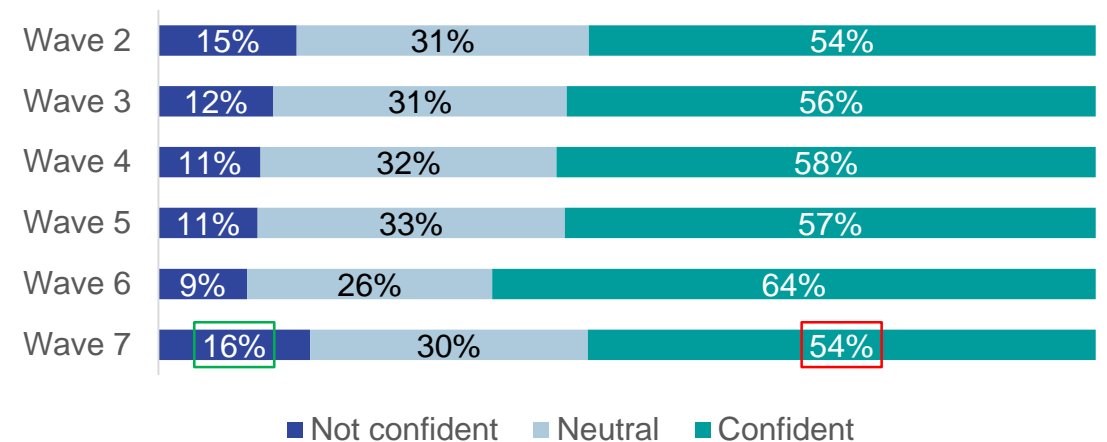
However, the proportion of those who are 'not confident' has significantly increased since wave 6 (Aug'20), now at nearly one in five Queenslanders (19%).



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, Total Wave 7 n=1019

Just over half of Queenslanders believe the Government's handling of the COVID-19 crisis will be to the state's economic advantage in the long run (significantly lower at 54% compared to wave 6's result of 64%).

Lack of confidence has significantly increased with 16% rating they are 'not confident', the highest level seen for this metric.



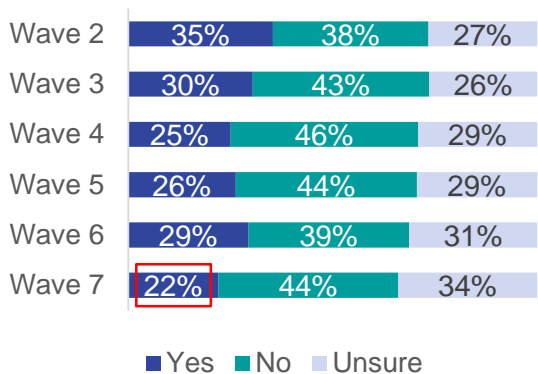
Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" –How confident that Queensland has handling COVID-19 will be to the State's economic advantage in the long run
 Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019

AWARENESS OF ECONOMIC INITIATIVES IS AT ITS LOWEST LEVEL

One in five (22%) Queenslanders purport to have heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery, representing a significant decline compared to wave 6 (29%) and the lowest awareness level observed.

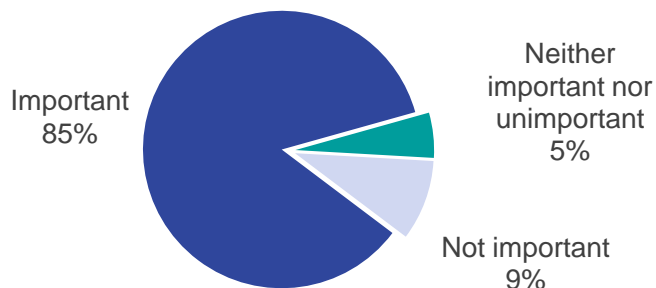
Among those who have heard about the major economic initiatives, 85% perceive the initiatives will be important for recovery and the main strategies recalled are 'supporting jobs' and 'Building Queensland'.

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



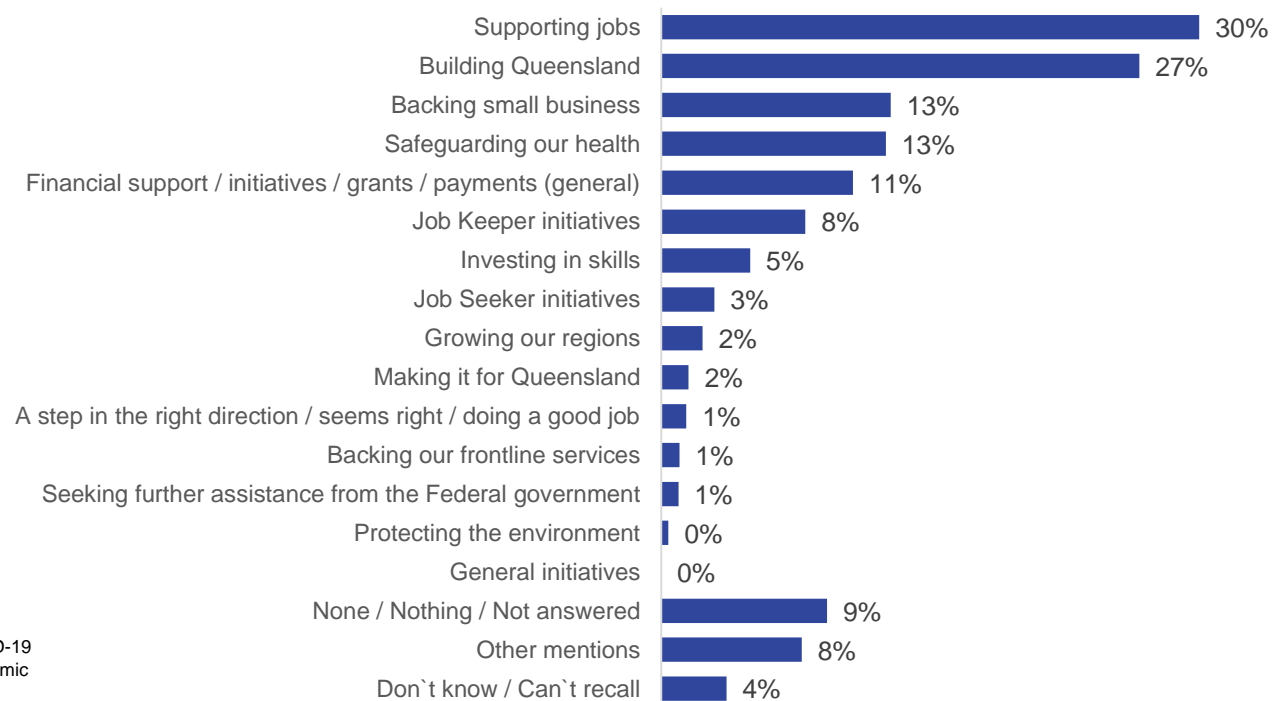
Q46 Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery? Total Wave 2 n = 1018, Wave 3 n=1021; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019

How important will these specific initiatives be for COVID-19 recovery?



Q46a How important will these specific initiatives be for COVID-19 recovery? Base: those who have heard about any major economic initiatives (at Q46) Wave 7 n=234

What specific initiatives have you heard of?



Q46b What specific initiatives have you heard of? Base: those who have heard about any major economic initiatives (at Q46) Wave 7 n=234

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



IMPORTANCE OF FRONT LINE SERVICES AND ECONOMIC SUPPORT

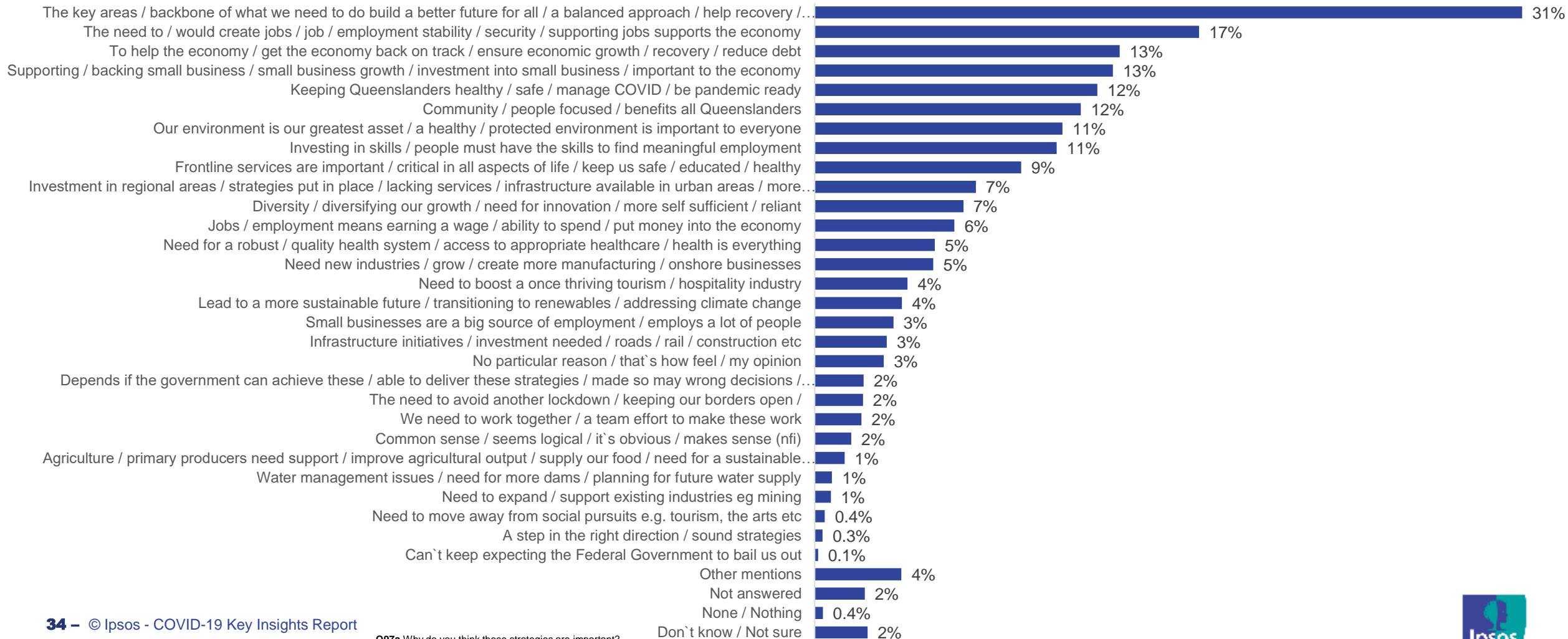
Strong perception of the importance across all strategies with support of frontline services and focus on rebuilding and investing in the Queensland economy slightly ahead of safeguarding health and protecting the environment.

