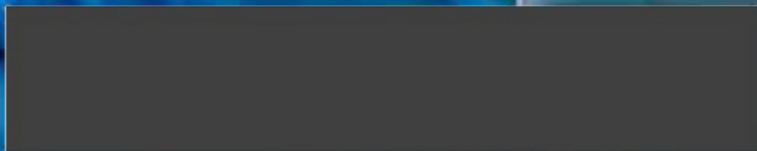


VACCINES & THE ECONOMY WAVE 8

For Queensland Department of Premier and Cabinet

Prepared by Ipsos
28 May, 2021

For more information contact:



GAME CHANGERS



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EXECUTIVE SUMMARY

1

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EXECUTIVE SUMMARY – IMPACT

Wave 8 Survey completed 19 May – 26 May 2021

Impact of COVID on work remains steady

44%

Employees work impacted

Overall, Queenslanders who have had their work situation impacted by Covid-19 has remained steady from Wave 7 (Feb'21). Similarly, those who have lost their job has remained steady (8%) since Wave 7 (9%).

64%

Self-employed / business owners impacted

Impact on SMEs and sole traders also remains steady. They continue to experience a higher level of disruption compared to the average employee (net impact).

Queenslanders feel we act appropriately to COVID-19 threat but those who feel we are under-reacting has nearly doubled to 13%.

78%

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. Perception of over-reaction (9%) remained steady from Wave 7 but a significant increase seen for those perceiving under-reacting (13%) from previous wave.

Tourism (46%), followed by mining (34%) and infrastructure (26%), are perceived to receive the most support from the Queensland Government.

A third (32%) said the Queensland Government is focused on creating jobs by supporting the traditional Queensland industries of tourism, mining, construction and agriculture.

Lower perceived risk of catching Covid-19

13%

Likely to get COVID-19

Perceived risk of them or their families getting Covid-19 remains steady.

15%

Likely family to get COVID-19

DASHBOARD – IMPACT

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 7) %	This wave (Wave 8) %	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	53	56	
	Impacted (red)	56	46	44	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	33	36	
	Impacted (red)	79	59	64	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	11	9	
	Appropriate response (green)	78	82	78	
	Under-reacting (orange)	15	7	13	

EXECUTIVE SUMMARY – EXPECTATIONS & CONFIDENCE

Wave 8 Survey completed 19 May – 26 May 2021

Expectations for the economy is more positive

25% The worst is yet to come

16% At its worst now

37% Worst behind us

22% Unsure

Compared to Wave 7, a significantly greater proportion are feeling optimistic, with 37% stating 'the worst is behind us' versus 29% in Feb'21.

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

53%
Agree QLD Gov can manage the economic recovery

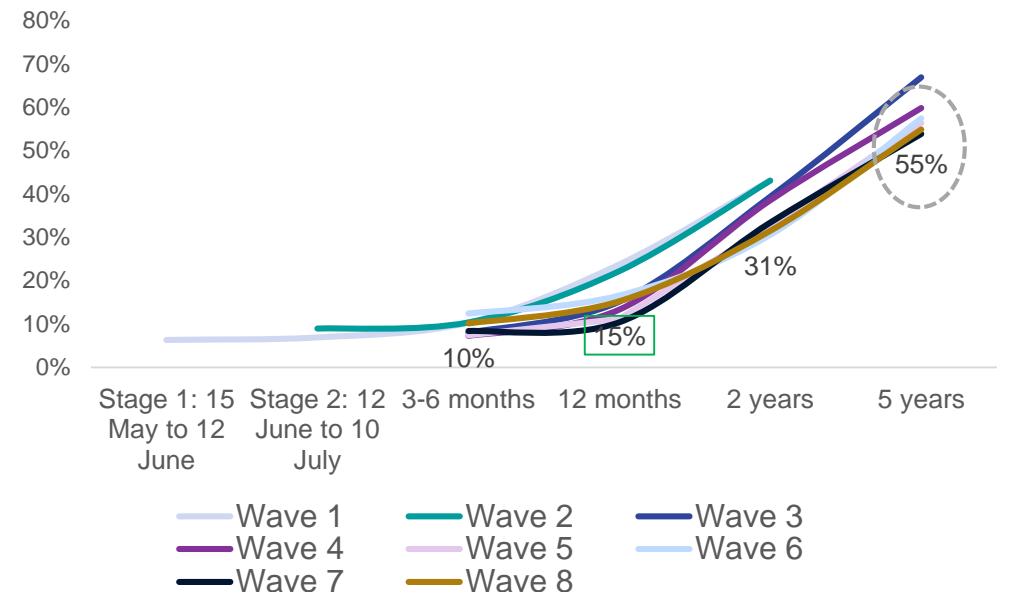
52%
Agree QLD Gov are handling for economic advantage in long run

Queenslanders are split in their confidence of the Queensland Government's management of the economic recovery, with half feeling confident and the other half feeling either neutral (30%) or not confident (17%). Those who are 'not confident' has remained steady compared to Wave 7 (19%).

One in two (52%) Queenslanders believe that the Government has been handling the COVID-19 crisis to the State's economic advantage in the long run (steady with Wave 7 at 54%). Similarly, lack of confidence has also remained steady from 16% in Wave 7 to 14% in Wave 8.

Optimism about economic recovery remains long term

Queenslanders expectations regarding economic recovery remains long term (5 years), with 55% believing that the economy will fully recover within this time. However, a significantly higher proportion (15%) project recovery within 12 months (versus 10% in Feb'21).



DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 7) %	This wave (Wave 8) %	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	29	25	
	At their worst now (orange)	19	19	16	
	Worst is behind us (green)	14	29	37	
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	8	10	
	12 months (orange)	24	10	15	
	2 years (blue)	43	33	31	
	5 years (green)	-	54	55	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	50	53	
	Not confident (red)	18	19	17	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	54	52	
	Not confident (red)	-	16	14	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	22	25	

EXECUTIVE SUMMARY – ECONOMIC STRATEGIES & SUPPORT

Wave 8 Survey completed 19 May – 26 May 2021

Awareness, understanding and support of the economy strategy generally steady.

26%

Aware of Economic Strategy

Awareness of the economic strategy has increased from Wave 7 (21%). Overall understanding of the strategy marginally lower, with 18% of Queenslanders saying they don't understand the strategy compared to Wave 7 (25%).

46%

Understands the Economic Recovery Strategy

39%

Agree they have enough information on how QLD economy will recover

Agreement on they are receiving enough information on how the Queensland economy will recover remained steady from the previous wave (36% in Wave 7).

25%

Aware of any major economic initiatives

A key challenge for the Queensland Government continues to be raising awareness of the State's major economic initiatives (remained steady from 22% in Wave 7 but significantly less than 35% in Wave 2).

