

# ROADMAP TO RECOVERY

## WAVE 2

For Queensland Department of Premier and Cabinet

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GAME CHANGERS



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# KEY INSIGHTS

# 1

1



# THE LIFE CHANGING EXPERIENCE CONTINUES...

More changes seen to mental and physical health symptoms, employment and household finances. Queenslanders starting to see that things will be getting back to normal now or soon.

## 51%

### Physical health changed.

↓Wave 1 – May (41%)

Life is still changing for Queenslanders (statistically significant change):

- Household spending (72% June vs 66% May)
- Saving (65% June vs 58% May)
- Employment (39% June vs 32% May)
- Household income (58% June vs 53% May)
- Insurance (24% June vs 17% May)

Things that changed continue to do so:

- Work, Study or Socialise (72%)
- Plans for holidays and travel (75%)
- Banking and finance (59%)
- Superannuation (52%)
- Volunteering (39%)

A small proportion getting back to before Covid-19:

- Work, study or socialise (4%)
- Household income (3%)
- Savings (3%)
- Plan for holidays and travel (3%)

Q11 Coronavirus has affected people from many countries around the world. What has changed for you? Please select one

## 26%

Could not raise \$4000 in an emergency.



Q10 Suppose you only had one week to raise \$4,000 for an emergency. Which of the following best describes how hard it would be for you to get that money?

## One in three

feeling restless and fidgety, everything was an effort, and nervous, in particular casual or temporary employees feel this more often than other Queenslanders surveyed.



Q12 During the past 4 weeks (28 days), how much of the time did you feel...

## 61%

Employees work impacted

↑ Casual / Temporary staff (81%)  
↑ Work in Food and Accommodation (96%)

Q7. Employment status before Coronavirus pandemic Q8 and Q9 Has the Coronavirus pandemic affected your work situation?

## 15%

Symptoms of probable mental illness

↑ Employment impacted (23%)  
↑ 18-34 (22%)  
↑ Casual or Temporary (27%)  
↑ Retail (27%)  
↑ Food & Accom (31%)  
↑ Info media & Telecoms (47%)

Q12 During the past 4 weeks (28 days), how much of the time did you feel...

## 82%

Self-employed / business owners impacted

Q7. Employment status before Coronavirus pandemic Q8 and Q9 Has the Coronavirus pandemic affected your work situation?

## 54%

Mental health and wellbeing changed.

↓Wave 1 – May (47%)

Q11 Coronavirus has affected people from many countries around the world. What has changed for you? Please select one

# WE GOT IT RIGHT BUT IT WILL BE HARD FOR SOME TIME

The majority of Queenslanders continue to feel that we are responding appropriately to Covid-19. On the day of the survey 21% felt happy things were returning to normal but 11% still worried about second wave.

**79%**

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

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

**48%**

**Feel the worst is yet to come for the economy**

↓ 18 – 34 year old (36%)

Q19 What do you expect will happen with the economy in Queensland?

**43%**

**Feel it will take 2 years for full economic recovery**

↑ 18 – 34 year old (58%)

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....?:

**21%**

**Feel happy things are going back to normal**

↓ Employee Impacted (16%)  
↓ Business impacted (11%)

Q13 Which best describes how you are feeling today?

**11%**

**Worried about a second wave of Covid-19**

Q13 Which best describes how you are feeling today?

When asked in general about the global Covid-19 pandemic, a quarter of those surveyed said that the impact on Australian economy was their biggest worry (28%) and some said the risk to friends and family health (15%) or losing income due to salary reduction or investments (10%).

There was a similar response when asked specifically what worries them most about the economic impacts of Covid-19: a third of Queenslanders (36%) are most worried about the impact on the Australian Economy and 12% are worried about losing income due to salary reduction or investments or losing their job (10%).

## **Biggest worry about Covid-19**

**28% Impact on Australian economy**

**15% Health of friends and family**

**10% losing income**

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

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

Only a third have heard about the Economic Initiatives, and a quarter aware of the Economic Strategy. Only three in ten feel they have enough information about how Queensland's economy will recover.

Those aware of the Economic Strategy are more likely to agree QLD Gov are handling for economic advantage in long run.  
62% aware Vs 47% unaware

**51%**

**Agree QLD Gov can manage the economic recovery**  
↑18-34 year old (61%)  
↓ Not aware of Economic Recovery Strategy (43%)

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

**54%**

**Agree QLD Gov are handling for economic advantage in long run**  
↑18-39 year old (62%)  
↑Aware strategy (62%)

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

**32%**

**Neutral**  
**Unsure, unaware, uncertain**  
**need information**

**31%**

**Agree they have enough information on how the Queensland economy will recover**

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

**35%**

**Aware of any major economic initiatives**  
↑Males (40%)  
↑Aware of Roadmap (47%)

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

**26%**

**Aware of Economic Strategy**  
↑Aware of Roadmap (40%)

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

Which of these initiatives do you think will best support Queensland jobs

	QLD
Strengthening Queensland industries and sectors	39%
Providing skills and training	20%
Building the State's vital infrastructure	19%
Creating a competitive regulatory environment by reducing red tape	14%
Facilitating private sector investment	8%

Q56 Which of these initiatives do you think will best support Queensland jobs?  
Total Wave 2 n = 1018

**39%**

**Feel that strengthening Queensland industries and sectors will work best to support Queensland Jobs**



# SUPPORT FOR ECONOMIC STRATEGY

There is a need to increase awareness of the strategy, the level of detail to build trust in the Economic Strategy to built positive support.

Based on their comments some participants are also confused between Australian Government strategies and Queensland Government strategies.

+  
Positive  
65%

Those who are supportive are positive because it looks after small business and helps affected industries, will help lift the economy and is a well thought out and detailed strategy. Those who are supportive also feel the restrictions have been lifted gradually and handled appropriately in stages. The strategy is favoured because it keeps people in jobs or creates new jobs. There is positive sentiment towards the Queensland Government, and the Premier who have both shown strength and gained trust.

Q48a You say you support the direction of the State Government's COVID-19 Economic Recovery Strategy. Can you tell me why?  
Total Wave 2 n = 160

Half the Queenslanders surveyed (52%) believe the Federal Government has the most responsibility for economic recovery.

+  
Neutral  
26%

Those who are neutral feel unsure of the situation, are negative in general towards the government and still feel they don't know enough. There is a lack of trust that the Queensland Government will keep their word, there are too many mixed messages or not enough real or detailed information.

Q48c You say you are neither opposed or support the direction of the State Government's COVID-19 Economic Recovery Strategy. Can you tell me why?  
Total Wave 2 n = 69

**65%**  
Support the direction of the  
QLD Gov Economic  
Recovery Strategy

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?  
Total Wave 2 n = 252

+  
Negative  
9%

Those who opposed the economic strategy felt there was not enough real or detailed information leading to a lack of trust. They were frustrated that restrictions were eased too slowly, and that this is all too little too late. They also state that it doesn't address tourism sufficiently and that there are concerns for how the Government will pay for it.

Q48b You say you oppose the direction of the State Government's COVID-19 Economic Recovery Strategy. Can you tell me why?  
Total Wave 2 n = 23

Which level of government do you think carries the most responsibility for economic recovery from coronavirus pandemic?	QLD
Federal Government	52%
State Government	42%
Local Government (Shire Councils)	6%

Q58 Which level of government do you think carries the most responsibility for economic recovery from coronavirus pandemic?  
Total Wave 2 n = 1018

# IS QLD GOVERNMENT DOING ENOUGH?

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

**34%**

**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

**39%**

**Enough support to small business through this pandemic and recovery**

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

Total Wave 2 n = 1018

**49%**

**Enough support to the community through this pandemic and recovery**

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

Total Wave 2 n = 1018

**42%**

**Enough support to the mental health and wellbeing through this pandemic and recovery**

Q52 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 mental health and wellbeing through this pandemic and recovery?

Total Wave 2 n = 1018

Awareness of the Economic Strategy is associated with more agreement that there is enough support from Qld Gov.

Enough support for small business through this pandemic and recovery

**50%** aware strategy Vs **30%** unaware

Enough support for the community through this pandemic and recovery

**54%** aware strategy Vs **41%** unaware

Enough support for the mental health and wellbeing through this pandemic and recovery

**51%** aware strategy Vs **35%** unaware

Queenslanders have an expectation for industries that deserve support but they are not confident they will be supported.

## Small business

83% deserve support vs 48% believe likely to benefit

## Tourism

76% deserves support vs 55% believe likely to benefit

## Agriculture

76% deserve support vs 53% believe likely to benefit

## Manufacturing

74% deserve support vs 55% believe likely to benefit

## Housing

71% deserve support vs 44% believe likely to benefit

## Infrastructure

69% deserve support vs 48% believe likely to benefit.

Q53 On a scale of 1 to 10, where 1 is "do not deserve support" and 10 is "very deserving of support" - How deserving are the following sectors for Queensland Government support? Q54 how likely are the following sectors of the Queensland economy to benefit after time from the way COVID-19 will change the world?

Total Wave 2 n = 1018



# OPENING BORDERS AND EASING RESTRICTIONS STAGE 3

Half agree with, understand and can comply with Stage 3 restrictions. South East Queenslanders are more likely to feel that people will not comply with Stage 3 restrictions than Queenslanders from the rest of Qld.

**51%**

**Agree that interstate travel should be allowed between states with similar numbers of cases of Covid-19**  
 ↓ Male (58%)

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

**23%**

**Agree that states with 5-10 new cases per day should be allowed to travel in Qld.**  
 ↑ Male (29%)  
 ↑65+ (30%)

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

**67%**

**Confident Queensland Government can manage the easing of restrictions.**  
 ↓ Wave 1 - May (59%)

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

**45%**

**Life will be same**  
 ↑ 65+ years (58%)  
 ↑ Work not impacted employee (56%)  
 ↑ Not working or looking for a job (55%)

**18%**

**Life will be better**  
 ↑ 18-39 years (24%)

**14%**

**Life will be worse**  
 ↑ Work impacted employee (22%)  
 ↑ Casual employee (24%)

**23%**

**Unsure**  
 ↑ 35-64 years (27%)

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

**When Stage 3 restrictions ease:** Dining out was mentioned the most (9%) followed by visiting family and friends (8%), going out to see entertainment and music or movies (8%), going out with family and friends (8%) and taking a weekend away / mini break or holiday in Queensland (8%).



Priority when making decisions	QLD
Health risk to Queenslanders due to number of current Covid-19 cases in other states	51%
Getting businesses up and running with no restrictions in Queenslanders first, before opening borders	21%
Economic risk due to border closure	15%*
Health risk to travellers due to number of current Covid-19 cases in Queensland	7%
Unsure	4%
Other	1%

Q62 Which of the following should be the highest priority, when making decisions about opening the Queensland borders?

**\*Aware of Economic Strategy**  
**14% aware Vs 19% unaware**

Most Queenslanders surveyed felt that it was important to be patient and understanding with service staff in hospitality and other service jobs who are complying with social distancing rules (82%), to keep good distance on public transport (69%), leave 1.5 metre space when queuing (69%) and physically distancing from others outside their household (65%). Only half (53%) felt the 4 square rule was important indoors or at a venue store or workplace (59%).

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

Significantly higher / lower than wave 1 – 95%

# INFORMATION FOR QUEENSLANDERS

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

**91%**

How to prevent the spread of coronavirus

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

**71%**

Stages of restrictions easing

↓ Not aware of road map (62%)

**78%**

Current coronavirus level of restrictions

↓ 18-39 year old (71%)  
↑ 65+ year old (88%)

**52%**

Aware of the Roadmap

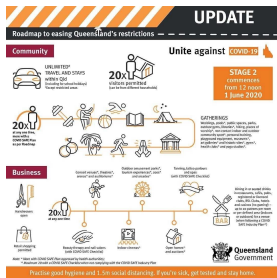
Q34 Have you seen, read or heard about the Queensland Government's Roadmap to Easing Restrictions?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

**71%**

Roadmap is helpful

↑ Impacted employee said they found the Roadmap helpful (78%)

Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018



**73%**

Queensland Government is a trustworthy information source

- ↑ 18-39yo (82%) - ↓ 40-64yo (69%) - ↓ 65+(66%)
- ↑ Full time/Part Time Employee (78%)
- ↓ Business Owner (54%)
- ↑ Aware of Roadmap (79%)
- ↓ Vulnerable people (67%)
- ↑ Working in Professional, Scientific and Technical Services (94%)
- ↑ Wave 1 - May (66%)

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

**72%**

Queensland Government managed better than other states or territories

- ↑ Female (77%)
- ↑ Wave 1 - May (65%)

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

# RECOMMENDATIONS

## Keep communicating about the Economic Strategy to build trust and positive sentiment

Communication of the Roadmap for Easing Restrictions has been received positively and high awareness is also associated with positive sentiment. Queensland Government is seen as a trustworthy information source about Covid-19. Queenslanders continue to be aligned with the way Queensland Government is making decisions about border closure and easing restrictions with health risks as a priority. There is confidence amongst Queenslanders in how the Queensland Government is managing the restrictions easing and that we are responding appropriately. However, don't overlook the need to **continue to talk about health risks** as there is still some concern with a second wave.

There is less confidence in how Queensland Government is managing the economic recovery because people are unaware of what is being done. Communication about the Economic Recovery needs to increase Queenslanders awareness of what the Queensland Government initiatives and strategy are, and importantly the support for small business, the community and mental health and wellbeing. Queenslanders need more detailed and "real" information about the strategy to mitigate uncertainty and nervousness, and this will help to be transparent and build trust and confidence. Where Queenslanders are aware of the Economic Strategy they agree there is support from Queensland Government and have more positive sentiment for Queensland Government.

Ensure that branding for Queensland Government is strong as some Queenslanders are confused about which initiatives are Federal or State. Help Queenslanders make a connection between the two documents – Roadmap for Easing Restrictions and Economic Strategy. Health and Economy together.



**KEEP CALM**

**AND**

**COMMUNICATE  
Economic Recovery**

# 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.

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

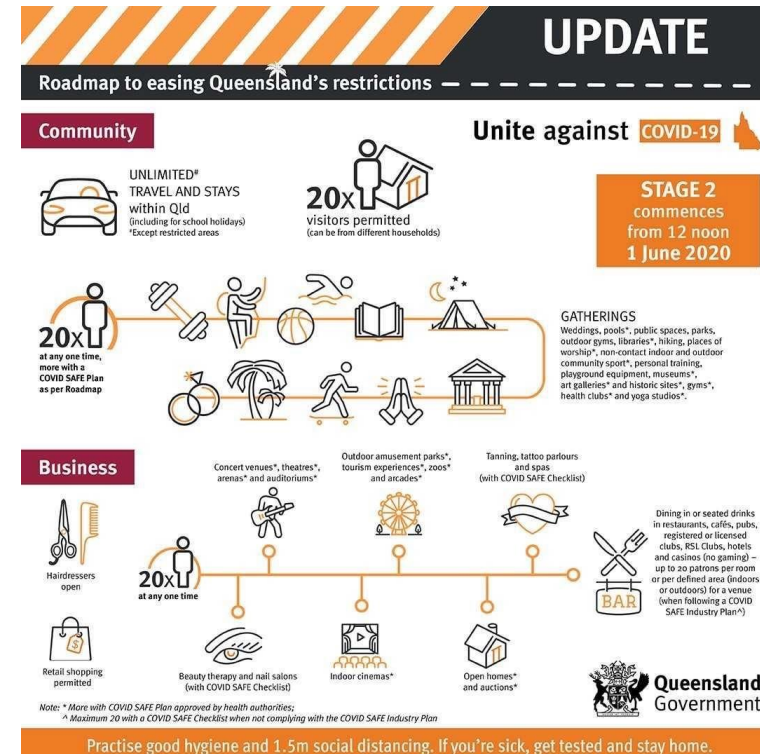
The first wave of the research was conducted between Tuesday 12<sup>th</sup> May and Thursday 14<sup>th</sup> May. Wave 1 took on average 21 minutes to complete the online survey. Sample of n=1603 was sourced through commercial research panels. Wave 2 of the research was undertaken between Wednesday 3<sup>rd</sup> June to Thursday 4<sup>th</sup> of June. Wave 2 took on average 20 minutes to complete the online survey. Sample of n=1018 was sourced through commercial research panels. The composition of survey respondents is displayed in the table on the next page. The responses in this report have been weighted to reflect the Queensland's population using 2016 ABS Census data.

