

# UNITE AND RECOVERY WAVE 4

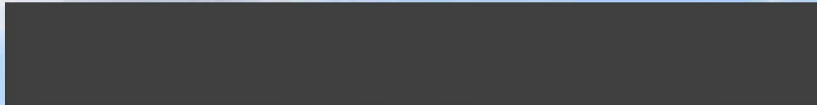
For Queensland Department of Premier and Cabinet

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Prepared by Ipsos

12 July, 2020

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GAME CHANGERS



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# EXECUTIVE SUMMARY

# 1

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# EXECUTIVE SUMMARY – IMPACT AND WORRIES

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

## Queenslanders work slowly returning to normal

**47%**

**Employees work impacted**

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

**74%**

**Self-employed / business owners impacted**

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

## Queenslanders continue to feel we act appropriately to COVID-19 threat

**79%**

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

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

## Keep Job Keeper going

**21%**

**Job Keeper payment should continue**

**48%**

**Continue for only those worst hit businesses**

**31%**

**Finish as planned on 24 September 2020**

The majority of Queenslanders support the continuation of Job Keeper (72%, of which 48% is conditional support for businesses worst affected).

## Biggest worry about Covid-19

**28%** Impact on Australian economy

**19%** Health of friends and family

**12%** Risk to my health

Interestingly, health risk is perceived to be increasingly imminent with Queenslanders more worried about COVID-19's risk to their **personal** health (12%, up from 8%) this wave. Meanwhile, concerns about feeling isolated has decreased with the relaxation of restrictions.

## Biggest worry about Economy

**37%** Impact on Australian economy

**9%** Losing income

**9%** Losing job

**8%** Health of friends and family

Impact on the Australian economy continues to be the top concern, followed by risk to family and friends, risk to self and losing income.

# DASHBOARD – IMPACT

Question	Measure	Benchmark (Wave 1) %	2nd wave (Wave 2) %	Last wave (Wave 3) %	This wave (Wave 4) %	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	38	51	52	
	Impacted (red)	56	61	48	47	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	16	27	26	
	Impacted (red)	79	82	73	74	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	9	5	4	
	Appropriate response (green)	78	79	82	78	
	Under-reacting (orange)	15	12	12	17	
Q20b Most worried about in regards to economic impacts from COVID-19 (top 5)	Impact on the Aust economy (red)	-	36	41	37	
	Losing my job (orange)	-	10	9	9	
	Losing income due to salary reductions or investments (green)	-	12	8	9	
	Unable to find a job/unemployment (purple)	-	7	8	7	
	Risk to my friends/family health (blue)	-	7	8	8	

# EXECUTIVE SUMMARY – EXPECTATIONS & CONFIDENCE

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

## Expectations for the Economy

**46%** Life will be the same after restrictions ease

**20%** Life will be better after restrictions ease

**17%** Life will be worse after restrictions ease

**18%** Unsure

Queenslanders' expectations about the economy has remained consistent across the 4 waves to date with almost half having a negative outlook (46% believing that the worst is yet to come). There's considerable uncertainties with close to 1/5 of the population not knowing what to expect.

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

**55%**  
Agree QLD Gov can manage the economic recovery

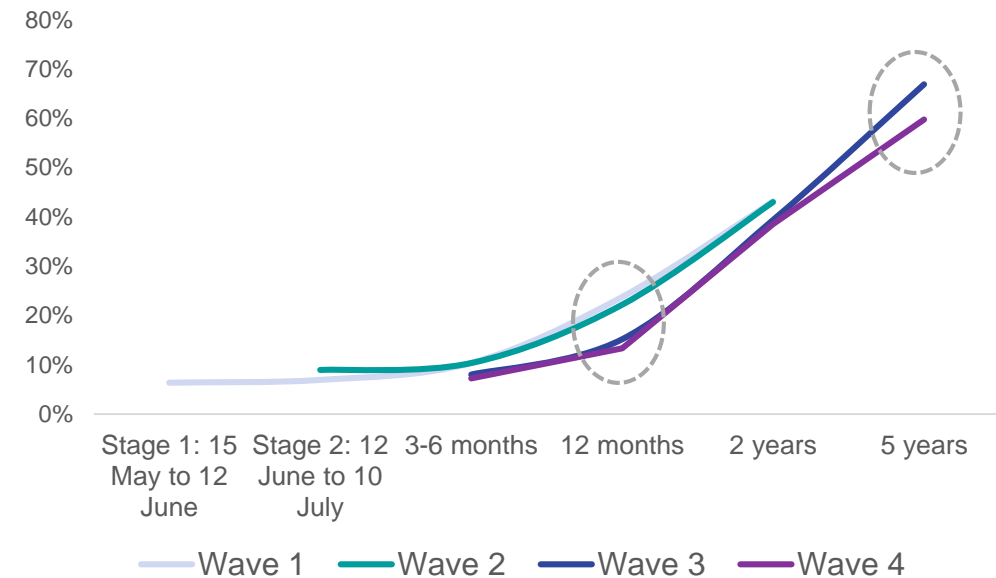
Queenslanders are split in their confidence in the Queensland Government's management of the economic recovery, with half feeling confident and the other half feeling either neutral or not confident. On a positive note, public confidence grew in wave 2 and has maintained a positive momentum.

**58%**  
Agree QLD Gov are handling for economic advantage in long run

Similarly, half of the population believes that the Government has been handling the COVID-19 crisis to the State economic advantage in the long run. There isn't a significant issue with distrust or lack of confidence. Sentiment is driven by a lot of uncertainties with a third of the population sitting on the fence, feeling undecided.

## Optimism about economic recovery starting to decline

Queenslanders are becoming less optimistic of a speedy economic recovery, with the majority believing that the economy will fully recover in 5 years time (60%). Furthermore, early positive projections of a 12 month recovery in wave 1 & 2 has decreased in wave 3 and 4, making room for a 5 year projection.



# DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (Wave 1) %	2nd wave (Wave 2) %	Last wave (Wave 3) %	This wave (Wave 4) %	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	48	46	46	
	At their worst now (orange)	19	17	23	20	
	Worst is behind us (green)	14	17	14	17	
Q22 As restrictions are relaxed, confidence that Queensland's economy will have made a full recovery to pre-COVID-19 levels in ...	3-6 months (red)	10	10	8	7	
	12 months (orange)	24	22	15	13	
	2 years (blue)	43	43	39	39	
	5 years (green)	-	-	67	60	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	51	55	55	
	Not confident (red)	18	16	14	14	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	54	56	58	
	Not confident (red)	-	15	12	11	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	35	30	25	

# EXECUTIVE SUMMARY – ECONOMIC STRATEGY & INITIATIVES

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

## Awareness and understanding about economic recovery strategy associated with positive sentiment

**35%**

Agree they have enough information on how QLD economy will recover

There's still room for improvement when it comes to communicating about economic recovery, despite positive movements over the past 4 waves.

**25%**

Aware of any major economic initiatives

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

**23%**

Aware of Economic Strategy

Once awareness is achieved, understanding is moderate and support is relatively strong. The next stepping stone in building support is to improve familiarity and understanding. Awareness is not enough, people need to understand the strategy better before they can support it. As evident in the data, those who understand the strategy well are significantly more likely to support it (86% vs. 41% and 24%).

**48%**

Understands the Economic Recovery Strategy

**61%**

Support the Economic Recovery Strategy

**33%** neutral

**6%** oppose

Improving familiarity and understanding of the Strategy is needed to ultimately convert the fence sitters (33%) to supporters (61%). Those who support the strategy feel it will lift the economy (46%) as well as positive sentiment for handling the restrictions in stages (54%) and creating or keeping people in jobs (33%), doing the right thing by keeping borders closed (40%) and keeping us safe (40%). Lack of information for neutrality or opposition.

### Aware / not aware of Economic Recovery Strategy

Confident Queensland Government is a trustworthy information source (Q3)

**77%** aware Vs **62%** unaware

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

**87%** aware Vs **74%** unaware

Good information about current coronavirus level of restrictions (Q1)

**90%** aware Vs **71%** unaware

Good information about the stages of restrictions (Q1)

**83%** aware Vs **61%** unaware

Good information about how the economy will recover (Q1)

**47%** aware Vs **25%** unaware

**86%**

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

**24%**

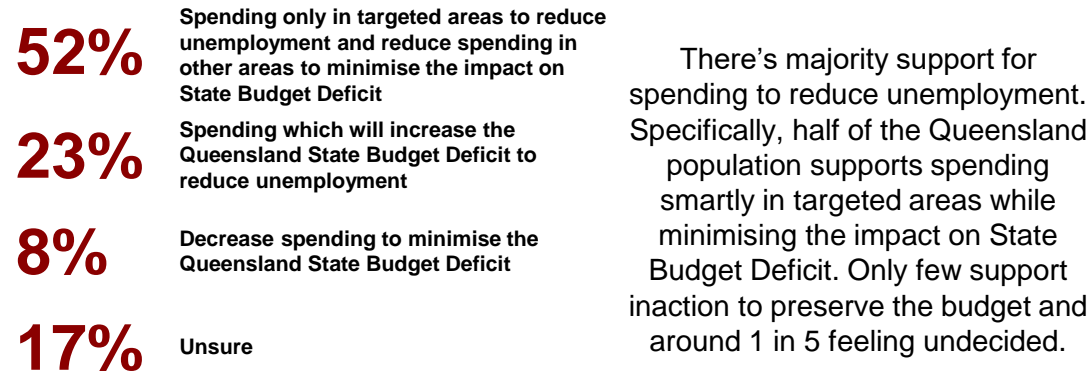
Queenslanders who aware of the strategy and did not understand it well were supportive.



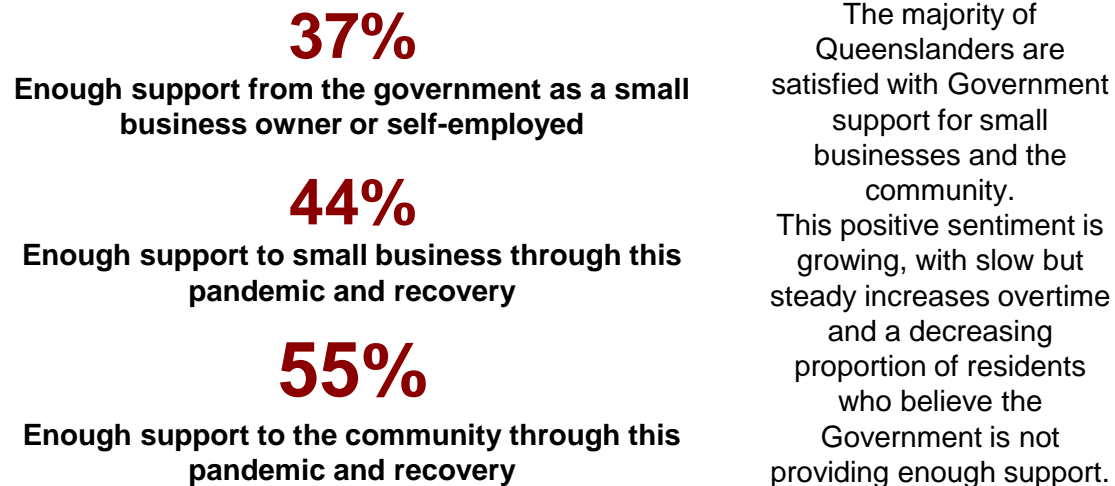
# EXECUTIVE SUMMARY – SUPPORT FOR STRATEGIES

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

## Prudent spending to balance the budget.



## Positive sentiment about Gov support is growing.



## Building skills, local solutions, and targeted infrastructure investments rank as most important.

Consistent with previous waves, the top strategies to focus on include: 1) Building the skills capacity of the Queensland workforce, 2) Developing locally tailored economic solutions, and 3) Targeting infrastructure investments that leverage previous investment.



# DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (Wave 1) %	2nd wave (Wave 2) %	Last wave (Wave 3) %	This wave (Wave 4) %	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	26	21	23	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	-	52	48	
	Not well (red)	-	-	11	11	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	65	65	61	
	Oppose (red)	-	9	9	6	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	34	39	37	
	Low support (red)	-	39	31	25	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	39	42	44	
	Low support (red)	-	20	17	14	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	49	54	55	
	Low support (red)	-	16	11	10	

# EXECUTIVE SUMMARY – BORDERS OPENING AND EASING RESTRICTIONS

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

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

**81%**

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

There's almost consensus across Queensland that border should be closed to states that continue to record hot spots or multiple new cases per day.

**87%**

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

The Queensland Government enjoys public confidence in managing the easing of restrictions. This confidence significantly grew in wave 2 and has maintained positive momentum since.

**71%**

**Confident Queensland Government can manage the easing of restrictions.**

↓ Wave 1 - May (59%)

↓ Wave 2 (67%)

Non compliance is more prevalent when it comes to health advice, particularly the 1.5 metres distancing rule e.g. indoors, when queuing and in general.

Queenslanders who have personally witnessed non-compliance with health rules.

Physical distancing - 1.5m from others	60%
Physical distancing - 4m <sup>2</sup> per person when indoors	51%
Be patient with service staff who are complying with social distancing	40%
Leaving 1.5m in front of you when queuing	59%
Keeping distance while on public transport	27%
Limit the number of people in a venue by the 4m <sup>2</sup> rule	42%
Wear a mask in public if they have been feeling sick	25%
Leaving contact details at restaurants and cafes	29%

There's wide compliance with restriction rules, with the exception of distancing in public spaces and homes and small venues.

Queenslanders who have personally witnessed non-compliance with social distancing.

4m <sup>2</sup> distancing in public spaces and homes	51%
Maximum 20 in small venues	39%
4m <sup>2</sup> distancing at religious ceremonies	22%
4m <sup>2</sup> distancing at pools/ gyms	24%
4m <sup>2</sup> distancing at saunas/ bathhouses	20%
4m <sup>2</sup> distancing at open homes/ auctions	20%

# DASHBOARD – RESTRICTIONS

Question	Measure	Benchmark (Wave 1) %	2nd wave (Wave 2) %	Last wave (Wave 3) %	This wave (Wave 4) %	Trend
Q30 Life after restrictions	Worse than before (red)	12	14	12	12	
	Same as before (orange)	45	45	48	50	
	Better than before (green)	21	18	19	14	
Q66 Interstate travel should be allowed between states with hot spots and multiple cases	No (red)	-	-	83	81	
	Yes (green)	-	-	9	9	
Q67 Travel allowed to Queensland for towns or regions continuing to record hot spots / multiple new cases per day	No (red)	-	-	85	87	
	Yes (green)	-	-	7	5	
Q24 Confidence the Queensland Government can manage the easing of restrictions	Confident (green)	59	67	71	71	
	Not confident (red)	12	12	10	9	

# EXECUTIVE SUMMARY – ACTIVITIES

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria and during last week of school holidays.

Activities are gradually resuming to normal with less restrictions.

	Done last 7 days	Will do next 7 days
Going out with family/ friends	41%	39%
Dining out	32%	33%
Going out to hotel / pub / bar / club or venue	20%	20%
Non urgent medical appointment	19%	18%
Take a trip away from home / travel	16%	9%
Look for a job/employment	14%	12%
Take a weekend away / mini-break or holiday in Queensland	12%	8%
Dentist / Eye / Skin and other check-ups or test	12%	10%
Play sport	9%	13%
See councillor / other mental health practitioner	5%	5%
Going out to see entertainment / music / movies etc	4%	7%
Take a weekend away / mini-break or holiday in Another State	3%	2%
Take a weekend away / mini-break or holiday Overseas	1%	0%
Take a weekend away / mini-break or holiday in New Zealand	0%	0%

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

# EXECUTIVE SUMMARY – INFORMATION

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

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.

**90%**  
How to prevent the spread of coronavirus

**72%**  
Stages of restrictions easing

**79%**  
Current coronavirus level of restrictions

**35%**  
How the Queensland economy will recover

Queenslanders are generally satisfied with the information provided by the Government and feel that it's sufficient, especially across restriction related topics and how to prevent the virus spread. There's room for improvement when it comes to communicating about economic recovery, despite positive movements over the past 4 waves.