Top Box 'very important' %



■ Important ■ Neither important nor unimportant ■ Not important

REASONS FOR PERCEIVED IMPORTANCE OF ECONOMIC STRATEGIES



VERBATIM COMMENTS FOR RATING ECONOMIC STRATEGIES AS IMPORTANT

Frontline services

Need frontline services to be strong (e.g. health) in order to ensure wellbeing, health and safety of Queenslanders.

We need to support our first responders better as well as improving our hospitals and schools.

... our frontline services are very important to keep our state safe and functioning.

Our frontline services are very important in all aspects of everyday life ex. ambulance, hospitals, police etc.

Backing our frontline services - without backing, 100% we could, over time, become '3rd world'.

I'm a frontline worker and so far I have worked double shifts all year with no support or financial gift from government but am just expected to get to work.

Job creation/upgrading skills

Investing in skills can only help Queensland via education, Apprenticeships, Educate Queenslanders, train Queensland's youth from the ground up.

Skills vital to support employment in new industries.

Those who lost jobs through no fault of their own need retraining in other trades/professions.

Queensland can only recover if it builds and invests in skills.

Giving people skills means more employment which results in a healthier economy.

Supporting current jobs is a must to keep economy going.

Focus on business industry

Backing small business in our communities is important to support a thriving community and keeping families afloat.

Small businesses were some of the hardest hit covering all industries, as unlike large businesses, they had no shareholders, sponsors etc to back them in times of crisis.

Need small business to thrive to keep competition and chose alive.

If you build Queensland businesses this will produce jobs which will then produce a better economy long term.

VERBATIM COMMENTS FOR RATING ECONOMIC STRATEGIES AS IMPORTANT

Safeguarding health

The health of the population is paramount to job efficiency and minimises the strain on the overall health system.

Without healthy people there isn't anyone to do the jobs to make the money for economic recovery.

A healthy economy depends on a healthy community.

Without health safeguards, such as border restrictions and local restrictions we would be in a worse situation.

We can't do anything without protecting our health first.

And safeguarding our health there will be people alive to carry out the recovery by assisting to build our economy again in many industries and businesses.

Environment

We need to stop tearing down wildlife habitats for residential builds. Developers need to be monitored and impact studies done prior to destroying wilderness for residential. I want my grandchildren and great grandchildren to see nature in nature.

Our environment is our greatest asset and needs to be protected for our kids and future generations.

Protecting the environment will help give Queenslanders a better life and support more jobs in the long term.

Protection of the environment is essential for the continuance of the human species.

The environment is the backbone of the tourist industry and must be protected for them and also for future generations of Queenslanders.

A healthy environment will help our tourism industry, which will support many jobs.

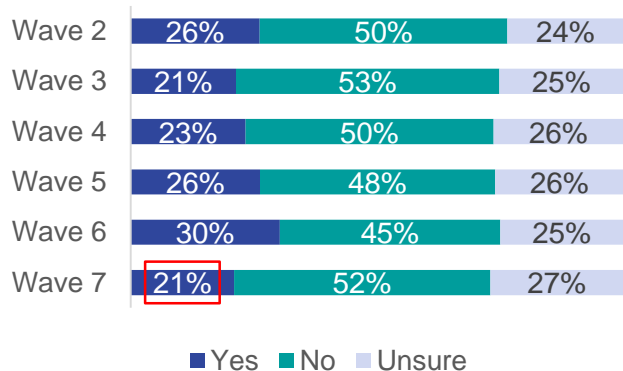
Helping the environment is a very important cause, because if the climate become too unbearable, us humans will suffer tremendously.

RAISING AWARENESS OF ECONOMIC RECOVERY STRATEGY REMAINS A CHALLENGE

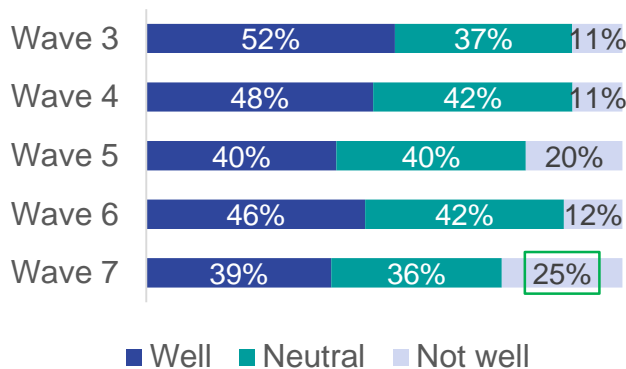
Awareness of the Recovery Strategy is at the lowest level at one in five (21%). Among those aware, lack of understanding and those who oppose the strategy is on the rise (more than double compared to wave 6), albeit still the minority.

As previously recommended, awareness needs to be addressed first before improving familiarity and understanding of the Strategy and ultimately convert those who are opposed/neutral to supporters.

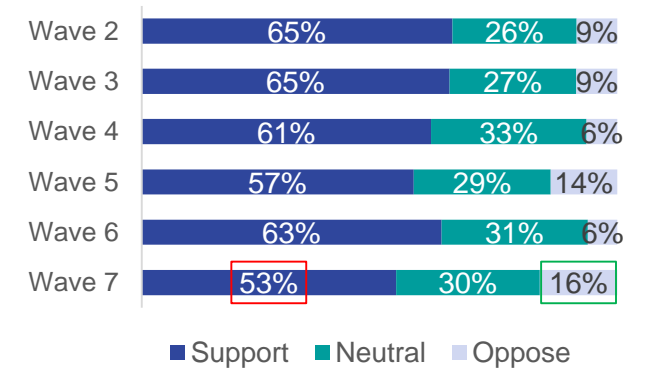
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



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



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



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, Total Wave 7 n=1019

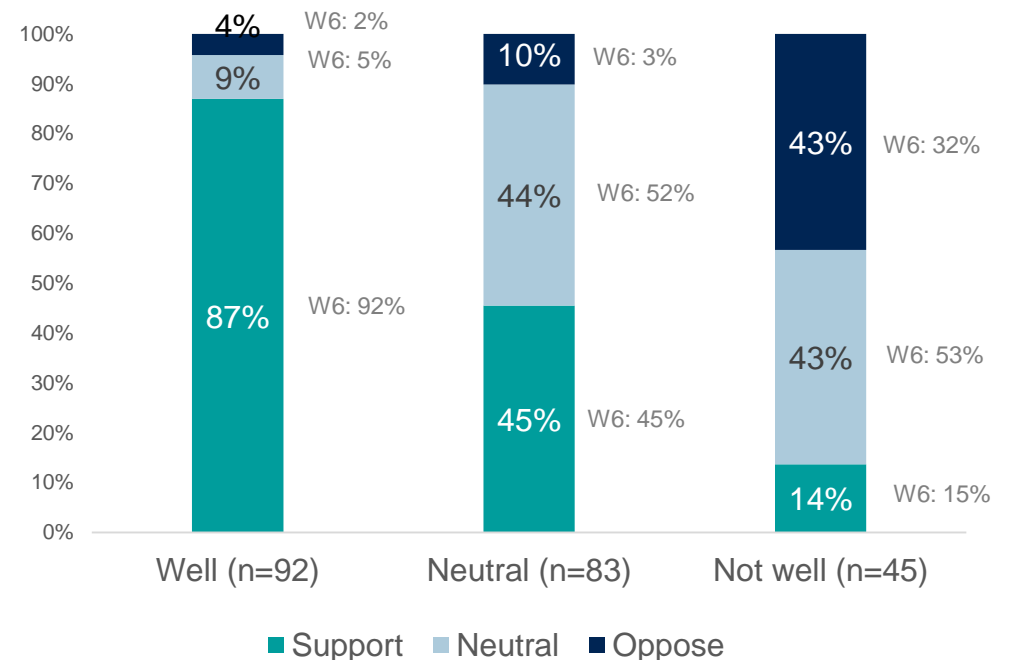
Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
Base: aware of Economic Recovery Strategy Wave 3 n = 211; Wave 4 = 237;
Wave 5 n=282; Total Wave 6 n=310, Total Wave 7 n=220

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?
Base: aware of Economic Recovery Strategy Wave 2 n = 252; Wave 3 n=211; Wave 4 n=237; Wave 5 n=282; Total Wave 6 n=310, Total Wave 7 n=220

UNDERSTANDING ASSOCIATED WITH SUPPORT

The next step to build 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 (87% vs. 45% neutral and 14% not well).



W6: x%
Wave 6 %

Q48 by Q64
(Wave 7)

SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Queenslanders support the Strategy mainly for helping to lift the economy. Mention of keeping people in jobs and creating jobs has significantly increased from wave 6 to 7, with this factor now ranked in second place and over half (52%) supporting the strategy for this reason.