The limitations for this methodology include:

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

On Friday 8 May 2020 the Premier 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.

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



# SAMPLE

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

Age	Wave 1											Wave 2								
	South East Queensland			Rest of Queensland				Queensland				South East Queensland			Rest of Queensland			Queensland		
	Male	Female	SEQ	Male	Female	Other	ROQ	Male	Female	Other	QLD	Male	Female	SEQ	Male	Female	ROQ	Male	Female	QLD
18-39	54	62	116	43	230	1	274	97	292	1	390	52	94	146	54	128	182	106	222	328
40-64	159	166	325	152	206	0	358	311	372	0	683	82	155	237	80	129	209	162	284	446
65+	175	130	305	135	90	0	225	310	220	0	530	70	51	121	72	51	123	142	102	244
Total	388	358	746	330	526	1	857	718	884	1	1603	204	300	504	206	308	514	410	608	1018

Household	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
I live alone	162	134	296	79	77	156
I live with my Partner	476	579	1055	311	342	653
I live with my Children	171	283	454	153	175	328
I live with my Parents	28	48	76	35	38	73

Diversity	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Aboriginal or Torres Strait Islander	7	23	30	13	26	39
Culturally or linguistically diverse background	67	70	137	72	53	125
Person with disability	113	117	230	56	63	119
Person most at risk of	240	242	482	141	152	293

Carer for - A person with a chronic medical condition or disability	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Yes – living with me	84	130	214	80	85	165
Yes – but they do not live with me	38	50	88	24	25	49
No	621	672	1293	397	398	795
Prefer not to say	3	5	8	3	6	9

Education level	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Year 10 or equivalent or below	110	127	237	57	81	138
Year 12 or equivalent or below	123	195	318	84	101	185
Trade/Technical/Vocational training	212	258	470	140	153	293
Undergraduate Degree	184	168	352	134	110	244
Postgraduate Degree	109	99	208	79	63	142
Prefer not to say	8	10	18	10	6	16

# SAMPLE

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

Employment status before Coronavirus pandemic	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Employed permanent full-time or part-time	249	280	<b>529</b>	208	193	<b>401</b>
Employed, casual/temporary	48	117	<b>165</b>	59	60	<b>119</b>
Self-employed / business owner	53	53	<b>106</b>	35	34	<b>69</b>
Unemployed (looking for work)	54	68	<b>122</b>	33	29	<b>62</b>
Not working or looking for work	335	329	<b>664</b>	157	186	<b>343</b>
Prefer not to say	7	10	<b>17</b>	12	12	<b>24</b>

Industry prior to coronavirus pandemic	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Agriculture, Forestry and Fishing	4	23	<b>27</b>	2	17	<b>19</b>
Mining	6	9	<b>15</b>	6	5	<b>11</b>
Manufacturing	20	18	<b>38</b>	16	9	<b>25</b>
Electricity, Gas, Water and Waste Services	6	6	<b>12</b>	6	5	<b>11</b>
Construction	21	21	<b>42</b>	15	13	<b>28</b>
Wholesale Trade	12	4	<b>16</b>	7	4	<b>11</b>
Retail Trade	29	69	<b>98</b>	25	37	<b>62</b>
Accommodation and Food Services	17	32	<b>49</b>	14	23	<b>37</b>
Transport, Postal and Warehousing	22	24	<b>46</b>	16	18	<b>34</b>
Information Media and Telecommunications	9	8	<b>17</b>	6	5	<b>11</b>
Financial and Insurance Services	17	7	<b>24</b>	14	12	<b>26</b>
Rental, Hiring and Real Estate Services	6	8	<b>14</b>	5	5	<b>10</b>
Professional, Scientific and Technical Services	32	22	<b>54</b>	19	16	<b>35</b>
Administrative and Support Services	15	42	<b>57</b>	20	20	<b>40</b>
Public Administration and Safety	33	17	<b>50</b>	16	6	<b>22</b>
Education and Training	48	63	<b>111</b>	36	37	<b>73</b>
Health Care and Social Assistance	42	85	<b>127</b>	31	43	<b>74</b>
Arts and Recreation Services	10	16	<b>26</b>	7	7	<b>14</b>
Other Services	112	106	<b>218</b>	47	38	<b>85</b>
None of these/not working	285	277	<b>562</b>	196	194	<b>390</b>

# QUESTIONS WAVE 1 AND WAVE 2

Focus this wave is on Stage 3 restrictions, economic recovery, awareness of initiatives and recovery strategy, and border closure.

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

Section	Wave 1	Wave 2		
<b>Screening</b>	SQ1-SQ5	SQ1-SQ5		
<b>Demographics</b>	Q37-Q45	Q37-Q45		
<b>Personal impacts</b>	1-15	Deleted Q6 Q14 Q15	Edited Q3 – text edit Q11 – add code 6/7 Q13 – add code 13/14	
<b>Future perceptions and goals / Economic Recovery</b>	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
<b>Restrictions</b>	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



# DETAILED FINDINGS

Online survey Wave 2

# 3



# IMPACTS

How has the Coronavirus impacted  
Queenslanders

3.1





# QUEENSLANDERS IMPACTED BY CORONAVIRUS

## Indicators of financial hardship and impacts are not changing.

Coronavirus affected work situation EMPLOYED	Wave 1 – May			Wave 2 - June		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	44%	43%	44%	33%	44%	38%
Yes, I am working more	7%	8%	8%	7%	10%	8%
Yes, I am working less than I would like	20%	21%	21%	29%	21%	25%
Yes, I have been stood down temporarily	6%	9%	7%	10%	11%	10%
Yes, I have lost my job	8%	5%	6%	10%	5%	7%
Yes, it has affected my work situation in another way	14%	14%	14%	11%	10%	10%
Prefer not to say	1%	1%	1%	0%	1%	1%
<b>NET employee impact</b>	<b>55%</b>	<b>57%</b>	<b>56%</b>	<b>66%</b>	<b>56%</b>	<b>61%</b>

Q8 Has the Coronavirus pandemic affected your work situation?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Employee n=520

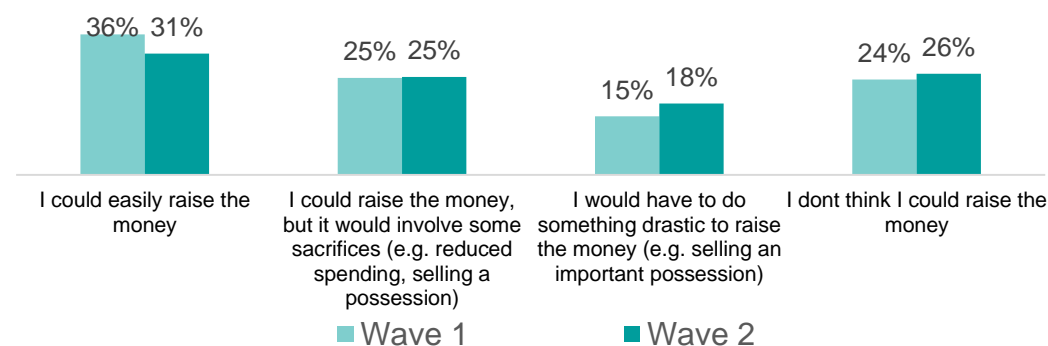
Coronavirus affected work situation SELF EMPLOYED / BUSINESS OWNER	Wave 1 - May			Wave 2 - June		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	16%	13%	18%	16%
Yes, I am working more	2%	11%	4%	4%	4%	4%
Yes, my business has less income	56%	38%	47%	43%	51%	47%
Yes, I have had to close my business temporarily	15%	19%	23%	29%	16%	23%
Yes, I have had to shut down my business permanently	1%	3%	1%	0%	2%	1%
Yes, it has affected my work situation in another way	9%	5%	7%	7%	7%	7%
Prefer not to say	0%	0%	2%	4%	0%	2%
<b>Net Impacted SELF / EMPLOYED / BUSINESS OWNER</b>	<b>83%</b>	<b>76%</b>	<b>82%</b>	<b>83%</b>	<b>82%</b>	<b>82%</b>

Q9 Has the Coronavirus pandemic affected your work situation?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Self Employed/Business Owners n=69.

Of those Queenslanders surveyed in June more had their employment impacted (61%) than in May (56%) but this was not statistically significant. There were more working less (25% June vs 21% May), or stood down temporarily (10% June vs 7% May). But less were affected in other ways like working from home, salary reductions or forced annual leave (10% June vs 14% May). Temporary or Casual employees more likely to be impacted (81%) as are those working in Food and Accommodation Services (96%).

The impact on self-employed or business owners has not change significantly over all between June (82%) and May (79%). However more businesses have closed temporarily (23% June vs 15% May).

One quarter of Queenslanders surveyed could not raise \$4000 for an emergency, indicating financial hardship has not shifted. Males (33%) were more likely to be able to raise the money than females (29%). Others more likely not to be able to raise the money were 40-64 year old Queenslanders (29%), those whose employment impacted (28%), and unemployed (39%).

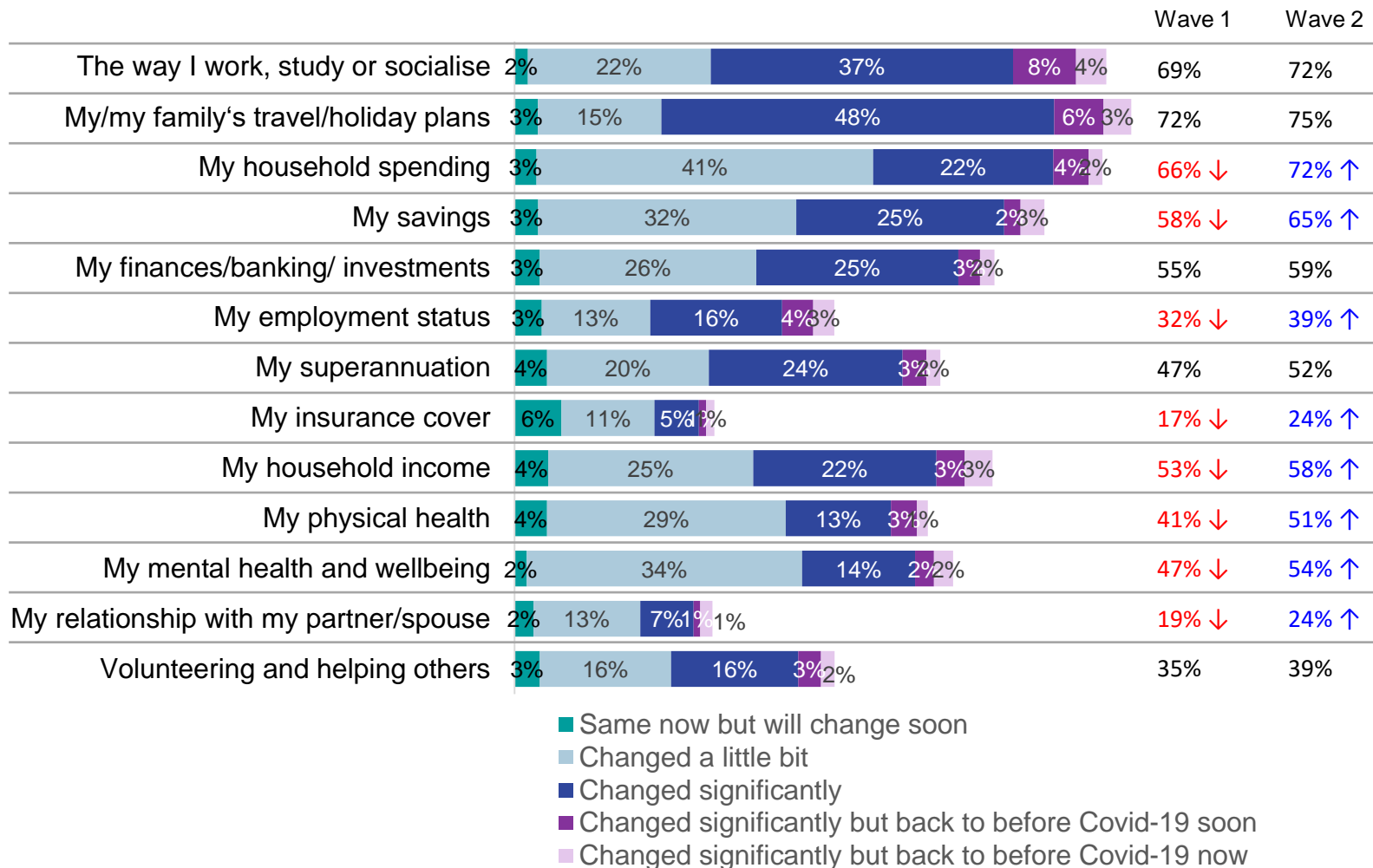


Q10 Suppose you only had one week to raise \$4,000 for an emergency. Which of the following best describes how hard it would be for you to get that money?

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

# LIFE IS STILL CHANGING FOR QUEENSLANDERS

Small number are returning back to before Covid-19 and others feel this will be soon.



Life may still be changing for Queenslanders, particularly their household spending (72% June vs 66% May), saving (65% June vs 58% May), employment (39% June vs 32% May), household income (58% June vs 53% May) and insurance (24% June vs 17% May) increasing in the June wave of the survey. Banking and finance (59%), superannuation (52%) and volunteering (39%) has changed but no changes in June from May wave of the survey.

A small proportion of Queenslanders are starting to emerge from restrictions and get back to before Covid-19 in the way they work, study or socialise (4%), Household income, savings (3%) and plan for holidays and travel (3%).

Physical health (51% June vs 41% May), mental health (54% June vs 47% May) and relationships with partners or spouses (24% June vs 19% May) has seen an increase in change from May to June.