**55%**  
Aware of the Roadmap

**73%**  
Roadmap is helpful

Aware / not aware of Roadmap to Easing Restrictions

Confident Queensland Government is a trustworthy information source (Q3)  
**77%** aware Vs **52%** unaware  
Queensland Government managed better than other states or territories (Q4)  
**86%** aware Vs **64%** unaware  
Good information about current coronavirus level of restrictions (Q1)  
**82%** aware Vs **72%** unaware

The Queensland Government remains a consistently trustworthy source of information. Positive perceptions of the Government's management of the pandemic has been making gains, on top of an already strong base.

**69%**  
Queensland Government is a trustworthy information source

**79%**  
Queensland Government managed better than other states or territories

# DASHBOARD – INFORMATION

Question	Measure	Benchmark (Wave 1) %	2nd wave (Wave 2) %	Last wave (Wave 3) %	This wave (Wave 4) %	Trend
Q1 Getting enough information to feel confident you know about ... <small>(T2B = 5 very good + 4)</small>	How to prevent the spread (red)	91	91	93	90	
	Current level of restrictions (orange)	79	78	76	79	
	Stages of restrictions easing (green)	71	71	67	72	
	How QLD economy will recover (blue)	29	31	36	35	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	73	67	69	
	Disagree (red)	11	8	10	8	
Q4 QLD Govt has managed the pandemic better than other states or territories	Agree (green)	65	72	75	79	
	Disagree (red)	8	9	7	6	
Q34 Aware of QLD Govt's Roadmap to Easing Restrictions	Yes, seen, read or heard	59	52	47	55	
Q36 Helpfulness of Roadmap to Easing Restrictions comms	Helpful (green)	68	71	77	73	
	Not helpful (red)	5	7	5	5	
Q68 See ads	Yes	-	-	26	38	

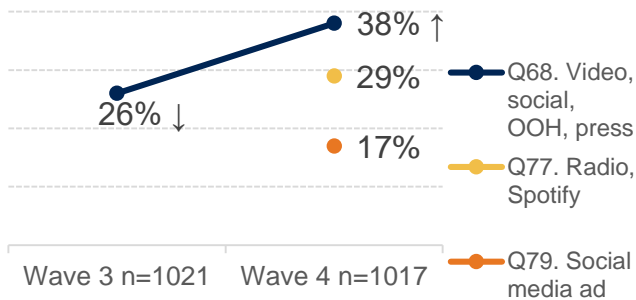
# EXECUTIVE SUMMARY – CAMPAIGN RECOGNITION

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

## Two fifths of Queenslanders recall seeing the campaign (38%), a significant increase from Wave 3.

The campaign prompt had messaging removed to test the message receipt. Less than a third who saw the campaign could recall the intended messages of the advertisement (28%), whereas over half (52%) were unable to interpret the intention of the messaging. Queenslanders were more likely to recall other messages from other campaigns, particularly those around restrictions and health rules. The clearest message coming through from the campaign is boosting tourism/trave within Queensland (10%), The Economic recovery (10%), and to innovate to create jobs for now and in the future (8%).

### Seen any of these ads



**38% is above Ipsos Norm (25%)**

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

Aware of economic initiatives.

**32%** seen Vs **18%** unseen

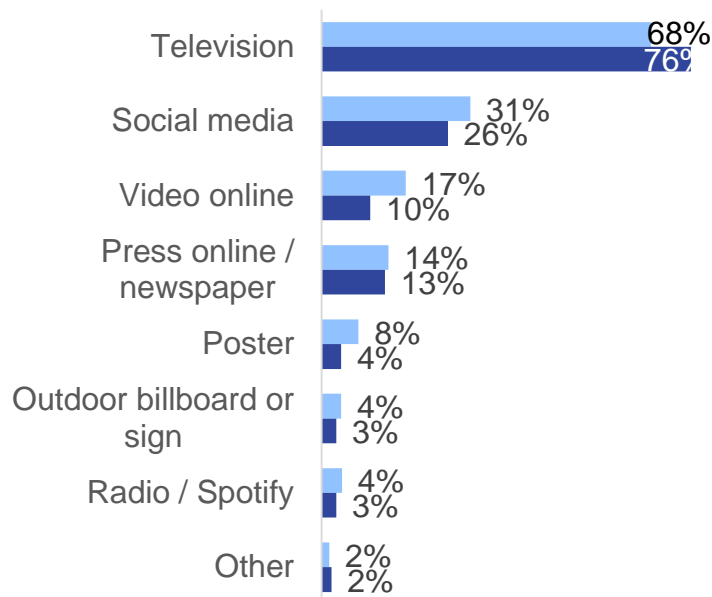
Aware of economic strategy.

**31%** seen Vs **15%** unseen

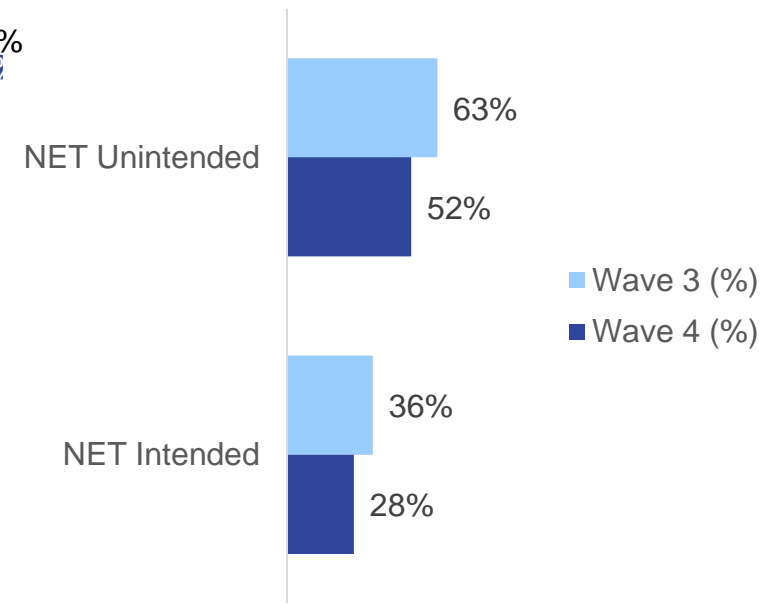
Aware of Roadmap for easing restrictions.

**66%** seen Vs **43%** unseen

### Where ads seen



### Messages you can remember from this ad



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

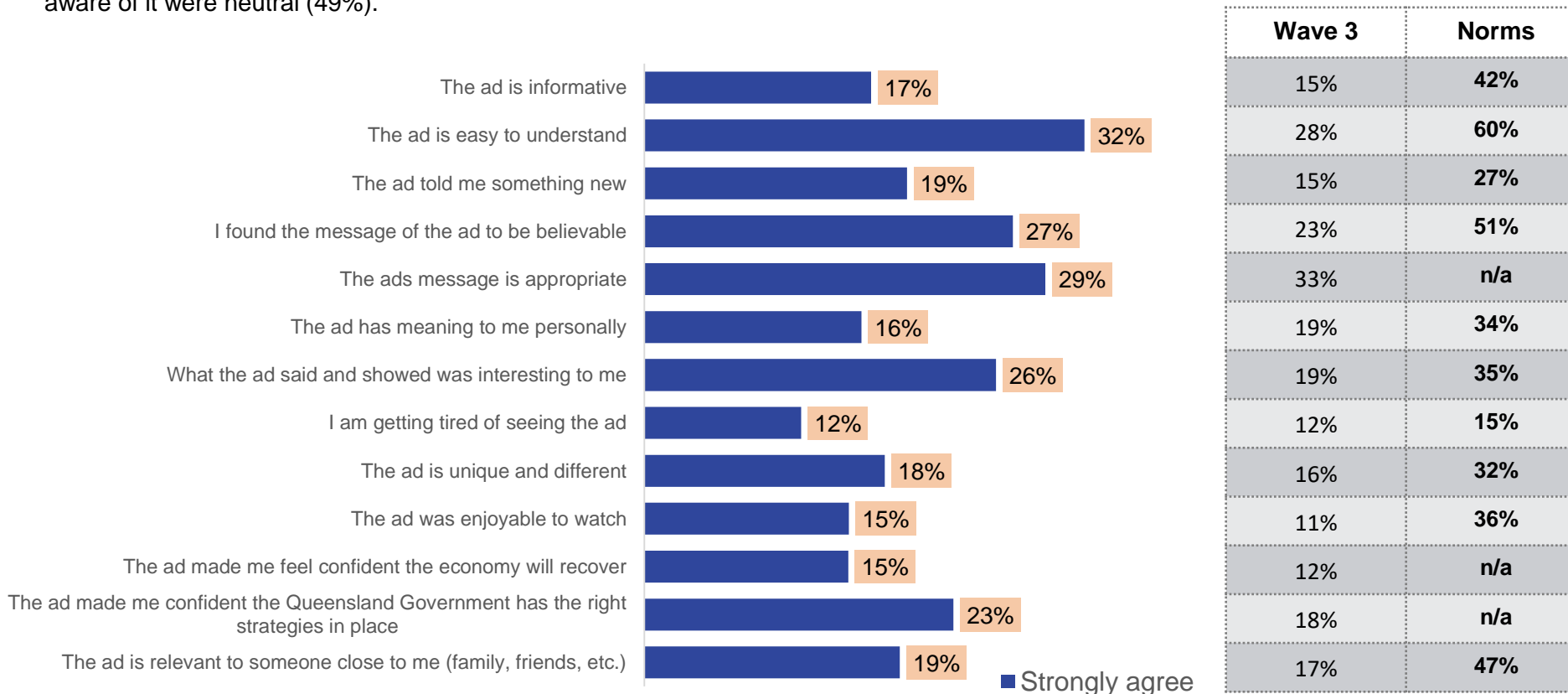
Norm for TV 500 TARPS is 25% and this campaign is 450 TARPS.



# EXECUTIVE SUMMARY – CAMPAIGN DIAGNOSTICS

Wave 4 Survey completed 6-7 July 2020 prior to borders opening between all states but Victoria.

The campaign performs below Ipsos norms on all available diagnostics, however there is slight improvement since Wave 3. The topic of COVID-19 cuts through but if it is not immediately distinguished as informative, important, interesting or relevant, people are switching off and not absorbing key messages. All participants were exposed to the advertisement which ran on both commercial radio and Spotify. Overall, Queenslanders liked the ad (42%), while half of those who were aware of it were neutral (49%). All participants were exposed to the advertisement which ran on both commercial radio and Spotify. Overall, Queenslanders liked the ad (42%), while half of those who were aware of it were neutral (49%).



Of those who recognised  
**42%**  
who said they liked  
the Radio/Spotify  
execution

Of those who recognised  
**36%**  
said they liked the  
Social Media  
execution

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



# RECOMMENDATIONS

## Awareness and understanding increases sentiment for support.

Communication of the Roadmap for Easing Restrictions has been received positively and high awareness is also associated with positive sentiment, however as serious outbreaks have occurred in Victoria, it hasn't altered, awareness and confidence but, Queenslanders **are witnessing non-compliance with social distancing and health rules.** Queensland Government is seen as a trustworthy information source about Covid-19. However, don't overlook the need to continue to talk about health risks as there is still some concern with a second wave forcing another lockdown, and the impact that could have on the economic recovery.

There is confidence amongst Queenslanders in how the Queensland Government is managing the restrictions easing and that we are responding appropriately. With serious outbreaks in Victoria, Queenslanders continue to be aligned with the way Queensland Government is making decisions about border closure to hot spots and states and easing restrictions with health risks as a priority.

Whilst still low, there is a small growth in confidence about how Queensland Government is managing the economic recovery because people are becoming more aware of what is being done. Awareness about the Economic Recovery has increased slightly but understanding how the Queensland Government will support recovery will drive more positive sentiment. Those that are aware of the Economic Strategy agree there is support from Queensland Government and have more positive sentiment for Queensland Government. Awareness of the strategy is not enough as people need to understand it well enough to be supportive.

# CAMPAIGN RECOMMENDATIONS

## Awareness is increasing but increased understanding of the message needed to increase sentiment

The campaign was in market 20 days before this research was completed. (Campaign commenced 18 June 2020). The campaign is competing in a clutter of COVID-19 communications and has a high cut through at 38% recognition of the campaign which is above the norm (26%). There is however an observed underperformance in the creative that is evidenced against a range of norms for advertising diagnostics, although this has improved since Wave 2. There is a campaign effect observed for positive sentiment for QLD Government has managed the coronavirus pandemic better than other states or territories (84% seen 75% unseen) but also pessimism about the economy with feeling the worst is yet to come (50% seen vs 41% unseen). Those that have seen the campaign are more confident with less likely to think we are not managing restrictions well (5% seen vs 12% unseen). There is less uncertainty about how to manage state budget spending (14% seen vs 22% unseen) and feeling they do not understand the economic strategy (7% seen vs 20% unseen) for those who have seen the campaign. Those that have seen the campaign are more likely to have also seen the other government communications (i.e. Initiatives, Economic Strategy and Roadmap) there is no campaign effect observed in relation to sentiment or support. Those that understand the strategy well are overall more positive in their confidence of the Government doing enough and ability to manage the economic recovery, therefore awareness is not enough to increase sentiment, increase in understanding the economic recovery is needed.

Additional time in market may see the performance improve with repeated viewing, however message receipt tends to be low. The execution may need to strive to deliver the “newest information” first and reinforce that the topic communicated is distinctly about the economic recovery. In addition as the campaign will be repeated over time, the creative may need to have a change of device, colour or message up front to draw attention to any new information or messaging. The media buy strategy appears to be aiming to reach 55-60% 18+ years with each person on average seeing the ad 1.5 times. This low frequency high reach strategy may account for higher recall of the campaign but lower message receipt. With COVID-19 related communications we see instant attention but also quick switch off if the information is not new or relevant to the here and now situation. The campaign delivers high level statements about investing for the future and this type of messaging may not be resonating with the audience who are looking for some immediacy in the solutions, particularly around employment solutions and business reopening. Queenslanders are keen to hear about the economy but this may be too early for this type of long term thinking, people are still very focussed on planning for now:

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

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

# BACKGROUND

# 2

# BACKGROUND AND OBJECTIVES

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

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

- The impact of the COVID-19 pandemic on Queenslanders lives, their jobs and the economy
- The community's views around the economic impact and economic recovery
- The community's views about easing restrictions
- Awareness and effectiveness of communication on current restrictions, Government initiatives, strategies and actions.

This report covers the fourth wave of research which was conducted between Tuesday 7<sup>th</sup> July to 8<sup>th</sup> July 2020. Wave 4 took on average 18 minutes to complete the online survey. A sample of n=1017 was sourced from commercial research panels. Subsequent waves of research are included for comparison:

- Wave 1: 12 May to 14 May 2020; average 21 minutes; n=1603
- Wave 2: 3 June to 4 June 2020; average 20 minutes; n=1018
- Wave 3: 23 June to 25 June 2020; average 15 minutes; n=1019
- Wave 4: 7 July to 8 July 2020; average 15 minutes; n=1017

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

**Wave 1:** On Friday 8 May 2020 the Premier Anastacia Palaszczuk released Queensland's Roadmap to Easing COVID-19 restrictions (the Roadmap). The Roadmap outlines a staged approach to giving Queenslanders more freedom to travel, participate in more activities and hold more gatherings. The Roadmap provides sensible and gradual steps to a COVID recovery that will reconnect our communities and keeps our economy moving by supporting business, industry and Queensland jobs.