The ambivalent are mainly unsure and acknowledge that there are still uncertainties to be dealt with and while others still don't know enough to have an opinion.

Opposers of the strategy (*results should be indicative only) mainly state the restriction period has been too long and a level of distrust to keep promises.

53%

SUPPORT	W5	W6	W7
Will help lift the economy	48%	47%	57%
Keeps people in jobs or creates more jobs	48%	41%	52%
It looks after small business and helps affected industries	36%	42%	42%
It is a recovery package where they have an action plan	26%	28%	42%
They have done the right thing by keeping our borders closed	44%	47%	41%
It supports tourism and promotes local tourism	41%	36%	40%
Restrictions are being gradually lifted, and it has been handled in stages	51%	47%	37%
Right approach as it keeps us safe and looks after our health and well being	35%	40%	36%
Its a good strategy for all Queenslanders	29%	36%	32%
It is doing the right things and heading in the right direction	26%	30%	32%
Need to get things moving and get back on track	23%	21%	30%
The strategy is detailed, well thought out and logical	19%	20%	27%
Developed with specialised knowledge and experts	16%	18%	25%
It will be for the best	14%	15%	22%

30%

NEUTRAL	W5	W6	W7
So many unknowns still to be faced and I will have to see how the situation goes	70%	64%	60%
I don't know enough to say	23%	32%	37%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	23%	28%	32%
Not enough real information available and too many mixed messages	10%	16%	20%
I would need to analyse it in more detail and I would need more information	26%	16%	18%
I don't trust them to keep their word	11%	12%	18%
Some families missed out completely and some people get no support	10%	14%	16%
We are on the right track and then other times we are not	2%	8%	9%

16%

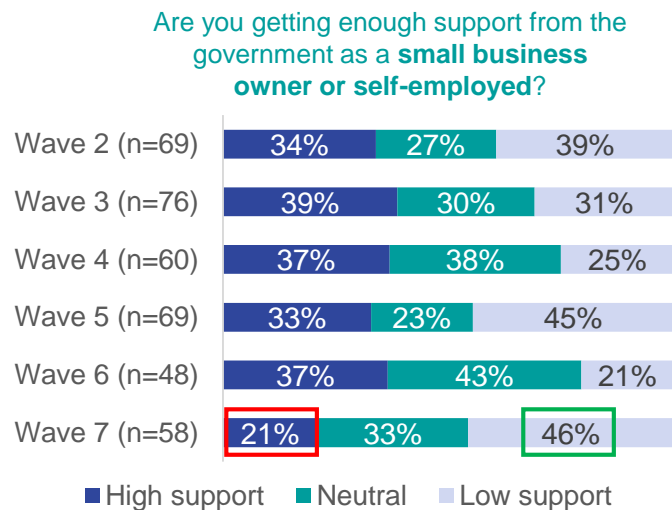
OPPOSE (*Caution: small base)

	W5	W6	W7
Restrictions should have been eased and we have stayed in lock down too long	13%	7%	45%
I don't trust them to keep their word	44%	55%	39%
Not enough real information available and too many mixed messages	59%	57%	37%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	33%	44%	34%
Some families missed out completely and some people get no support	7%	24%	22%
Doesn't address core businesses concerns and small business are suffering	23%	39%	21%
I feel we should open our borders	5%	2%	21%
Doesn't address core tourism concerns and tourism is suffering	13%	24%	16%
Too little, too late, too slow to act	9%	19%	9%

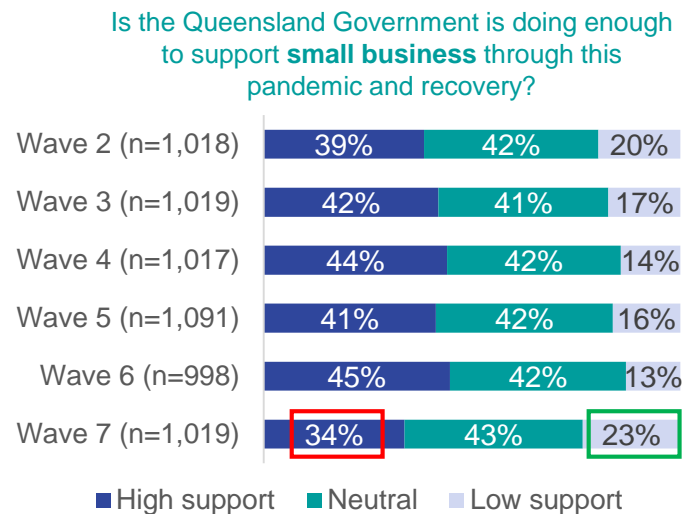
Significantly higher / lower than previous wave unless otherwise noted – 95% CI.

PERCEPTION OF 'LOW SUPPORT' FROM THE QLD GOVERNMENT IS ON THE RISE

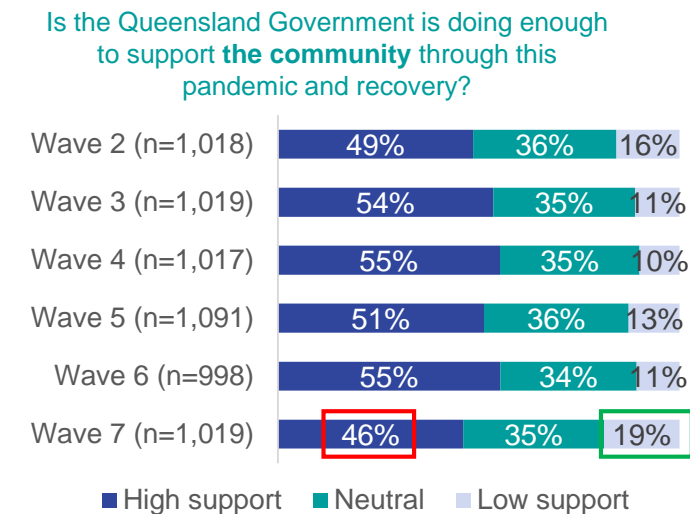
Increased dissatisfaction among small business and self employed with regards to the support they are getting from Government. This is also evidence of increased dissatisfaction among Queenslanders with perceived Government support for small businesses and the community.



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, Total Wave 7 n=58



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, Total Wave 7 n=1019



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, Total Wave 7 n=1019

RESTRICTIONS

3.3



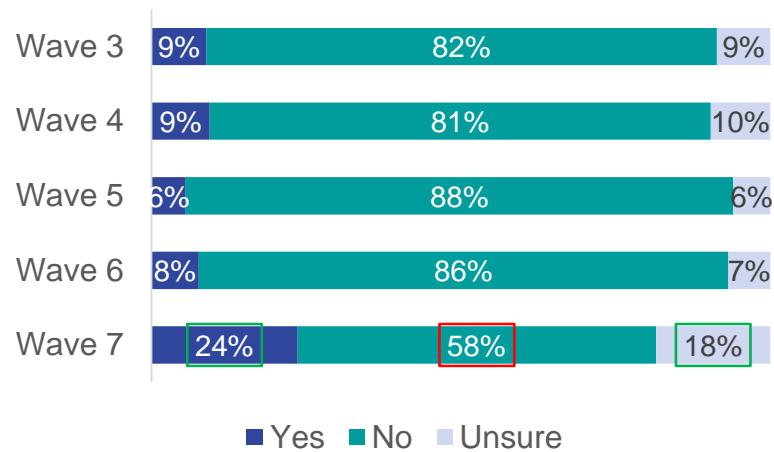
LESS APPETITE FOR CLOSING BORDER TO OTHER STATES

Survey completed 29 Jan – 12 Feb 2021

Significant decline in Queenslanders who support the closing of borders to states that continue to record hot spots or multiple new cases per day.

This finding comes after the closure of QLD/NSW border to Greater Sydney residents due to the Northern Beaches and Berala outbreaks over the Christmas period.