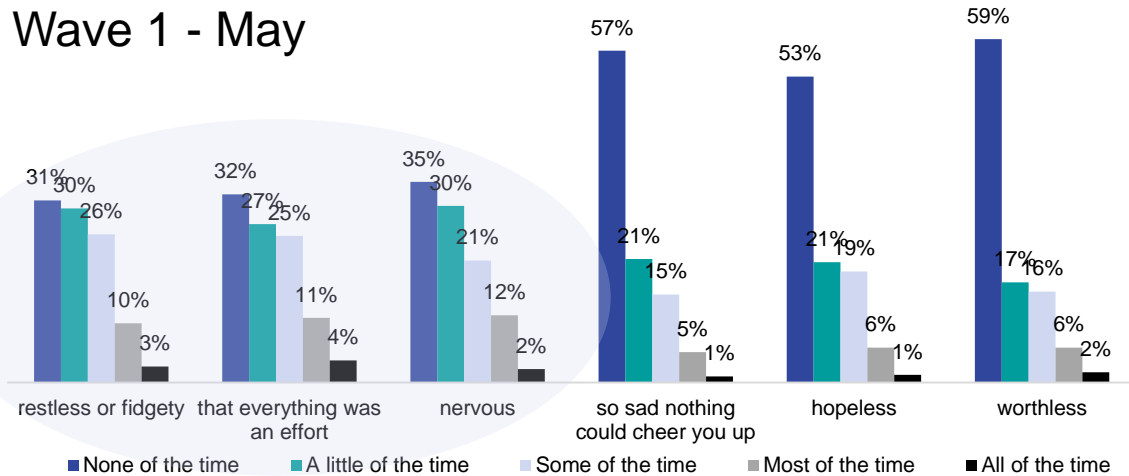
Q11 Coronavirus has affected people from many countries around the world. What has changed for you? Please select one  
Total Wave 1 n = 1603; Total Wave 2 n = 1018



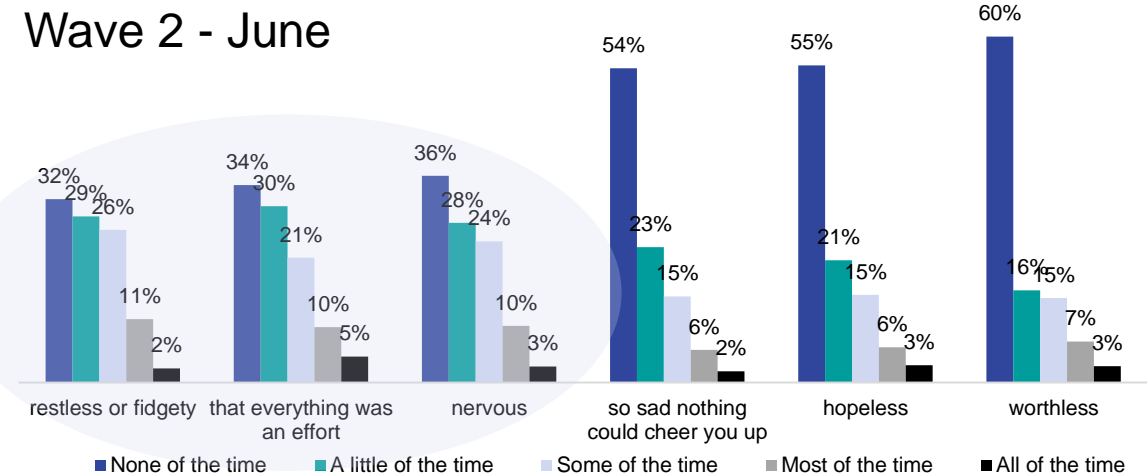
# MENTAL HEALTH OF QUEENSLANDERS

Mental health indicators continues to show that Queenslanders are feeling restless, that everything is an effort, and nervous.

## Wave 1 - May



## Wave 2 - June



Q12 During the past 4 weeks (28 days), how much of the time did you feel...  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

Overall at least two in three Queenslanders are feeling some symptoms of mental illness (restless or fidgety, everything was an effort, and nervous). Queenslanders in the survey who were in a casual or temporary position prior to Covid-19 are more likely to be feeling restless or fidgety (22%), hopeless (15%) or worthless (15%) most of the time which is higher than other Queenslanders (11%, 6%, 7% respectively).

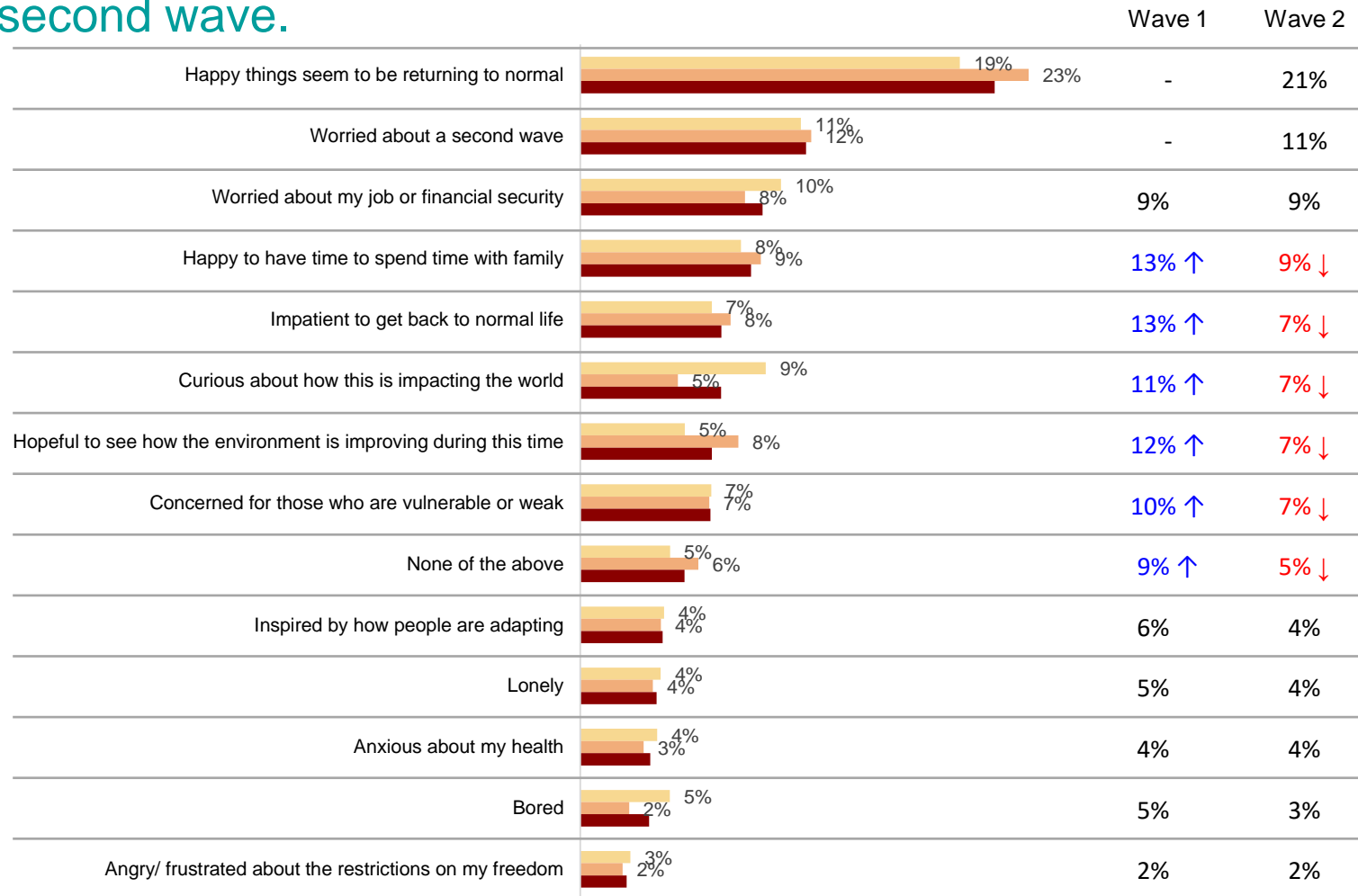
Those Queenslanders surveyed that have had their employment impacted by Covid-19 restrictions are more likely to be showing signs of probable mental illness (23%) compared to those who have not had impact on their employment (9%). Self-employed or business owners are also more likely to be showing signs of probable mental illness (14%) compared to those who have not had impact on their business than those who are not impacted (8%). Queenslanders more likely to be showing signs of probable serious mental illness are young people 18-34 (22%) and casual or temporary employees (27%). Queenslanders who work in Retail (27%), Accommodation and Food Services (31%) and Information media and telecommunications (47%) are more likely to be showing symptoms of probable serious illness.

		Wave 1			Wave 2			Employee Impact		Business Impact	
Australian Kessler 6	Level of psychological distress	SEQ	ROQ	QLD	SEQ	ROQ	QLD	Yes	No	Yes	No
6 – 18 score	No probable serious mental illness	85%	89%	87%	86%	85%	85%	77%	91%	86%	92%
18+ score	Probable serious mental illness	15%	11%	13%	14%	15%	15%	23%	9%	14%	8%

Q12 During the past 4 weeks (28 days), how much of the time did you feel...  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

# QUEENSLANDERS FEELINGS ON THE DAY OF THE SURVEY

One in five feeling happy things are returning to normal, with only one in ten worried about a second wave.



One in five Queenslanders were feeling happy that things seem to be returning to normal (21%) however one in ten are worried about a second wave (11%) on the day of the survey.

There are less people in June than May feeling happy about spending time with family (9%), impatient to get back to normal life (7%), curious about the impact on the world (7%), and concerned for the vulnerable and weak (7%).

The same proportion of people in May as in June are feeling inspired by how people are adapting (4%), lonely (4%), anxious about my health (4%), bored (3% or angry and frustrated about the restrictions on their freedom (2%).

Q13 Which best describes how you are feeling today?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

■ SEQ ■ ROQ ■ QLD

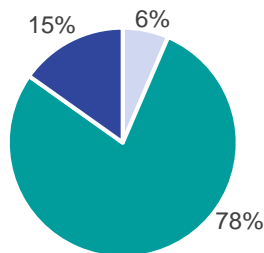
# QUEENSLANDERS STILL FEEL WE GOT IT RIGHT

Majority continue to feel Queenslanders are responding appropriately but some are worried about the economy.

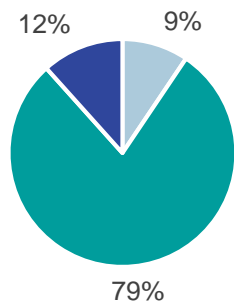
In June eight out of ten (79%) Queenslanders in the survey felt that Queenslanders are responding appropriately to the threat of Coronavirus, which is the same proportion as in May (78%).

When asked in general about the global Covid-19 pandemic, a quarter of those surveyed said that the impact on Australian economy was their biggest worry (28%) and some said the risk to friends and family health (15%) or losing income due to salary reduction or investments (10%). A similar response when asked specifically what worries them most about the economic impacts of the Covid-19 a third of Queenslanders (36%) are most worried about the impact on the Australian Economy and 12% are worried about losing income due to salary reduction or investments or losing their job (10%).

Wave 1 - May

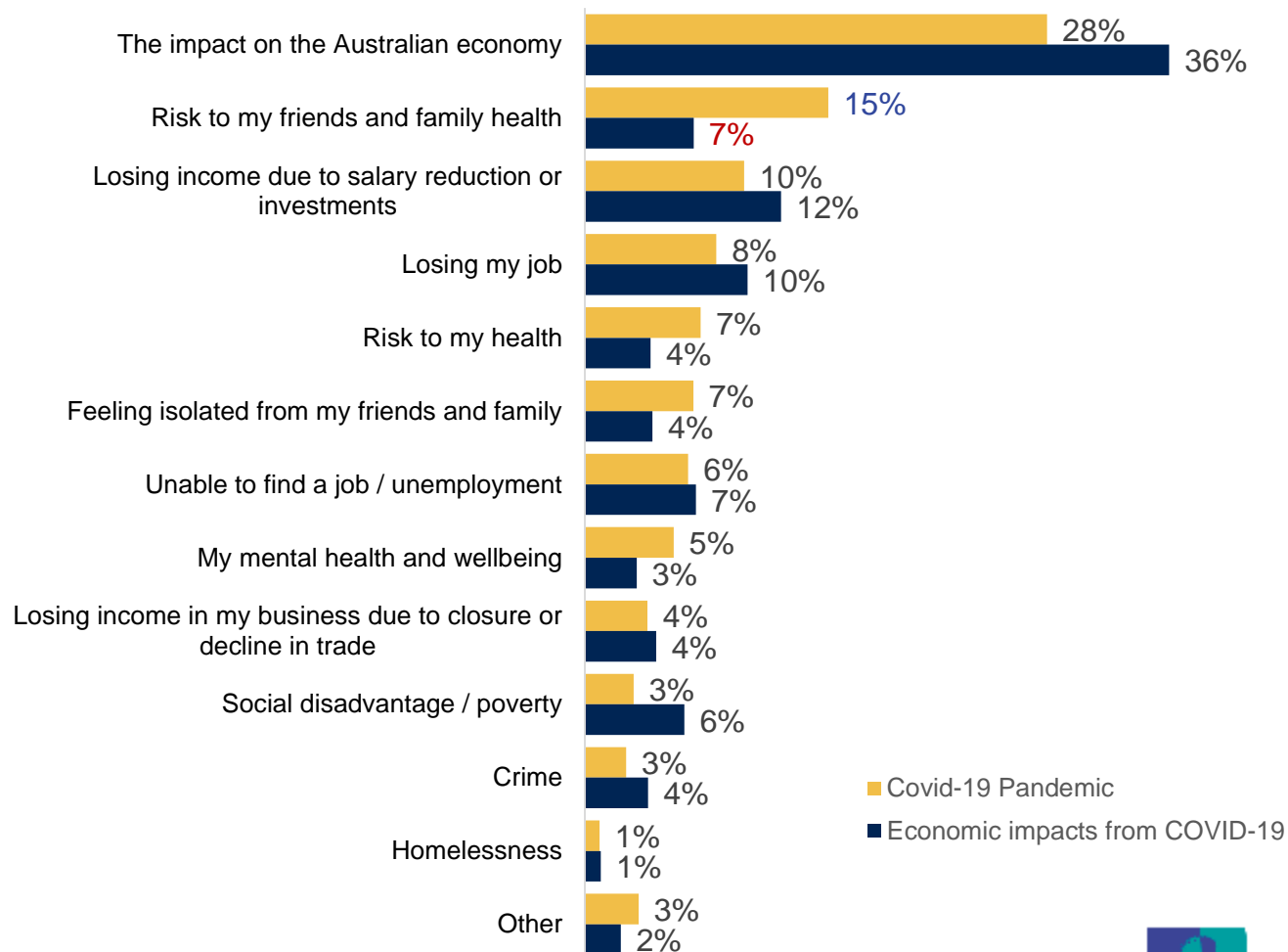


Wave 2 - June



- Queenslanders are overreacting
- Queenslanders are responding appropriately
- Queenslanders are under-reacting

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



# ECONOMY

Queenslanders views  
on economic recovery



# 3.2



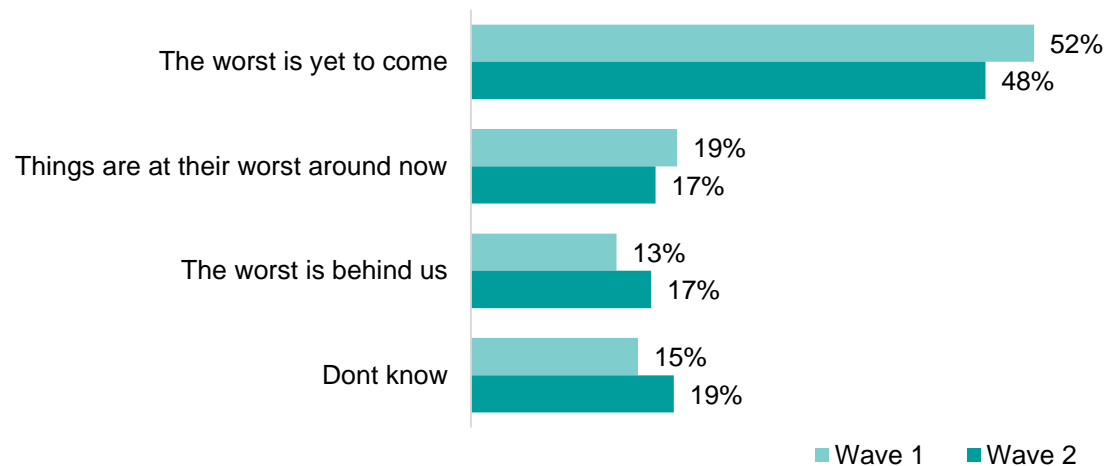


# QUEENSLANDERS EXPECTATIONS ABOUT THE ECONOMY

## Half continue to feel the worst is yet to come.

In June almost half of those surveyed (48%) feel that the worst is yet to come with the economy in Queensland.