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

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

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

The limitations for this methodology include:

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

# SAMPLE

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

n	Wave 1									Wave 2									Wave 3									Wave 4								
	SEQ			ROQ			QLD			SEQ			ROQ			QLD			SEQ			ROQ			QLD			SEQ			ROQ			QLD		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
18-39	54	62	116	43	230	273	97	292	389	52	94	146	54	128	182	106	222	328	33	37	70	13	51	64	46	88	134	28	63	91	17	42	59	45	105	150
40-64	159	166	325	152	206	358	311	372	683	82	155	237	80	129	209	162	284	446	114	116	230	97	134	231	211	250	461	89	153	242	90	123	213	179	276	455
65+	175	130	305	135	90	225	310	220	530	70	51	121	72	51	123	142	102	244	125	83	208	127	89	216	252	172	424	128	81	209	132	71	203	260	152	412
Total	388	358	746	330	526	856	718	884	1,602	204	300	504	206	308	514	410	608	1,018	272	236	508	237	274	511	509	510	1,019	245	297	542	239	236	475	484	533	1,017

Diversity	n	Wave 1			Wave 2			Wave 3			Wave 4		
		SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Aboriginal or Torres Strait Islander		7	23	30	13	26	39	7	11	18	7	8	15
Culturally or linguistically diverse background		67	70	137	72	53	125	42	40	82	39	25	64
Person with disability		113	117	230	56	63	119	81	78	159	75	74	149
Person most at risk		240	242	482	141	152	293	151	172	323	185	167	352

# SAMPLE

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

## Education Level

n	Wave 1			Wave 2			Wave 3			Wave 4		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Year 10 or equivalent or below	110	127	237	57	81	138	61	97	158	68	87	155
Year 12 or equivalent or below	123	194	317	84	101	185	87	79	166	84	88	172
Trade/Technical/Vocational training	212	258	470	140	153	293	154	172	326	161	161	322
Undergraduate Degree	184	168	352	134	110	244	131	105	236	146	85	231
Postgraduate Degree	109	99	208	79	63	142	72	52	124	78	50	128
Prefer not to say	8	10	18	10	6	16	3	6	9	5	4	9

## Employment status before Coronavirus pandemic

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

# QUESTIONS CHANGES PER WAVE

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

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

Section	Wave 1	Wave 2			Wave 3			Wave 4		
<b>Screening</b>	SQ1-SQ5	SQ1-SQ5			SQ1-SQ5			SQ1-SQ3		
<b>Demographics</b>	Q37-Q45	Q37-Q45			Deleted Q37, Q39			Q38, Q40-Q44		
<b>Personal impacts</b>	1-15	Deleted Q6 Q14 Q15	Edited Q3 – text edit Q11 – add code 6/7 Q13 – add code 13/14		Deleted Q2, Q5, Q10, Q11, Q12, Q13,		Added Q72			
<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	Delete Q52, Q53, Q54, Q56, Q57, Q58,	Added Codes Wave 3 Q27 (1,2,3,4,5,6) Q28 (10, 11) Q22 (6) Deleted codes Q22 (1,2)	Added Q63, Q64, Q65, Q68, Q70, Q71,			Added Q76, 76a Q77 Q78 Q79 Q80
<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	Q35, Q37, Q39, Q60, Q62	Edits Wave 3 Q28, Q28 (1) Q48a, Q48b, Q48c (added code frame) Deleted codes Q28 (3,4,5) Q29 (1,2,3) Q22 (1,2)	Added Q66, Q67,	Deleted Q27 Q28 Q29 Q59		Added Q73 Q74 Q75a, b



# DETAILED FINDINGS

Online survey Wave 4

3

# IMPACTS

How has the Coronavirus impacted  
Queenslanders work life and their worries

3.1



# WORK CONTINUES TO BE IMPACTED BY CORONAVIRUS

## Coronavirus affected work situation EMPLOYED

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

Q8 Has the Coronavirus pandemic affected your work situation?

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Employee n=520; Wave 3 n=1021 Total Employee = 551; Wave 4 n=1017 Total Employee = 472

## Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

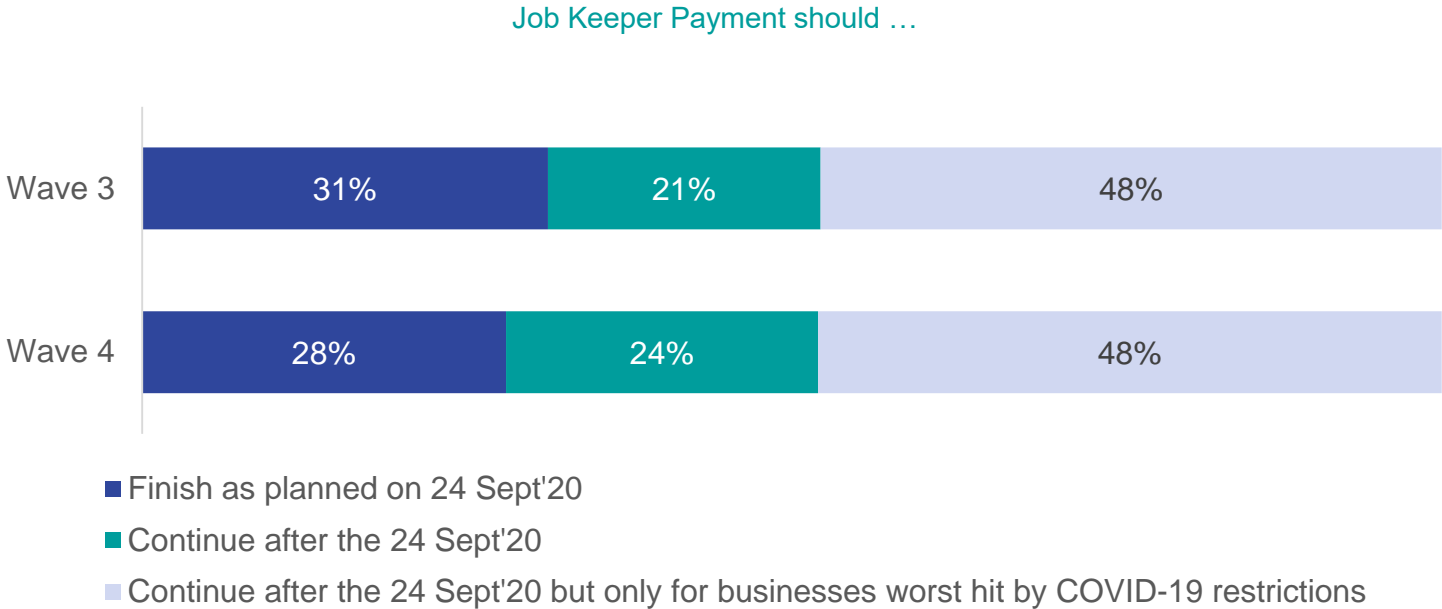
Column %	Wave 1			Wave 2			Wave 3			Wave 4		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	21%	13%	18%	16%	19%	35%	27%	17%	34%	26%
Yes, I am working more	2%	11%	6%	4%	4%	4%	3%	4%	4%	0%	2%	1%
Yes, my business has less income	56%	38%	47%	43%	51%	47%	39%	44%	42%	54%	46%	50%
Yes, I have had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

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

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

# JOB KEEPER SHOULD KEEP GOING

The majority of Queenslanders support the continuation of Job Keeper (72%, of which 48% is conditional support for businesses worst affected).

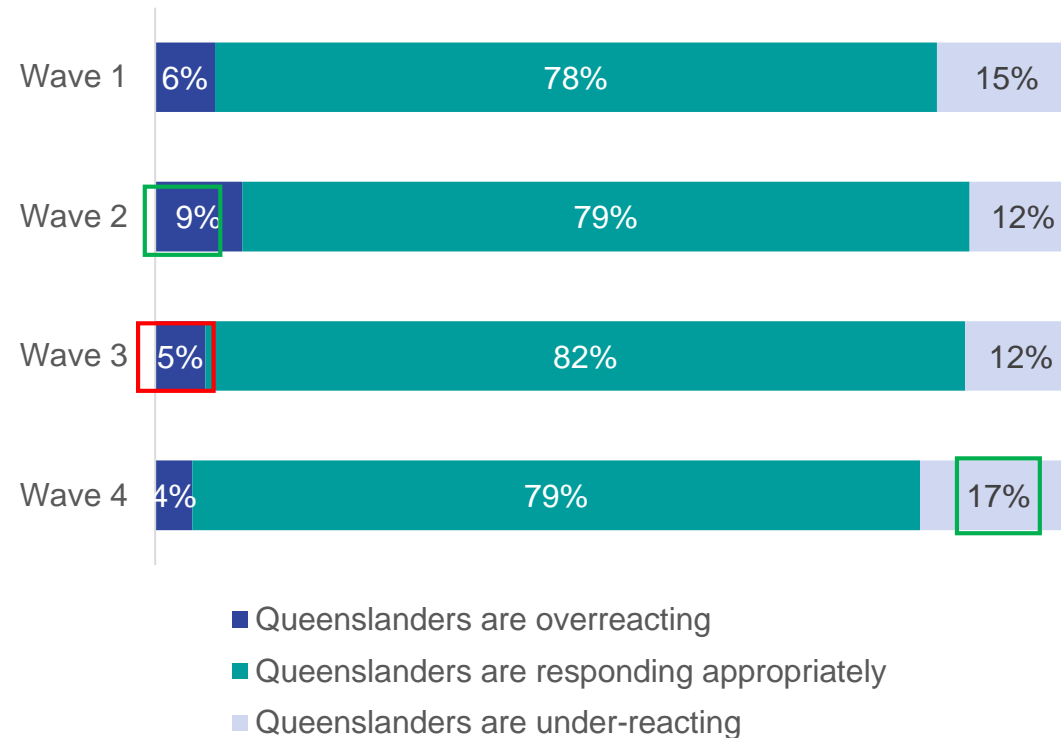


Q72 The Federal Government's Job Keeper payment is open to eligible employers to enable them to pay their eligible employee's salary or wages of at least \$1,500 (before tax) per fortnight ends on 24th September 2020. Which of the following do you agree with most?

Total: Wave 3 n = 1021, Wave 4 n = 1017

# QUEENSLANDERS STILL FEEL WE GOT IT RIGHT

The majority continue to feel Queenslanders are responding appropriately to the COVID threat. There's a slight shift from believing that we are overreacting to under-reacting in wave 4. This coincides with this week's sharp rise in community transmission in Victoria.



There have been over 500 cases reported in VIC w/c 6 July 2020.

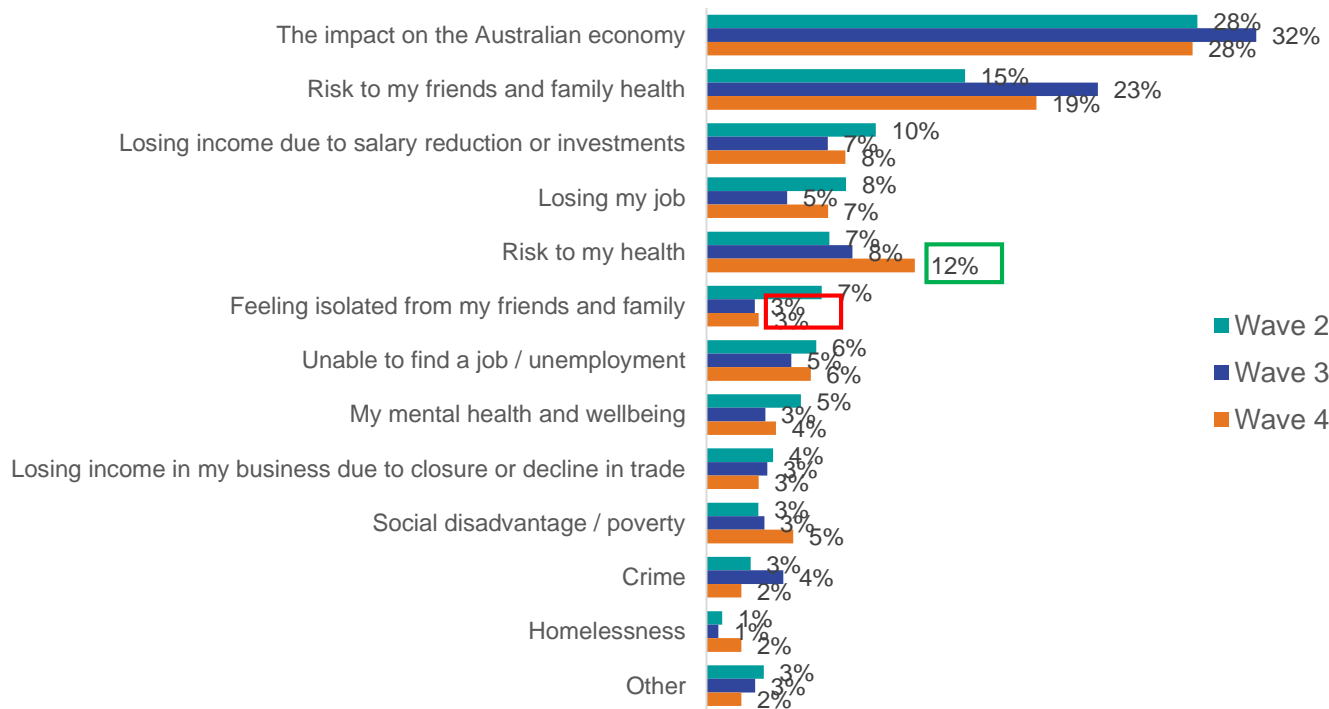
Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

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

# IMPACT ON ECONOMY IS TOP CONCERN

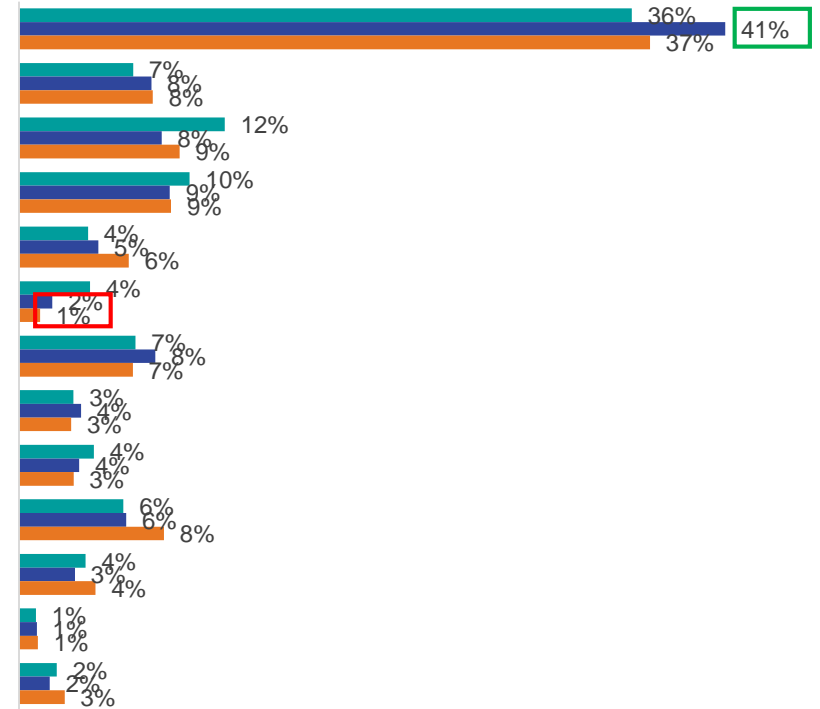
Impact on the Australian economy continues to be the top concern, followed by risk to family and friends, risk to self and losing income. Interestingly, health risk is perceived to be increasingly imminent with Queenslanders more worried about COVID-19's risk to their **personal** health (12%, up from 8%). Meanwhile, concerns about feeling isolated has decreased with the relaxation of restrictions.