68%

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

10%

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

Satisfaction and dissatisfaction with Government support provided to small business and the community also steady

25%

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

36%







Enough support to small business through this pandemic and recovery

47%

Enough support to the community through this pandemic and recovery

Satisfaction levels with the support provided by the Government among small business owners/self employed, for small businesses and for the community have remained steady from Wave 7.

DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 7) %	This wave (Wave 8) %	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	21	26	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	39	46	
	Not well (red)	-	25	18	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	53	52	
	Oppose (red)	-	16	11	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	21	25	
	Low support (red)	-	46	44	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	34	36	
	Low support (red)	-	23	24	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	46	47	
	Low support (red)	-	19	17	

EXECUTIVE SUMMARY – VACCINES

Wave 8 Survey completed 19 May – 26 May 2021

Persuasion of Queenslanders to get the COVID-19 vaccine required with further information regarding its efficacy and safety

37%

Think the Queensland Government is managing the roll out of vaccines in Queensland well

Varied perceptions with regards to management of the roll out of the COVID-19 vaccine by the Queensland Government, with 37% rating 'well', 40% 'neutral' and 23% 'not well'.

53%

Are confident that they will be protected from COVID-19 by receiving a vaccine

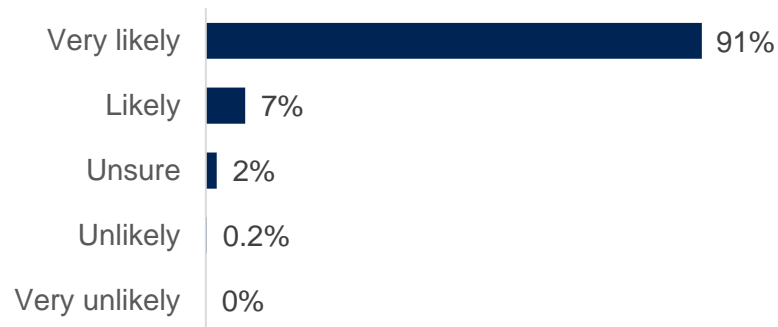
One in two Queenslanders are confident of the efficacy of the COVID-19 vaccine, while one in five (18%) are 'not confident'.

21%

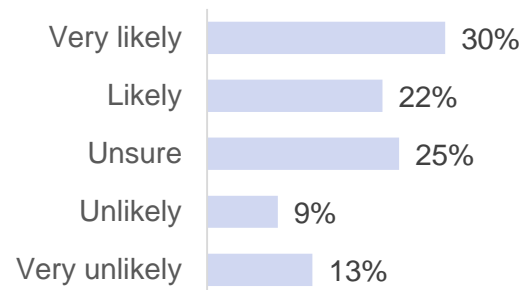
Have received their 1st or 2nd dose of the COVID-19 vaccine

One in five (20%) have received their first dose of the COVID-19 vaccine, with a further 1% who have received their second dose.

Likelihood to get second dose of COVID-19 vaccine is almost universal at 98% (among those who have had 1 dose).



One in two (52%) likely to get COVID-19 vaccine once it is available (among those who have not or unsure if they had the COVID-19 vaccine).



Among those aged 50 years and over who are not yet vaccinated, only one in three are confident in receiving the AstraZenica vaccine, with the main worries including blood clots and/or other side effects.

EXECUTIVE SUMMARY – RESTRICTIONS

Wave 8 Survey completed 19 May – 26 May 2021

Confidence in the Government's ability to manage restrictions steady

67%

Confident Queensland Government can manage restrictions

Confidence has remained steady from Wave 7 with two in three (67%) Queenslanders now stating they have confidence in the Government (66% in Feb'21).

General consensus with regards to establishing quarantine facilities in regional Queensland

73%

Support establishing quarantine facilities for international travellers in regional Queensland

Three in four Queenslanders support establishing quarantine facilities in regional Queensland, remaining steady from previous wave (71%). Support is marginally higher among SEQ residents (75%) compared to ROQ residents (70%).

DASHBOARD – VACCINES & RESTRICTIONS

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 7) %	This wave (Wave 8) %	Trend
Q24 Confidence the Queensland Government can manage restrictions	Confident (green)	59	66	67	
	Not confident (red)	12	11	12	
V4 How well the Queensland Government is managing the roll out of the vaccines across Queensland	Well (green)	-	-	37	
	Neutral (orange)	-	-	40	
	Not well (red)	-	-	23	
V5 Confidence in receiving a vaccine will protect from COVID-19	Confident (green)	-	-	53	
	Neutral (orange)	-	-	29	
	Not confident (red)	-	-	18	
V6 Confidence in receiving the AstraZenica vaccine	Confident (green)	-	-	33	
	Neutral (orange)	-	-	25	
	Not confident (red)	-	-	42	

EXECUTIVE SUMMARY – INFORMATION

Wave 8 Survey completed 19 May – 26 May 2021

Perception of the level of information from the Queensland Government remains steady with wave 7. Communication gap most evident on how the Queensland economy will recover.

The Queensland Government remains a consistently trustworthy source of information, steady in agreement compared to Wave 7. However, perception of the Queensland Government handling of the pandemic as 'better' than other states/territories has significantly declined since wave 6 (last time question was asked)

88%

How to prevent the spread of coronavirus

76%

Current coronavirus level of restrictions

78%

How community transmission occurs

61%

Who can cross the border into Queensland

39%

How the Queensland economy will recover

Queenslanders continue to be generally satisfied with the information provided by the Government with regards how to prevent the virus spread, how community transmission occurs or level of restrictions. Communication gaps remain about economic recovery and restrictions on who can cross the border.

67%

Queensland Government is a trustworthy information source

71%

Queensland Government managed better than other states or territories

DASHBOARD – INFORMATION

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 7) %	This wave (Wave 8) %	Trend
Q1 Getting enough information to feel confident you know about ... (T2B = 5 very good + 4)	How to prevent the spread (red)	91	87	88	
	Current level of restrictions (orange)	79	77	76	
	How QLD economy will recover (blue)	29	36	39	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	69	67	
	Disagree (red)	11	12	12	
Q4 QLD Govt has managed the pandemic better than other states or territories	Agree (green)	65	Not asked	71	
	Disagree (red)	8	Not asked	9	

EXECUTIVE SUMMARY – DROUGHT

Wave 8 Survey completed 19 May – 26 May 2021

Perceptions and attitudes regarding the value of water is high.

87%

Agree they believe water is a precious resource, and it doesn't always rain where and when we need to keep dams full

A higher proportion of Queenslanders agree they (themselves) use water responsibly compared to how responsibly their neighbours use water.

87%

Agree they try to use water responsibly

82%

Agree water conservation measures and drought response plans will be needed to manage climate changes and drought

58%

Agree they believe their neighbours use water responsibly

Further need to educate Queenslanders on purified recycled water.