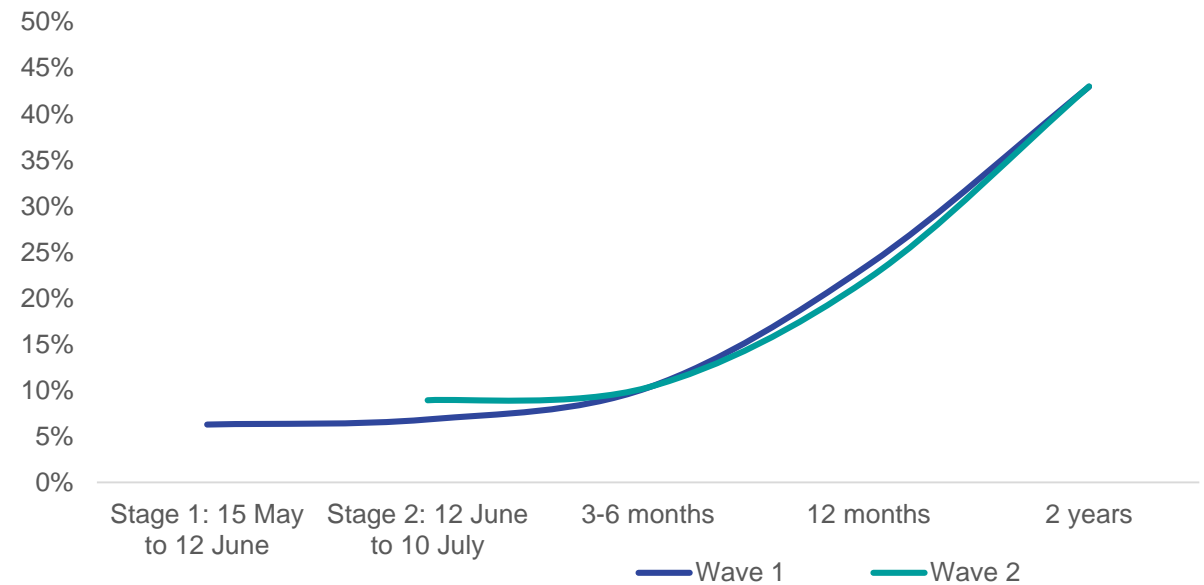
The Far North HHS region were more likely to feel the worst is behind us (34%).  
 Adults aged 18-34 years were more likely to feel that things are at their worst now (25%).  
 Adults aged over 65 years were more likely to feel that the worst is yet to come (57%).



## Half continue to feel full recovery in two years.

As restrictions are relaxed, Queensland's confidence that the economy will have made a full recovery to pre-COVID-19 levels increases in time, however less than half feel that will be in two years time (43%). No regional differences observed.

Those 18-34 year old Queenslanders surveyed are more optimistic (58%).



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

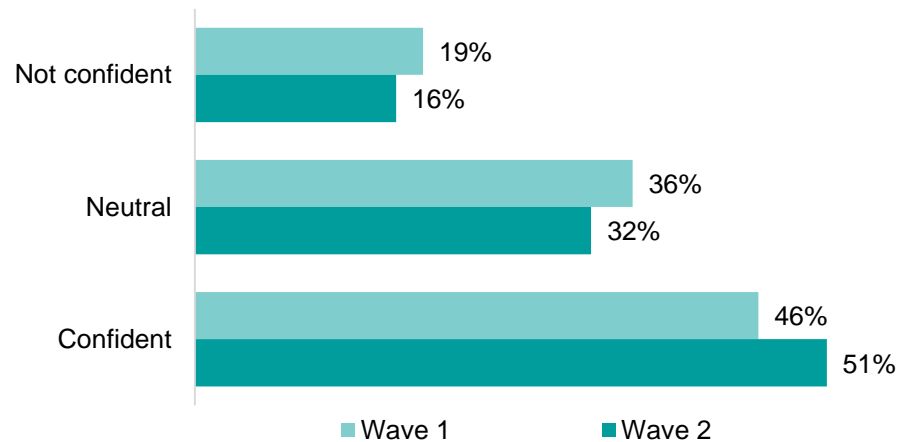
Q22 As restrictions are relaxed, how confident are you that Queensland's economy will have made a full recovery to pre-COVID-19 levels in...?:  
 Total Wave 1 n = 1603; Total Wave 2 n = 1018

# QUEENSLANDERS CONFIDENCE

Half agree that QLD Government can manage the economic recovery.

In June half of Queenslanders surveyed (51%) felt confident that the Queensland Government can manage the economic recovery.

Adults aged 18-34 years were more likely to feel confident (61%).



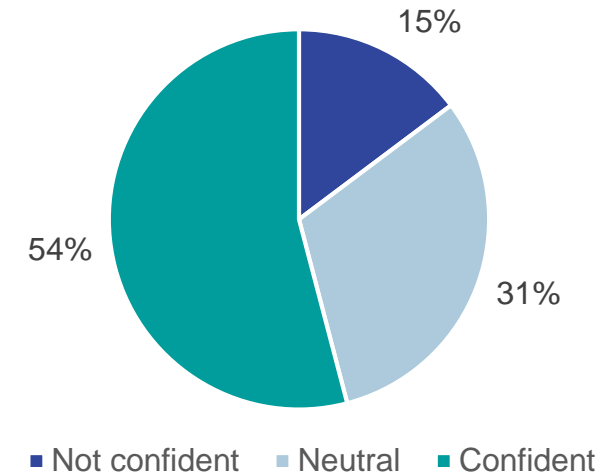
Q25. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the economic recovery?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

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

As restrictions are relaxed, just over half (54%) Queensland's confidence that the Queensland Government has handled Covid-19 will be to the State's economic advantage in the long run. Those 18-39 year old Queenslanders surveyed are more optimistic (62%).

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

62% aware Vs 47% unaware



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

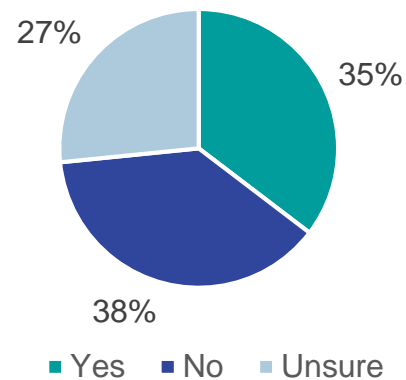
# SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Only a third have heard about the Economic Initiatives, and a quarter aware of the Economic Strategy. Of those aware of the strategy two thirds are supportive.

Those Queenslanders surveyed who were aware of the Roadmap to Easing Restrictions were more aware of initiatives (47%) and the strategy (40%) than if not (22%, 10% respectively). Males (40%) are more aware of major economic initiatives than females (31%). Queenslanders from Central Queensland HHS were more likely to be aware (41%) than those from other regions.

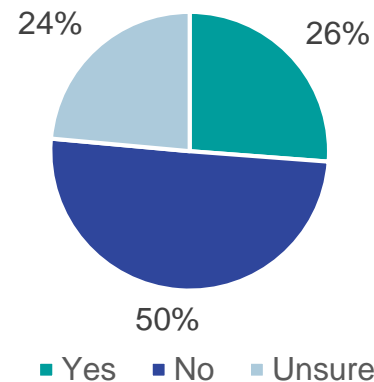
Of the 252 Queenslanders who were aware of the Economic Strategy, two thirds (65%) were supportive. Those who work in Financial and Insurance Services were more likely to oppose the State Government's Economic Recovery Strategy (54%) than Queenslanders surveyed who worked in other industries.

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



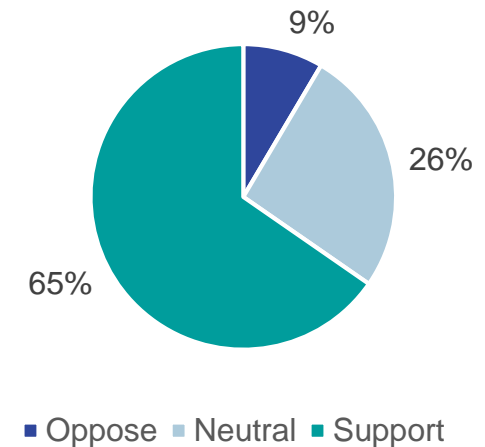
**Q46** Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?  
Total Wave 2 n = 1018

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



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

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



**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?  
Total Wave 2 n = 252

# SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

**SUPPORT** **65%**

Positive towards business/looks after small business/helps affected industries	18%
Better for the economy/helps lift the economy	15%
The strategy is detailed/well thought out/logical	11%
Restrictions are be gradually lifted/it has been handled in stages	11%
Keeps people in jobs/creates more jobs	11%
General positive comments towards the State Government/Premier e.g. They have showed strength, I trust them etc.	9%
It's good/a good strategy/good for all	8%
It supports tourism/promotes local tourism	7%
It's for the best/best interest of the state/doing the best they can	5%
Precautions to stop the spread/they are containing the virus	5%
Need to get things moving/get back on track	5%
Don't know/not answered	5%
They are looking after us/keeps us safe/for our health and well being	4%
It helps/helps everyone	4%
They are doing the right things/heading in the right direction	4%
They have specialised knowledge/they are experts	4%
They are doing a recovery package/implemented action plans	3%
They have done the right thing by keeping our borders closed	1%

**NEUTRAL** **26%**

So many unknowns still to be faced/have to see how the situation goes	20%
General negative comments towards Government e.g. They are the worst, don't run things well etc.	12%
I don't know much about it/I don't know enough	11%
Economic concerns/can we afford to pay this money/hope my taxes don't go up	10%
Some families missed out completely/some people get no support	8%
We are on the right track and then other times we are not/good and bad/general neutral comments	7%
I don't trust them/I don't trust them to keep their word	7%
Not enough real information available/too many mixed messages	7%
I would need to analyse it in more detail/I would need more information	6%
I don't have confidence in them	5%
Doesn't address core businesses concerns/small business are suffering	4%
Doesn't impact me directly/doesn't affect me	3%
Restrictions should have been eased/stayed in lock down too long	1%

**OPPOSE** **9%**

Not enough real information available/too many mixed messages	31%
Restrictions should have been eased/stayed in lock down too long	25%
I don't trust them/I don't trust them to keep their word	22%
Doesn't address core tourism concerns/tourism is suffering	21%
Some families missed out completely/some people get no support	20%
Too little, too late/too slow	16%
Economic concerns/can we afford to pay this money/hope my taxes don't go up	12%
I feel we should open our borders	7%
Doesn't address core businesses concerns/small business are suffering	6%
General negative comments towards Government e.g. They are the worst, don't run things well etc.	6%



# REASONS FOR SUPPORT

*"I am confident in the way the QLD government has managed the whole pandemic situation and will also manage the economic recovery. Queenslanders are resilient and are used to rebuilding and recovering after floods, cyclones etc."*

*"Balanced approach, focus on unemployment, addressing issues with rental agreements, small business focus. Local tourism key."*

*"Because I think it balances the right amount of easing restrictions and supporting the needs of business without simply pointing the money hose at the problem or over-rushing it."*

*"Ensuring people have jobs is extremely important in keeping the economy going, as well as preventing crime and homelessness."*

*"Because it is a clear plan and outlines the recovery strategy in simple terms."*

*Gradual easing of restrictions will see manageable increase in hospitality and tourism industries without a high risk/ upgrade to infrastructure is a good employment initiative without health risk."*

*"I believe identifying the industries that are now or will be most hit and putting money into projects or training/upskilling or rebates will help the economy recover. However I am unsure how you will support the individuals running super small business that only supports themselves and their families. The mums and dads doing part time businesses to keep their families afloat, but can't operate anymore. You've supplied money for the un-working poor, and incentives for the companies, but what about those in between who are furiously paddling trying to keep their heads above water, robbing Peter to pay the car payment."*

**Some comments show people may have confused Australian Government initiatives:**

*"I think giving money to house builds and the cash flow for home projects will positively impact trades and home owners."*

*"I am very impressed with our Premier and her team and how they have handled this Coronavirus."*

*"I believe that the government is being very careful with how they reverse the restrictions and are doing so very timely."*

*"I believe the Queensland State Government has performed very well during this crisis and I think they will drive the economic Strategy well out of this despite me not liking the Premier!"*



Q48a You say you support the direction of the State Government's COVID-19 Economic Recovery Strategy. Can you tell me why?  
Total Wave 2 n = 160

# REASONS TO OPPOSE

*“A lot of measures I have seen announced have already existed long before this. QGrants sports vouchers, storm preparation grants from Bundaberg and north, roads and infrastructure that was previously announced, planned and budgeted for. I think it is dishonest, and out of touch with the majority of people needs.”*

*“Buying a airline like virgin who went broke is a bad idea in this situation, they need to open up the borders to get tourism and the money flowing and invest in new dams and making Qld drought proof.”*

*“The non allowance of interstate travel is what is killing the QLD economy. Until the borders are open and the restrictions on businesses eased the QLD state will suffer dire economic consequences.”*

*“The freezing of public servants wages takes money out of the economy, especially as cost of utilities continues to rise. This will reduce the amount of money being spent on items, further affecting businesses.”*

*“They aren't doing much for small business. Only looking out for them selves. Trying to fool the public to try and get back in at the state election in October. Too little. Too late. Open up Nth Qld to full commerce. Too slow doesn't address core businesses of service and tourism.”*

*“I feel we should open our borders.”*

**Some comments show people may have confused Australian Government initiatives:**

*“An example would be the home improvement grant of \$25,000 after people have committed to and spent \$150,000 on home renovations. Where do you think people are getting the money from for these renovations? How do you think they will afford financing repayments? Why would the government want to encourage further debt? Potentially leaning to people being unable to manage their home repayments and losing their homes, ending up on the street? Unrealistic.”*

*“I was a long term Labor voter but now my business is almost gone, The Queensland Government has completely ruined Queensland! NO MORE LABOR!”*



Q48b You say you oppose the direction of the State Government's COVID-19 Economic Recovery Strategy. Can you tell me why?  
Total Wave 2 n = 23



# INITIATIVES TO SUPPORT JOBS

A third of Queenslanders (39%) surveyed feel that strengthening Queensland industries and sectors will work best to support Queensland Jobs.

Females are more likely (44%) than males (33%) to think strengthening Queensland industries and sectors will work best to support jobs. Those Queenslanders surveyed who are 18-34 year old were more likely to think providing skills and training will best support jobs (27%) than those over 65 years old (11%). Older Queenslanders over 65 years old (21%) or males (17%) were more likely to feel creating a competitive regulatory environment by reducing red tape would best support jobs than 18-24 year old (7%) or female (11%) Queenslanders surveyed.

