

# UNITE AND RECOVER LIVINGSTONE SHIRE

For Queensland Government

Prepared by Ipsos  
7 July, 2020

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GAME CHANGERS



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# BACKGROUND

# 1



# BACKGROUND AND OBJECTIVES

## Findings will be used to inform decision making and communications for the recovery phase.

This research is to understand Queenslanders' sentiment and views on the impact of the COVID-19 pandemic to the economy. 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 investment options to stimulate investment and jobs in the region of Livingstone Shire.

Research covers:

- The impact of the COVID-19 pandemic on their businesses, their jobs and the economy
- The community's views around the economic in their local area and the Great Keppel Island (GKI) Rejuvenation Project
- The community's views about information, support and border closures.

The research was conducted between Tuesday 23<sup>rd</sup> June and Wednesday 1<sup>st</sup> July. On average the survey took 15 minutes to administer over the telephone. Sample of n=200 residents of Livingstone Shire was sourced through both fixed phone lines and mobile phones. 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 LGA of Livingstone's population using 2016 ABS Census data.

The limitations for this methodology include:

- Biased towards those with mobile and fixed lines
- Limited time in field may bias to those with more availability
- People with pre-paid mobiles and no fixed lines are less likely to be included in the sample frame and therefore participate in this research.

The Department of State Development, Tourism and Innovation is leading the Great Keppel Island (GKI) Rejuvenation Project. The project aims to facilitate the growth of tourism on GKI, and in the surrounding region, with the Queensland Government planning a significant investment towards common-user tourism infrastructure to encourage private sector investment and support existing tourism operators, residents, and future tourism development projects. This would support short term employment for construction and for long-term tourism jobs.



# EXECUTIVE SUMMARY



# 2



# EXECUTIVE SUMMARY

## Tourism critical and support positive for investment in major infrastructure and GKI project.

The level of impact to the work situation for employees, self-employed and business owners in the Livingstone Shire is relatively comparable to the impact seen across broader Queensland. Around 30% of those employed and around 56% self-employed or business owners have been negatively impacted by the coronavirus restrictions and lockdown. Small businesses are taking advantage of JobKeeper Payments with close to half (43%) accessing the Government stimulus package to pay for their employees. Individual workers report a lower level of access (31%) and some are uncertain if their employer is claiming on their behalf (18%).

**There's strong support and belief in the tourism sector as playing an important role in the overall economic recovery and growth of Central Queensland.** Seven out of ten (72%) see tourism as having a great importance to the growth of the region. This was higher with females (82%) and older residents 65 years or older (85%). Seven out of ten (70%) see tourism development on GKI as playing a critical role in the longer term recovery of Central Queensland. Interestingly, more Gen Y residents (18-34, 80%), those with a trade training and year 12 education (75%) were more likely to feel it was important whilst those with tertiary education (59%) were less likely to feel this way about the tourism development on GKI.

Support for investment in infrastructure projects and new development on Great Keppel Island is almost universal (90% of which 12% is conditional). This level of support is consistent with how Queenslanders rank various economic strategies e.g. "locally tailored solutions," and "targeting infrastructure investments that catalyse economic development opportunities" in the ongoing Queensland wide tracking study. The majority (88%) support for the government investing in infrastructure projects to stimulate further private sector investment into tourism in the region.

Unprompted awareness of the GKI rejuvenation project is moderate amongst the Livingstone population (54%). The majority of local residents (80%) support investment in power, water and data connections from the mainland to GKI after being provided with further information about the rejuvenation project. Support is higher amongst younger residents (18-34: 94%, 35-44: 84%) and lower amongst older generations (55+: 68%). Those that are supportive feel the GKI rejuvenation project will 1) create jobs, 2) that the GKI is a great resource that's currently underutilised, 3) the investment is seen as a hygiene factor for GKI and 4) inherently a Government responsibility. The fence sitters require more information and statistics on the following areas before committing their support: 1) environmental impact, 2) return on investment/can the money be better spent elsewhere and 3) whether the size of investment/development will impact the island's charm and natural beauty. Opposers are already convinced that 1) there will be environmental impact, 2) the island's natural beauty will be ruined by investment/development activities and 3) Government investment can be better spent elsewhere or the private sector should also pay, not just ratepayers.