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



Q20a In relation to the Covid-19 global pandemic, what are you most worried about?  
Total Wave 2 n = 1018, Total Wave 3 n=1021, Total Wave 4 = 1017

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



Q20b What are you most worried about when it comes to economic impacts from COVID-19?  
Total Wave 2 n = 1018, Total Wave 3 n=1021, Total Wave n = 1017

# ECONOMY

Queenslanders views  
on economic recovery

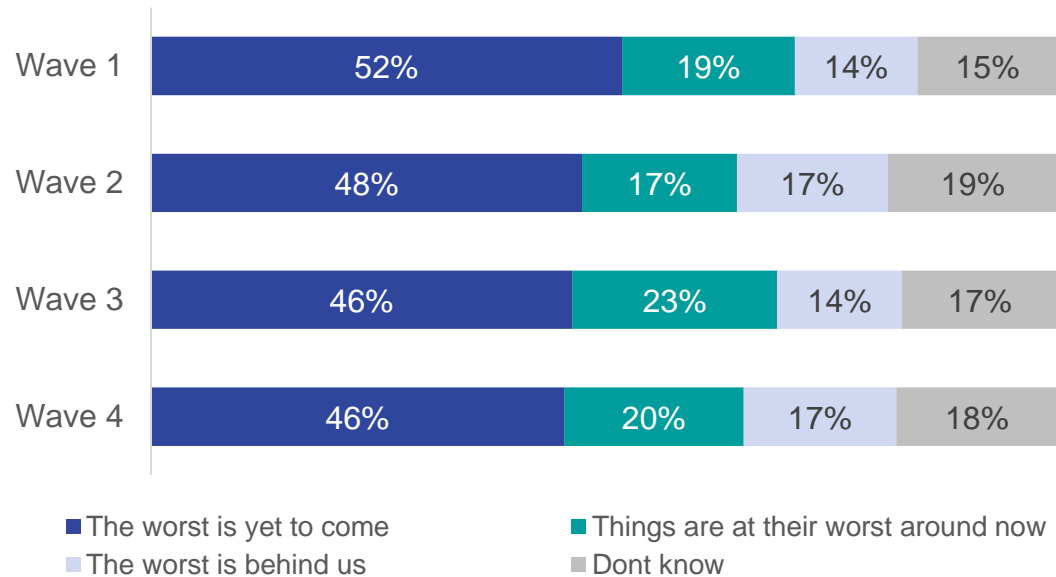


# 3.2

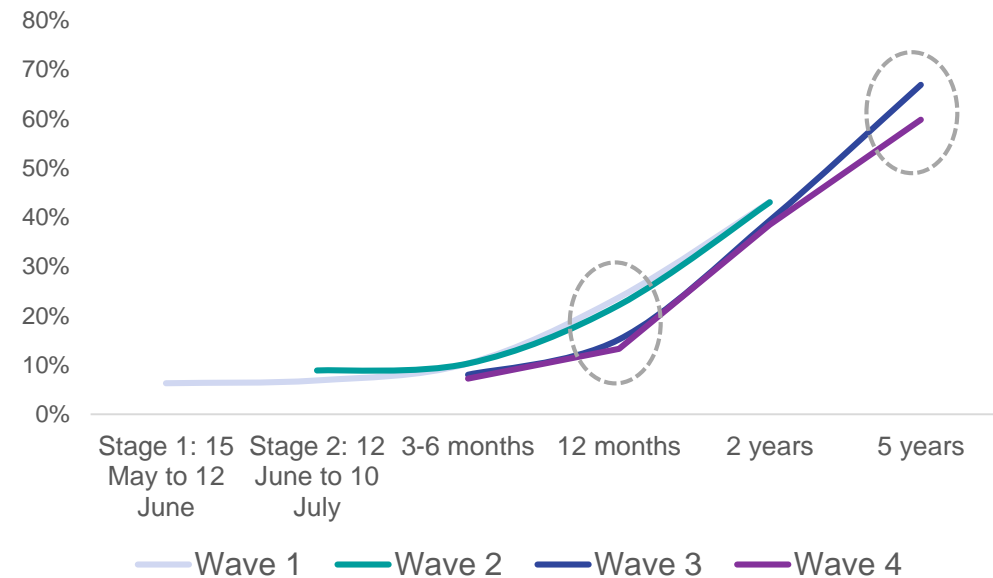


# QUEENSLANDERS EXPECTATIONS ABOUT THE ECONOMY

Queenslanders' expectations about the economy has remained consistent across the 4 waves to date with almost half having a negative outlook (46% believing that the worst is yet to come). There's considerable uncertainties with close to 1/5 of the population not knowing what to expect.



Queenslanders are becoming less optimistic of a speedy economic recovery, with the majority believing that the economy will fully recover in 5 years time (60%). Furthermore, early positive projections of a 12 month recovery in wave 1 & 2 has decreased in wave 3 and 4, making room for a 5 year projection.



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

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



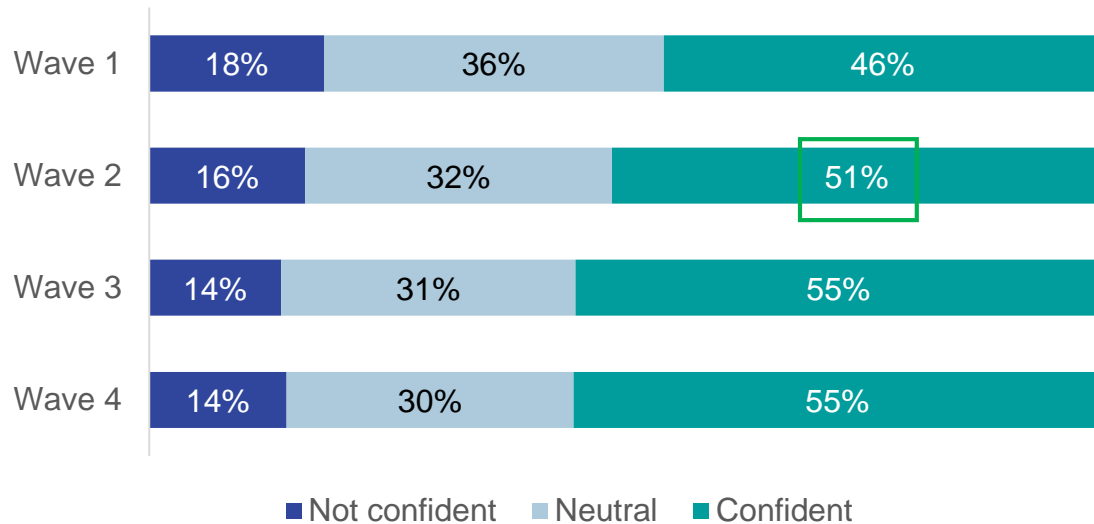
# QUEENSLANDERS CONFIDENCE

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

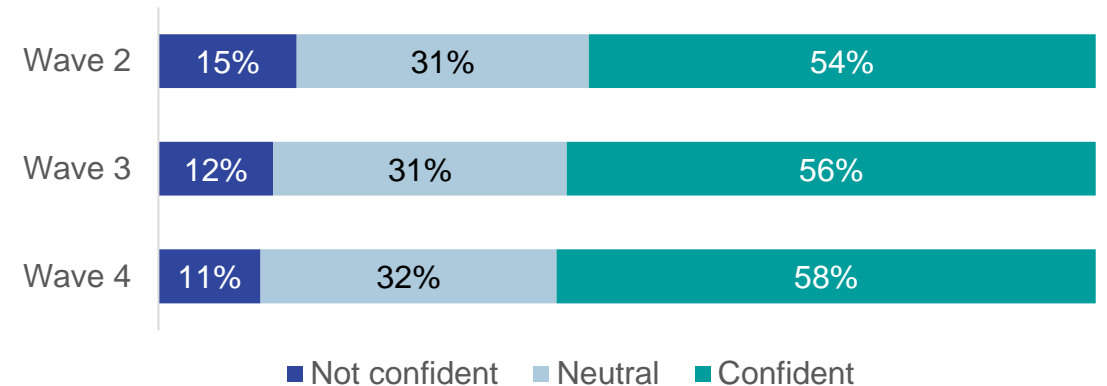
On a positive note, public confidence grew in wave 2 and has maintained a positive momentum.

Similarly, half of the population believes that the Government has been handling the COVID crisis to the State economic advantage in the long run.

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



Q25 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the economic recovery?  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017



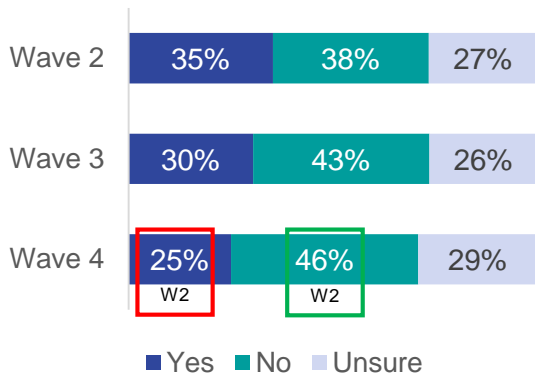
Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" –How confident that Queensland has handling COVID-19 will be to the State's economic advantage in the long run  
Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

# AWARENESS OF ECONOMIC INITIATIVES AND RECOVERY STRATEGY

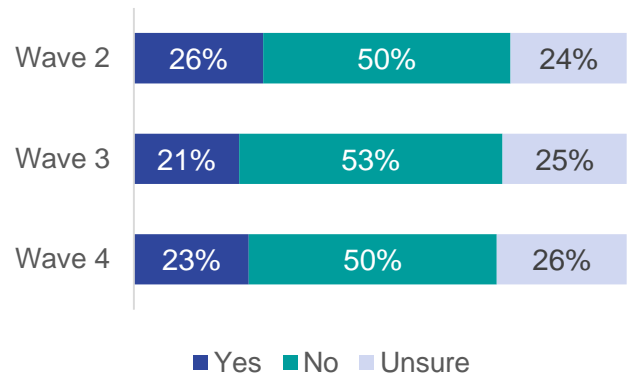
The key challenge for the Queensland Government is raising awareness of the State's Recovery Strategy. There are signs of decreasing awareness overtime. Once awareness is achieved, understanding is moderate and support is relatively strong.

Awareness needs to be addressed first before improving familiarity and understanding of the Strategy and ultimately convert the fence sitters (33%) to supporters (61%).

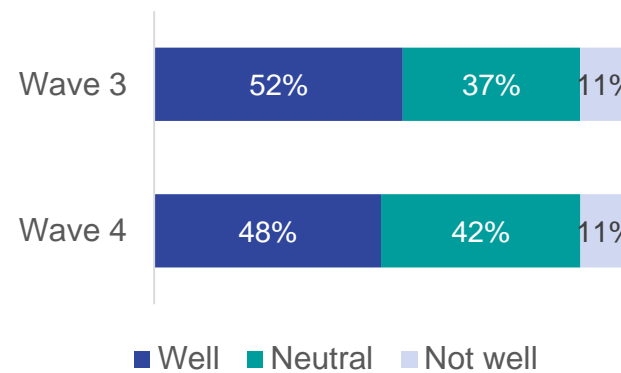
Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?



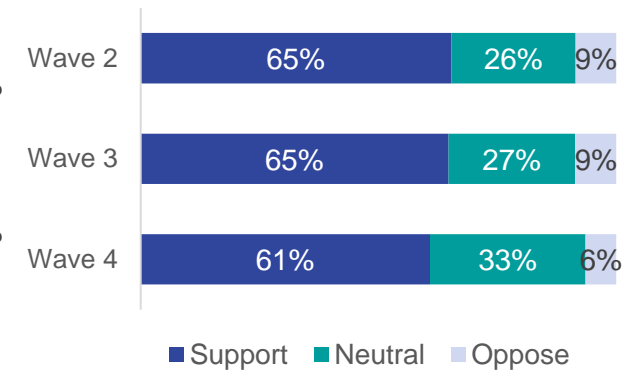
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



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



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



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

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

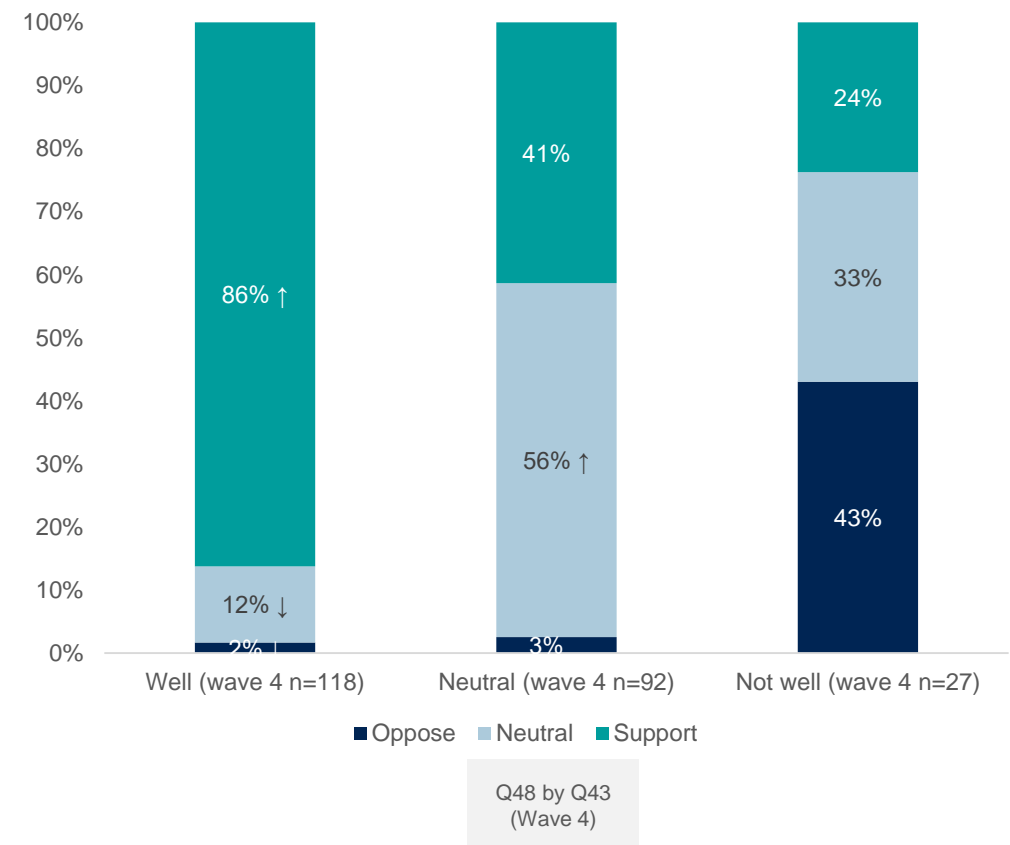
**Q64** On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?  
Wave 3 n = 211; Wave 4 = 237

**Q48** On a scale of 1 to 10, where 1 is "strongly oppose" and 10 is "strongly support" – Do you support the direction of State Government's Economic Recovery Strategy?  
Wave 2 n = 252; Wave 3 n=211; Wave 4 n=237

# UNDERSTANDING ASSOCIATED WITH SUPPORT

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

As evident in the data, those who understand the strategy well are significantly more likely to support it (86% vs. 41% and 24%).



# SUPPORT FOR ECONOMIC INITIATIVES AND RECOVERY STRATEGY

Queenslanders support the Strategy mainly for its economic merits, its step-by-step approach and consideration for health and wellbeing. Interestingly, there are less mentions about job creation or the economy being lifted in wave 4.

## SUPPORT

Restrictions are being gradually lifted, and it has been handled in stages	54%	54%
Will help lift the economy	62%	46%
They have done the right thing by keeping our borders closed	49%	40%
Right approach as it keeps us safe and looks after our health and well being	46%	40%
It looks after small business and helps affected industries	41%	37%
It is a recovery package where they have an action plan	30%	37%
Keeps people in jobs or creates more jobs	54%	33%
It supports tourism and promotes local tourism	41%	32%
The strategy is detailed, well thought out and logical	19%	27%
Need to get things moving and get back on track	27%	26%
Its a good strategy for all Queenslanders	33%	25%
It is doing the right things and heading in the right direction	31%	24%
Developed with specialised knowledge and experts	22%	19%
It will be for the best	18%	13%

61%

The fence sitters are mainly unsure and acknowledge that there are still uncertainties to be dealt with. Some others are concerned with how the State will be able to afford the Recovery Strategy.