Which of these initiatives do you think will best support Queensland jobs:	SEQ	REQ	QLD	Males	Females	18-34	35-64	65+
Strengthening Queensland industries and sectors	39%	38%	39%	33% ↓	44% ↑	42%	39%	33%
Providing skills and training	19%	21%	20%	17%	23%	27% ↑	20%	11% ↓
Building the States vital infrastructure	19%	20%	19%	23%	16%	13%	20%	26%
Creating a competitive regulatory environment by reducing red tape	13%	15%	14%	17% ↑	11% ↓	7% ↓	16%	21% ↑
Facilitating private sector investment	10%	6%	8%	9%	6%	11%	5% ↓	9%

Q56 Which of these initiatives do you think will best support Queensland jobs?  
Total Wave 2 n = 1018



# LEVEL OF GOVERNMENT RESPONSIBLE FOR ECONOMIC RECOVERY

Half the Queenslanders surveyed (52%) believe the Federal Government has the most responsibility for economic recovery.

Queenslanders 18-34 years old are less likely to believe the Federal Government is responsible (43%) than other age groups. This age group is more likely to consider Local Government responsible (11%) than other age groups. Casual and temporary employees are most likely to think that State Government is responsible (56%).

Which level of government do you think carries the most responsibility for economic recovery from coronavirus pandemic?	SEQ	REQ	QLD	Males	Females	18-34	35-64	65+
Federal Government	50%	55%	52%	53%	52%	43% ↓	56%	56%
State Government	46%	39%	42%	42%	43%	46%	41%	40%
Local Government (Shire Councils)	4%	7%	6%	5%	6%	11% ↑	3% ↓	3%

Q58 Which level of government do you think carries the most responsibility for economic recovery from coronavirus pandemic?  
Total Wave 2 n = 1018

# QLD GOVERNMENT SUPPORT

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

Only a third of self employed or small business owners (34%) feel supported by Government and just over a third (39%) Queenslanders surveyed feel Queensland Government is supporting small business. Half feel the Queensland Government are supporting the community (49%) but only one in four (42%) feel there is enough support for mental health and wellbeing. Neutral responses indicate that there is a lack of awareness about what Queensland Government is doing. Older Queenslanders over 65 years old (29%) and Self employed or small business owners (43%) were more likely to say that the Queensland Government is not supporting the small business. Older Queenslanders over 65 years old (24%), Males (20%) and those not aware of the Roadmap for Easing Restrictions (22%) were more likely to say that the QLD Government is not supporting the community. No statistical differences observed for mental health and wellbeing support.

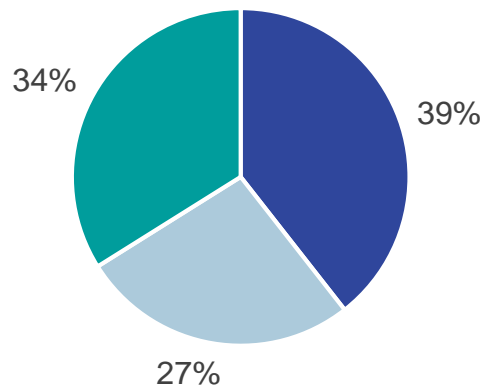
Awareness of the Economic Strategy is associated with more agreement that there is enough support from Qld Gov.

Enough support for small business through this pandemic and recovery  
**50%** aware Vs **30%** unaware

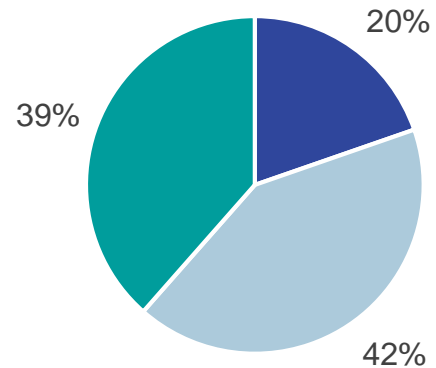
Enough support for the community through this pandemic and recovery  
**54%** aware Vs **41%** unaware

Enough support for mental health and wellbeing through this pandemic and recovery  
**51%** aware Vs **35%** unaware

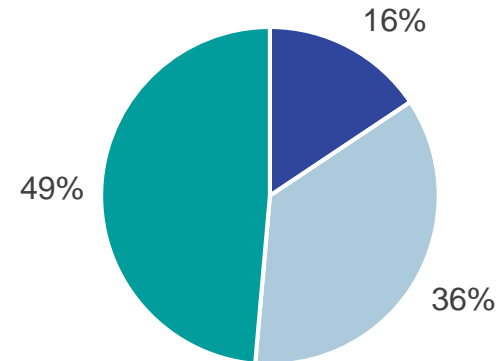
Are you getting enough support from the government as a **small business owner or self-employed**?



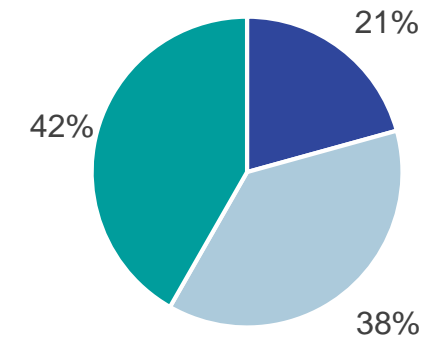
Is the Queensland Government is doing enough to support **small business** through this pandemic and recovery?



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



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



- Low support
- Neutral
- High support

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

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

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

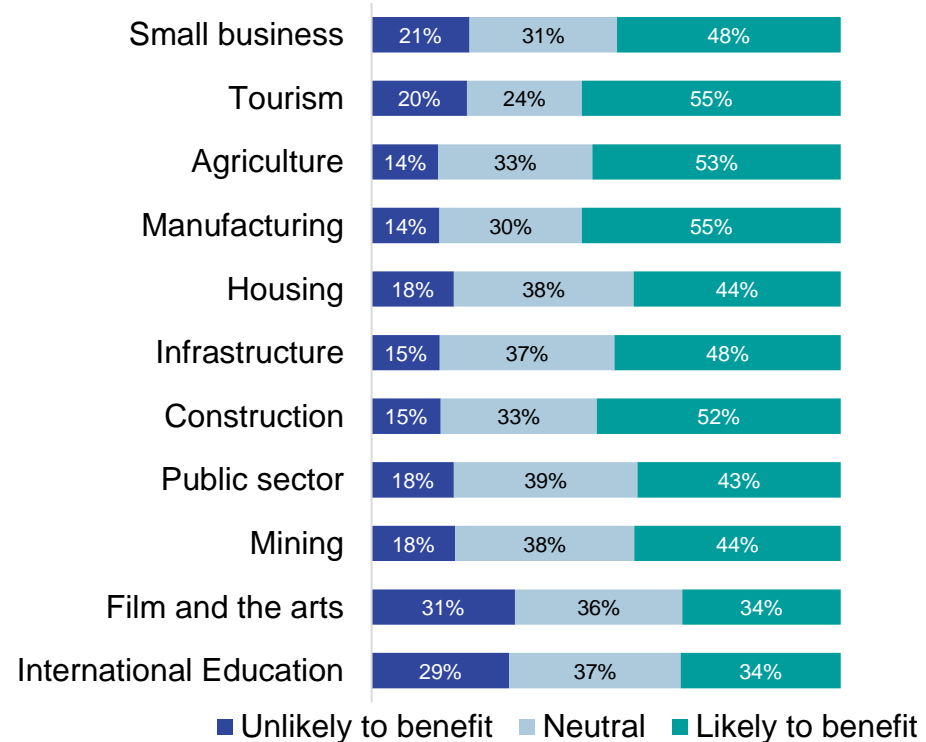
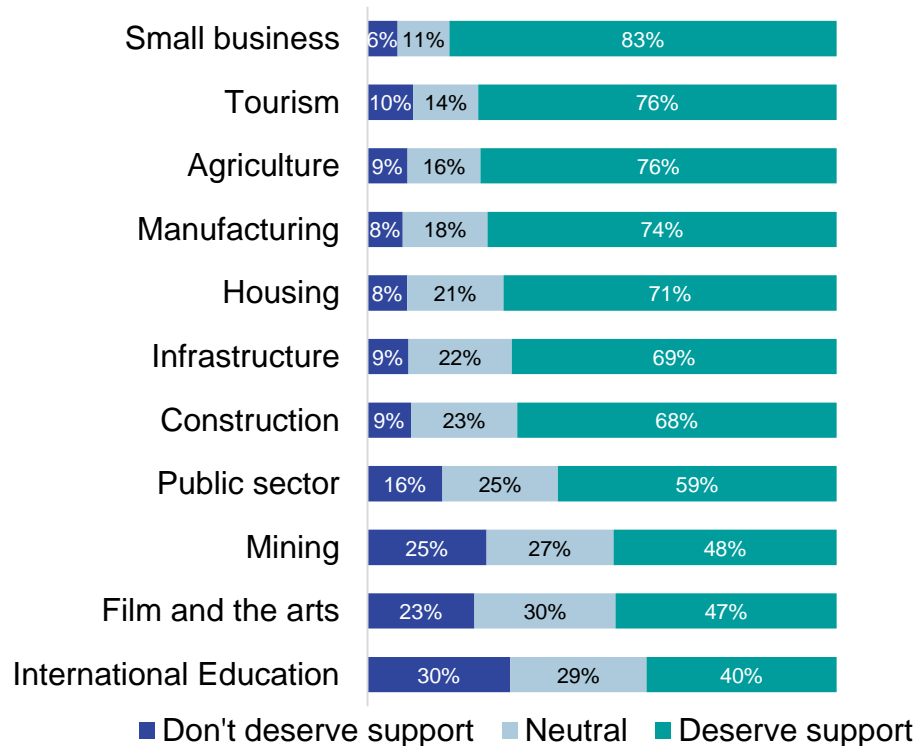
Q52 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" - Is the Queensland Government is doing enough to support the mental health and wellbeing through this pandemic and recovery?

Total Wave 2 n = 1018

# SECTORS DESERVING UNLIKELY TO BENEFIT

Queenslanders are not confident that the industries they think deserve support will be supported.

Whilst most feel that small business deserve support (83%) less than half (48%) believe they are likely to benefit. Two thirds feel Tourism deserves support (76%) but only half (55%) believe they are likely to get it. This is a similar story for Agriculture (76% deserve, 55% benefit), Manufacturing (76% deserve, 55% benefit), housing (69% deserve, 44% benefit) and infrastructure (69% deserve, 48% benefit).



Q53 On a scale of 1 to 10, where 1 is "do not deserve support" and 10 is "very deserving of support" – How deserving are the following sectors for Queensland Government support? Q54 how likely are the following sectors of the Queensland economy to benefit after time from the way COVID-19 will change the world?

Total Wave 2 n = 1018

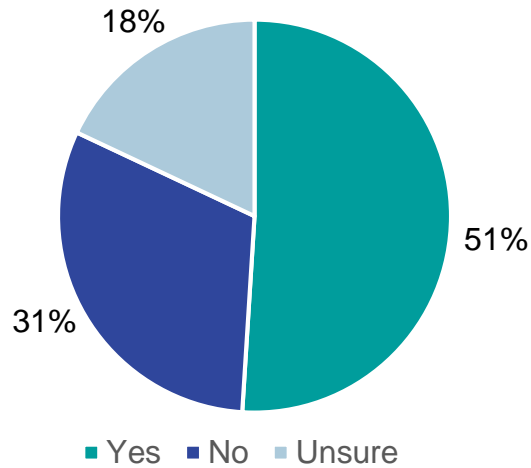
# RESTRICTIONS

# 3.3

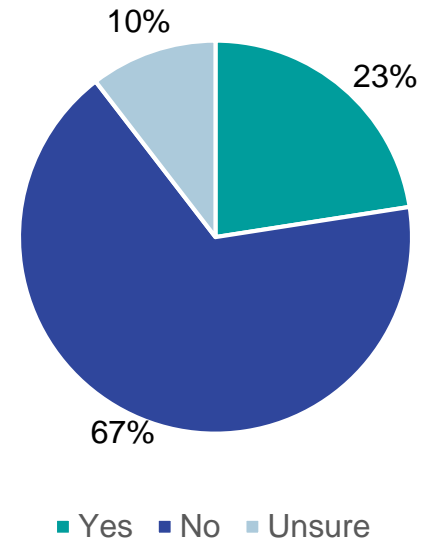


# BORDERS CLOSED

Half the Queenslanders surveyed agreed that travel should be allowed between states with similar Covid-19 cases. Only one in five (23%) agree that borders should be reopened between states with 5-10 cases.



**51%**  
**Agree that interstate travel should be allowed between states with similar cases of Covid-19**  
↑ Male (58%)



**23%**  
**Agree that states with 5-10 new cases per day should be allowed to travel in Qld.**  
↑ Male (29%)

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

Total Wave 2 n = 1018

Q60 For states continuing to record 5-10 new cases per day, should travel be allowed to Queensland? (i.e. the borders between these states and territories be re-opened)

Total Wave 2 n = 1018



# PRIORITIES IN DECISION MAKING ABOUT BORDERS

Half Queenslanders surveyed (51%) believe the highest priority when making decisions is health risk.

One in five Queenslanders surveyed (21%) believe that getting business up and running with no restrictions for Queenslanders first before opening borders is the highest priority, whilst 15% believe the economic risk of border closure should be the priority.

Females are more likely to prioritise health risk (57%) than males (45%).

Males are more likely to prioritise economic risk (19%) than females (11%).

Younger Queenslanders 18-34 years old are more likely to prioritise health risk to those travelling to Queensland (13%) than other age groups.

Those that are aware of the Economic Strategy are less likely to prioritise economic risk due to border closure than those unaware of the strategy.