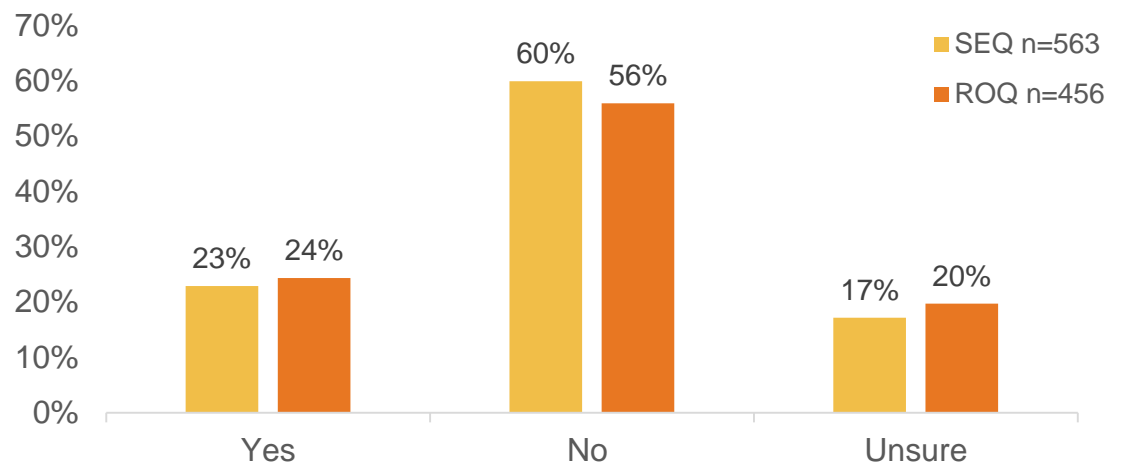
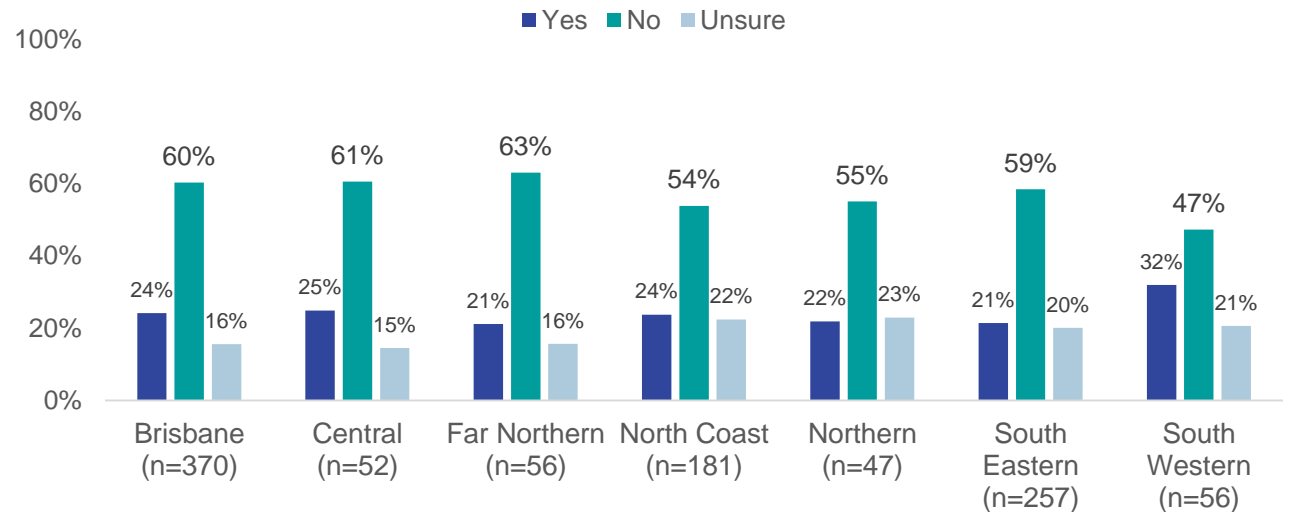
For states and territories continuing to record hot spots or multiple new cases per day, should travel be allowed to Queensland?



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, Total Wave 7 n=1019

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

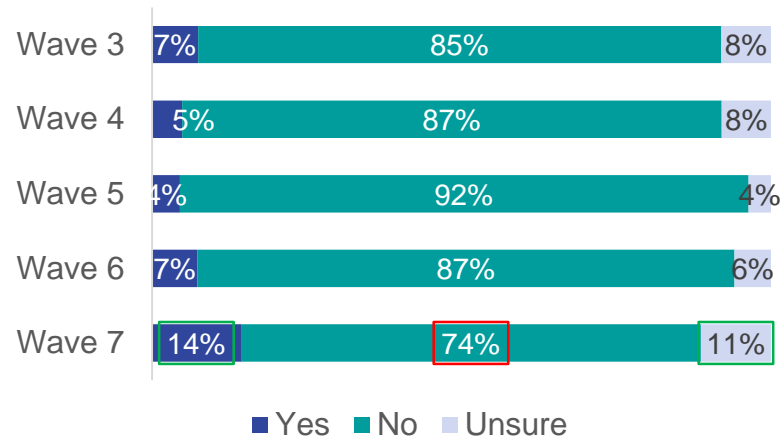


CLOSE BORDERS BETWEEN TOWNS/REGIONS WITH HOT SPOTS

Survey completed 29 Jan – 12 Feb 2021

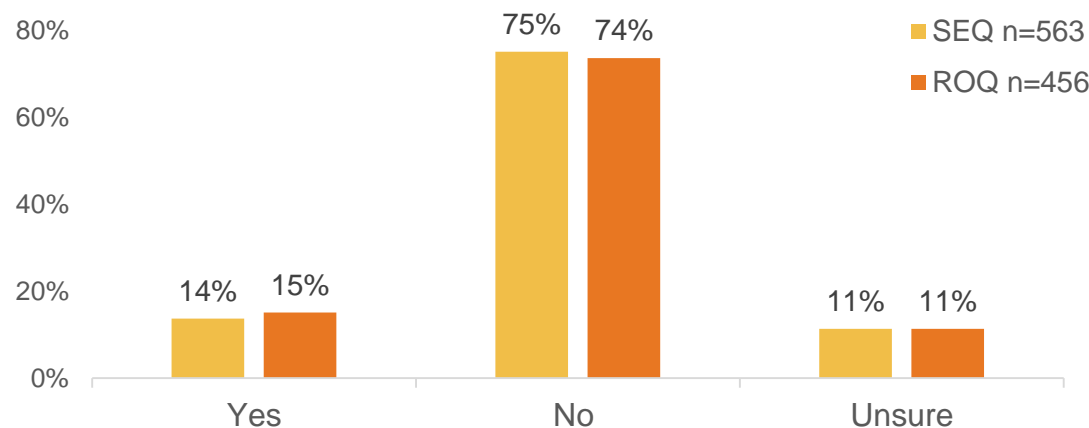
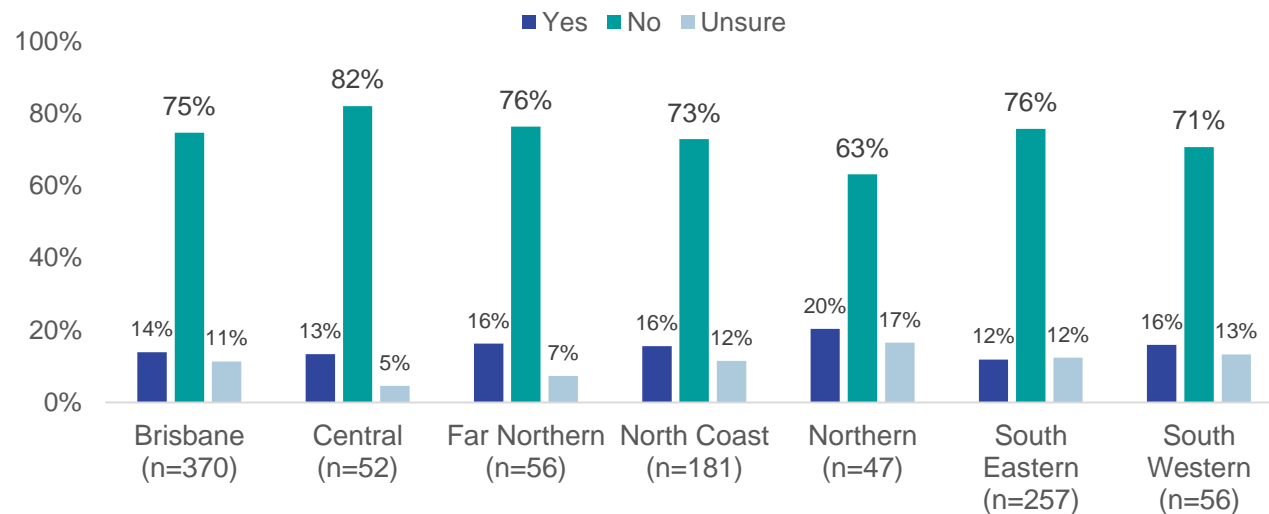
While the proportion of Queenslanders who support border closure with towns/regions that record hot spots has significantly declined since wave 6, the decline is not as pronounced as seen for closing border to entire states/territories.

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.

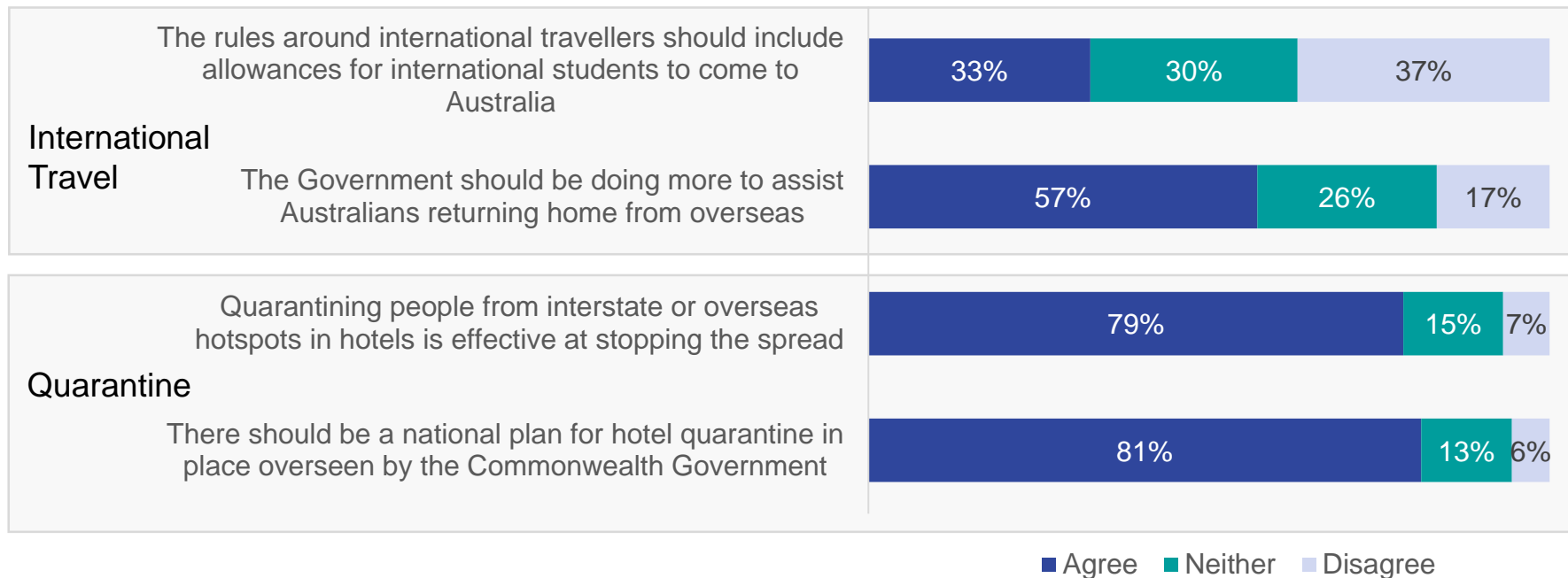
Total Wave 3 n=1021; Total Wave 4 n = 1017; Total Wave 5 n = 1091 ; Total Wave 6 n=998, Total Wave 7 n=1019