**Overall, there's a stronger preference for investment in major infrastructure. This preference is again stronger amongst those who already believe in the importance of tourism development on GKI. Those who think tourism development on GKI is less important, tend to opt for smaller scale investment like visitor infrastructure and public facilities.**

Over half of Livingstone residents (63%) believe that it's essential/very important to incorporate renewable energy as part of the planned power infrastructure. Overall, there's a stronger preference for investment in major infrastructure (36%). This preference is again stronger amongst those who already believe in the importance of tourism development on GKI (44%). Three out of ten preferred broader investment into general infrastructure works to support on-island development (29%) whilst a quarter prioritised investment into smaller scale infrastructure (26%). Those who think tourism development on GKI is less important, tend to opt for smaller scale investment like visitor infrastructure and public facilities (43%).

**Livingstone is largely in line with the rest of Queensland when rating the adequacy of Government support across a range of issues.** Half of the residents believe that there's good community support (50%), this is followed by mental health support (39%) and SME support (38%). Small business owners and sole traders, especially those affected by the pandemic, are more polarised in their view of the Government's performance. Livingstone residents are most satisfied with information provision on The stages of restrictions easing, followed by the State Recovery Strategy, How the QLD economy will recover and Initiatives to stimulate the local economy. There's a perceived gap in information provision on economic matters, especially on specific initiatives to support the local economy, representing room for improvement. Livingstone residents are split in their opinions when it comes to allowing travel if other states have a similar number of cases. Those whose employment was negatively affected tend to favour re-opening more. There's a clear consensus on border closure with hot spot states and towns. This remains true even amongst tourism supporters and those whose employment was negatively affected by the pandemic.

# SETTING THE SCENE - QUEENSLAND



# 3



# IS QLD GOVERNMENT DOING ENOUGH?

There's a low to moderate level of acknowledgement that the Government is doing enough to support small businesses and the community through this pandemic.

This sentiment is likely associated with low awareness of what the Government is doing, as indicated in low campaign recognition for "Unite and Recover." There's an important opportunity to increase awareness of both the Roadmap and the campaign.

**39%**

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

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

Total Wave 3 n = 76

**42%**

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

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

Total Wave 3 n = 1021

**52%**

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

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

Total Wave 3 n = 1021

**47%**

**Aware of the Roadmap**

↑ Aware of Economic Strategy (78%)

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

**77%**

**Roadmap is helpful**

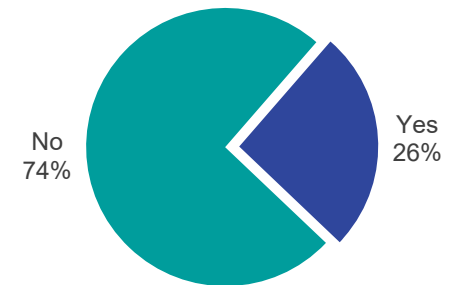
↓ Central HHS (47%)

Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021

## Unite and Recover – Campaign Recognition

**26% is above Ipsos Norm (25%)**

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



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



# OPENING BORDERS AND EASING RESTRICTIONS

## Support/opposition against re-opening borders

**47%**

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

Q59 If some state and territories have the same number or less cases of Covid-19 than Queensland, should travel between these states be allowed? (i.e. the borders between these states and territories be re-opened)  
Total Wave 3 n=1021

**82%**

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

Q66 For states and territories continuing to record hot spots / 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

**85%**

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

Q67 For towns or regions continuing to record hot spots / multiple new cases per day, should travel be allowed to Queensland? (i.e. the borders open for people coming from these specific areas be re-opened)  
Total Wave 3 n=1021

Opinions are split amongst Queenslanders when it comes to opening borders for states with a similar number of cases. There is however almost a universal consensus that borders should remain closed with hot spot states and towns.

## Enough information from the Government regarding...

**93%**

**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; Total Wave 3 n=2021.

**67%**

**Stages of restrictions easing**

↑ Wave 2 (71%)  
↑ 65+ years (77%)

**76%**

**Current coronavirus level of restrictions**

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

**36%**

**How the Queensland economy will recover**

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

Satisfaction with adequate information provision is highest for current restrictions and how to prevent spread. Queenslanders remain the least satisfied with the adequacy of information on how the economy will recover, despite a significant improvement compared to wave 2.

# ZOOMING INTO LIVINGSTONE

**Economic & Employment impact**

4

# EMPLOYMENT IMPACT

The level of impact in Livingstone is relatively comparable to broader Queensland.  
 Individuals are less impacted than small businesses and those self employed (30% vs. 56% negatively impacted).

## Q2. Coronavirus affected work situation EMPLOYED

	QLD	LVS
No	51%	50%
Yes, I am working more	6%	11%
Yes, I am working less than I would like.	19%	8%
Yes, I have been stood down temporarily.	7%	6%
Yes, I have lost my job.	7%	6%
Yes, it has affected my work situation in another way.	10%	19%
Prefer not to say	2%	0%

Around **30% negatively** impacted

Q2/9 Has the Coronavirus affected your work situation?  
 Total Wave 3 n=1021; Total Employee n=551; Livingstone n=112.