53%

Understanding of what purified recycled water is ('well')

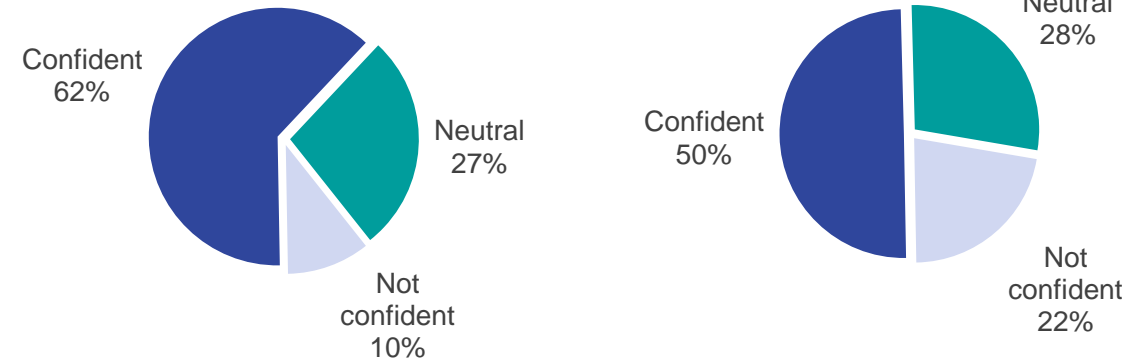
While just over one in two (53%) rate their understanding of purified recycled water as 'well', 33% rate it as neutral and 14% as not well.

Purified recycled water is the least preferred option, with 53% rating this option as favourable; 'favourable' significantly higher among SEQ residents (57%) than ROQ residents (49%).

Queenslanders are more likely to be confident to use purified recycled water around their house than for drinking.

Confidence to use purified recycled water around your house if the drought continues and purified recycled water was needed in your region

Confidence to drink purified recycled water



Differences between SEQ and ROQ residents observed when selecting priorities.

- Providing rebates to community (12% SEQ vs 19% ROQ)
- Save water voluntarily (12% SEQ vs 8% ROQ)
- Use desalination plant (13% SEQ vs 7% ROQ)

There are statistical differences between SEQ and ROQ when considering the use of purified recycled water during and outside times of drought.

If South East Queensland were to experience a drought in the next 2-3 years, I would be comfortable with purified recycled water being added to my drinking water supply (via Wivenhoe Dam/existing water supplies) (62% SEQ vs 54% ROQ)

Purified recycled water is a sustainable source of quality drinking water (59% SEQ vs 52% ROQ)

COMMUNICATION RECOMMENDATIONS

Clarity in concrete terms and outcomes focused.

The Queensland Government remains a consistently trustworthy source of information, steady in agreement compared to Wave 7. However, perception of the Queensland Government handling of the pandemic as 'better' than other states/territories has significantly declined since wave 6 (last time question was asked). There is more optimism in the air with an increase in those who feel the worst is yet to come or behind us, certainly Queenslanders are feeling more optimistic since 2021 and more people are feeling that the economic recovery will be sooner. However, the impact from COVID-19 on work or small business hasn't seen any shift. With only half of Queenslanders feeling the economic recovery is being managed well now and in the long term, and low awareness of the economic strategy, there is more work needed to inform the public of the actions being taken. The perceptions of the public are that tourism (46%), followed by mining (34%) and infrastructure (26%), are getting the most support from the Queensland Government. Only a third (36%) perceive enough support getting to the small businesses and self-employed, while only 25% small business or self-employed Queenslanders actually feel supported. A third (32%) said the Queensland Government is focused on creating jobs by supporting the traditional Queensland industries of tourism, mining, construction and agriculture. There has been an increase in awareness of the Economic Recovery Strategy, which has a positive influence on sentiment, but still less than half of those aware of the strategy, state they understand the strategy. In addition only one in four (39%) feel they have enough information about how the economy will recover.

Communication on the Economic Recovery Strategy needs to focus on giving clarity and details on who are the beneficiaries of the initiatives and the impact aimed to be achieved by with an outcomes focus.

Most of the fieldwork was completed before Sunday evening as the conversation of community contagion unfolded in Victoria. The proximity to risk of COVID-19 continues to be low, with an increase in those feeling that the Queensland Government is underreacting. Three in four Queenslanders support establishing quarantine facilities in regional Queensland, remaining steady from previous wave (71%). Support is marginally higher among SEQ residents (75%) compared to ROQ residents (70%). There are varied perceptions with regards to management of the roll out of the COVID-19 vaccine by the Queensland Government, with 37% rating 'well', 40% 'neutral' and 23% 'not well'. One in two Queenslanders are confident of the efficacy of the COVID-19 vaccine, while one in five (18%) are 'not confident'. A similar proportion (52%) of those not vaccinated say they are likely to get COVID-19 vaccine once it is available. There were 21% in the survey who have already had at least one dose, and the majority say they will get their second dose if they have not already done so. Among those aged 50 years and over who are not yet vaccinated, only one in three are confident in receiving the AstraZenica vaccine, with the main worries including blood clots and/or other side effects.

A higher proportion of Queenslanders believe water is a precious resource and agree they (themselves) use water responsibly. However, there is less agreement that others use water responsibly. Changing the social norms around water use may be required in communications as it is unlikely everyone is as conscientious as they self report. Queenslanders are more likely to be confident to use purified recycled water around their house than for drinking, but only half know what purified recycled water is, or how it is produced. Favourable drinking supplies are dams and weirs (79%) and rainwater harvesting (76%) while purified recycled water is the least preferred option, with 53% rating this option as favourable; 'favourable' significantly higher among SEQ residents (57%) than ROQ residents (49%). Multiple strategies may be palatable as replenishing Wivenhoe Dam/existing water supplies by adding purified recycled water is selected most often (23%), but support for the other initiatives is fragmented across all options. Again SEQ are more favourable than ROQ when it comes to purified recycled water. Just over three in five Queenslanders agree that using purified recycled water to replenish the drinking water supply makes sense during times of drought (64%) and outside times of drought (62%). Only half of Queenslanders are comfortable to drink purified recycled water (52%) however it does make sense to do so amongst one in six (62%). The most sensitive item to test acceptance of purified water is the confidence to use while brushing teeth (59%). Because there is a high level of belief for, and agreement with, using purified recycled water, the communication should focus on the process, the purity, and the overall economic benefits around cost of production, opportunity cost of not having a secure water supply to strengthen the rational to top up existing water supplies with using purified recycled water.

BACKGROUND

2

BACKGROUND AND OBJECTIVES



Findings will be used to inform communications.