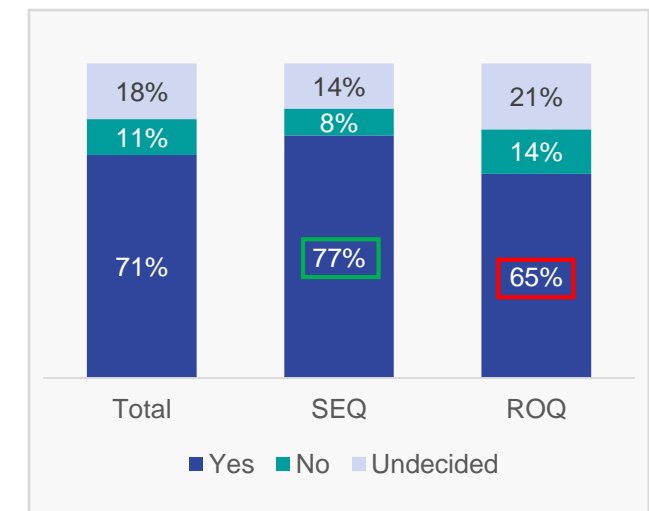
HIGH CONSENSUS REGARDING QUARANTINE ISSUES

Four in five Queenslanders believe there should be a national plan for hotel quarantine overseen by the Federal Government (81%) and perceive quarantining interstate/hotspot travellers as effective (79%). 71% support establishing quarantine facilities in regional Queensland, with significantly higher support from SEQ residents (77%) compared to ROQ residents (65%).

With regards to international travellers to Australia, three in five (57%) believe the Government should be doing more to assist Australians returning home and less support is observed for allowances for international students (33%).



Support establishing quarantine facilities in regional Queensland



Q99 Please indicate how much you agree or disagree with the following statements?
Total Wave 7 n=1019; results exclude 'not applicable'

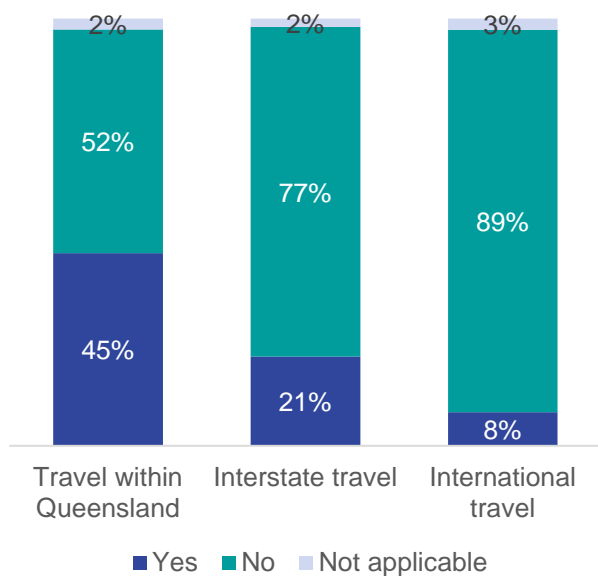
Q103 Do you support establishing quarantine facilities for international travellers in regional Queensland?
Total Wave 7 n=1019, SEQ n=563, ROQ n=456

TRAVEL PLANS MAINLY ON INTRASTATE TRAVEL

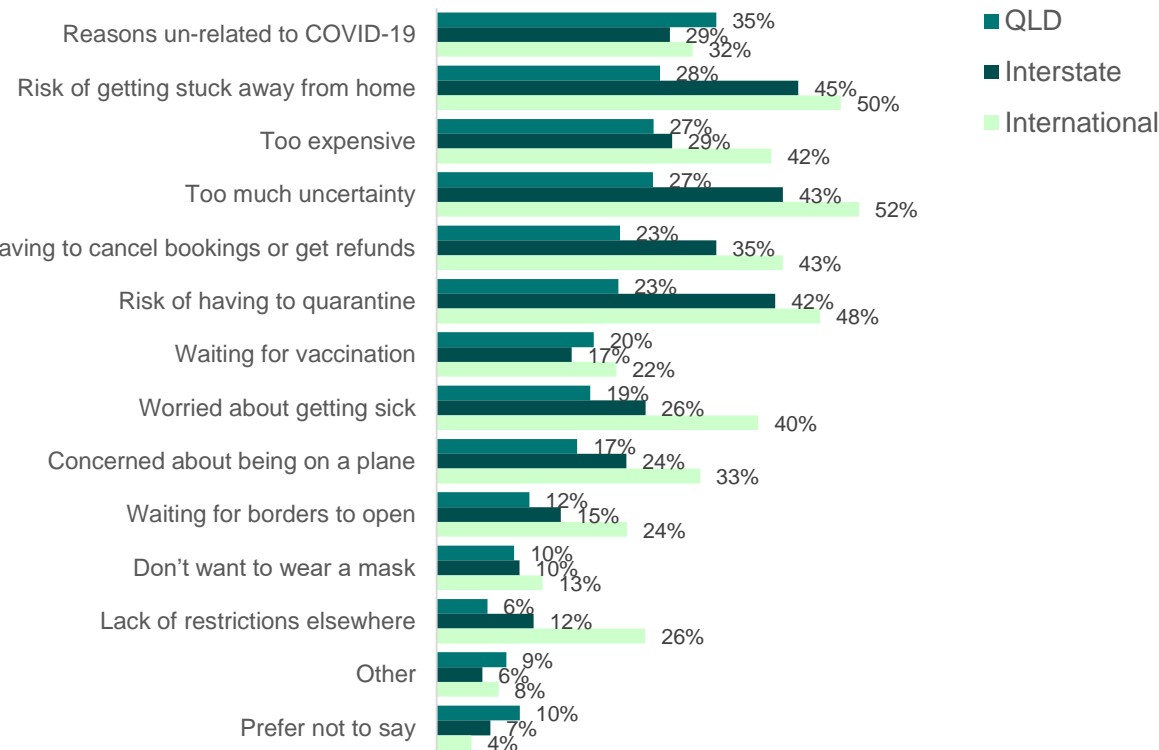
One in two (52%) Queenslanders have plans to book travel in the next three months, including 45% who have plans to travel within Queensland and 21% interstate travel. Among Queenslanders who do not have travel plans, the main reasons (excluding those unrelated to Covid-19) for not planning to book travel are due to uncertainty, expense and inconvenience; this is the case regardless of whether it is intrastate, interstate or international travel.

Plans to travel in the next 3 months

Nett:
Any travel plans 52%



Reasons for not planning to book travel to ...

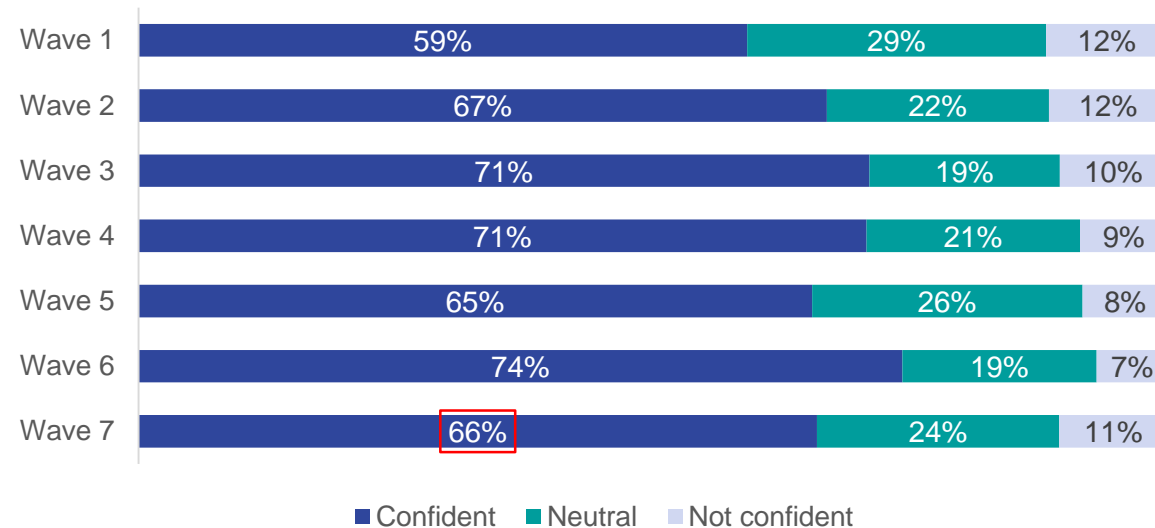


Q100 Are you planning to book travel in the next three months? Total Wave 7 n=1019

Q100a You indicated you are not planning to book travel in the next three months, why is that? Wave 7 (QLD) n=584, Wave 7 (Interstate) n=774, Wave 7 (International) n=945