## Q4. Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

	QLD	LVS
No	27%	20%
Yes, I am working more	4%	8%
Yes, my business has less income.	42%	40%
Yes, I have had to close my business temporarily.	23%	13%
Yes, I have had to shut down my business permanently.	0%	4%
Yes, it has affected my work situation in another way.	4%	16%
Prefer not to say	0%	0%

Around **56% negatively** impacted.  
**16%** reported fluctuations and having to change their usual practice.

Q4/8 Has the Coronavirus pandemic affected your work situation?  
 Total Wave 3 n = 1021; Total Self Employed/Business Owners n=61; Livingstone n=26.

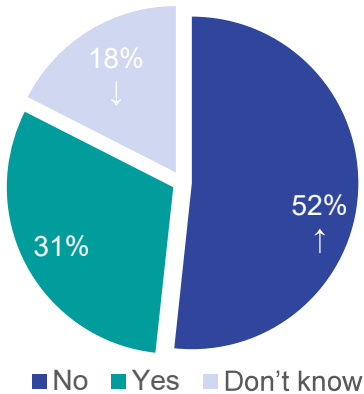
# TAKING ADVANTAGE OF JOBKEEPER

Small businesses are taking advantage of JobKeeper with close to half (43%) accessing the Government stimulus package to pay for their employees.

Individual workers report a lower level of access (31%) and some are uncertain (18%).

## Individuals' access to Jobkeeper

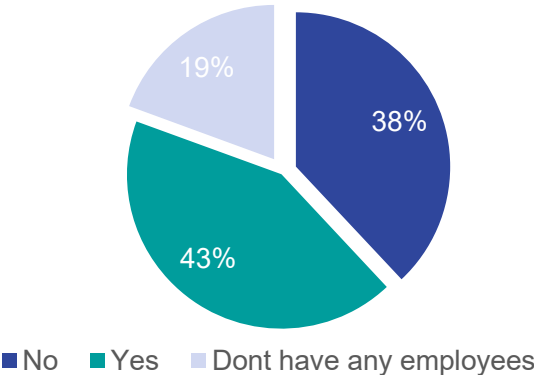
Q3. Has your employer been accessing Job Keeper Payment?



Base n = 56; total n = 200.

## SMEs' access to Jobkeeper

Q5. Have you been accessing Job Keeper Payment for your employees?



Base n = 21; total n = 200.

# ZOOMING INTO LIVINGSTONE

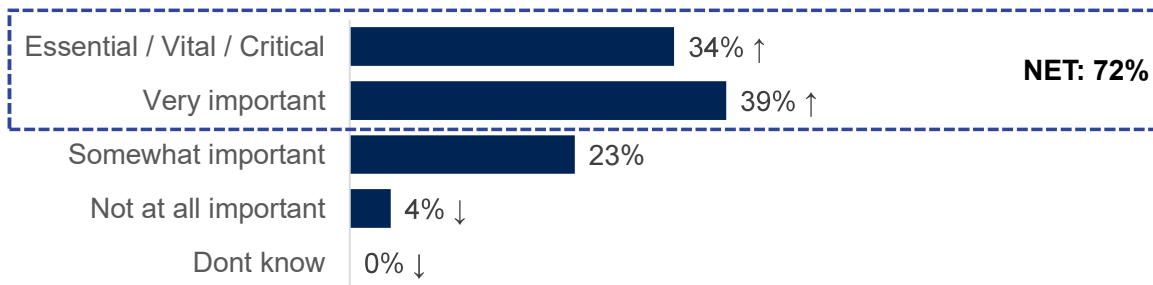
The importance of the tourism sector

5

# IMPORTANCE OF THE TOURISM SECTOR

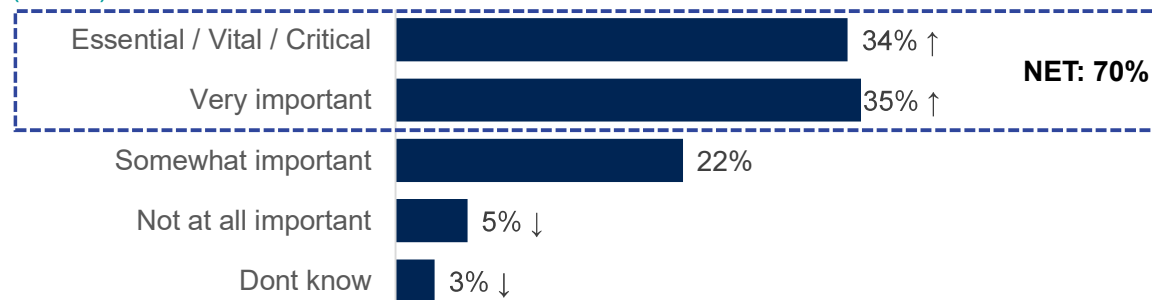
There's strong support and belief in the tourism sector as playing an important role in the overall economic recovery and growth of Central Queensland.