**14%** aware Vs **19%** unaware

	QLD	SEQ	ROQ	Male	Female	18-34	35-64	65+	Aware of a Roadmap	Unaware of a Roadmap
Health risk to Queenslanders due to number of current Covid-19 cases in other states	51%	52%	50%	45%	↑ 57%	51%	52%	48%	54%	47%
Getting businesses up and running with no restrictions in Queenslanders first, before opening borders	21%	21%	22%	23%	20%	17%	23%	23%	21%	23%
Economic risk due to border closure	15%	16%	15%	↑ 19%	11%	14%	13%	22%	14%	18%
Health risk to travellers due to number of current Covid-19 cases in Queensland	7%	6%	7%	7%	6%	↑ 13%	5%	2%	7%	6%
Unsure	4%	4%	4%	4%	4%	5%	5%	3%	2%	5%
Other	1%	1%	1%	1%	1%	0%	1%	3%	2%	1%

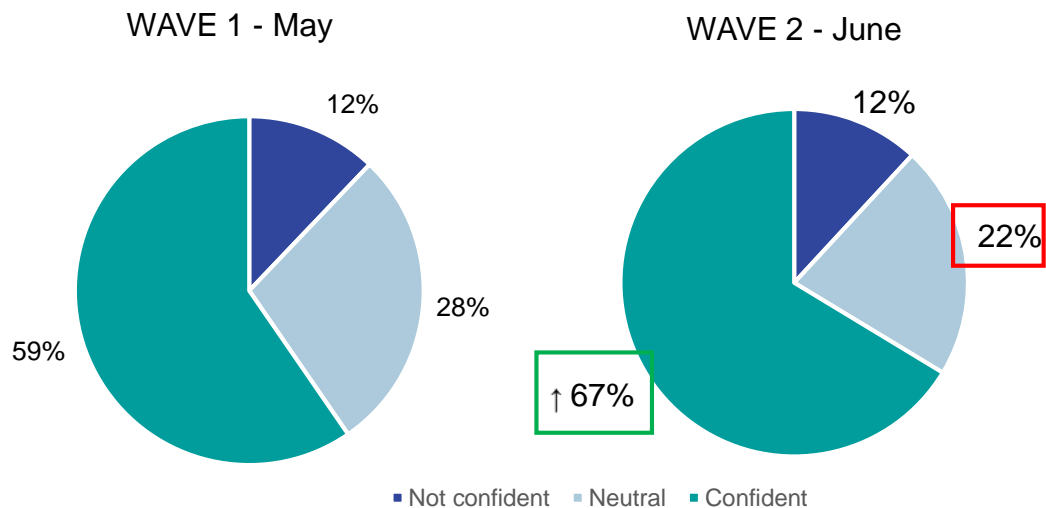
Q62 Which of the following should be the highest priority, when making decisions about opening the Queensland borders?  
Total Wave 2 n = 1018

# CONFIDENCE INCREASED FROM MAY TO JUNE ON MANAGING THE EASE OF RESTRICTIONS

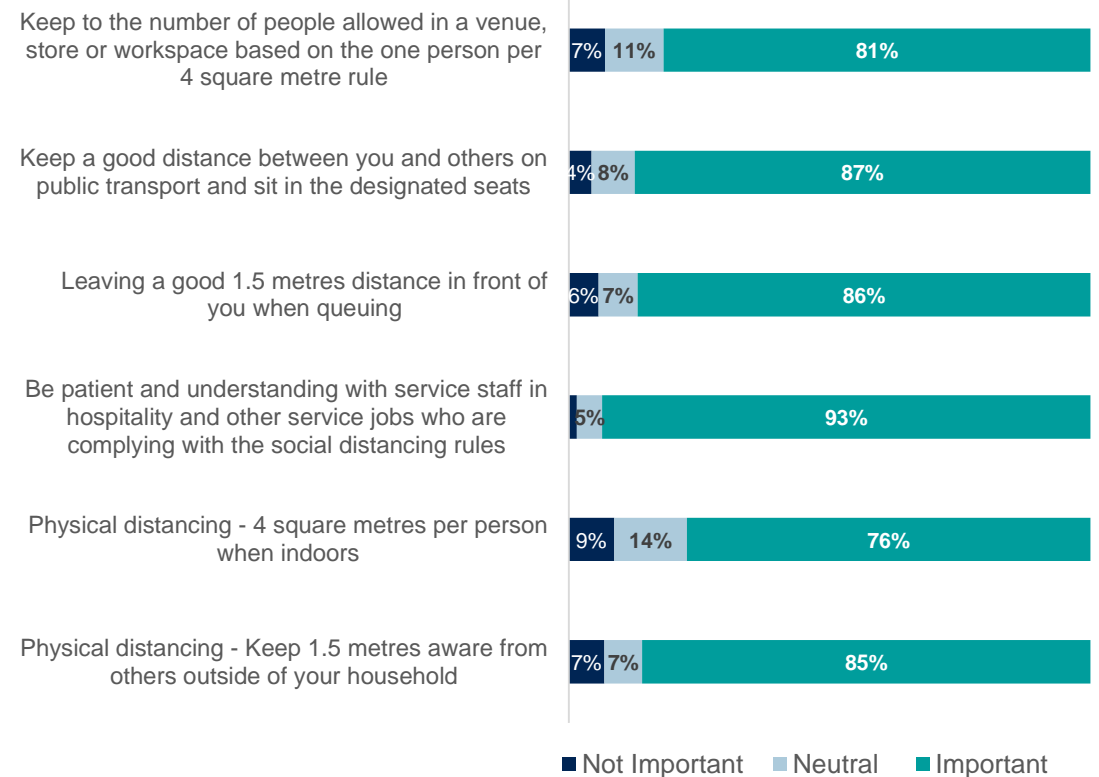
## Health rules and social distancing etiquette important to most Queenslanders.

Two thirds (67%) of Queenslanders surveyed in June are confident that Queensland Government can manage the easing of restrictions which has increased since May (59%).

Most Queenslanders surveyed felt that it was important to be patient and understanding with service staff in hospitality and other service jobs who are complying with social distancing rules (93%), to keep good distance on public transport (87%), leave 1.5 metre space when queuing (86%) and physically distancing from others outside their household (85%).



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



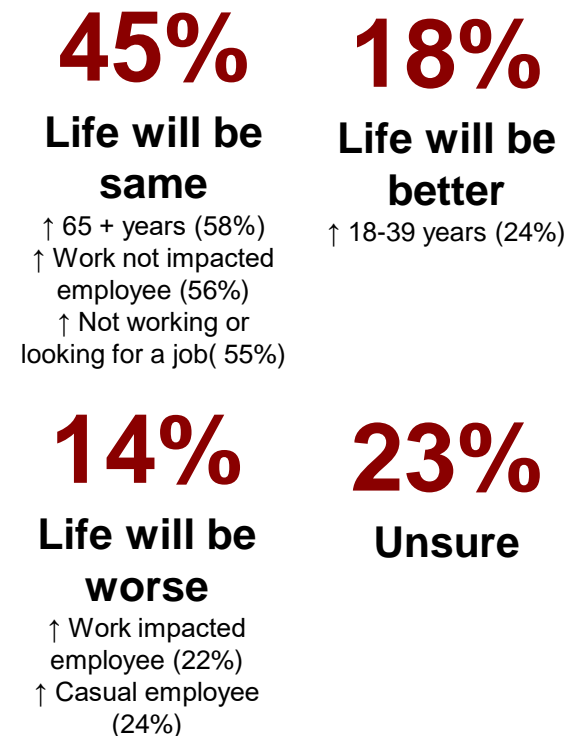
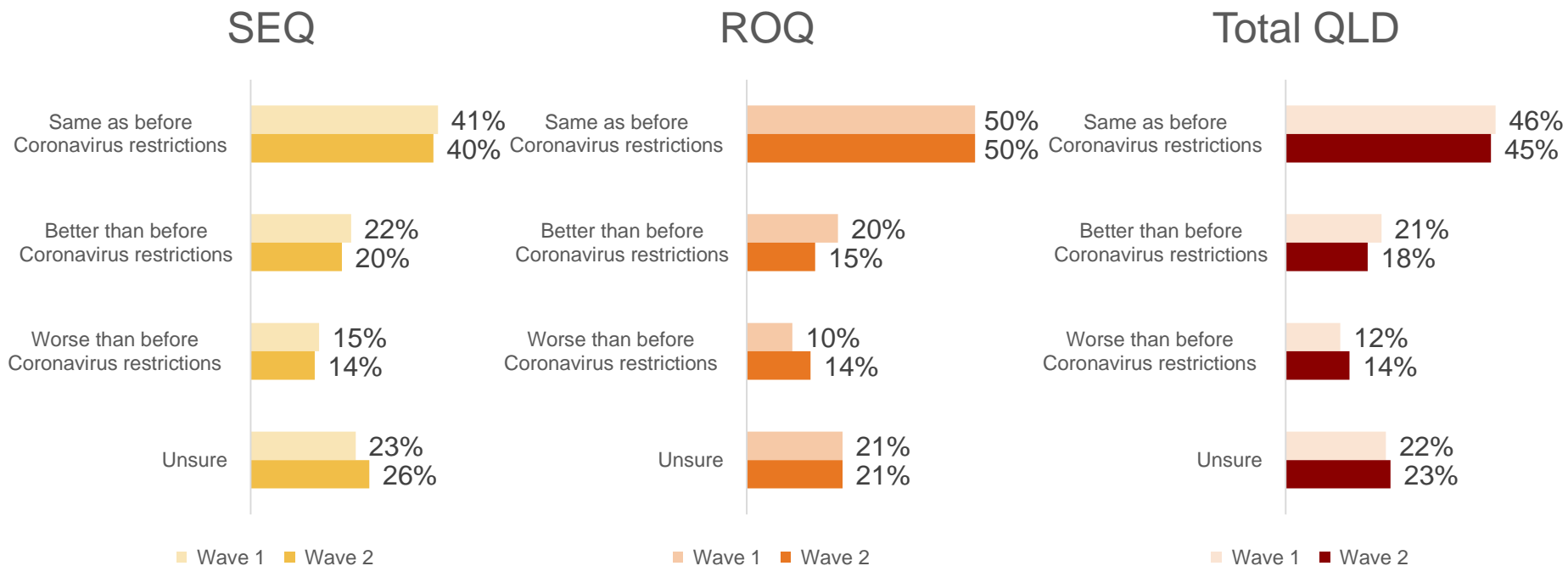
Q28 How important is it for people to follow the following public health rules while restrictions are easing?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

NB. : No comparison with W1 due to questionnaire changes

Significantly higher / lower than wave 1 – 95% CI.

# MOST FEEL LIFE WILL BE THE SAME AFTER RESTRICTIONS EASE

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



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

# QUEENSLANDERS EXCITED ABOUT WHAT TO DO WHEN RESTRICTIONS EASE

As restrictions are easing Queenslanders are most looking forward to dining out (9%) followed by visiting family and friends (8%), going out to see entertainment and music or movies (8%), going out with family and friends (8%) and taking a weekend away / mini break or holiday in Queensland (8%).

In order of priority visiting family and friends (3.0), looking for a job (3.4), going out with family and friends (3.5) and Dining out (3.9) were mentioned higher in the ranking.

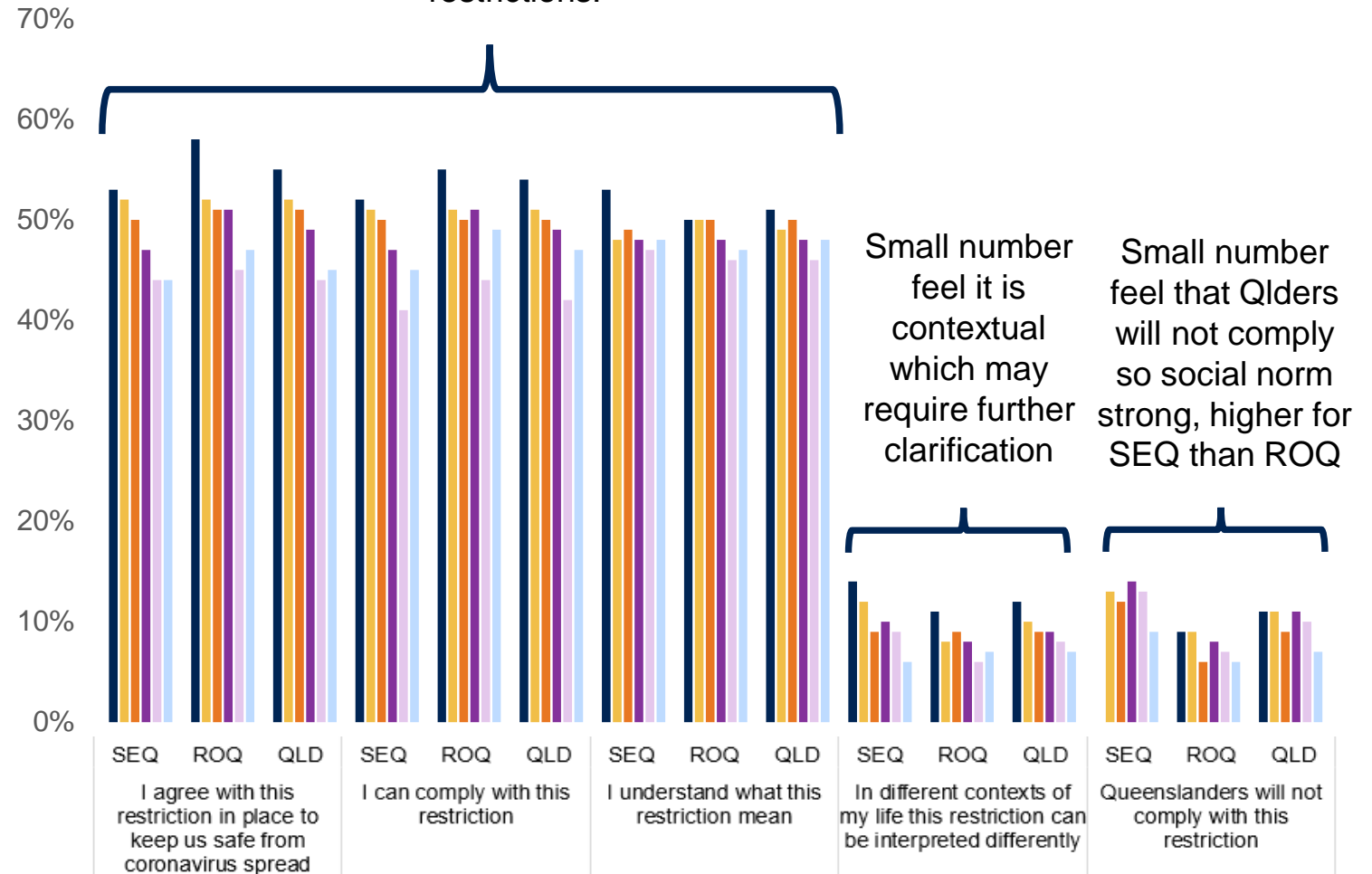
Activities	QLD Rank score	QLD %
Visit family and friends	3.0	8%
Look for a job/employment	3.4	3%
Going out with family / friends	3.5	8%
Dinning out	3.9	9%
Take a weekend away / mini-break or holiday in Queensland	4.1	8%
Going out to hotel / pub / bar / club or venue	4.3	7%
Take a trip away from home / travel	4.4	7%
Dentist / Eye / Skin and other check-ups or test	4.6	6%
Play sport	4.7	4%
Going out to see entertainment / music / movies etc	4.8	8%
Take a weekend away / mini-break or holiday Overseas	5.0	4%
See allied health services/alternative health practitioners	5.0	4%
See councillor / other mental health practitioner	5.1	3%
Non urgent medical appointment	5.1	5%
Take a weekend away / mini-break or holiday in Another State	5.2	6%
Get personal/beauty/hair/appointment	5.4	6%
Take a weekend away / mini-break or holiday in New Zealand	5.5	4%
None of these	4.6	1%

Q29. Rank in order of priority, what you would like to do when restrictions are eased.  
 Total Wave 1 n = 1603; Total Wave 2 n = 1018  
 NB. : No comparison with W1 due to questionnaire changes

# COMPLIANCE WITH RESTRICTIONS

Half agree with, understand and can comply with restrictions.

- Gatherings of up to 100 people: gatherings in public spaces and homes
- Gatherings of up to 100 people: restaurants, cafés, pubs, registered and licensed clubs, RSL clubs, food courts and hotels, indoor cinemas, concert venues, theatres, arenas, etc...
- Gatherings of up to 100 people: places of worship and religious ceremonies, museums, art galleries and historic sites, weddings, funerals, libraries
- Gatherings of up to 100 people: pools, community sports clubs/gyms, health clubs, outdoor amusement parks zoos and arcades
- Gatherings of up to 100 people: saunas and bathhouses, beauty therapy, tanning, nail salons and spas, tattoo parlours and non-therapeutic massage parlours
- Gatherings of up to 100 people: open homes and auctions



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

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

NB: : No comparison with W1 due to questionnaire changes



# COMPLIANCE WITH RESTRICTIONS IN SEQ

South East Queenslanders are more likely than the rest of Queensland to feel that people will not comply with restrictions.