## NEUTRAL

So many unknowns still to be faced and I will have to see how the situation goes	70%	45%
I don't know enough to say	17%	44%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	46%	34%
Some families missed out completely and some people get no support	14%	21%
We are on the right track and then other times we are not	17%	11%
I don't trust them to keep their word	11%	14%
I would need to analyse it in more detail and I would need more information	19%	37%
Not enough real information available and too many mixed messages	19%	19%

33%

Opposers remain either sceptical pending more information or have a distrust towards Government. This is however a small group.

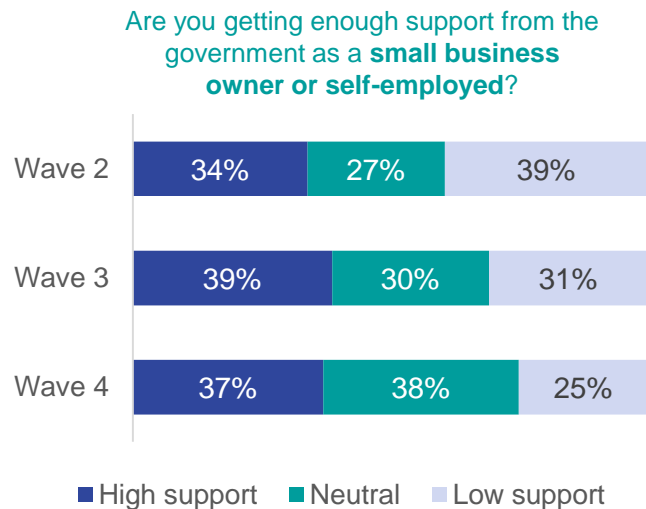
## OPPOSE (Caution: small base)

Not enough real information available and too many mixed messages	69%	48%
Restrictions should have been eased and we have stayed in lock down too long	25%	3%
I don't trust them to keep their word	72%	51%
Doesnt address core tourism concerns and tourism is suffering	33%	13%
Some families missed out completely and some people get no support	51%	44%
Too little, too late, too slow to act	38%	20%
Concerned about how we can afford to pay this, and I hope my taxes don't go up	50%	30%
I feel we should open our borders	25%	3%
Doesnt address core businesses concerns and small business are suffering	63%	45%

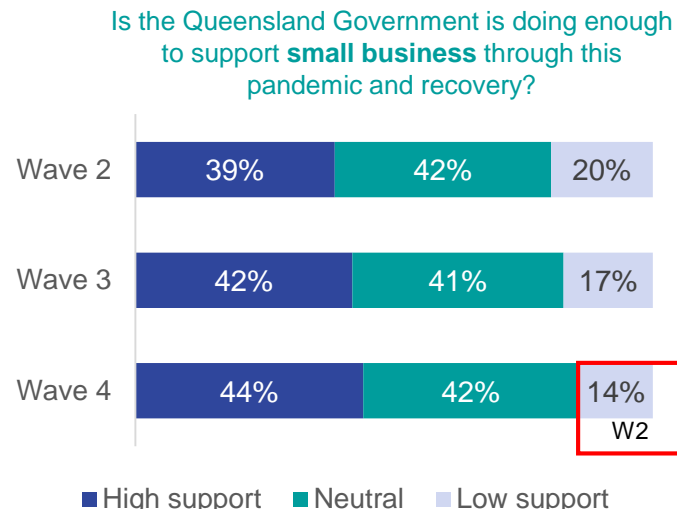
6%

# QLD GOVERNMENT SUPPORT

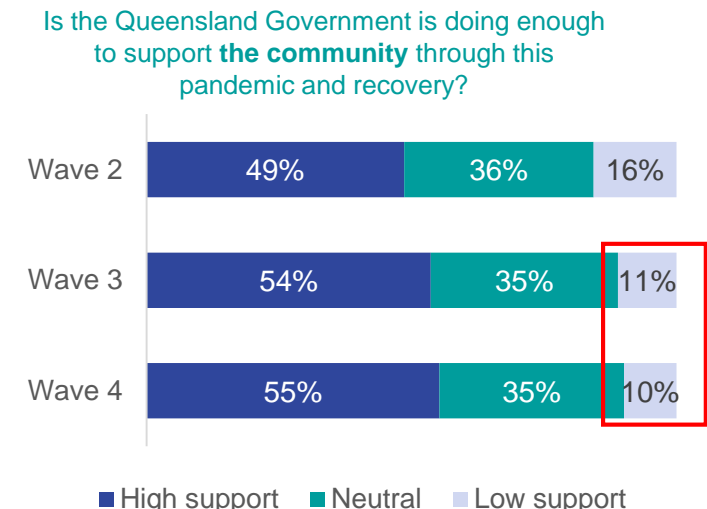
The majority of Queenslanders are satisfied with Government support for small businesses and the community. This positive sentiment is growing, with slow but steady increases overtime and a decreasing proportion of residents who believe the Government is not providing enough support.



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; Total Wave 3 n=76; Total Wave 4 n=60



Q50 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support small business through this pandemic and recovery? Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

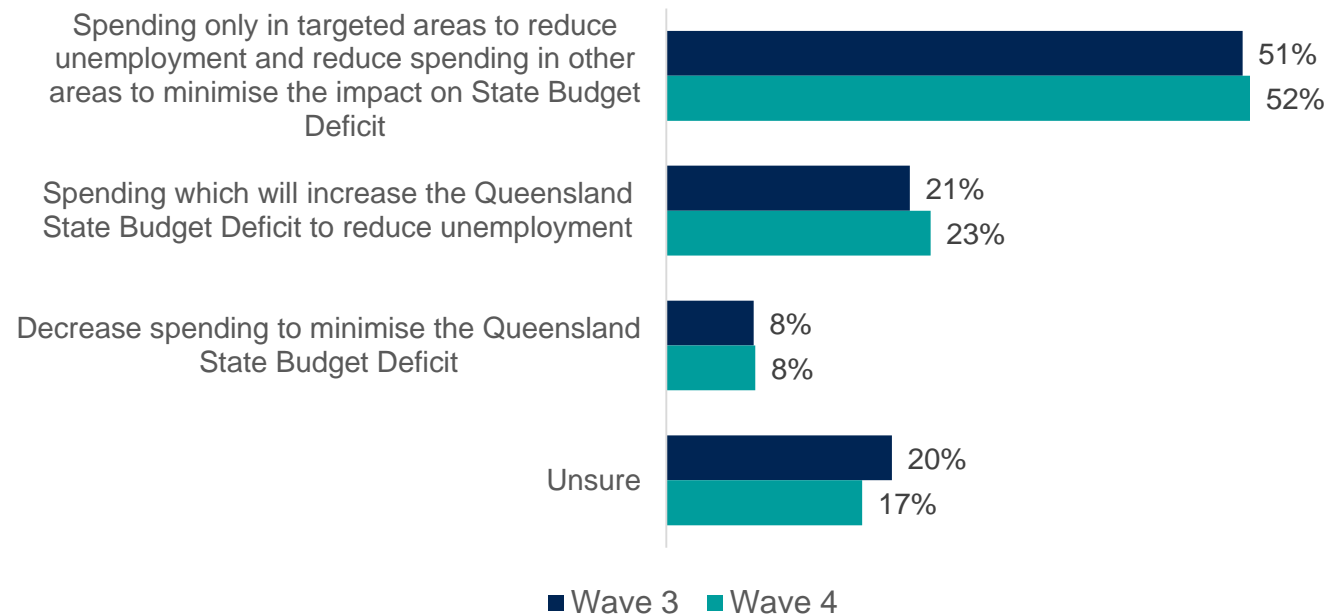


Q51 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support the community through this pandemic and recovery? Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

# SPENDING WISELY AND WATCHING THE DEFICIT

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

## Managing the State Budget



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

# ECONOMIC STRATEGIES TO FOCUS ON FOR RECOVERY

Consistent with previous waves, the top strategies to focus on include: 1) Developing locally tailored economic solutions, 2) Building the skills capacity of the Queensland workforce, and 3) Targeting infrastructure investments that leverage previous investment.

Row %	Top 3 Rank	Rank 1 - most important	2	3	4	5	6	7	8	Rank 9 - least important
Building the skills capacity of the Queensland workforce to attract and retain talent	61%	25%	18%	18%	14%	9%	5%	5%	2%	4%
Developing locally tailored economic, infrastructure and workforce solutions	54%	24%	19%	10%	11%	10%	9%	7%	8%	3%
Targeting infrastructure investments that leverage previous investment and catalyse economic development opportunities	48%	19%	16%	13%	9%	12%	7%	11%	8%	5%
Providing a competitive business environment to enable investment	42%	15%	13%	14%	13%	11%	8%	9%	10%	8%
Facilitating growth in clean energy and technology	36%	9%	13%	14%	10%	9%	10%	9%	11%	15%
Investing in research development and innovation	32%	8%	11%	13%	14%	15%	14%	11%	9%	6%
Investing in smart technologies, devices and industries	25%	3%	8%	13%	13%	10%	12%	17%	16%	7%
Accessing global markets to reinforce key existing markets and consider opportunities to diversify	22%	5%	6%	10%	8%	9%	10%	10%	10%	29%
Enabling digital connectivity and literacy	19%	3%	8%	7%	7%	11%	15%	15%	18%	15%

**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 4 n = 1017

# RESTRICTIONS

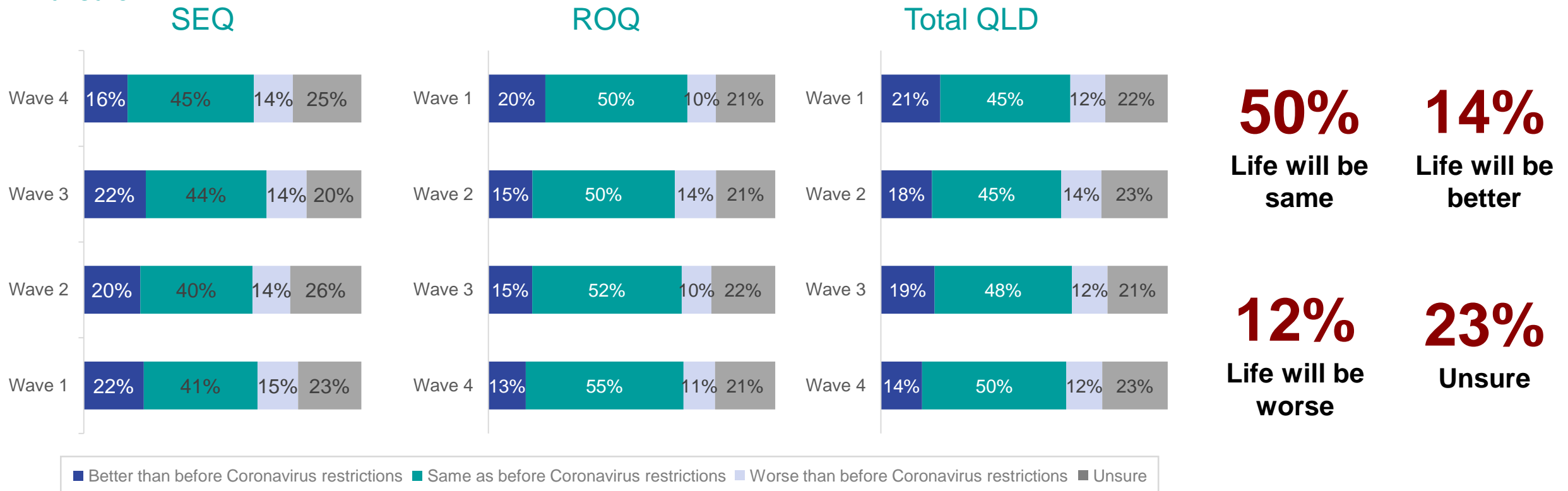
# 3.3





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

Coronavirus is not seen to have a lasting impact on quality of life. Half of the population believe that life will be the same after restrictions ease. An equal number of residents believe life will be better and worse. A quarter of the population remain unsure.



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

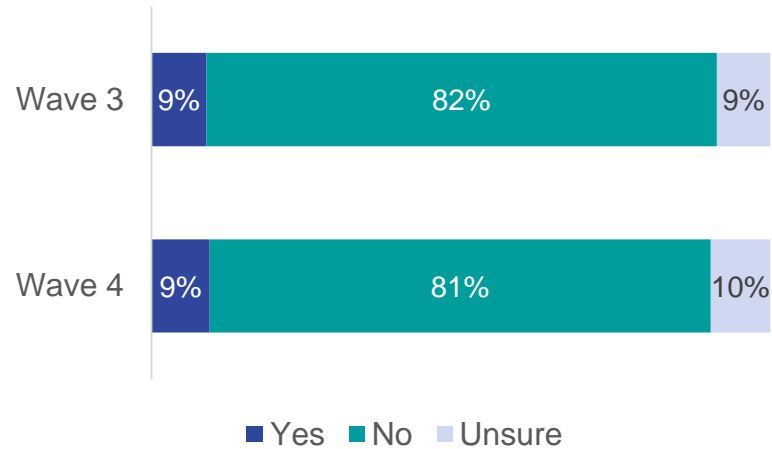


# OPEN BORDERS BETWEEN STATES WITH HOT SPOTS

Survey completed 7-8 July 2020

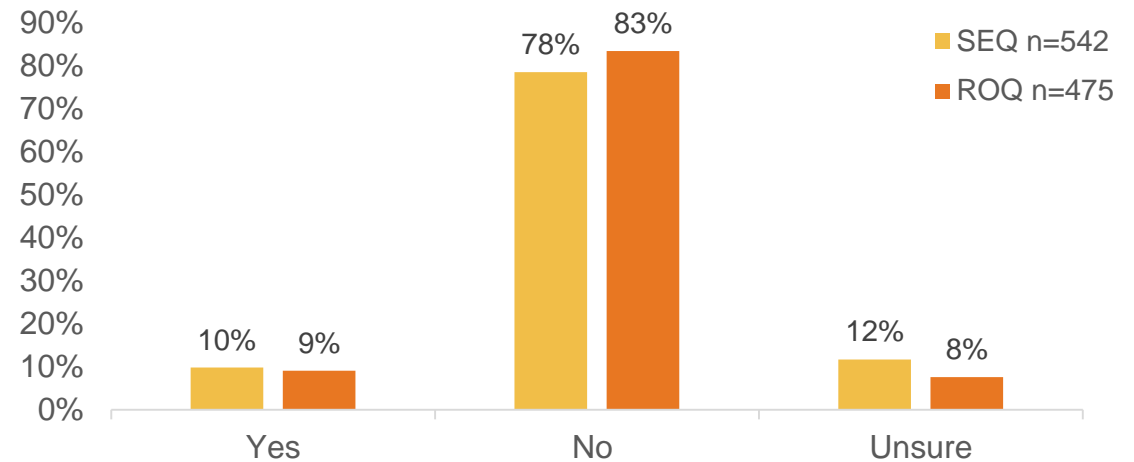
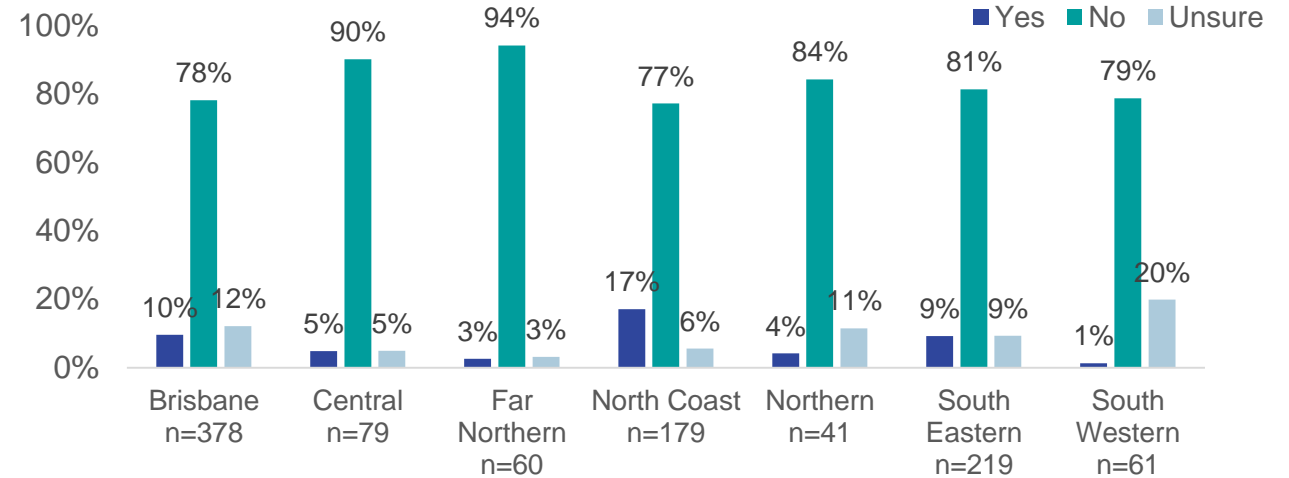
There's almost consensus across Queensland that border should be closed to states that continue to record hot spots or multiple new cases per day.