Q6. How important is the tourism sector for the future growth of your region's economy? (n=200)



**Females (82%) and older residents (85%)** of Livingstone see tourism as having a greater importance to the growth of the region.

Q7. How important do you think tourism development on Great Keppel Island is for the longer term recovery and growth of tourism jobs in Central Queensland? (n=200)



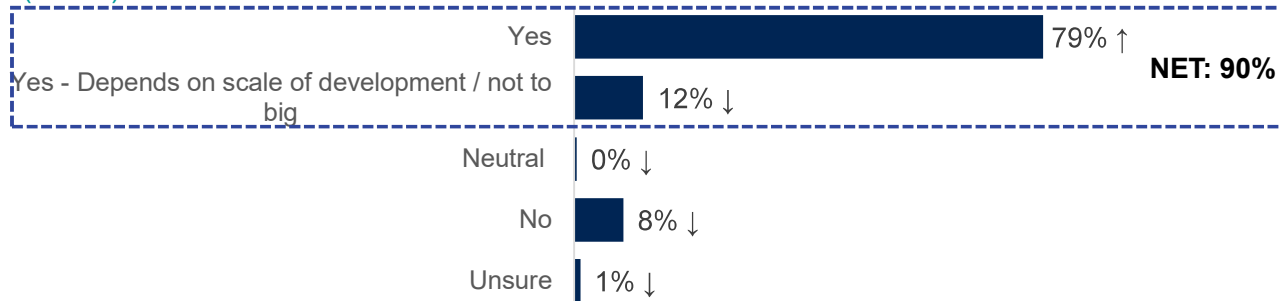
Interestingly, more **Gen Y residents (18-34, 80%)** see tourism development on GKI as playing a critical role in the longer term recovery of Central Queensland.

Support is also **higher amongst those with trade training** and year 12 education (75%) and **lower amongst those with tertiary education (59%)**

# SUPPORT FOR INVESTMENT

Support for investment in infrastructure projects and new development on Great Keppel Island is universal (90% of which 12% is conditional). This level of support is consistent with how Queenslanders rank various economic strategies e.g. “locally tailored solutions,” and “targeting infrastructure investments that catalyse economic development opportunities.”

Q8. Do you support significant new investment and development on Great Keppel Island? (n=200)



Q9. Do you support Government investing in infrastructure projects to stimulate further private sector investment into tourism in the region? (n=200)



## Ranking of economic strategies - Wave 3

%	Top 3 Rank
Developing locally tailored economic, infrastructure and workforce solutions	62%
Building the skills capacity of the Queensland workforce to attract and retain talent	59%
Targeting infrastructure investments that leverage previous investment and catalyse economic development opportunities	47%
Providing a competitive business environment to enable investment	38%
Investing in research development and innovation	33%
Facilitating growth in clean energy and technology	33%
Accessing global markets to reinforce key existing markets and consider opportunities to diversify	24%
Enabling digital connectivity and literacy	21%
Investing in smart technologies, devices and industries	19%

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

# ZOOMING INTO LIVINGSTONE

## The GKI Rejuvenation Project

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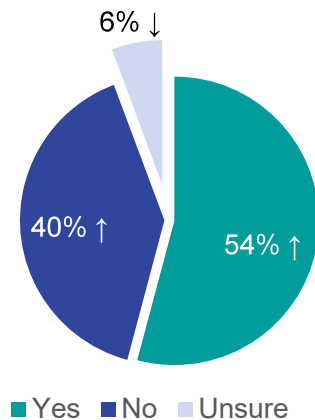


# AWARENESS & SUPPORT FOR GREAT KEPPEL ISLAND (GKI) REJUVENATION PROJECT.

Unprompted awareness of the GKI rejuvenation project is moderate amongst the Livingstone population (54%).

The majority of local residents support investment in power, water and data connections from the mainland to GKI after being provided with further information about the rejuvenation project.