This research is to understand Queenslanders' sentiment and views on issues arising from the COVID-19 pandemic. Extending on this, the Department of Premier and Cabinet also want to uncover Queenslanders' perceptions and attitudes to purified recycling. The research will be used to shape the government's approach and communication. 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 vaccines and restrictions
- Awareness and effectiveness of communication on current restrictions, Government initiatives, strategies and actions
- The community's views on use of purified recycling water in response to a drought.

This report covers the seventh wave of research which was conducted between 29th January to 12th February 2021. The sample was sourced from commercial research panels. Subsequent waves of research are included for comparison:

- Wave 1: 12 May to 14 May 2020; average 21 minutes; n=1603
- Wave 2: 3 June to 4 June 2020; average 20 minutes; n=1018
- Wave 3: 23 June to 25 June 2020; average 15 minutes; n=1019
- Wave 4: 7 July to 8 July 2020; average 15 minutes; n=1017
- Wave 5: 28 July to 30 July 2020; average 17 minutes; n=1091
- Wave 6: 10 August to 11 August; average 17 minutes; n=1001
- Wave 7: 29 January to 12 February, average 17 minutes; n=1019
- Wave 8: 19 May to 26 May 2021, average 18 minutes; n=1006

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

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

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

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

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

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

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

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

Wave 8: The rollout of COVID-19 vaccines in Queensland commenced 22 February 2021. Borders are open to all other Australian states and New Zealand. However, from 26 May 2021, anyone who has been to any of the exposure venues in Victoria will be required to enter government arranged quarantine.

The limitations for this methodology include:

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



SAMPLE

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

n	Wave 1									Wave 2									Wave 3									Wave 4									Wave 5								
	SEQ			ROQ			QLD			SEQ			ROQ			QLD			SEQ			ROQ			QLD			SEQ			ROQ			QLD											
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total									
18-39	54	62	116	43	230	273	97	292	389	52	94	146	54	128	182	106	222	328	33	37	70	13	51	64	46	88	134	28	63	91	17	42	59	45	105	150	19	59	78	18	42	60	37	101	138
40-64	159	166	325	152	206	358	311	372	683	82	155	237	80	129	209	162	284	446	114	116	230	97	134	231	211	250	461	89	153	242	90	123	213	179	276	455	102	172	274	132	139	271	234	311	545
65+	175	130	305	135	90	225	310	220	530	70	51	121	72	51	123	142	102	244	125	83	208	127	89	216	252	172	424	128	81	209	132	71	203	260	152	412	110	83	193	146	69	215	256	152	408
Total	388	358	746	330	526	856	718	884	1602	204	300	504	206	308	514	410	608	1018	272	236	508	237	274	511	509	510	1019	245	297	542	239	236	475	484	533	1017	231	314	545	296	250	546	527	564	1091

n	Wave 6									Wave 7									Wave 8								
	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
18-39	57	62	119	24	44	68	81	106	187	9	61	70	17	47	64	26	108	134	30	46	76	16	42	58	46	88	134
40-64	105	121	226	101	126	227	206	247	453	57	190	247	60	123	183	117	313	430	102	138	240	75	122	197	177	260	437
65+	111	68	179	129	50	179	240	118	358	138	108	246	130	79	209	268	187	455	147	99	246	112	77	189	259	176	435
Total	273	251	524	254	220	474	527	471	998	204	359	563	207	249	456	411	608	1019	279	283	562	203	241	444	482	524	1006

Diversity

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Aboriginal or Torres Strait Islander	7	23	30	13	26	39	7	11	18	7	8	15	4	17	21	12	16	28	12	17	29	6	22	28
Culturally or linguistically diverse background	67	70	137	72	53	125	42	40	82	39	25	64	43	51	94	36	30	66	35	26	61	62	47	109
Person with disability	113	117	230	56	63	119	81	78	159	75	74	149	81	78	159	76	80	156	81	79	160	87	77	164
Person most at risk	240	242	482	141	152	293	151	172	323	185	167	352	180	190	370	176	164	340	196	169	365	185	144	329

SAMPLE

Survey respondents were from a mix of educational backgrounds.

Education Level

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Year 10 or equivalent or below	110	127	237	57	81	138	61	97	158	68	87	155	70	99	169	62	83	145	88	97	185	85	92	177
Year 12 or equivalent or below	123	194	317	84	101	185	87	79	166	84	88	172	82	102	184	92	79	171	108	91	199	114	77	191
Trade/Technical/Vocational training	212	258	470	140	153	293	154	172	326	161	161	322	162	178	340	145	159	304	164	132	296	163	138	301
Undergraduate Degree	184	168	352	134	110	244	131	105	236	146	85	231	152	104	256	126	90	216	114	82	196	122	93	215
Postgraduate Degree	109	99	208	79	63	142	72	52	124	78	50	128	72	56	128	92	61	153	76	50	126	74	43	117
Prefer not to say	8	10	18	10	6	16	3	6	9	5	4	9	7	7	14	7	2	9	13	4	17	4	1	5

SAMPLE

Survey respondents were both in and out of the labour force prior to the coronavirus pandemic and at the current time.

Employment status before Coronavirus pandemic

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Employed permanent full-time or part-time	249	279	528	208	193	401	178	139	317	195	143	338	202	175	377	193	147	340	181	143	324	194	130	324
Employed, casual/temporary	48	117	165	59	60	119	40	42	82	49	40	89	39	51	90	56	41	97	38	35	73	24	30	54
Self-employed / business owner	53	53	106	35	34	69	39	37	76	31	29	60	35	34	69	23	25	48	36	22	58	42	25	67
Unemployed (looking for work)	54	68	122	33	29	62	23	29	52	25	17	42	29	23	52	32	23	55	32	21	53	19	29	48
Not working or looking for work	335	329	664	157	186	343	224	250	474	236	240	476	229	252	481	215	232	447	266	220	486	271	224	495
Prefer not to say	7	10	17	12	12	24	4	14	18	6	6	12	11	11	22	5	6	11	10	15	25	12	6	18

Employment status now

n	Wave 8		
	SEQ	ROQ	QLD
Employed permanent full-time or part-time	176	118	294
Employed, casual/temporary	32	32	64
Self-employed / business owner	37	22	59
Unemployed (looking for work)	28	33	61
Not working or looking for work	279	234	513
Prefer not to say	10	5	15
NET	562	444	1,006

QUESTIONS CHANGES PER WAVE

Focus of this wave is on economic recovery, drought and vaccines.