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



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

Total Wave 3 n=1021; Total Wave 4 n = 1017

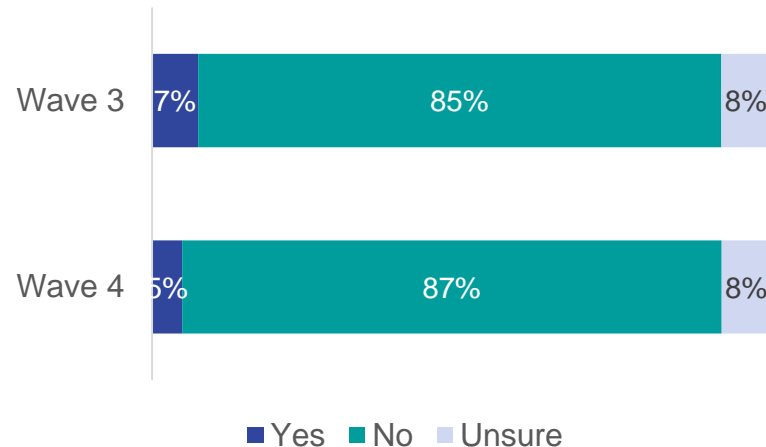


# OPEN BORDERS BETWEEN TOWNS/REGIONS WITH HOT SPOTS

Survey completed 6-7 July 2020

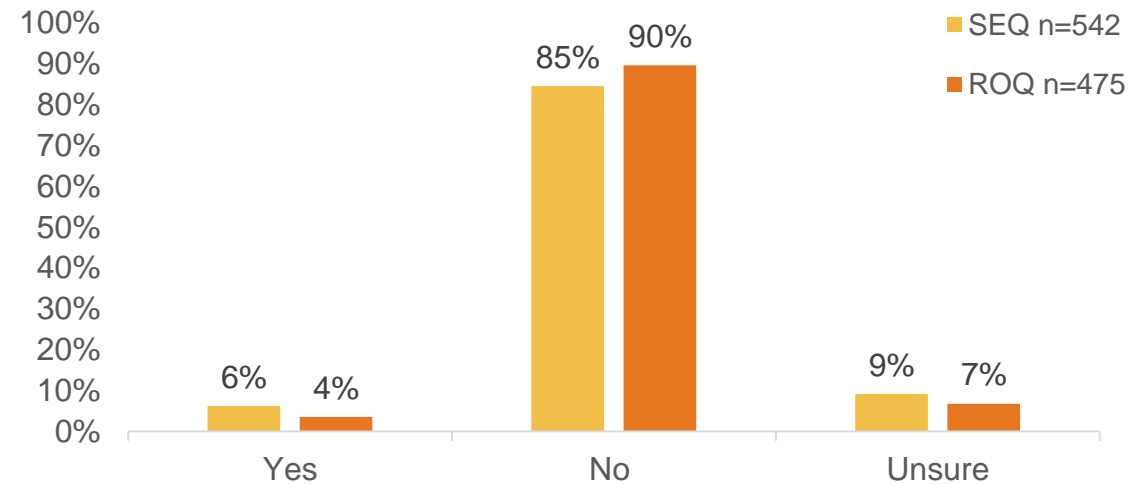
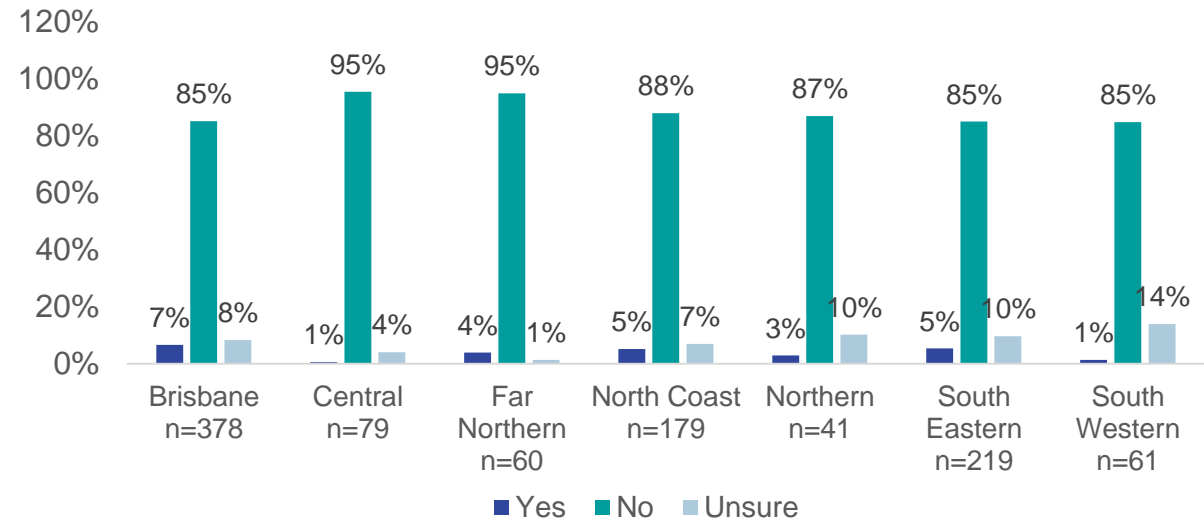
Similarly, a majority supports border closure with towns/regions that record hot spots. This is true across Queensland.

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



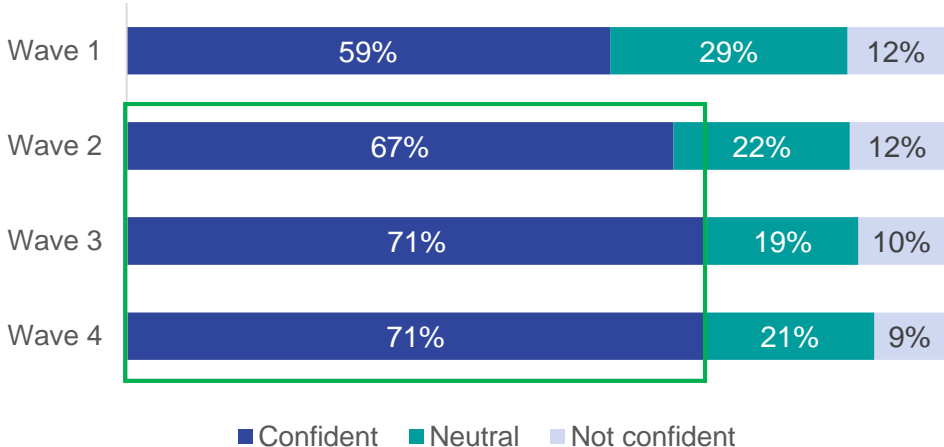
Q67 For towns or regions continuing to record hot spots / multiple new cases per day, should travel be allowed to Queensland? (i.e. the borders open for people coming from these specific areas be re-opened)

Total Wave 3 n=1021; Total Wave 4 n = 1017



# CONFIDENCE CONTINUES TO INCREASE ON MANAGING THE EASING OF RESTRICTIONS

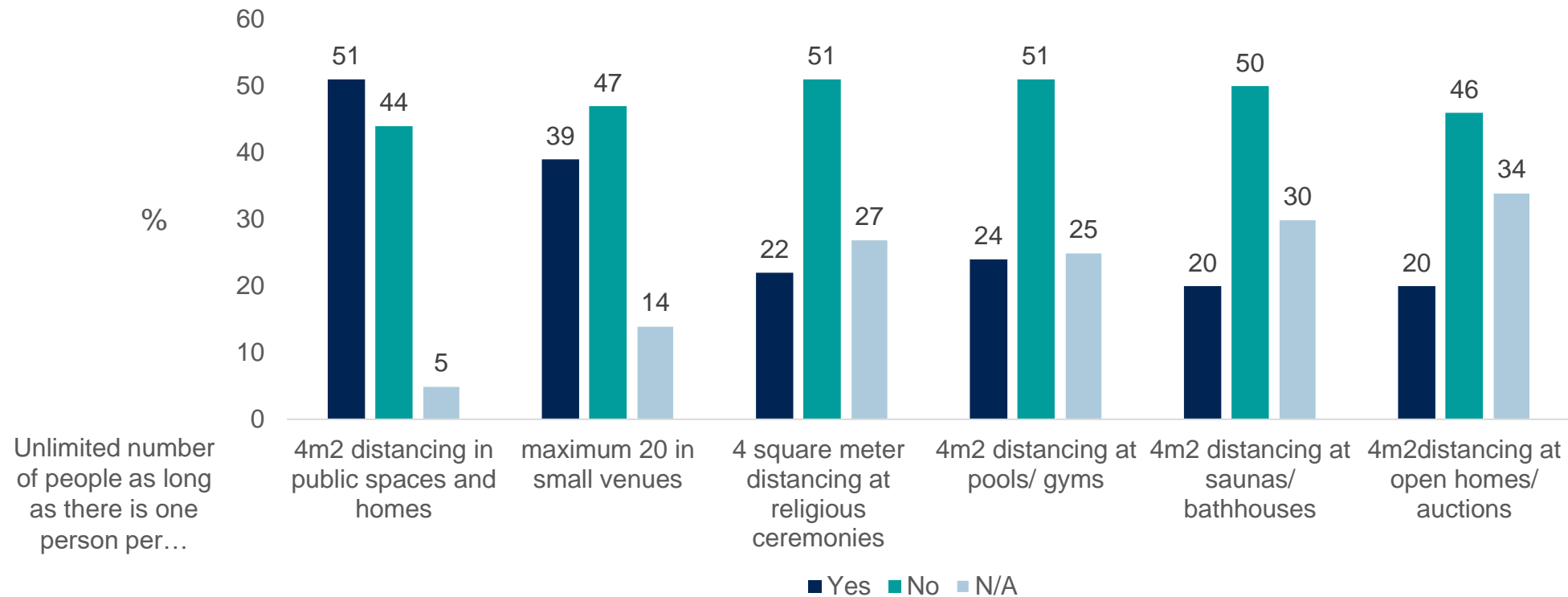
The Queensland Government enjoys public confidence in managing the easing of restrictions. This confidence significantly grew in wave 2 and has maintained positive momentum since.



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

# NON-COMPLIANCE WITH RESTRICTIONS

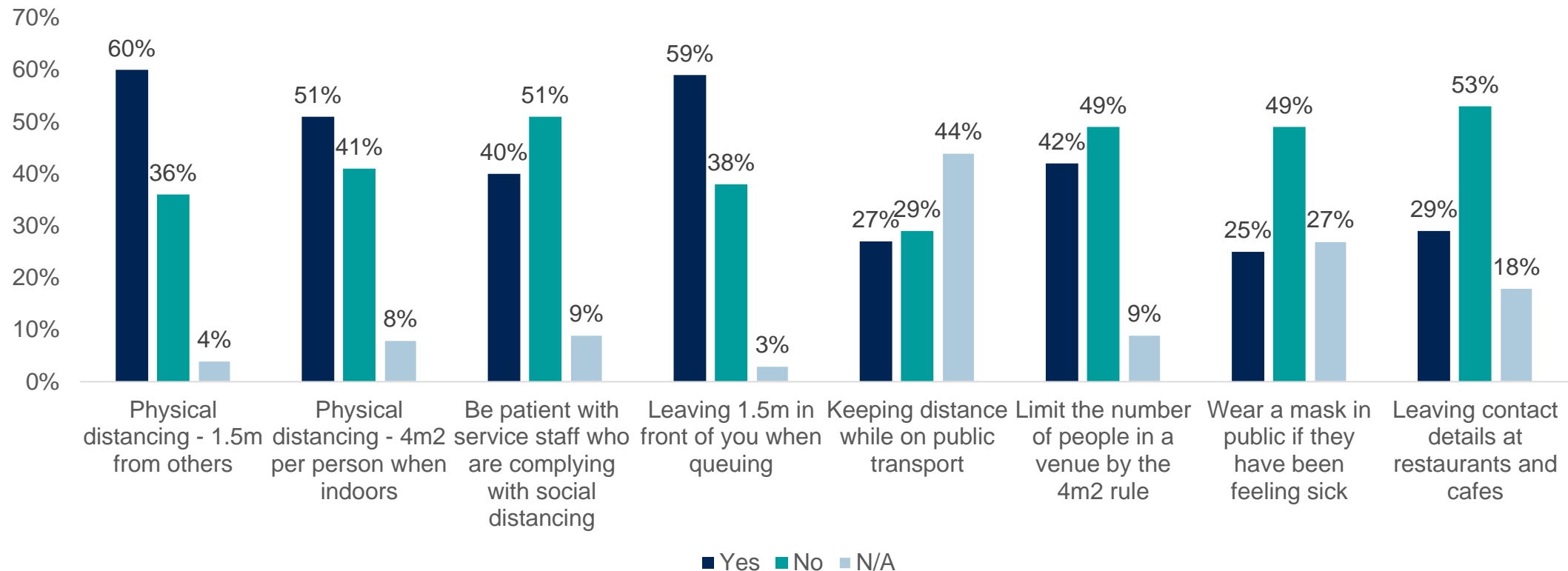
There's wide compliance with restriction rules, with the exception of distancing in public spaces and homes.



**Q73:** for each one please indicate if you have personally seen Queenslanders not complying with the restriction within the last week (7 days). Total Wave 4 n=1017

# NON-COMPLIANCE WITH HEALTH ADVICE

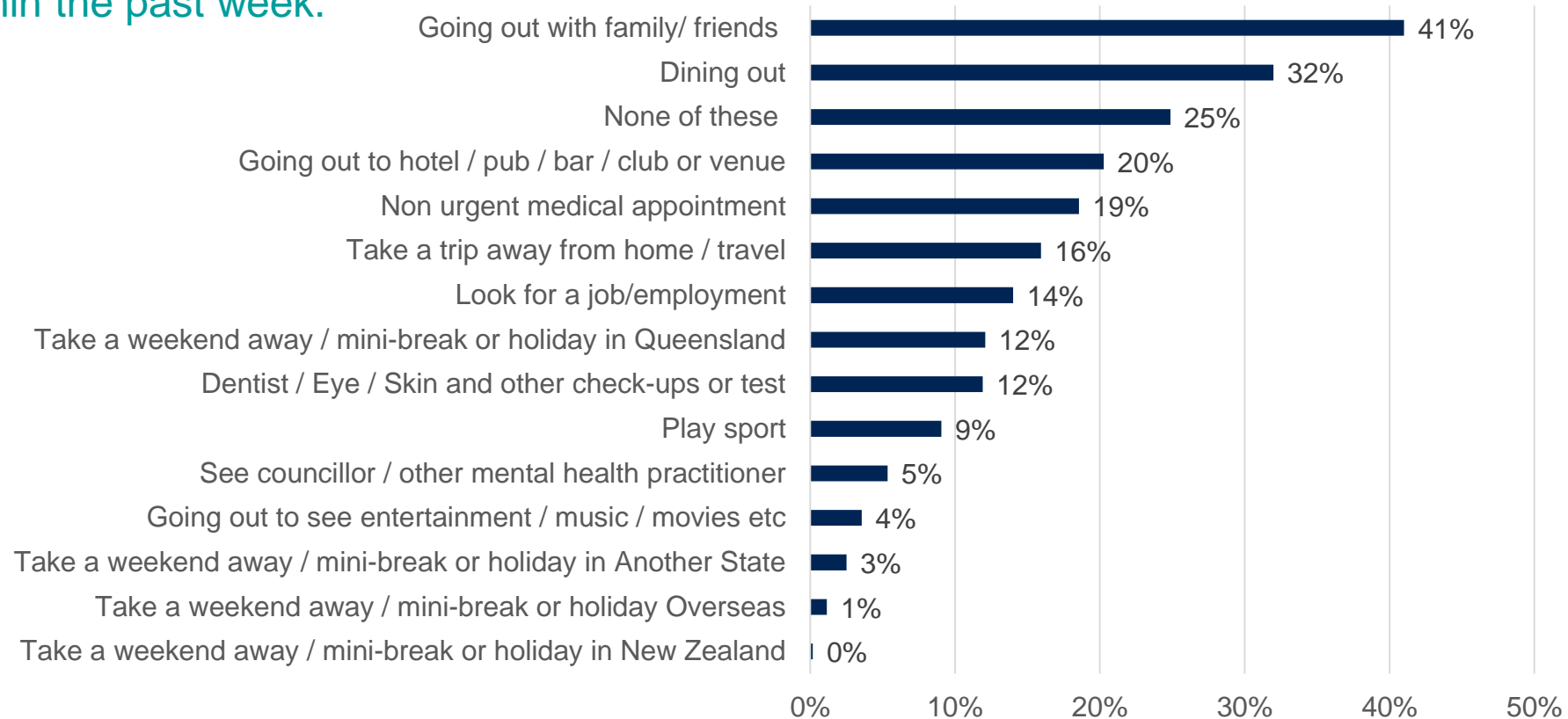
Non compliance is more prevalent when it comes to health advice, particularly the 1.5 metres distancing rule e.g. indoors, when queuing and in general.