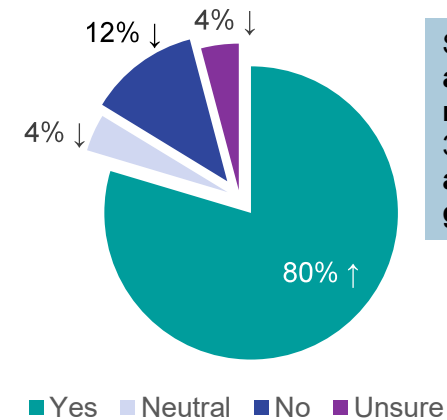
Q10. Aware of the project to deliver common-user power and water infrastructure (n=200)



## Information prompt

*"The Department of State Development, Tourism and Innovation is leading the Great Keppel Island (GKI) Rejuvenation Project. The project aims to facilitate the growth of tourism on GKI, and in the surrounding region, with the Queensland Government planning a significant investment towards common-user tourism infrastructure to encourage private sector investment and support existing tourism operators, residents, and future tourism development projects. This would support short term employment for construction and for long-term tourism jobs."*

Q11. Support the Queensland Government's proposal to invest in power, water and data connections (n=200)



Support is **higher amongst younger residents** (18-34: 94%, 35-44: 84%) and **lower amongst older generations** (55+: 68%).

# REASONS FOR SUPPORT AND OPPOSITION

## Supporters (80%)

Most support the GKI rejuvenation project because of 4 key reasons: 1) **job** creation, 2) GKI is a **great resource** that's currently **underutilised**, 3) the investment is seen as a **hygiene factor** for GKI and 4) **inherently a Government responsibility**.

"The private sector is not capable of delivering on some of those items. Basic infrastructure like water, power etc. would need Government help."

"It has been years that they were going to do something and nothing has been done yet. It's long overdue."

"I know a lot of people out of work. Even short term employment would really help."

"To promote employment in the Central Queensland region. There's no work for those under 25 here."

"Because GKI is a great resource that is being underutilised. I wish more people get to experience its beauty."

## Fence sitters (8% neutral & unsure)

The fence sitters require more information and statistics on the following areas before committing their support: 1) **environmental** impact, 2) **return on investment/** can the money be better spent elsewhere and 3) whether the size of investment/development will **impact the island's charm and natural beauty**.

"Because I'm worried about the impact on the area. If they want to go across the ocean, what damage it could do to the environment."

"I'm not for all in and absolute trash. There has got to be a good balance between the environment and what tourism wants."

"I don't know anything about it e.g. how much it costs, who's paying for it."

"I would need the stats. I don't know the economics of it all. I don't have the numbers."

## Opposers (12%)

Opposers are already convinced that 1) there will be **environmental** impact, 2) the **island's natural beauty** will be ruined by investment/development activities and 3) Government investment can be **better spent elsewhere** or the **private sector should also pay**, not just ratepayers.

"Because I have seen power and water put over to islands before and seen them ruined. It would open the island to resorts and absolutely ruin the beauty of the island."

"Because it's one of the last untouched islands on the Queensland coast. I think GKI is perfect as it is. I don't want it to be over-developed and exploited."

"I think the money is better elsewhere, more essential areas like health and aged care."

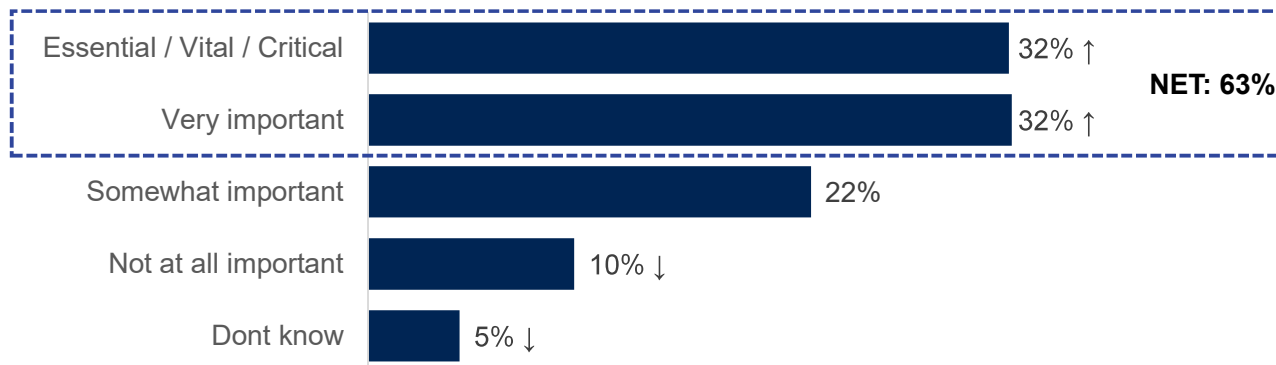
"At this point, I think there is more important projects to attend to right across Queensland."