Statements	I agree with this restriction in place to keep us safe from coronavirus spread			I can comply with this restriction			I understand what this restriction mean			In different contexts of my life this restriction can be interpreted differently			Queenslanders will not comply with this restriction		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Gatherings of up to 100 people: gatherings in public spaces and homes	53%	58%	55%	52%	55%	54%	53%	50%	51%	14%	11%	12%	14%	9%	11%
Gatherings of up to 100 people: restaurants, cafés, pubs, registered and licensed clubs, RSL clubs, food courts and hotels, indoor cinemas, concert venues, theatres, arenas, etc...	52%	52%	52%	51%	51%	51%	48%	50%	49%	12%	8%	10%	13%	9%	11%
Gatherings of up to 100 people: places of worship and religious ceremonies, museums, art galleries and historic sites, weddings, funerals, libraries	50%	51%	51%	50%	50%	50%	49%	50%	50%	9%	9%	9%	↑12%	6%	9%
Gatherings of up to 100 people: pools, community sports clubs/gyms, health clubs, outdoor amusement parks zoos and arcades	47%	51%	49%	47%	51%	49%	48%	48%	48%	10%	8%	9%	↑14%	8%	11%
Gatherings of up to 100 people: saunas and bathhouses, beauty therapy, tanning, nail salons and spas, tattoo parlours and non-therapeutic massage parlours	44%	45%	44%	41%	44%	42%	47%	46%	46%	9%	6%	8%	↑13%	7%	10%
Gatherings of up to 100 people: open homes and auctions	44%	47%	45%	45%	49%	47%	48%	47%	48%	6%	7%	7%	9%	6%	7%

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

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

NB. : No comparison with W1 due to questionnaire changes

# INFORMATION

# 3.4

# QUEENSLANDERS STAYING INFORMED AND SENTIMENT IMPROVED

Most Queenslanders know how to prevent the spread of coronavirus (91%), what the current levels of restrictions are (78%), and stages of restrictions (71%), but less than a third are aware of how the Queensland economy will recover (31%). In June almost a quarter (73%) of Queenslanders surveyed think Queensland Government is a trustworthy source of information which has increased since May (55%). Similarly, Queenslanders in June feel that Queensland Government has managed better than other states (72%) which has increased since May (53%).

**73%**

**Queensland Government is a trustworthy information source**

- ↑ 18-39yo (82%)
- ↑ Aware of Roadmap (79%)
- Full time/Part Time Employee (78%)
- Business Owner (54%)
- Vulnerable people (66%)
- Working in Professional, Scientific and Technical Services (94%)

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

**72%**

**Queensland Government managed better than other states or territories**

Female (77%)



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



Source of information	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Television – News and other media	78%	84%	81%	82%	83%	82%
Announcements by Premier	52%	52%	52%	54%	57%	55%
Announcements by Chief Health Officer	48%	47%	48%	49%	48%	48%
Facebook	32%	41%	37%	40%	46%	43%
Radio – News and other media	36%	36%	36%	35%	38%	37%
Queensland Government Coronavirus website	28%	30%	29%	29%	28%	28%
Queensland Health website	19%	23%	21%	23%	21%	22%
Australian Government website	21%	17%	19%	21%	19%	20%
Newspaper or other print news	20%	18%	19%	17%	22%	20%
Word of mouth	17%	19%	18%	19%	19%	19%
Somewhere else online	13%	12%	13%	12%	11%	12%
YouTube	7%	5%	6%	11%	8%	9%
Instagram	5%	5%	5%	8%	5%	7%
Queensland Department of Small Business website	2%	1%	2%	2%	2%	2%

Q2 Where have you been getting your information from about coronavirus? Please select as many as apply.  
Total Wave 1 n = 1603; Total Wave 2 n = 1018

  Significantly higher / lower than wave 1 – 95% CI.

**91%**  
**How to prevent the spread of coronavirus**

**71%**  
**Stages of restrictions easing**  
↓ Not aware of road map (62%)

**78%**  
**Current coronavirus level of restrictions**  
↓ 18-39 year old (71%)  
↑ 65+ year old (88%)

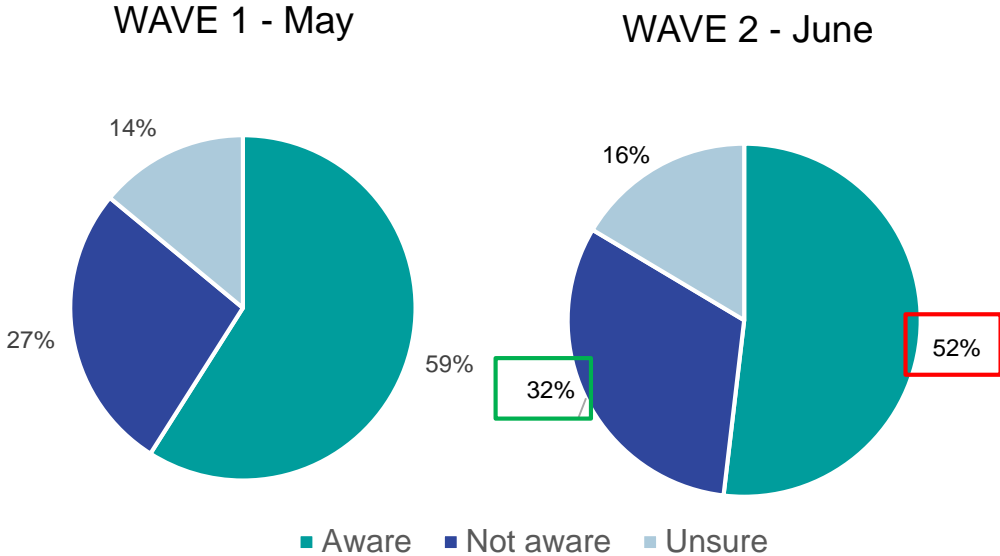
**31%**  
**How the Queensland economy will recover**  
↓ Not aware of Economic Recovery Strategy (24%)

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

# AWARENESS OF ROADMAP

Fewer people in June were aware of the roadmap (52%) than in May (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. There were less statistical differences between those that were aware and sentiment questions in June than in May.



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

**52%**  
**Aware of the Roadmap**  
Confident Queensland Government is a trustworthy information source (Q3)  
**79%** aware Vs **67%** unaware



# THE ROADMAP SOURCES OF INFORMATION

Queenslanders surveyed aware of the Roadmap, sourced it from Television news or other media (65%), from the Premier's announcements (40%), Facebook (35%), the Chief Health Officer (24%) or the Queensland Government Coronavirus website (25%).

While no difference is seen between South East Queenslanders and the Rest of Queensland in their way to source roadmap information, other channel differences observed:

- Males are more likely to have seen or heard of the Roadmap on TV News (73%), Newspapers (25%) or YouTube (9%).
- 18-39 year old Queenslanders are more likely to have seen or heard of the Roadmap on Facebook (50%), YouTube (13%) or Instagram (7%), rather than TV (51%) or through announcements from the Premier (30%).
- 65 years and older are less likely see or hear about the Roadmap on Facebook (19%).
- Carers are more likely to have seen or heard of the Roadmap through Facebook (42%), as are people working in Retail Trade (65%).
- Retail – Trade workers also tend to be informed through the QLD Department of small businesses (16%), so are people working in Media / Communication, who are also more likely to use the Australian Government website (50%).

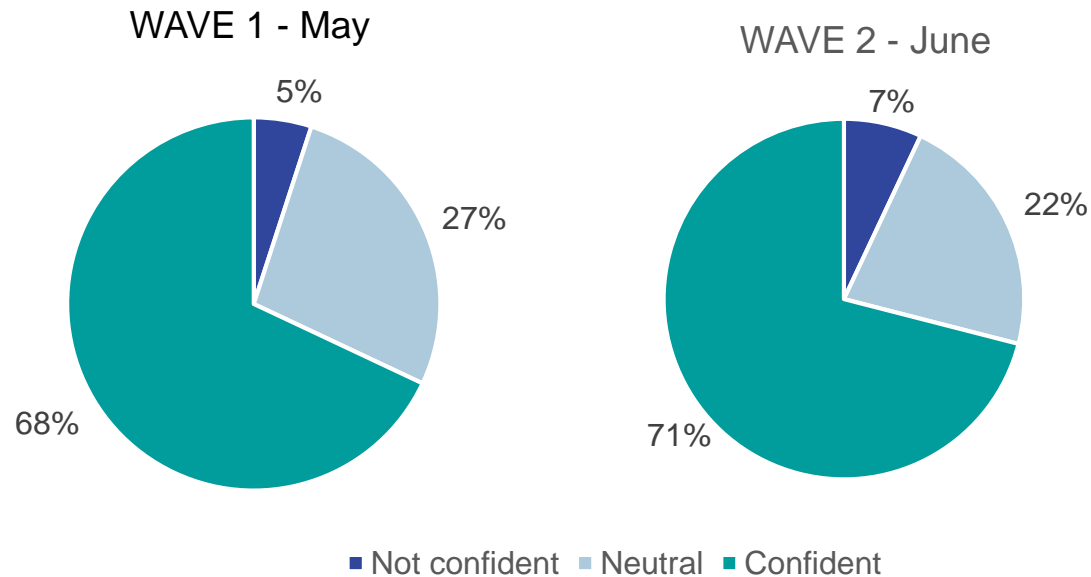
Seen or heard of Roadmap from	Wave 1			Wave 2		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Television - News and other media	61%	61%	61%	67%	62%	65%
Announcements by Premier	38%	36%	37%	39%	42%	40%
Facebook	31%	36%	34%	33%	38%	35%
Announcements by Chief Health Officer	21%	23%	22%	25%	24%	24%
Queensland Government Coronavirus website	16%	18%	17%	25%	24%	25%
Radio - News and other media	18%	13%	16%	23%	24%	23%
Newspaper or other print news	15%	17%	16%	18%	15%	17%
Queensland Health website	8%	15%	11%	13%	10%	12%
Somewhere else online	11%	7%	9%	8%	7%	7%
Word of mouth	9%	8%	9%	7%	10%	8%
Australian Government website	5%	10%	8%	9%	8%	8%
Instagram	5%	2%	4%	2%	4%	3%
YouTube	2%	2%	2%	5%	5%	5%
Queensland Department of Small Business website	0%	1%	1%	2%	2%	2%

Q35 Where did you see, hear or read about Queensland Government's Roadmap to Easing Restrictions? Please select as many as apply.  
Total Wave 1 n = 944; Total Wave 2 n = 530



# ROADMAP IS HELPFUL COMMUNICATION

Seven out of ten (71%) Queenslanders who saw or heard about the Roadmap to Easing Restrictions said they felt it was helpful.



**71%**  
**Roadmap is helpful**  
Impacted employee said they found the Roadmap helpful (78%)

Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?

Total Wave 1 n = 944; Total Wave 2 n = 530

# OMNIBUS RESULTS

Data from additional questions

# 4

About the study

**Ipsos Omnibus:** A National sample of 1042 adults (aged 18 years+), weighting to latest ABS population statistics.

n=100 Greater Brisbane Region

n=106 Rest of Queensland

**Fieldwork:** Three Omnibus questions over one wave between 20<sup>th</sup> May to 24<sup>th</sup> May

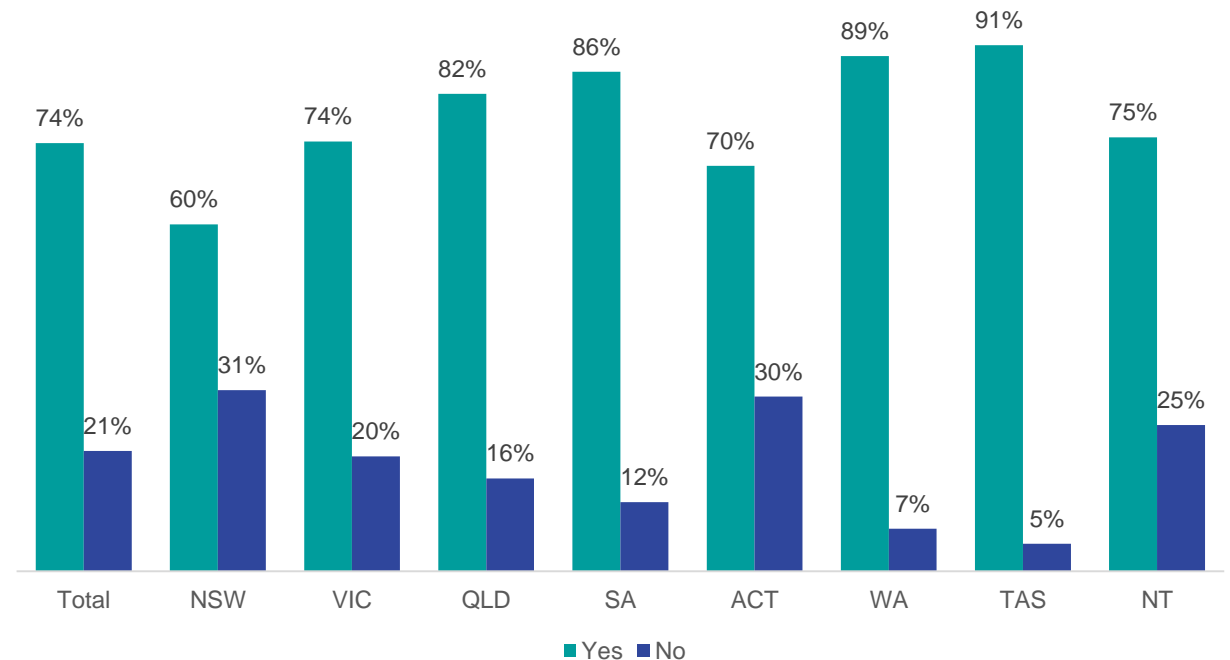
# KEEPING BORDERS CLOSED

The current health advice from the Chief Health Officer is to keep some borders between states closed until there are no hot spots of positive coronavirus cases in other states. Do you support this position?

Three quarters (74%) of Australians are happy with some border closures to keep safe.

Eight out of ten Queenslanders (82%) agree to keep some borders closed until there are no hot spots of positive coronavirus cases in other states. Brisbane were less likely to agree (78%) than rest of Queensland (86%).

Tasmanians (91%) and Western Australians (89%) are most likely to agree, whilst New South Wales (60%) and ACT (70%) are less likely to agree.



May Omnibus Question 16. The current health advice from the Chief Health Officer is to keep some borders between states closed until there is no hot spots of positive coronavirus cases in other states. Do you support this position?  
n=1042 (Brisbane n=100 and Rest of QLD n=106)

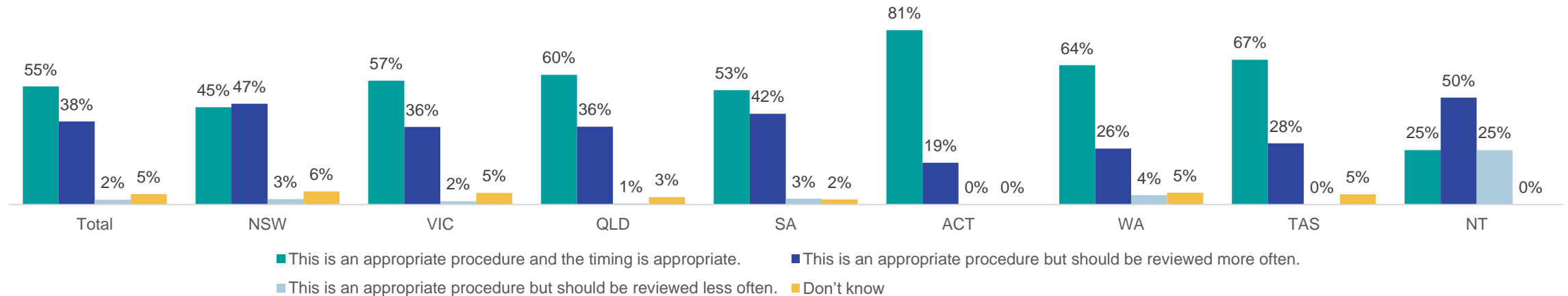
# APPROPRIATE PROCESS

The Chief Health Officer reviews the restriction regarding border closure at the end of each month. Do you think this is appropriate procedure and timing?