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

# ACTIVITIES

Social activities are gradually resuming. Most residents have gone out with family, dined out or gone to a hotel/ pub/ bar in the last week. Only a quarter of residents have not done any of the following activities within the past week.



**Q75a:** within the last week (7 days) have you done any of the following activities?  
Total wave 4 n=1017

# ACTIVITIES

A similar level of activities is planned for the following week.



**Q74:** within the next week (7 days) do you intend to do any of the following activities?  
Total wave 4 n=1017



# AWARENESS OF INFORMATION 3.4

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

Queenslanders are generally satisfied with the information provided by the Government and feel that it's sufficient, especially across restriction related topics and how to prevent the virus spread. There's room for improvement when it comes to communicating about economic recovery, despite positive movements over the past 4 waves.

**90%**

How to prevent the spread of coronavirus

**72%**

Stages of restrictions easing

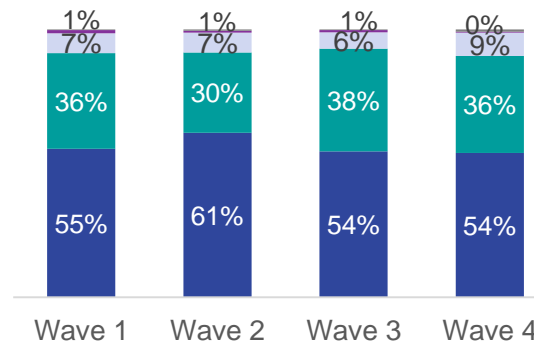
**79%**

Current coronavirus level of restrictions

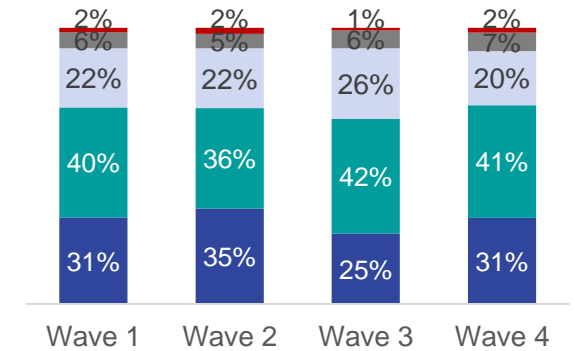
**35%**

How the Queensland economy will recover

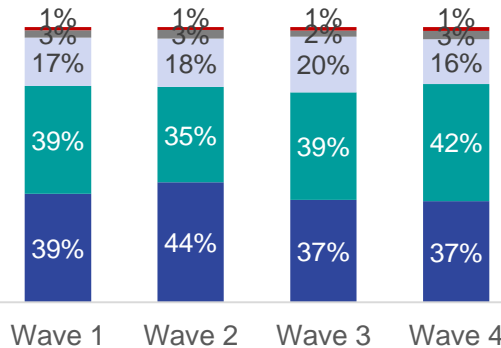
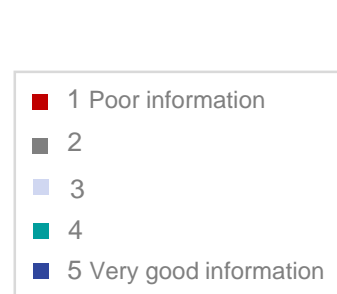
How to prevent the spread of coronavirus



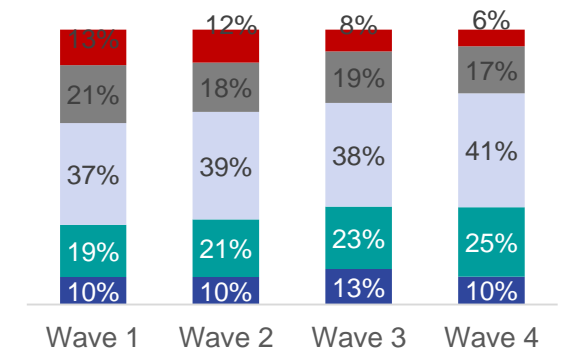
The stages of restrictions easing



Current coronavirus level of restrictions



How the Queensland economy will recover



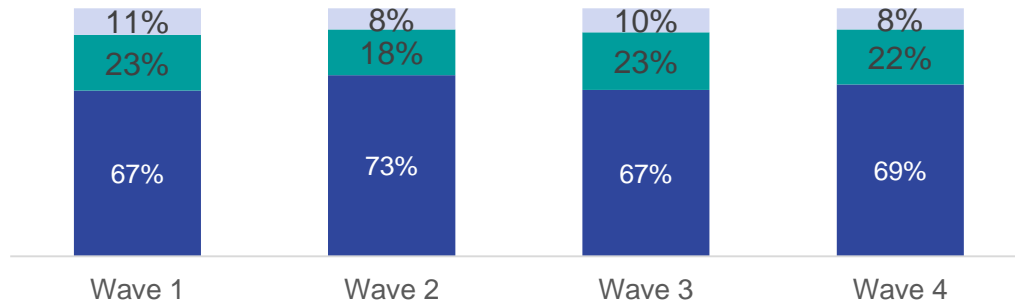
Q1 Have you been getting enough information to feel confident you know about .....  
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

# QUEENSLANDERS STAYING INFORMED AND SENTIMENT IMPROVED

The Queensland Government remains a consistently trustworthy source of information. Positive perceptions of the Government's management of the pandemic has been making gains, on top of an already strong base.

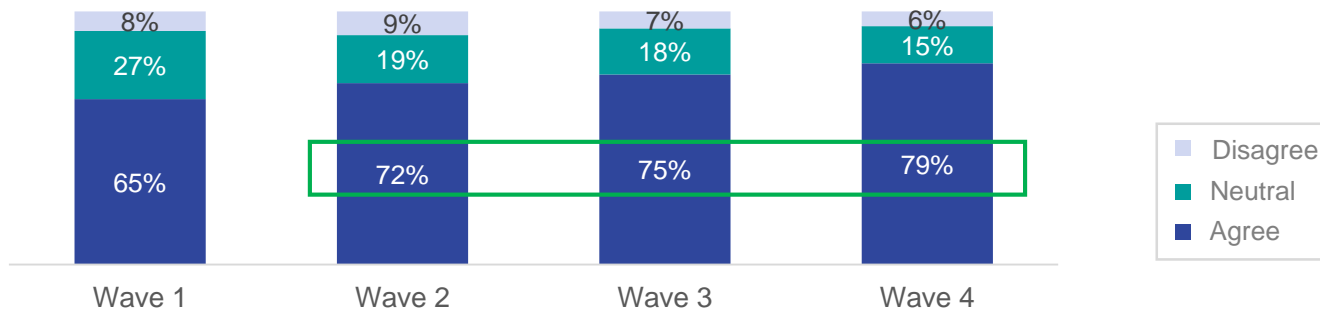
## Trustworthy information source



**69%**  
**Queensland Government is a trustworthy information source**

Q3 QLD Government is a trustworthy information source about the economic recovery after the coronavirus pandemic. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.  
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

## Managed the coronavirus pandemic better than other states or territories



**79%**  
**Queensland Government managed better than other states or territories**

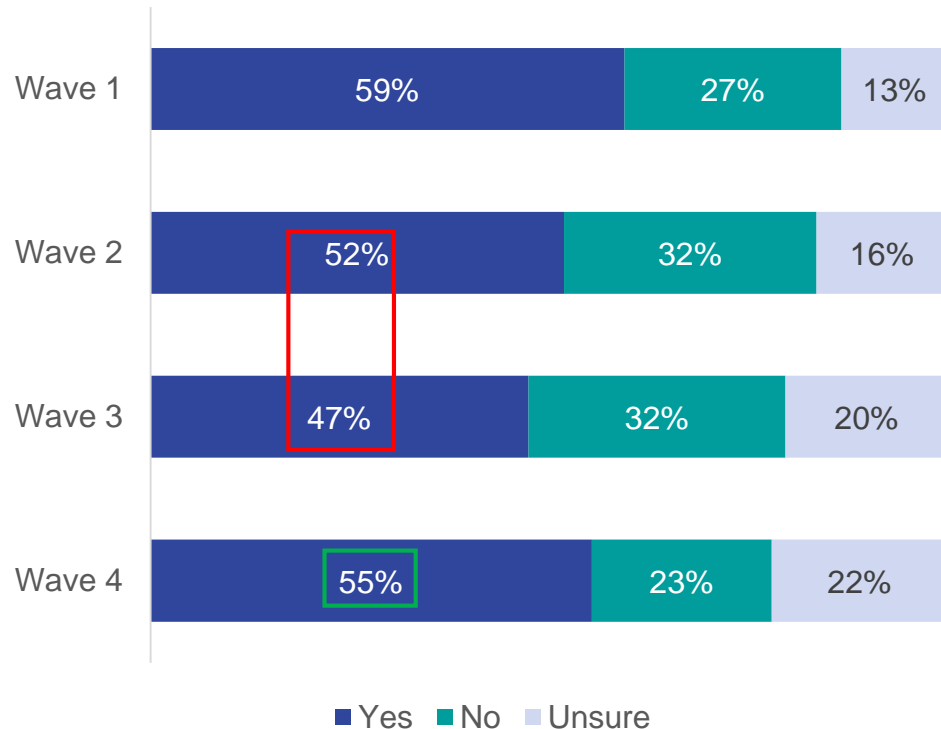
Q4 QLD Government has managed the coronavirus pandemic better than other states or territories. How much do you agree, on a scale of 0 to 10 where 0 is Strongly disagree and 10 is Strongly agree.  
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017

# ROADMAP FOR EASING RESTRICTIONS

A similar number of people are aware of the roadmap (55%) as when released in May (Wave 1, 59%).

Those that are aware of the Roadmap to Easing Restrictions are more likely to feel confident that the Queensland Government is a trustworthy source of information, that Queensland has managed better than other states or territories and have good information about the current level of restrictions. No geographic differences were observed.



Q34 Have you seen, read or heard about the Queensland Government's Roadmap to Easing Restrictions?  
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n = 1021; Total Wave 4 n=1017

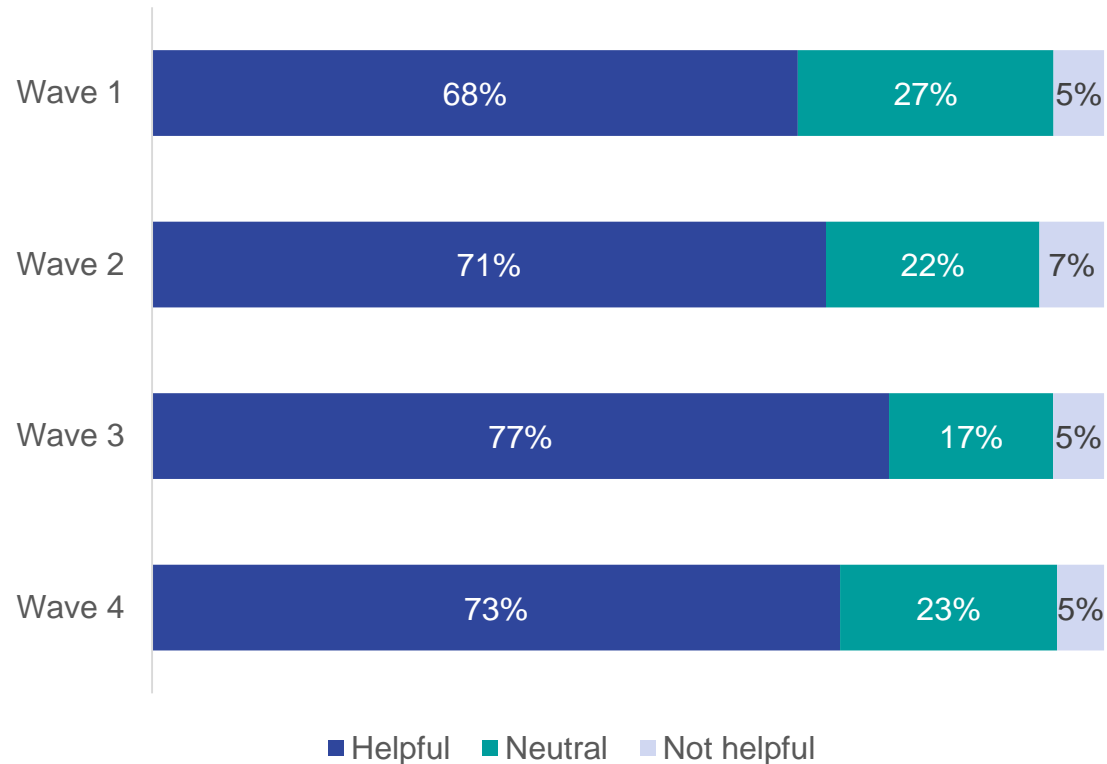
## 55%

### Aware of the Roadmap

- Confident Queensland Government is a trustworthy information source (Q3)  
**77%** aware Vs **52%** unaware
- Queensland Government managed better than other states or territories (Q4)  
**86%** aware Vs **64%** unaware
- Good information about current coronavirus level of restrictions (Q1)  
**82%** aware Vs **72%** unaware

# ROADMAP IS HELPFUL COMMUNICATION

Almost three quarters of Queenslanders who saw or heard about the Roadmap to Easing Restrictions said they felt it was helpful (73%).



**73%**  
Roadmap is helpful

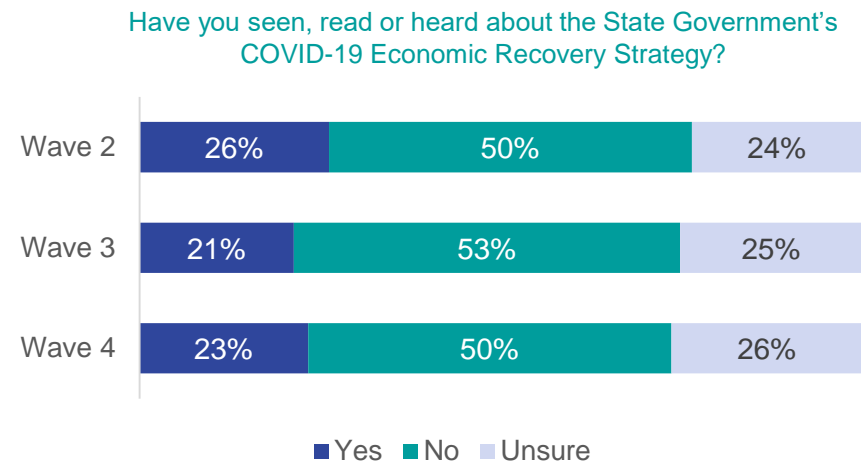
Q36 On a scale of 1 to 10, where 1 is "not at all helpful" and 10 is "very helpful" – how helpful do you feel that Queensland Government's Roadmap to Easing Restrictions communications have been?