"I think the Government puts too much money into helping the private sector. Private organisations should be paying on their own."

# RENEWABLE ENERGY

Over half of Livingstone residents believe that it's essential/very important to incorporate renewable energy as part of the planned power infrastructure.

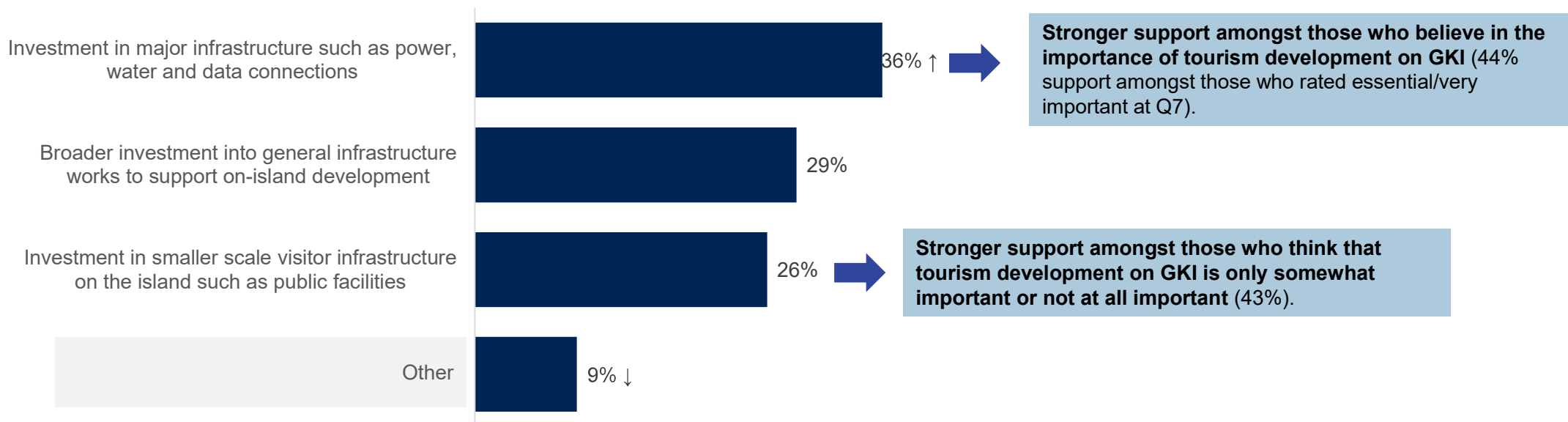
Q13 How important to you is it that any power infrastructure between the mainland and Great Keppel Island is designed to allow renewable energy sources to be incorporated into the network? (n=200)



# PREFERENCE FOR LONG TERM TOURISM DEVELOPMENT

Overall, there's a stronger preference for investment in major infrastructure. This preference is again stronger amongst those who already believe in the importance of tourism development on GKI. Those who think tourism development on GKI is less important, tend to opt for smaller scale investment like visitor infrastructure and public facilities.

Q14 In your opinion, what would best support long-term tourism development on Great Keppel Island? (n=200)



# ZOOMING INTO LIVINGSTONE

Government's perceived  
performance

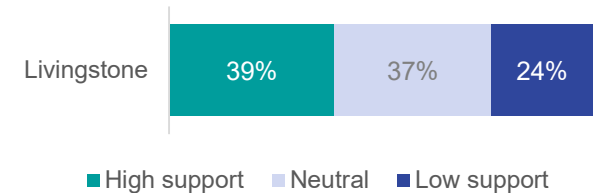
7

# GOVERNMENT'S PERCEIVED PERFORMANCE

Livingstone is largely in line with the rest of Queensland when rating the adequacy of Government support across a range of issues. Half of the residents believe that there's good community support (50%), this is followed by mental health support (39%) and SME support (38%).

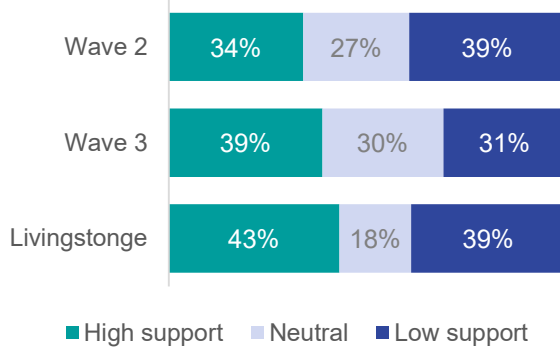
Small business owners and sole traders, especially those affected by the pandemic, are more polarised in their view of the Government's performance.