CONFIDENCE ON MANAGING RESTRICTIONS DECLINES

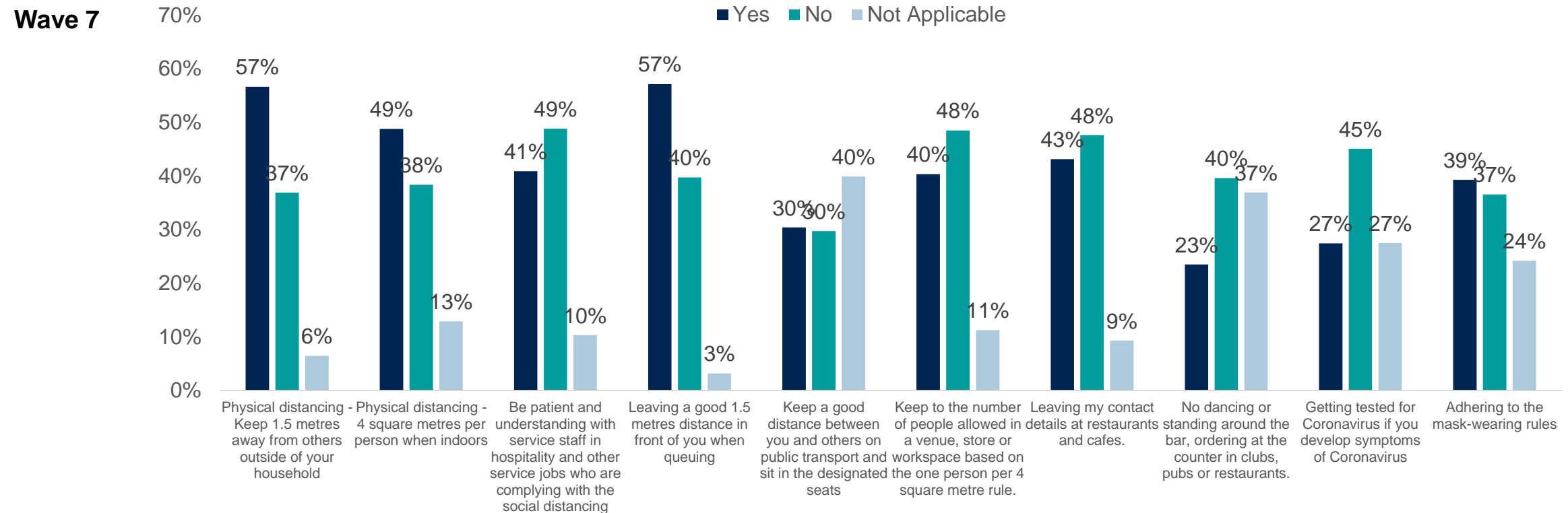
The Queensland Government enjoyed public confidence in managing restrictions in wave 6 with three quarters (74%) agreeing they were confident. However, there has been a significant decline in confidence since Aug'20 with two in three (66%) Queenslanders now stating they have confidence in the Government.



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 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, Total Wave 7 n=1019

OBSERVATION OF NON-COMPLIANCE WITH HEALTH RULES IS COMMON

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 (57%), when queuing (57%) and indoors (49%). Two-fifths observe a lack of leaving contact details (43%), patience for service staff trying to complying with the rules (41%), limiting the number of people in a venue (40%) and adhering to mask-wearing rules (39%). At least one fifth of Queenslanders have seen other non-compliance such as keeping distance on public transport, dancing and standing at the bar, or not getting tested if symptoms present.



Q74: Within the last two weeks (14 days), have you personally seen Queenslanders not complying with the following health rules?

Total Wave 7 n=1019

NB: Change to question wording in wave 7 – time period changed from 7 days to 14 days, removed “while restrictions are easing”.

OBSERVATION OF NON-COMPLIANCE WITH HEALTH RULES REMAINS GENERALLY STEADY

Compared to wave 6, there has been a higher level of observed non-compliance with leaving contact details at restaurants and bars. Other measures remain steady.

Personally seen non-compliance with health rules (Yes %)	Wave 4	Wave 5	Wave 6	Wave 7
Physical distancing - 1.5m from others	60%	56%	58%	57%
Physical distancing - 4m2 per person when indoors	51%	48%	49%	49%
Be patient with service staff who are complying with social distancing	40%	36%	37%	41%
Leaving 1.5m in front of you when queuing	59%	55%	58%	57%
Keeping distance while on public transport	27%	29%	32%	30%
Limit the number of people in a venue by the 4m2 rule	42%	41%	40%	40%
Leaving contact details at restaurants and cafes	29%	38%	32%	43%
No dancing or standing around the bar, ordering at the counter in clubs, pubs, etc.	n/a	24%	25%	23%
Getting tested if you develop symptoms of Coronavirus	n/a	24%	27%	27%

Q74: Within the last two weeks (14 days), have you personally seen Queenslanders not complying with the following health rules?

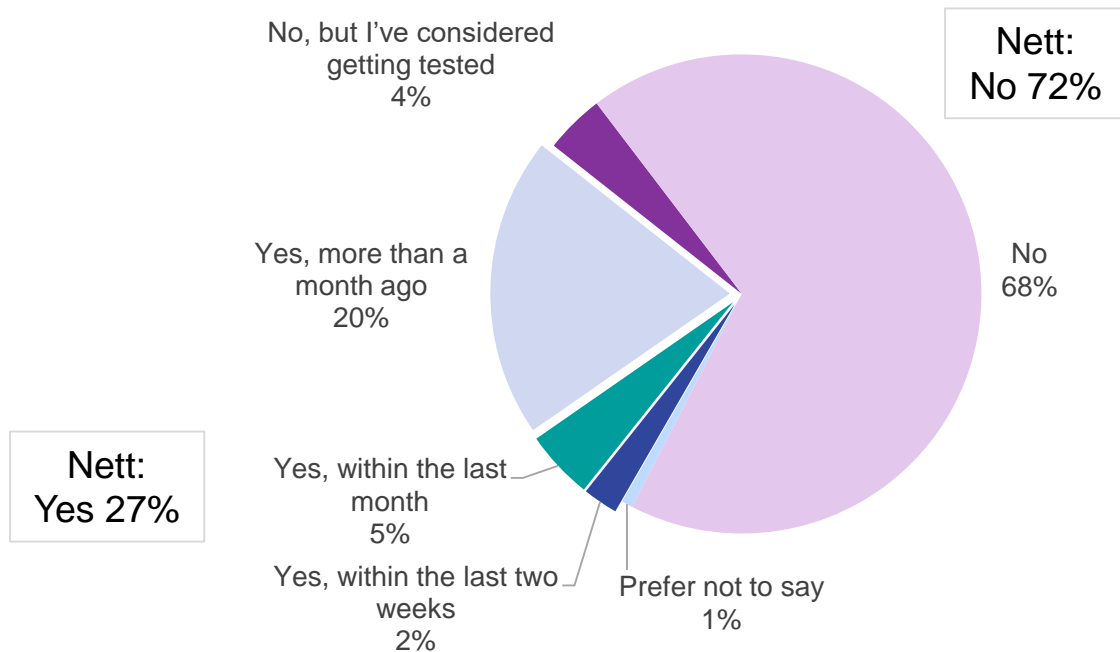
Total Wave 4 n = 1017; Total Wave 5 n = 1091 ; Total Wave 6 n=998, Total Wave 7 n=1019

NB: Change to question wording in wave 7 – time period changed from 7 days to 14 days, removed “while restrictions are easing”.

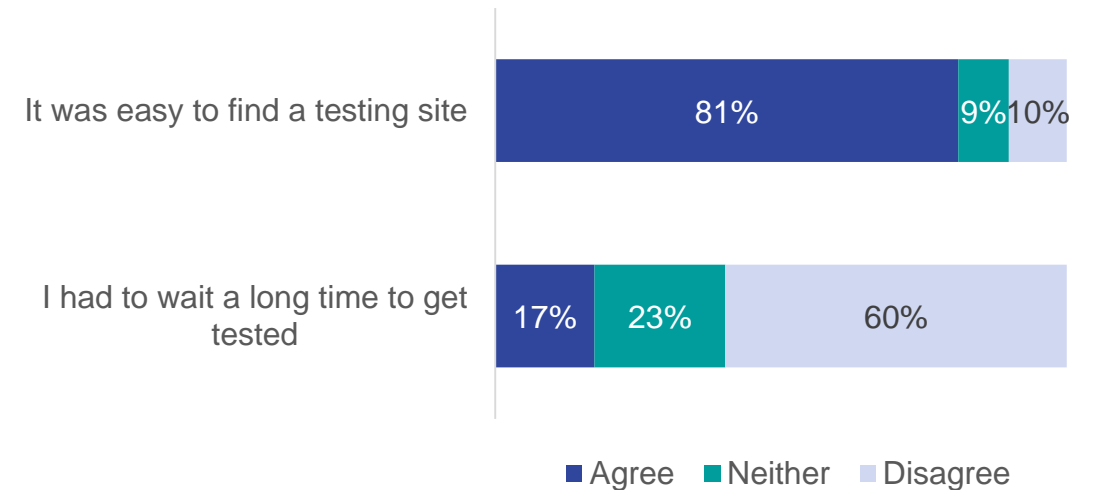
COVID-19 TESTING UNDERTAKEN BY ONE IN FOUR

Just over one in four (27%) Queenslanders have ever been tested for Covid-19. Perceptions of the testing experience is generally positive with four in five (81%) who have ever or considered getting tested reporting it was easy to find a testing site and less than one in five (17%) having to wait a long time to get the test undertaken.

Ever been tested for COVID-19?