Half (55%) of Australians believe the current procedure for reviewing border closure is appropriate and 38% feel it is an appropriate procedure but should be reviewed more often.

Six out of ten Queenslanders (60%) believe the current procedure for reviewing border closure is appropriate and 36% feel it is an appropriate procedure but should be reviewed more often. Brisbane are more likely to say that the procedure is appropriate but there needs to be a review more often (47%) than the rest of Queensland (26%).

ACT (81%) most likely to agree with the procedure and timing, with the NT (note: small sample size) most likely to want more frequent reviews (50%).



# REASONS FOR TIMING AND PROCEDURE ACCEPTANCE

## Procedure and timing appropriate

For those that think the procedure and timing is appropriate most said that it would cover the overlap of a 14 day incubation and there was enough time to see an outbreak occur, others heed caution to take it slowly, be smart and stay safe. The cold snap and a reminder that winter is coming had some survey respondents concerned for a second wave of the virus.

## Procedure appropriate but timing more often

For those that think the procedure is appropriate but that the time it is reviewed should occur more frequently, most felt that it is a rapidly evolving situation. Some answered that they felt if a breakout occurred they would not like to wait a month for a review. A few seemed to disagree with border closure in the first place and were in a hurry to lift them. A common theme was the need to review regularly because the economy is suffering and opening the borders is seen to enable the recovery.

*“The curve has flattened on the COVID - 19 and our economy requires immediate kick start.”*

*“Matter may change within the period of a fortnight. This period would be a better review period.”*

*“Most, if not all hot spots relate to prior overseas travel & therefore the mandatory requirements of isolation apply. This is not reflective of the situation with the overall population, but the current restrictions are now doing more harm than good.”*

*“With the new cases in Queensland being consistently low I think we should speed up the process.”*

*“Due to the fact that we are heading into our winter, and concern about a second wave of the virus.”*

*“Because I believe there will be another rise in infections and 2-3 weeks is paramount in timing, so a month would be good.”*

*“Because it seems like a reasonable amount of time. If it is reviewed more frequently then there is more pressure to lift restrictions sooner, and I think we should be more cautious.”*

*“Its being smart about the situation.” “Better to safe than sorry”.*

*“A lot can happen in a month. It should be a fortnightly affair.”*

*“A month is a long time considering how quickly the virus can spread.”*

*“All borders should be open, we are one country.”*

*“Almost nobody has Coronavirus. We're now at the stage where economic devastation is ruining more lives than the virus/ Open the borders to boost the tourism industry and help get employment back up.”*

*“Changes are happening on a weekly basis rather than monthly.”*

*“Look this is a day by day thing we need to get things going again in Queensland and tourist industry is an integral of getting the state moving so each day the border is closed it is costing this state millions of dollars and the lively hood of thousands of people>People are now conditioned to social distancing and generally do the right thing but the chief health office doesn't trust the general public.”*



# GLOBAL STUDY RESULTS FOR AUSTRALIA

Additional data from another tracker

# 5

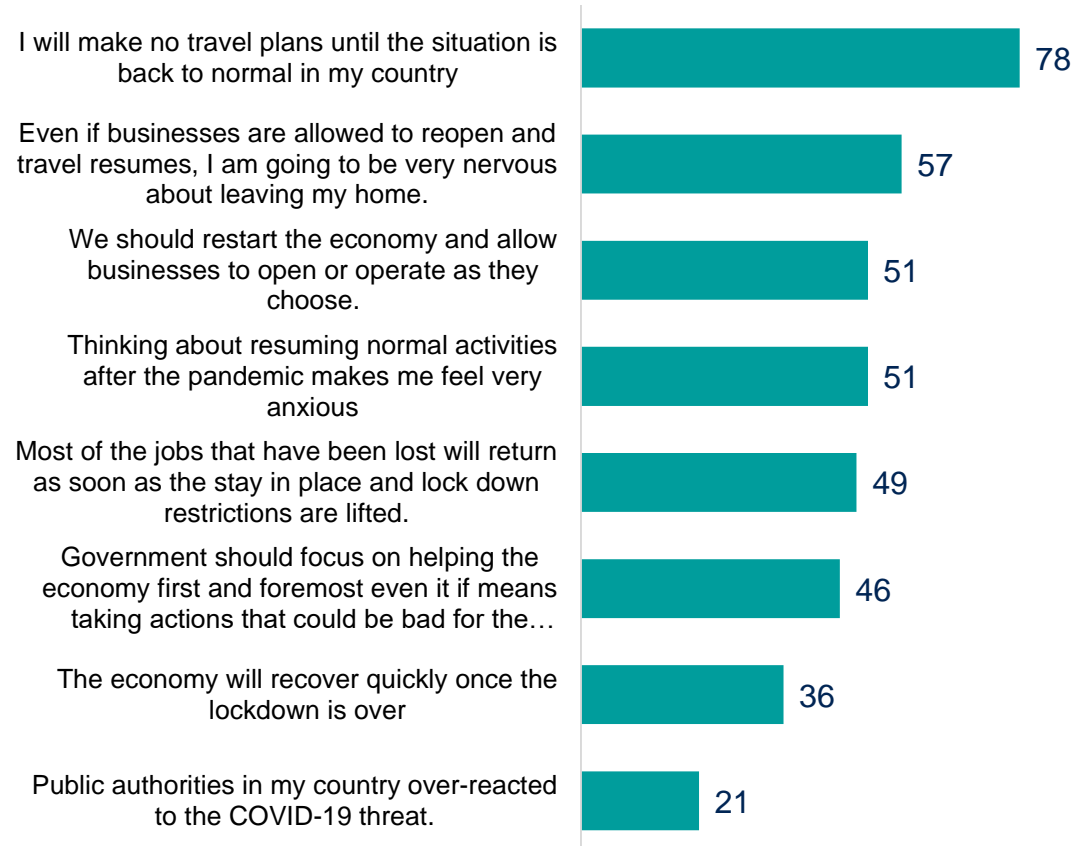
## About the Study

These are the results from Ipsos Essentials, a weekly global syndicated study examining the opinions and behaviours as countries move through the pandemic. These results were collected May 21st to 24th, 2020 using an online methodology 16,000 adults aged 18-74 years in Canada and the United States and 16-74 years in Australia, Brazil, China, France, Germany, Italy, Spain, India, Japan, Mexico, Russia, South Africa, South Korea and the United Kingdom.

The sample for this study consists of approximately 1,000 individuals in each country. The samples in Australia, Canada, France, Germany, Italy, Spain, Japan, South Korea, the U.K. and the U.S. can be taken as representative of these countries' general adult population over age 16 or 18 (as above) and under the age of 75. The sample in Brazil, China, India, Mexico, Russia, and South Africa is more urban, more educated and/or more affluent than the general population and should be viewed as reflecting the views of the more "connected" segment of the population. The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

# VIEWS AND RATINGS

## T2B %



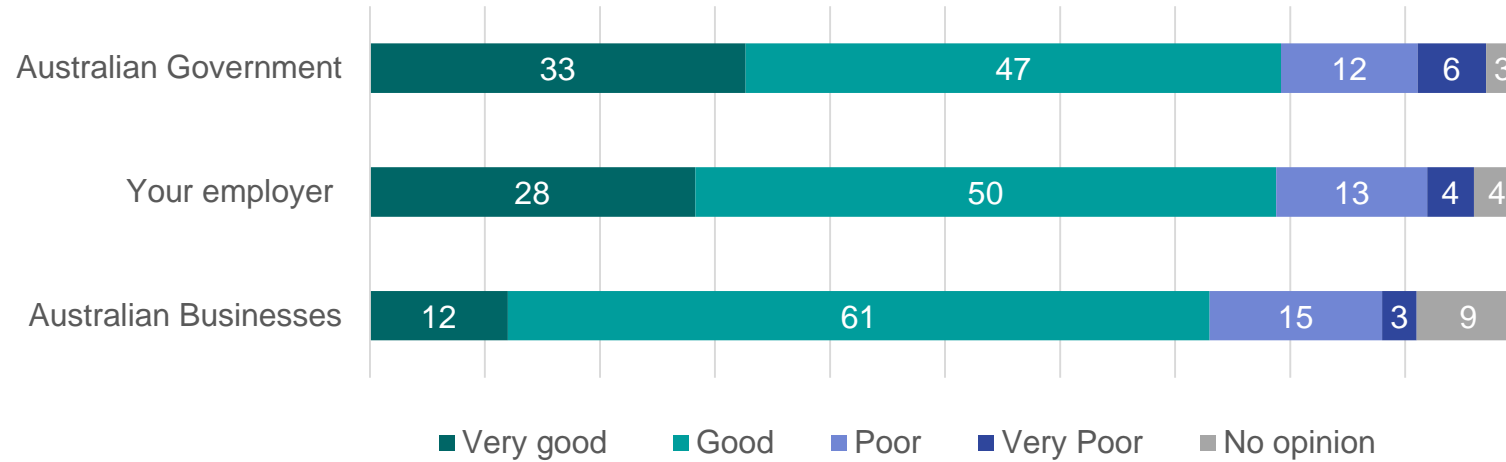
	TOTAL	VIC/TAS	NSW/ACT	QLD	SA/NT	WA
I will make no travel plans until the situation is back to normal in my country	78%	79%	77%	77%	77%	77%
Even if businesses are allowed to reopen and travel resumes, I am going to be very nervous about leaving my home.	57%	61%	57%	50%	61%	62%
We should restart the economy and allow businesses to open or operate as they choose.	51%	47%	52%	55%	44%	54%
Thinking about resuming normal activities after the pandemic makes me feel very anxious	51%	58%	53%	40%	48%	54%
Most of the jobs that have been lost will return as soon as the stay in place and lock down restrictions are lifted.	49%	46%	51%	50%	45%	57%
Government should focus on helping the economy first and foremost even it if means taking actions that could be bad for the environment	46%	44%	48%	49%	47%	37%
The economy will recover quickly once the lockdown is over	36%	31%	42%	37%	27%	41%
Public authorities in my country over-reacted to the COVID-19 threat.	21%	18%	21%	26%	18%	21%

Total sample (weighted base) n=1000 , VIC/TAS n=692, NSW/ACT n=308, QLD n=276, SA/NT n=336, WA n=200

V1. To what extent do you agree or disagree with each of the following?

Significant lower / higher vs. Total Sample – 95%

# WHO IS DOING A GOOD JOB DEALING WITH RECOVERY



	TOTAL	VIC/TAS	NSW/ACT	QLD	SA/NT	WA
Australian government	80%	82%	83%	74%	82%	78%
Your employer	79%	78%	78%	75%	84%	88%
Australian Businesses	73%	75%	70%	77%	78%	68%

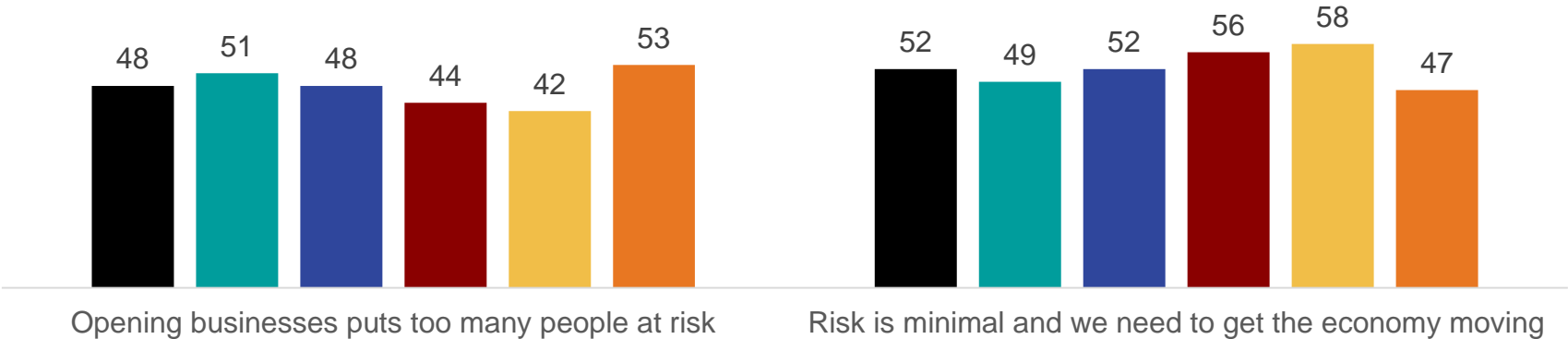
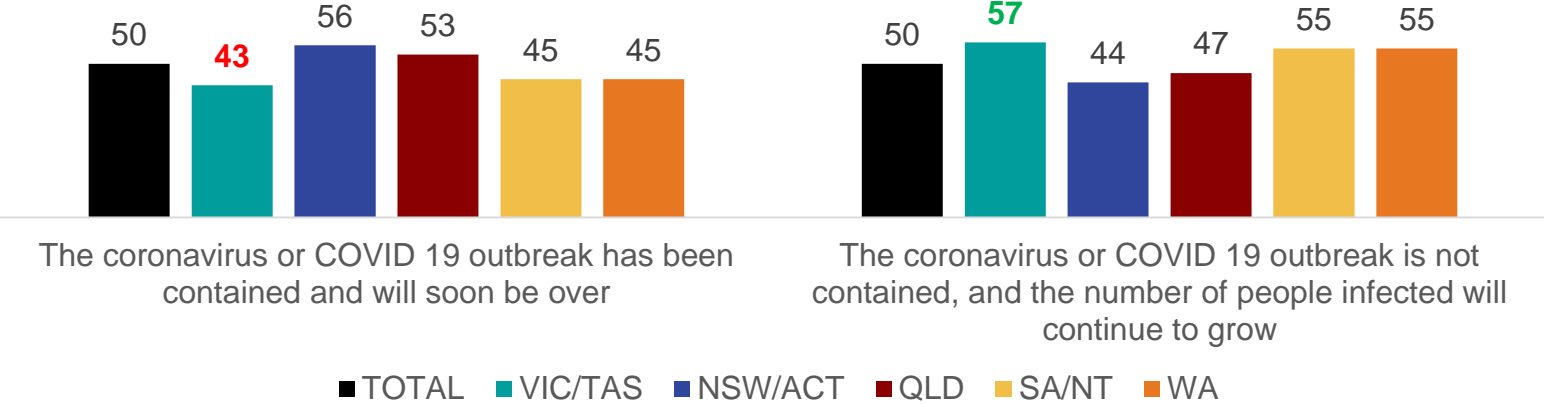
Queenslanders are less likely to say the Australian Government (74%) are doing a good job.

Total sample (weighted base) n=1000 , VIC/TAS n=692, NSW/ACT n=308, QLD n=276, SA/NT n=336, WA n=200

V2\_t2b. (T2B Summary) How good or poor a job are each of the following doing to help your country deal with recovery following the pandemic?

# VIEWS AND RATINGS

T2B %



Total sample (weighted base) n=1000 , VIC/TAS n=692, NSW/ACT n=308, QLD n=276, SA/NT n=336, WA n=200

XX, XX Significant lower / higher vs. Total Sample – 95% CI.

V4. Some people say that opening businesses now puts too many people at risk of contracting COVID-19 and we need to wait at least a few more weeks. Other people say that the health risk is minimal if people follow social distancing rules and we need to get the economy moving again. Which is closer to your point of view?  
 V3. Which of the following is closest to your point of view?



# THANK YOU



GAME CHANGERS