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



Q19 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government doing enough to support the mental health and wellbeing through this pandemic and recovery?  
Livingstone n=200

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

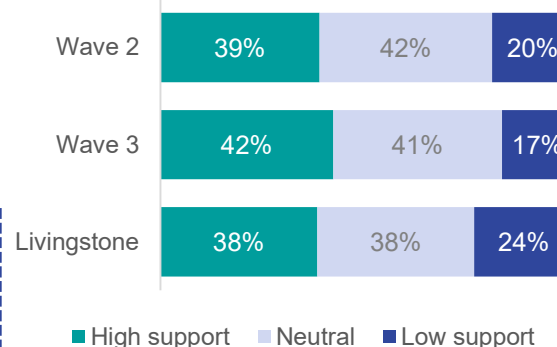


Q49/Q16 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Are you getting enough support from the government as a small business owner or self-employed?

Total Wave 2 n = 69; Wave 3 n=76; Livingstone n=26

Unaffected SMEs (No + work more):  
**29%/55%/16%**  
Affected SMEs (less income, business closed, work situation affected):  
**48%/4%/48%**

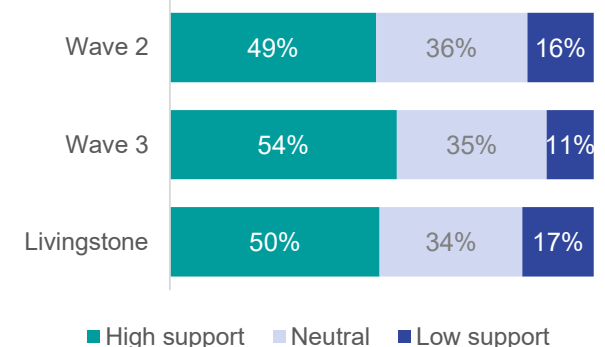
Is the Queensland Government doing enough to support **small business** through this pandemic and recovery?



Q50/Q17 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government doing enough to support small business through this pandemic and recovery?

Total Wave 2 n = 1018; Wave 3 n=1021; Livingstone n=200

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



Q51/Q18 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government doing enough to support the community through this pandemic and recovery?

Total Wave 2 n = 1018; Wave 3 n=1021; Livingstone n=200

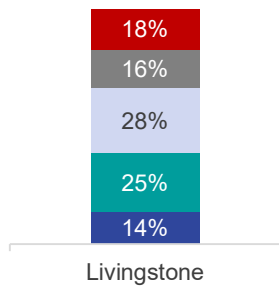


# THE GOVERNMENT'S INFORMATION PROVISION

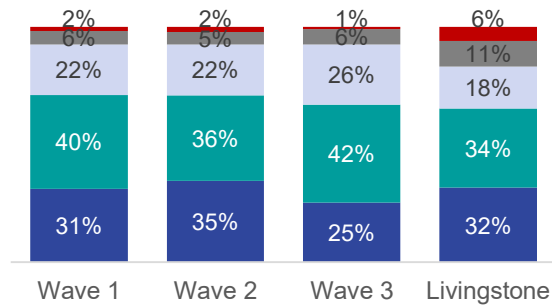
Livingstone residents are most satisfied with information provision on The stages of restrictions easing, followed by the State Recovery Strategy, How the QLD economy will recover and Initiatives to stimulate the local economy.

There's a perceived gap in information provision on economic matters, especially on specific initiatives to support the local economy, representing room for improvement.

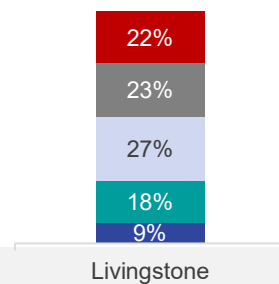
State Government's COVID-19 Economic Recovery Strategy



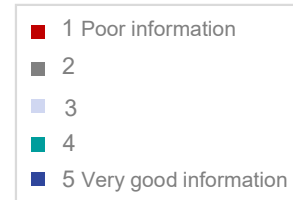
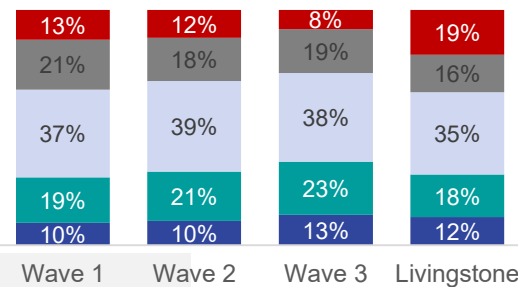
The stages of restrictions easing