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

Section	Wave 7			Wave 8		
Screening	SQ1-SQ3			SQ1-SQ5		
Demographics	Q38, Q40-Q45			Deleted Q		
Personal impacts	Deleted	Edited		Deleted Q		Added Q7a, V1-V7
Future perceptions and goals / Economy	Deleted Q86 Q63 Q68-Q71 Q87-Q94	Edits Q22 – revise question	Add new questions Q46a, Q46b, Q97a, Q97b	Deleted Q20a, Q20b, Q46a, Q46b, Q48a-Q48c, Q97, Q97a,	Added Codes	Added Q104, Q105
Restrictions	Deleted Q73 Q75a-Q75c Q30 Q96 Q81-Q85a	Edit Q74 – revise question, delete statement #10, Q34 – revise question Q36 – revise question	Add new questions Q98, Q99 Q100, Q100a Q101, Q102 Q103	Deleted Q34, Q36, Q67, Q74, Q98-Q102		Added Q103 ,
Information	Deleted Q4					Added Q4
Drought						Added D1-D11

QUESTIONS CHANGES PER WAVE

Waves 1-6

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

Section	Wave 1	Wave 2			Wave 3			Wave 4			Wave 5			Wave 6
Screening	SQ1-SQ5	SQ1-SQ5			SQ1-SQ5			SQ1-SQ3			SQ1-SQ3			SQ1-SQ3
Demographics	Q37-Q45	Q37-Q45			Deleted Q37, Q39			Q38, Q40-Q45			Q38, Q40-Q45			Q38, Q40-Q45
Personal impacts	1-15	Deleted Q6 Q14 Q15	Edited Q3 – text edit Q11 – add code 6/7 Q13 – add code 13/14		Deleted Q2, Q5, Q10, Q11, Q12, Q13,		Added Q72				Deleted codes Q1 (3)	Added codes Q1 (5, 6)		
Future perceptions and goals / Economic Recovery	16-26	Delete Q16 Q17 Q20 Q21 Q23 Q26	Edits Q22 – delete code 1 change timing of code 2	Add new questions Q20a Q20b Q47-Q58	Delete Q52, Q53, Q54, Q56, Q57, Q58,	Added Codes Wave 3 Q27 (1,2,3,4,5,6) Q28 (10, 11) Q22 (6) Deleted codes Q22 (1,2)	Added Q63, Q64, Q65, Q68, Q70, Q71,			Added Q76, 76a Q77 Q78 Q79 Q80	Deleted Q76, 76a Q77, Q78, Q79, Q80	Added codes Q20a/b (15, 16, 17)	Re-added Q16, Q17 Added Q86, Q87, Q88, Q89, Q90, Q91, Q92, Q93, Q94, Q95	Added Q96
Restrictions	27-36	Delete Q31 Q32 Q33	Edit Q27 – change to stage 3 statements Q28 – delete code 3,4,5 and add 5, 6, 7, 8, 9 Q29 – add code 15/16/17	Add new questions Q59-Q62	Q35, Q37, Q39, Q60, Q62	Edits Wave 3 Q28, Q28 (1) Q48a, Q48b, Q48c (added code frame) Deleted codes Q28 (3,4,5) Q29 (1,2,3) Q22 (1,2)	Added Q66, Q67,	Deleted Q27 Q28 Q29 Q59		Added Q73 Q74 Q75a, b		Added codes Q73 (7), Q74 (12, 13), Q75a/b (19)	Added Q75c Q81, Q82, Q83, Q84, Q84a, Q85, Q85a	

DETAILED FINDINGS

Online survey Wave 8

3

IMPACTS

How has the Coronavirus impacted
Queenslanders work life and their worries

3.1

WORK CONTINUES TO BE IMPACTED BY CORONAVIRUS

Overall, Queenslanders who have had their work situation impacted by COVID-19 remains steady compared to wave 7 (Feb'21). A significantly lower proportion state they are working less than they would like (11% versus 19% in wave 7).

Coronavirus affected work situation EMPLOYED

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	44%	42%	43%	33%	44%	38%	45%	57%	51%	44%	60%	52%	39%	60%	49%	41%	49%	45%	51%	55%	53%	53%	59%	56%
Yes, I am working more	7%	8%	8%	7%	10%	8%	7%	5%	6%	7%	9%	8%	11%	10%	10%	9%	13%	11%	5%	11%	8%	12%	10%	11%
Yes, I am working less than I would like	20%	21%	21%	29%	21%	25%	20%	17%	19%	21%	14%	17%	25%	14%	19%	25%	18%	22%	21%	18%	19%	8%	14%	11%
Yes, I have been stood down temporarily	6%	9%	7%	10%	11%	10%	7%	6%	7%	10%	4%	7%	6%	3%	5%	8%	6%	7%	2%	4%	3%	6%	0%	3%
Yes, I have lost my job	8%	5%	6%	10%	5%	7%	8%	6%	7%	7%	4%	5%	9%	3%	6%	7%	3%	5%	13%	4%	9%	10%	5%	8%
Yes, it has affected my work situation in another way	14%	14%	14%	11%	10%	10%	11%	8%	10%	9%	9%	9%	10%	9%	9%	10%	10%	10%	6%	8%	7%	11%	12%	11%
Prefer not to say	1%	1%	1%	0%	1%	1%	1%	2%	2%	3%	0%	2%	1%	1%	1%	0%	1%	1%	1%	0%	1%	0%	0%	0%
NET employee impact	55%	57%	56%	66%	56%	61%	54%	41%	48%	53%	40%	47%	60%	39%	50%	59%	50%	55%	47%	45%	46%	46%	41%	44%

Q8 Has the Coronavirus pandemic affected your work situation?

Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Employee n=520; Wave 3 n=1021 Total Employee = 551; Wave 4 n=1017 Total Employee = 472; Wave 5 n=1091 Total Employee =467; Wave 6 n=998 Total Employee n=437; Wave 7 n=1019 Total Employee n=397; Total Wave 8 n = 1006; Total Employee n=378

INCIDENCE OF THE IMPACT OF CORONAVIRUS CONTINUES TO BE HIGHER AMONG SME AND SOLE TRADERS

Consistent with previous waves, SMEs and sole traders experience a higher level of disruption compared to the average employee (net impact).

Coronavirus affected work situation SELF EMPLOYED/BUSINESS OWNER

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD	SEQ	ROQ	QLD
No	17%	24%	21%	13%	18%	16%	19%	35%	27%	17%	34%	26%	14%	37%	24%	17%	28%	23%	40%	25%	33%	30%	43%	36%
Yes, I am working more	2%	11%	6%	4%	4%	4%	3%	4%	4%	0%	2%	1%	0%	1%	1%	0%	6%	4%	7%	8%	8%	10%	15%	12%
Yes, my business has less income	56%	38%	47%	43%	51%	47%	39%	44%	42%	54%	46%	50%	57%	41%	50%	50%	25%	36%	36%	28%	32%	26%	24%	25%
Yes, I have had to close my business temporarily	15%	19%	17%	29%	16%	23%	31%	16%	23%	19%	13%	16%	24%	13%	19%	20%	20%	20%	8%	12%	10%	15%	6%	11%
Yes, I have had to shut down my business permanently	1%	3%	2%	0%	2%	1%	0%	0%	0%	2%	4%	3%	4%	5%	4%	8%	9%	9%	6%	10%	8%	9%	12%	10%
Yes, it has affected my work situation in another way	9%	5%	7%	7%	7%	7%	7%	1%	4%	8%	2%	4%	2%	3%	3%	5%	11%	9%	4%	0%	2%	10%	0%	5%
Prefer not to say	0%	0%	0%	4%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	16%	7%	0%	0%	0%
NET Impacted SELF / EMPLOYED / BUSINESS OWNER	83%	76%	79%	83%	82%	82%	81%	65%	73%	83%	66%	74%	86%	63%	76%	83%	72%	77%	60%	58%	59%	70%	57%	64%

Q8 + Q9 Has the Coronavirus pandemic affected your work situation?