COVID-19 testing experience



Q98 Have you ever been tested for COVID-19? Please answer regardless of whether your test was positive or negative.
Total Wave 7 n=1019

Q99 Please indicate how much you agree or disagree with the following statements?
Base: those who have been tested for COVID; also excludes 'not applicable'
Wave 7 'easy to find testing site' n=248, 'had to wait a long time' n=215

STRONG SUPPORT FOR HEALTH ADVICE COMPLIANCE BUT NOT AS WIDESPREAD FOR VACCINATION

There is widespread support for health advice rules with at least four in five in agreement they would stay home if feeling unwell (94%), provide contact details for contact tracing (94%), understand the rules for wearing masks (85%) and that people should wear masks on public transport (79%). However, when it comes to behaviours that are perceived to be more permanent there is a lower incidence of agreement; for willingness to wear a mask in the long term and will voluntarily get the Covid-19 vaccine (34% and 40% are ambivalent/disagree respectively).



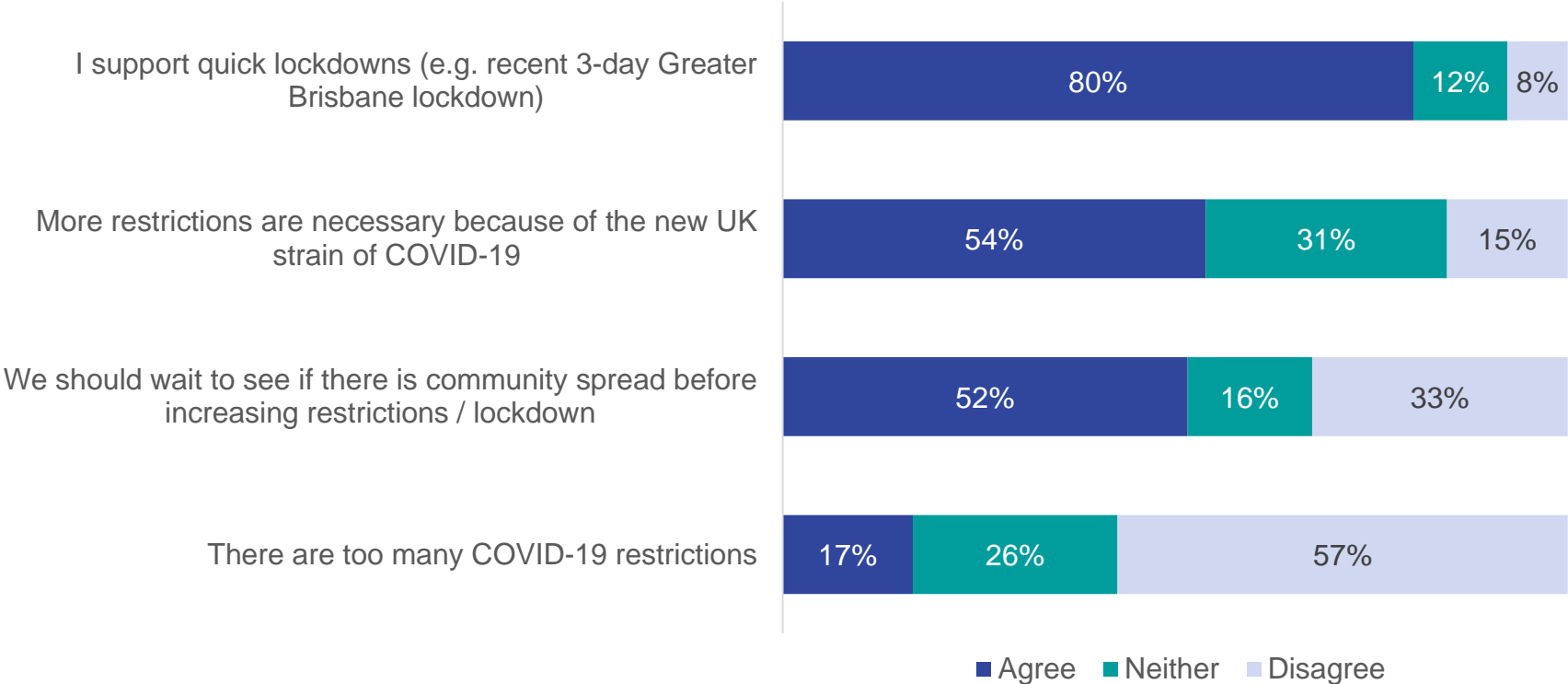
Q99 Please indicate how much you agree or disagree with the following statements?
Total Wave 7 n=1019; results exclude 'not applicable'



CAUTIOUS APPROACH TO WHAT RESTRICTIONS SHOULD BE IMPLEMENTED

Four in five (80%) Queenslanders support quick lockdowns.

More than half are content with the current level of Covid-19 restrictions (57% disagree there are 'too many' restrictions), support increasing restrictions due to the new UK strain (54%) but are willing to wait to see if there is community spread before increasing restrictions/lockdown (52%).



Q99 Please indicate how much you agree or disagree with the following statements?
Total Wave 7 n=1019; results exclude 'not applicable'



AWARENESS OF INFORMATION 3.4

INFORMATION GAPS FOR ECONOMY AND BORDER RESTRICTIONS

Queenslanders continue to be generally satisfied with the information provided by the Government, especially across level of restrictions, how to prevent the virus spread or how community transmission occurs. Some negative shifts observed regarding communication of economic recovery and restrictions on who can cross the border in wave 7.

87%

How to prevent the spread of coronavirus

76%

How community transmissions occur

77%

Current coronavirus level of restrictions

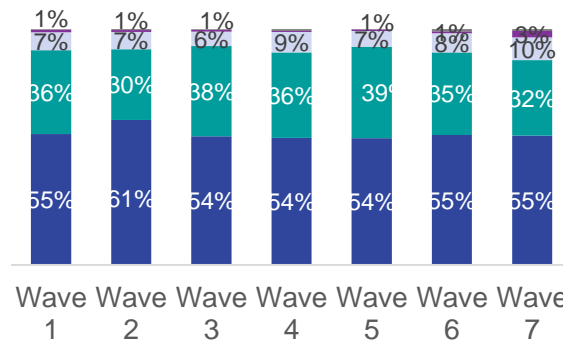
63%

Who can cross the border into Queensland

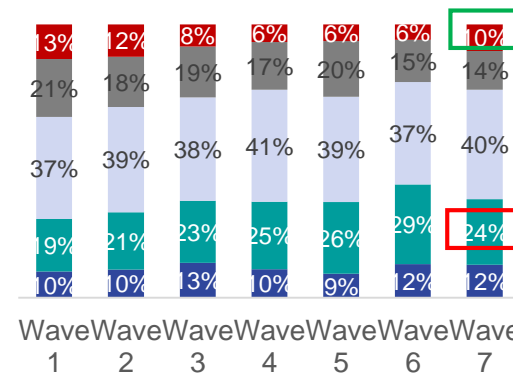
36%

How the Queensland economy will recover

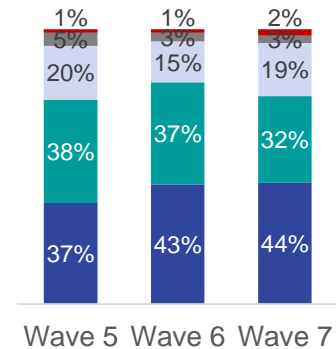
How to prevent the spread of coronavirus



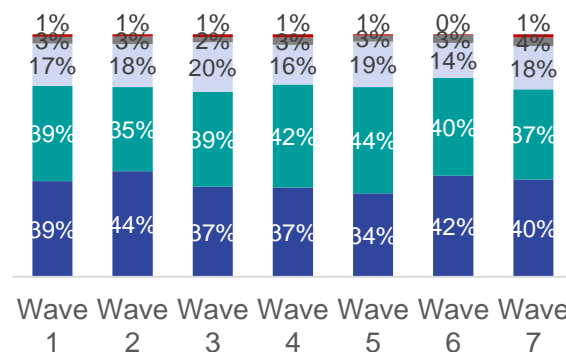
How the Queensland economy will recover



How community transmissions occur

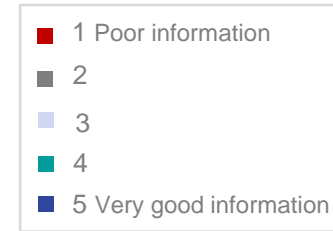
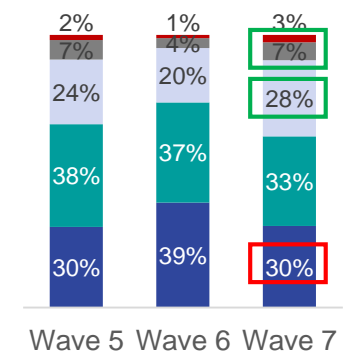


Current coronavirus level of restrictions



Who can cross into Queensland

Who can cross into Queensland



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, Total Wave 7 n=1019

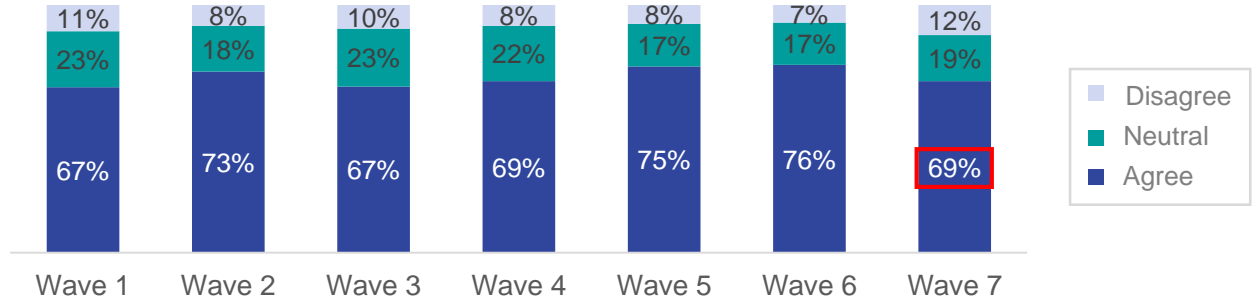
Significantly higher / lower than previous wave – 95% CI.