Strategy Initiatives planned to stimulate your economy in your local area



How the Queensland economy will recover

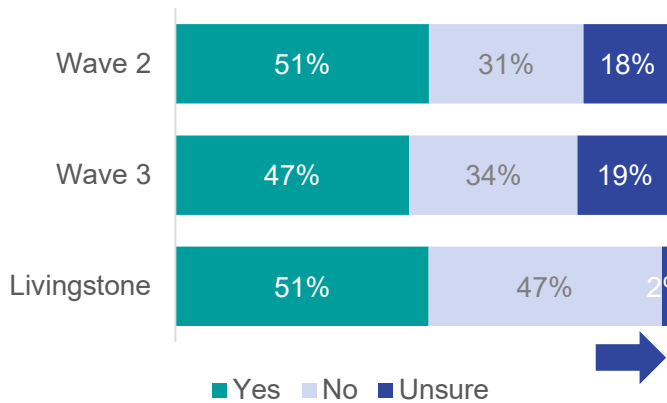


# BORDERS CLOSED

Livingstone residents are split in their opinions when it comes to allowing travel if other states have a similar number of cases. Those whose employment was negatively affected tend to favour re-opening more.

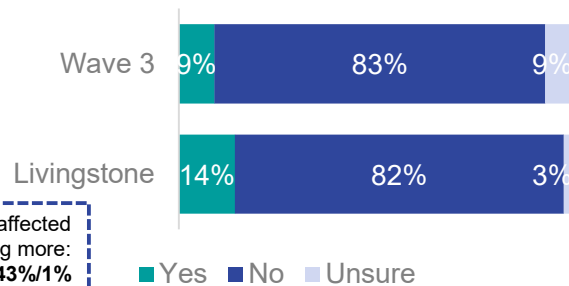
There's a clear consensus on border closure with hot spot states and towns. This remains true even amongst tourism supporters and those whose employment was negatively affected by the pandemic.

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

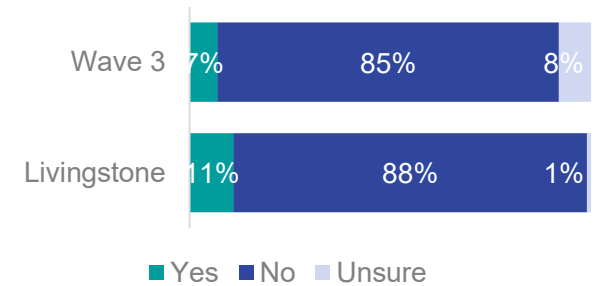


Individuals unaffected or are working more: **56%/43%/1%**  
 Individuals who lost their job or whose income was reduced: **75%/25%/0%**

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



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



Q59/Q20 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; Wave 3 n=1021; Livingstone n=200

Q66/Q21 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, Livingstone n=200

Q67/Q22 For towns or regions continuing to record hot spots / multiple new cases per day, should travel be allowed to Queensland? (i.e. the borders open for people coming from these specific areas be re-opened)

Total Wave 3 n = 1021, Livingstone n=200





# DEMOGRAPHICS



# 8



# SAMPLE

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

	n	Male	Female	NET
Age and Gender	18-34 years	26	27	53
	35-64 years	50	48	98
	65+ years	19	30	49
	NET	95	105	200

	Total	
Diversity	Aboriginal or Torres Strait Islander	12
	Culturally or linguistically diverse background	31
	Person with disability	16
	Person most at risk	59

	n	
Education Level	Year 10 or equivalent or below	42
	Year 12 or equivalent or below	37
	Trade/Technical/Vocational training	46
	Undergraduate Degree	51
	Postgraduate Degree	20
	Prefer not to say	4

## Industry prior to Coronavirus pandemic

	n
Agriculture, Forestry and Fishing	11
Mining	20
Manufacturing	0
Electricity, Gas, Water and Waste Services	7
Construction	10
Wholesale Trade	1
Retail Trade	3
Accommodation and Food Services	7
Transport, Postal and Warehousing	8
Information Media and Telecommunications	3
Financial and Insurance Services	7
Rental, Hiring and Real Estate Services	0
Professional, Scientific and Technical Services	1
Administrative and Support Services	1
Public Administration and Safety	3
Education and Training	21
Health Care and Social Assistance	25
Arts and Recreation Services	3
Other Services	12

## Employment status before Coronavirus pandemic

	n
Employed permanent full-time or part-time	97
Employed, casual/temporary	15
Self-employed / business owner	26
Unemployed (looking for work)	5
Not working or looking for work	56
Prefer not to say	1

# THANK YOU



GAME CHANGERS