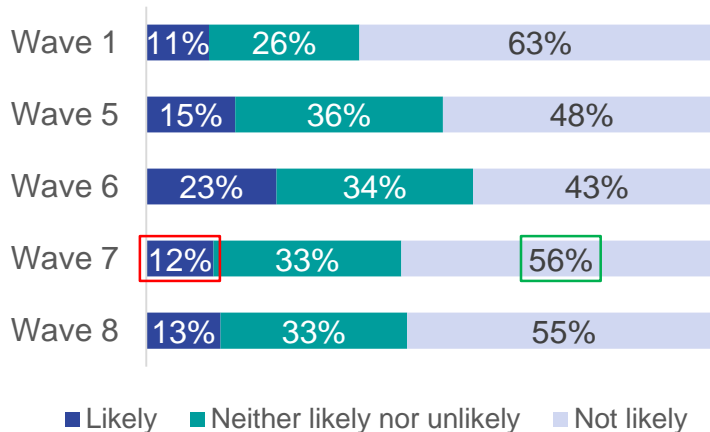
Total: Wave 1 n = 1603, Wave 2 n = 1018, Wave 3 n = 1021, Wave 4 n = 1017, Wave 5 n = 1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006

Total Self Employed/Business Owners: Wave 1 n = 106, Wave 2 n = 69, Wave 3 n = 76, Wave 4 n = 60, Wave 5 n =69 , Wave 6 n=48, Wave 7 n=58, Wave 8 n=67

PERCEIVED RISK OF CORONAVIRUS REMAINS STEADY

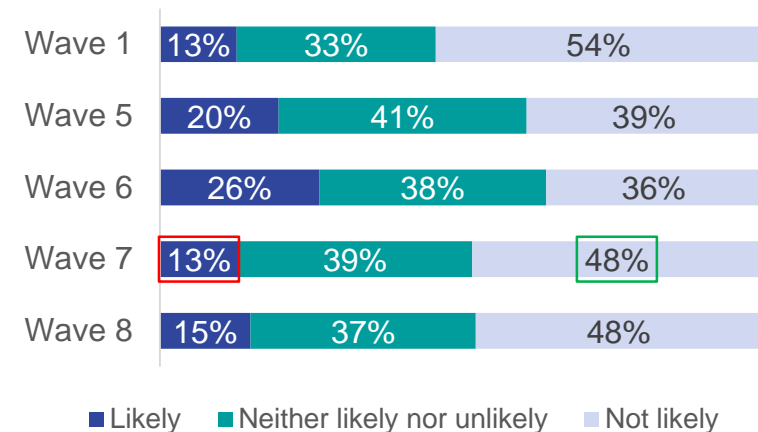
Queenslanders perception of risk remains steady compared Wave 7 (Feb'21). One in two don't perceive a risk to themselves (55%) or to their family (48%).

Perceived likelihood of you getting Coronavirus



Q16 How likely do you feel it is that you will get Coronavirus, on a scale of 1 to 10 where 1 is not at all likely and 10 is definitely likely?
Total: Wave 1 n = 1603, Wave 5 n=1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006

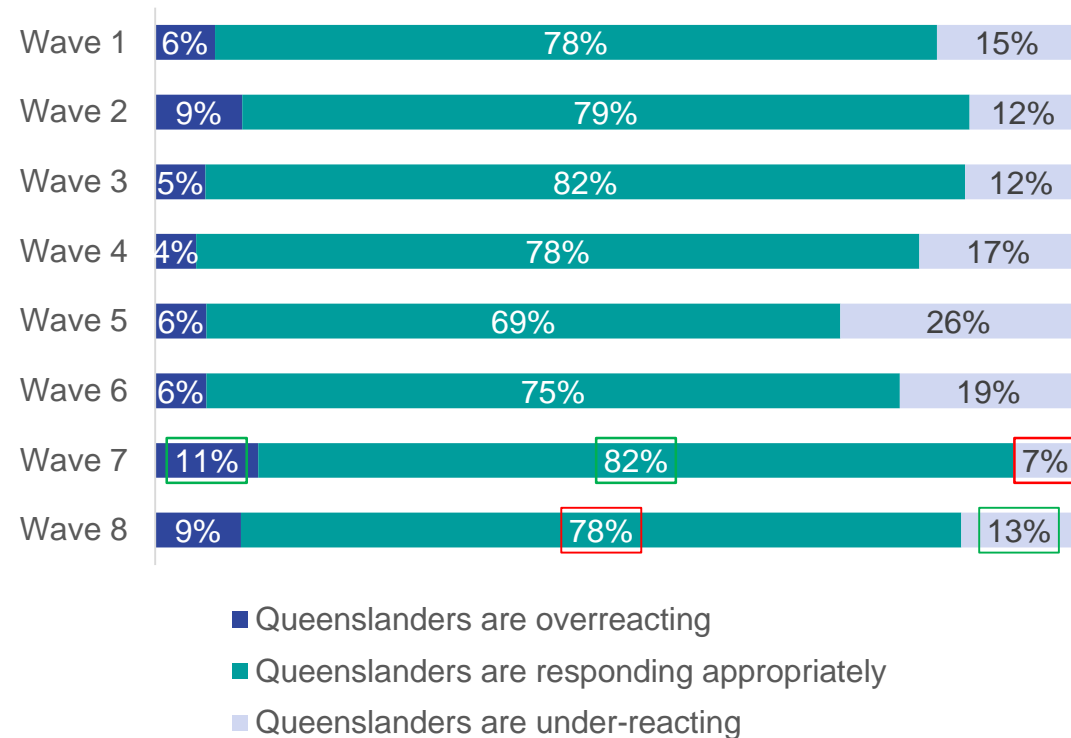
Perceived likelihood someone in your family getting Coronavirus



Q17 How likely do you feel it is that someone in your family will get Coronavirus, on a scale of 1 to 10 where 1 is not at all likely and 10 is definitely likely?
Total: Wave 1 n = 1603, Wave 5 n=1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006

MAJORITY OF QUEENSLANDERS STILL FEEL OUR RESPONSE IS APPROPRIATE

Four in five (78%) perceive that Queenslanders are responding appropriately to the COVID threat; significantly lower than wave 7 (Feb'21, 82%). A significantly higher proportion (13%) believe that Queenslanders are under-reacting.