Wave 1 n=960; Wave 2 n=530; Wave 3 n=477; Wave 4 n=538

# COVID-19 ECONOMIC RECOVERY STRATEGY

## Only one quarter of Queenslanders are aware of the Economic Recovery Strategy.

Those that are aware of the Queensland Government COVID-19 Economic Recovery Strategy are more likely to feel confident that the Queensland Government is a trustworthy source of information (77%), and that Queensland has managed better than other states or territories (87%). Those aware are also more likely to say they have good information about the level of restrictions (90%), stages of restrictions (83%) and how the economy will recover (47%). No geographic differences were observed.



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

# 23%

## Aware of the COVID-19 Economic Recovery Strategy

- Confident Queensland Government is a trustworthy information source (Q3)  
**77%** aware Vs **62%** unaware
- Queensland Government managed better than other states or territories (Q4)  
**87%** aware Vs **74%** unaware
- Good information about current coronavirus level of restrictions (Q1)  
**90%** aware Vs **71%** unaware
- Good information about the stages of restrictions (Q1)  
**83%** aware Vs **61%** unaware
- Good information about how the economy will recover (Q1)  
**47%** aware Vs **25%** unaware

# CAMPAIGN RECOGNITION

3.5

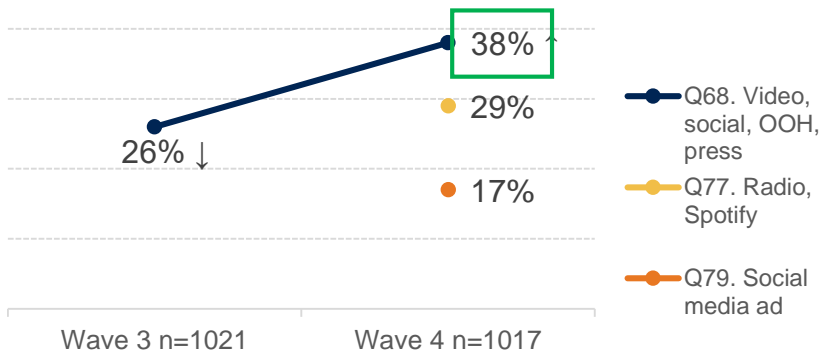


# CAMPAIGN RECOGNITION

Two fifths of Queenslanders recall seeing the campaign (38%), a significant increase from wave 3.

The campaign prompt had messaging removed to test the message receipt. Less than a third who saw the campaign could recall the intended messages of the advertisement (28%), whereas over half (52%) were unable to interpret the intention of the messaging.

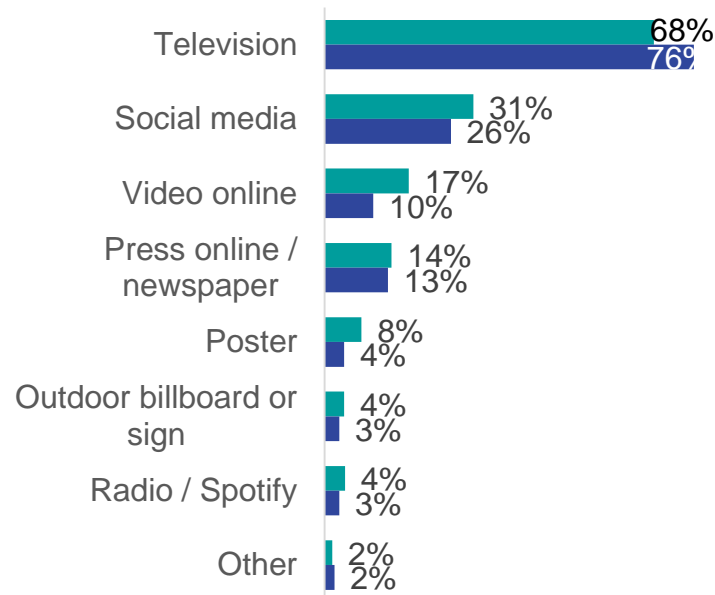
## Seen any of these ads



Q68/Q77/Q79 Have you seen/heard any of these ads?  
Total Wave 4 n = 1017

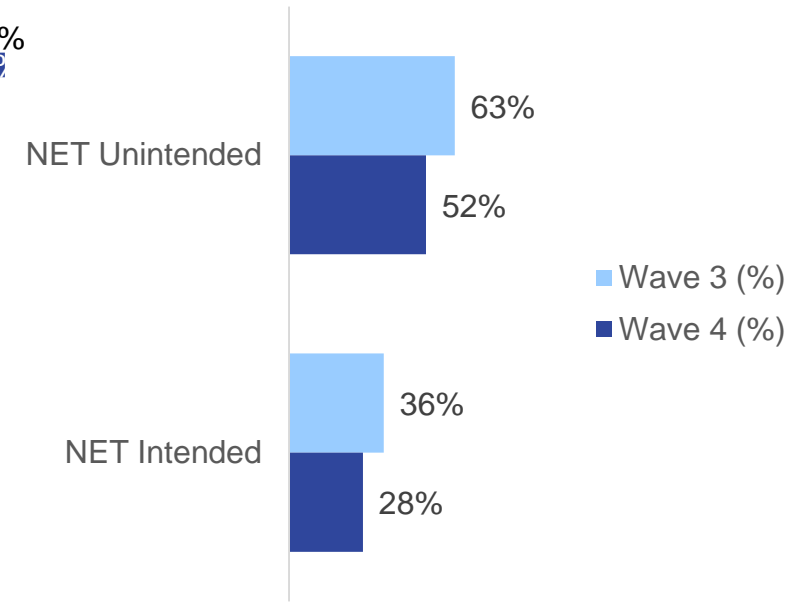
**This is well above IPSOS norm (25%) for TVC.**

## Where ads seen



Q69 Where have you seen these ads?  
Seen ads Wave 3 n=239; Wave 4 n = 404

## Messages you can remember from this ad



Q70 What are all the messages you can remember from this ad?  
Seen ads Wave 4 n = 404

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



# CAUGHT IN THE COVID-19 CLUTTER

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

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

The clearest message coming through from the campaign is boosting tourism/trave within Queensland (10%), The Economic recovery (10%), and to innovate to create jobs for now and in the future (8%)

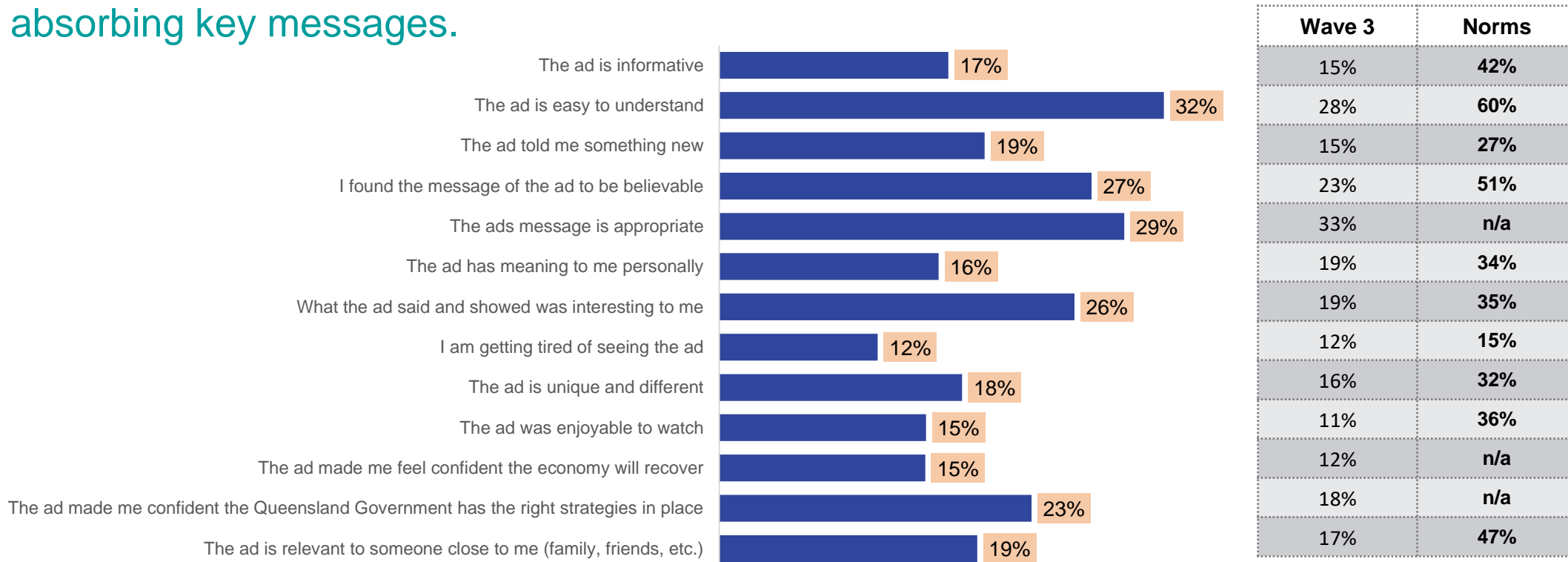


Q70 What are all the messages you can remember from this ad?  
Seen ads Wave 4 n = 404

Unite and recover	1%
Covid-19/coronavirus	1%
We are on the road to recovery	6%
We have protected Queenslanders and saved lives	0%
Invest in industries for our state	7%
Innovate to create jobs for now and in the future	8%
Work better and smarter	0%
Boosting tourism/travel within Queensland	10%
Economic recovery	10%
Queensland is getting back to business/is open for business	2%
<b>Total intended messages</b>	<b>28%</b>
Remember the safety rules/be safe/COVID-19 safe	4%
Remember to social distance	4%
Wash your hands	1%
Stay home	1%
Restrictions are easing	4%
We are doing well/better	4%
Recovery/covid recovery	7%
We are in this together	3%
Move forward/get Queensland moving again	3%
Queensland/support Queensland	2%
Positive attitude/positive future for Queensland	1%
Pictures/images on the ad	3%
Get tested/get tested if you are feeling unwell	0%
Building/building Queensland	1%
Information about what is happening/a chart of where we are headed	3%
Get going again/Queensland is going again	6%
The stages of opening Queensland	0%
We're with you/we're here to help/you're not alone	1%
General positive comments e.g. It's a good ad, I liked it etc.	2%
None/nothing	7%
Other – unintended messages	3%
Don't know/not answered	17%
<b>Total unintended messages</b>	<b>52%</b>

# CAMPAIGN DIAGNOSTICS

The campaign performs below Ipsos norms on all available diagnostics, however there is slight improvement since Wave 3. The topic of COVID-19 cuts through but if it is not immediately distinguished as informative, important, interesting or relevant, people are switching off and not absorbing key messages.



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

■ Strongly agree

# RADIO CAMPAIGN RECOGNITION

Less than a third (29%) of Queenslanders have heard the radio advertisement before the survey.

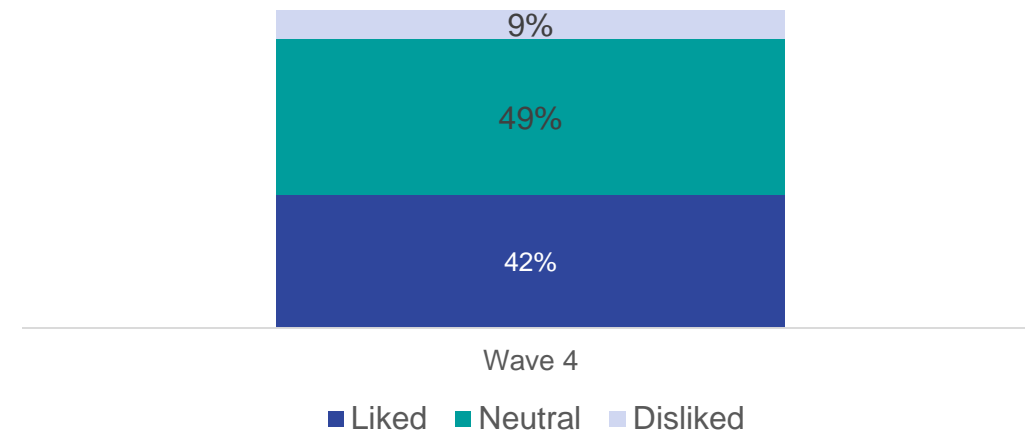
All participants were exposed to the advertisement which ran on both commercial radio and Spotify. Overall, Queenslanders liked the ad (42%), while half of those who were aware of it were neutral (49%).

Seen heard this radio/ Spotify ad



Q77 Have you heard this radio advertisement?  
Total Wave 4 n = 1017

How do you feel about this ad?



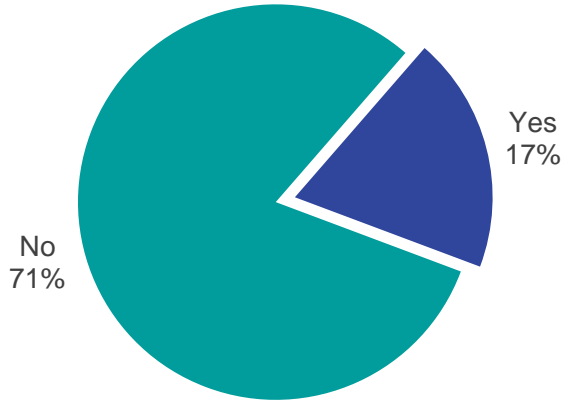
Q78 Overall opinion of the radio advertisement?  
Seen ads Wave 4 n = 1017

# SOCIAL MEDIA CAMPAIGN RECOGNITION

## Only 17% of Queenslanders had seen this advertisement before the survey

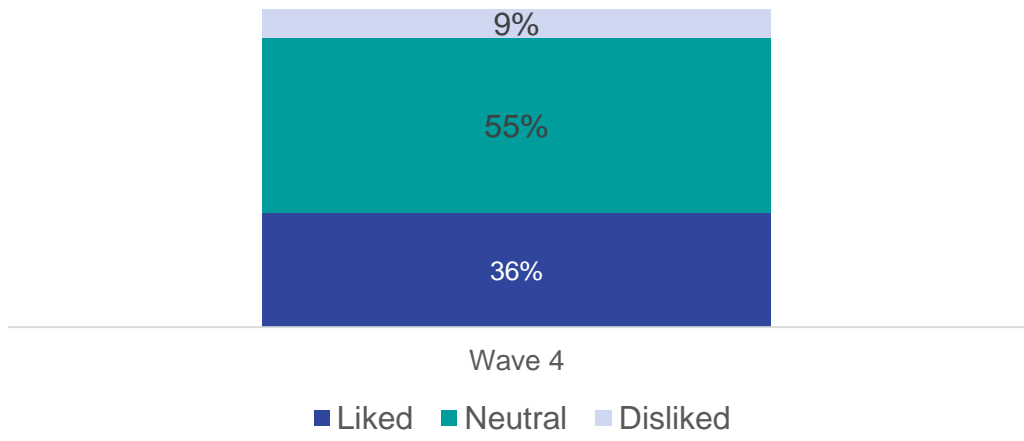
The advertisement specific to the social media campaign was shown to participants. Generally, Queenslanders were favourable of the social media advertisements (36%), but the majority (55%) were neutral.

Have you seen this advertisement on social media?



Q79 Have you seen this social media advertisement before today?  
Total Wave 4 n = 1017

How do you feel about this ad?



Q80 Overall opinion of the social media advertisement?  
Wave 4 n = 1017



# THANK YOU



GAME CHANGERS