SENTIMENT REGARDING QUEENSLAND GOVERNMENT AS TRUSTWORTHY INFORMATION SOURCE DECLINES

The Queensland Government remains a trustworthy source of information for over two in three (69%) Queenslanders, however, this represents a significant decline in agreement compared to wave 6 . Three in four (73%) can find the information they need regarding border closures.

Trustworthy information source



69%

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, Total Wave 7 n=1019

I am able to find the information I need around border closures



73%

Can find the information they need around border closures

Q99 Please indicate how much you agree or disagree with the following statements?
 Total Wave 7 n=1019; results exclude 'not applicable'

Total Wave 7 n=1019

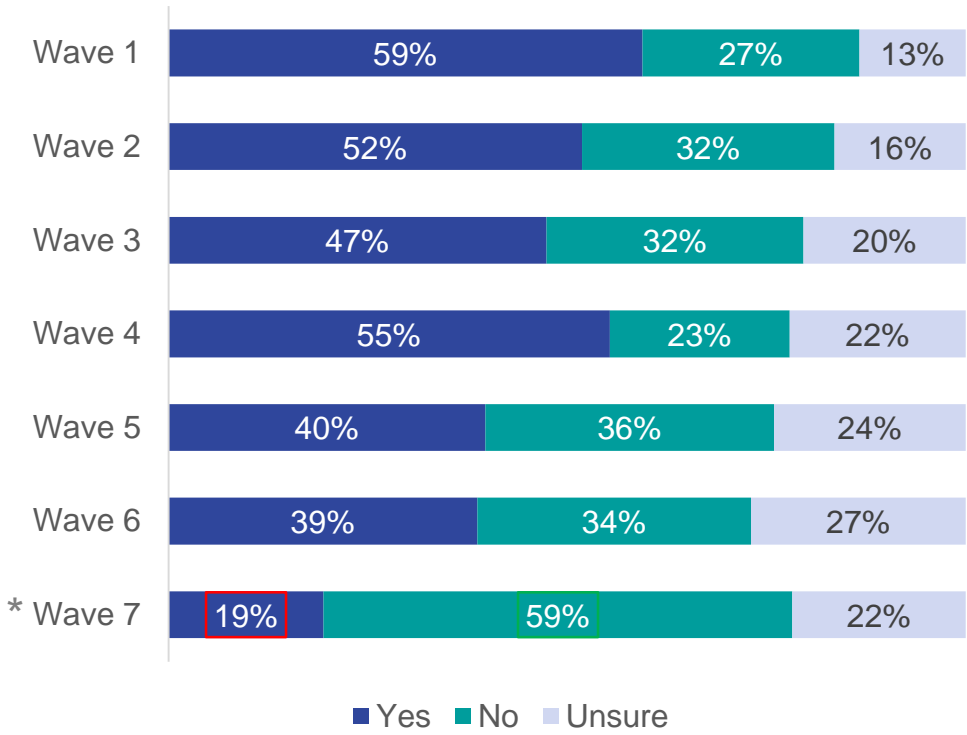
Significantly higher / lower than wave 2 – 95% CI.



AWARENESS OF COVID SAFE FUTURE ROADMAP IS LOW

Awareness of the COVID Safe Future Roadmap is low, with one in five (19%) reporting they have seen, read or heard about it.

Those that are aware of the Roadmap to Easing Restrictions are more likely to feel they have good information about how the economy will recover.



19%

Aware of the Roadmap

Wave7

Good information about how the economy will recover (Q1)

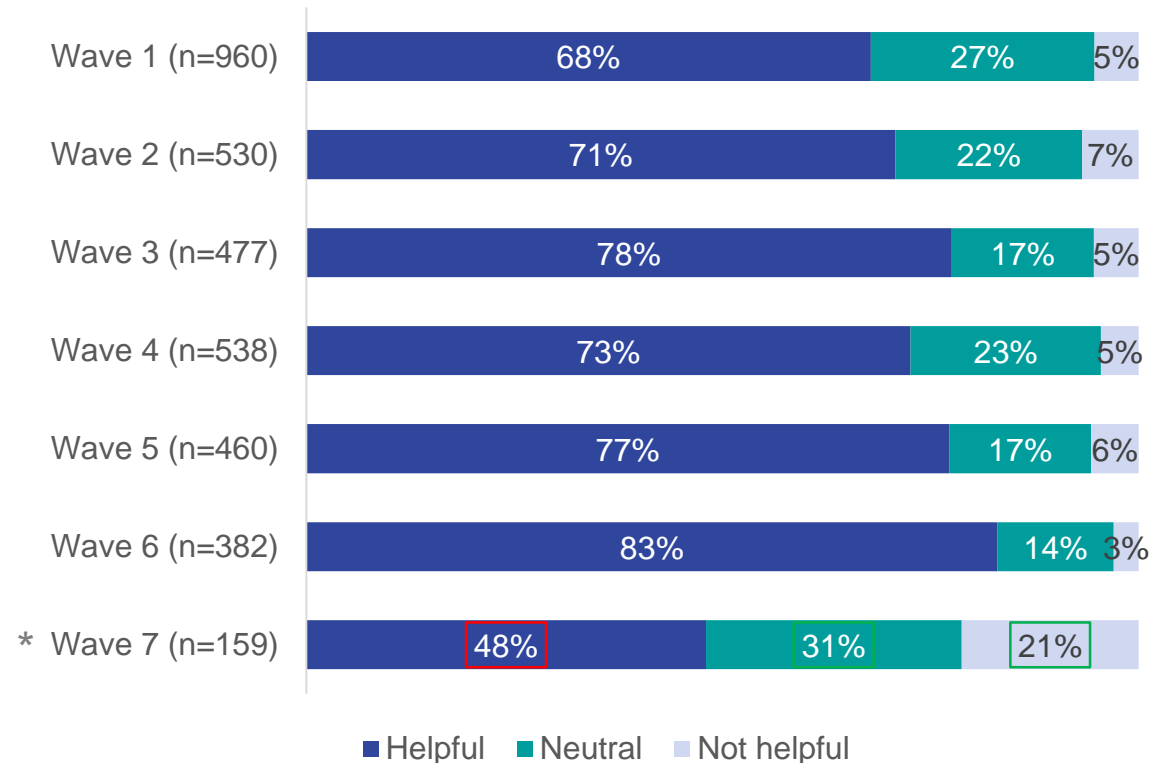
42% aware Vs **29%** unaware

Q34 Have you seen, read or heard about the Queensland Government's COVID Safe Future Roadmap? *Changed wording in wave 7 – deleted '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, Total Wave 7 n=1019.



ROADMAP'S PERCEIVED HELPFULNESS IS LIMITED

Less than half (48%) of Queenslanders who saw or heard about the COVID Safe Future Roadmap felt it was helpful, significantly lower than observed in previous waves.



48%
Roadmap is helpful

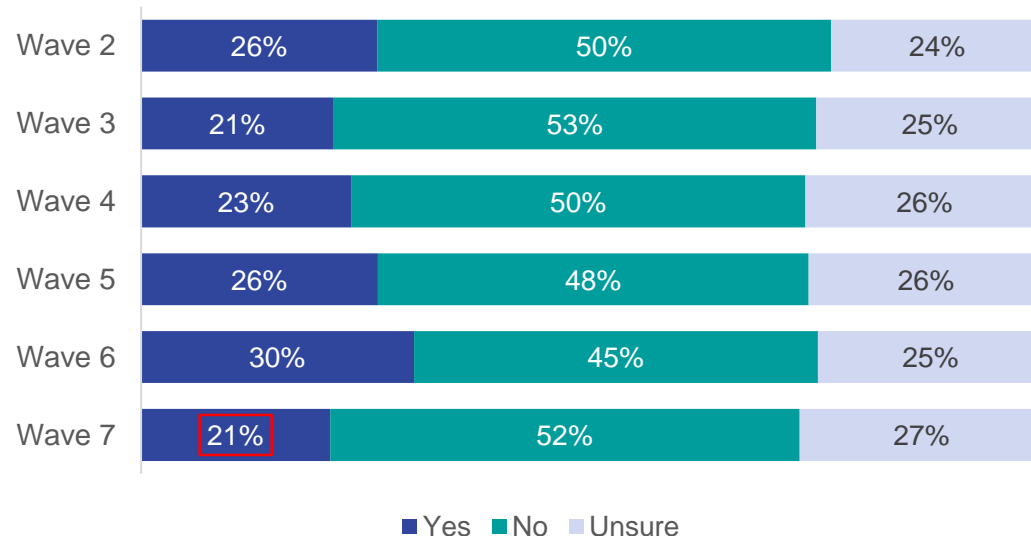
Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's COVID Safe Future Roadmap communications have been? *Changed wording in wave 7 – deleted 'Roadmap to easing restrictions'
Wave 1 n=960; Wave 2 n=530; Wave 3 n=477; Wave 4 n=538; Wave 5 n=460; Wave 6 n=382, Total Wave 7 n=159

AWARENESS OF THE COVID-19 ECONOMIC RECOVERY STRATEGY NEEDS TO BE LIFTED

Only one in five (21%) Queenslanders are aware of the Covid-19 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 (78%), are more likely to say they have good information about the level of restrictions (83%) and how the economy will recover (49%).

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



21%

Aware of the COVID-19 Economic Recovery Strategy

Confident Queensland Government is a trustworthy information source (Q3)

78% aware Vs **60%** unaware

Good information about current coronavirus level of restrictions (Q1)

83% aware Vs **73%** unaware

Good information about how the economy will recover (Q1)

49% aware Vs **32%** 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, Total Wave 7 n = 1019

**THANK
YOU**

GAME CHANGERS