Q18 How do you feel about how Queenslanders are responding to the threat of Coronavirus?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091, Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

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

ECONOMY

Queenslanders views
on economic recovery

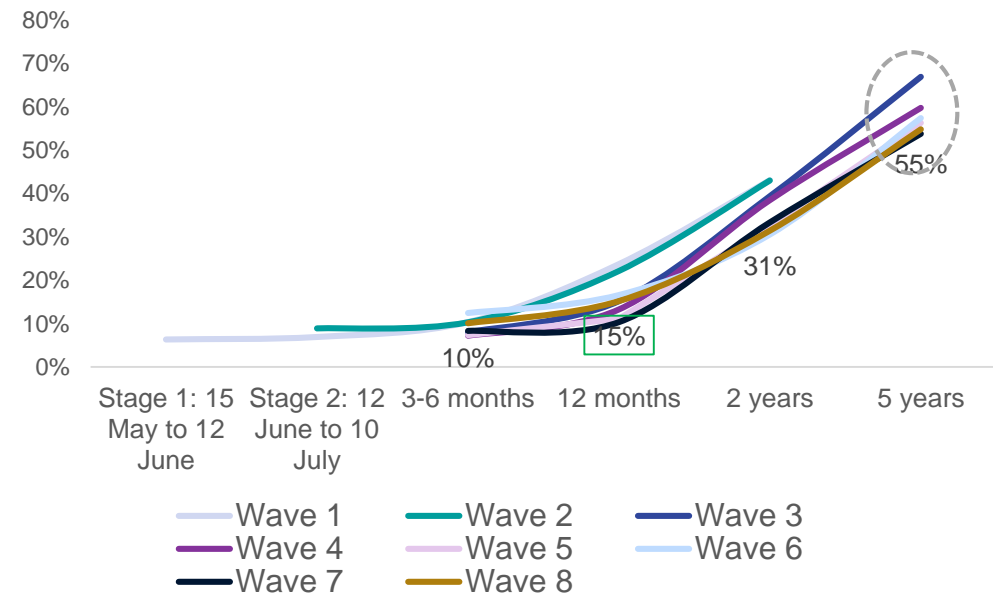
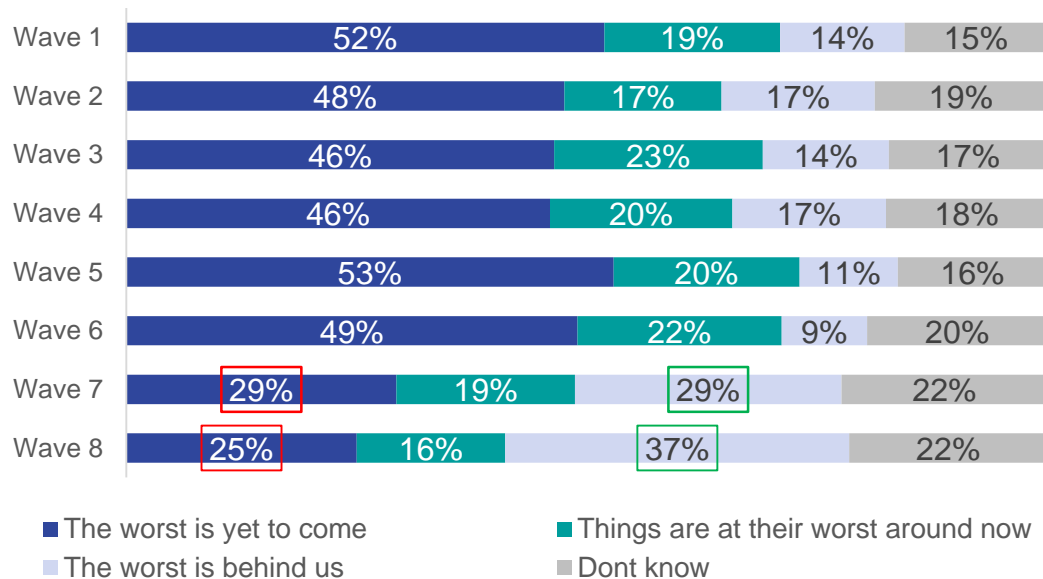
OPEN
BUSINESS AS
NEW NORMAL

3.2

PERCEPTIONS REGARDING THE ECONOMY IS MORE POSITIVE BUT RECOVERY REMAINS LONG TERM

Queenslanders' expectations about the economy is more positive. Compared to wave 7, a significantly greater proportion are feeling optimistic, with 37% stating 'the worst is behind us' versus 29% in Feb'21.

Queenslanders expectations regarding economic recovery remains long term (5 years), with 55% believing that the economy will fully recover within this time. However, a significantly higher proportion (15%) project recovery within 12 months (versus 10% in Feb'21).

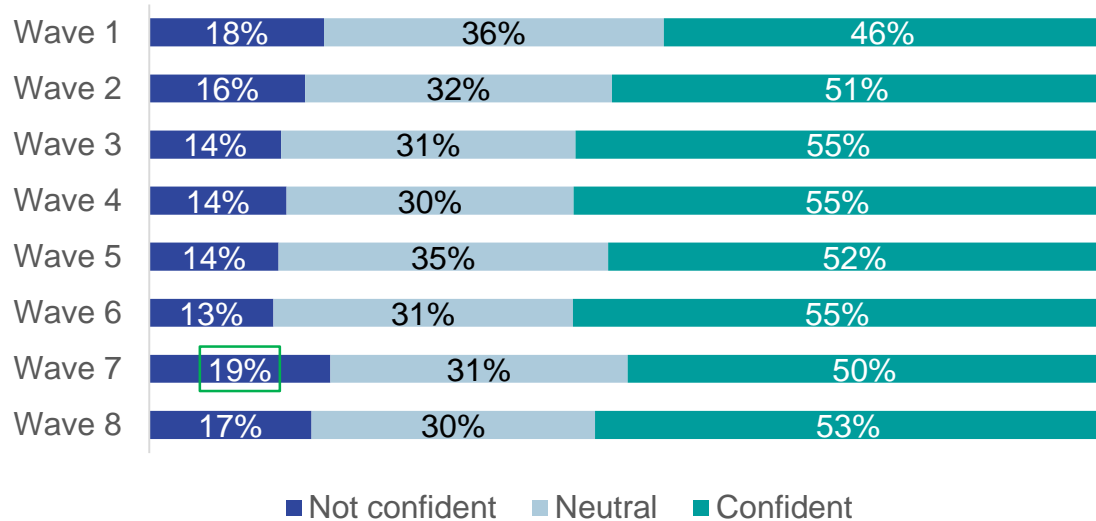


Q19 What do you expect will happen with the economy in Queensland?
 Total Wave 1 n = 1603, Total Wave 2 n = 1018, Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998,
 Total Wave 7 n=1019, Total Wave 8 n=1006

Q22 As restrictions are relaxed, how confident are you that Queensland's economy will have made a full recovery to pre-COVID-19 levels in...?:
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n = 1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7
 n=1019, Total Wave 8 n=1006
 NB: Wave 7 – "As restrictions are relaxed" deleted from question wording

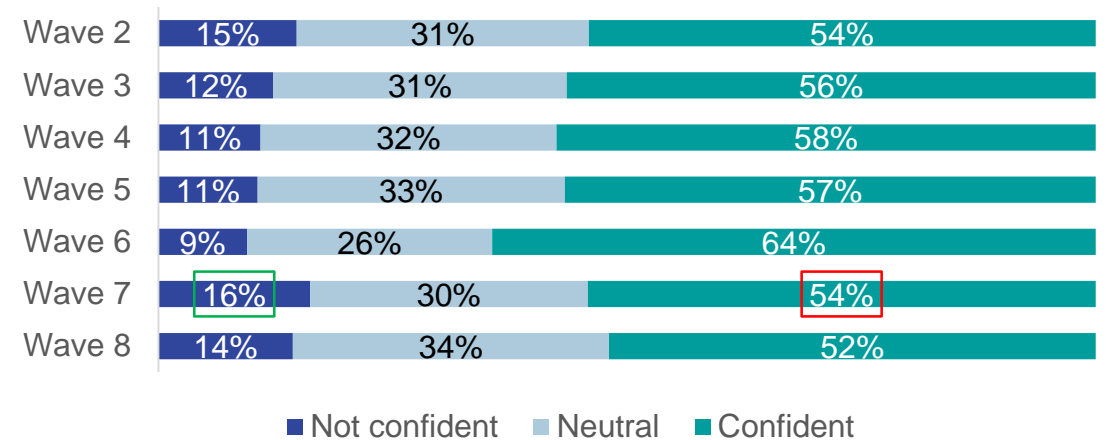
CONFIDENCE IN ECONOMIC MANAGEMENT STEADY

Queenslanders who are 'confident' versus 'not confident' in the Queensland Government's management of the economic recovery remains steady at 53% and 17% respectively.



Q25. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage the economic recovery?
 Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

Just over half of Queenslanders believe the Government's handling of the COVID-19 crisis will be to the state's economic advantage in the long run (steady at 52%). Lack of confidence also remains steady compared to Feb'21.

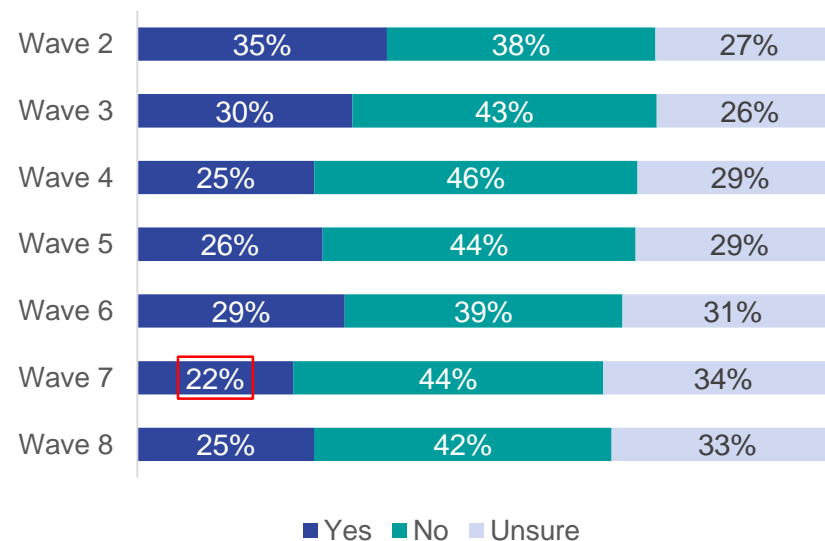


Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" –How confident that Queensland has handling COVID-19 will be to the State's economic advantage in the long run
 Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

AWARENESS OF ECONOMIC INITIATIVES IS AT ITS LOWEST LEVEL

One in four (25%) Queenslanders state they have heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery, steady compared to wave 7 (22%).

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

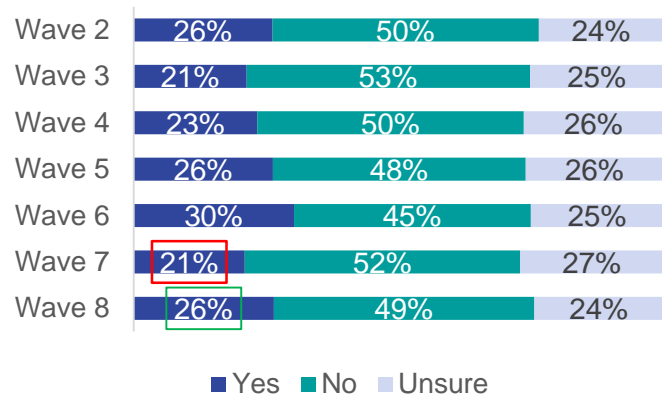


Q46 Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?
Total Wave 2 n = 1018, Wave 3 n=1021; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

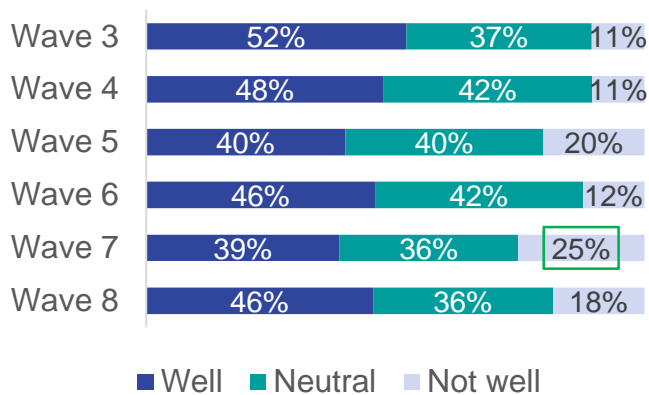
HIGHER AWARENESS OF ECONOMIC RECOVERY STRATEGY

Awareness of the Recovery Strategy is significantly higher (26%) compared to wave 7 (21%). Among those aware, understanding the strategy 'well' is marginally higher (46%), while those who support the strategy remains steady (52%).

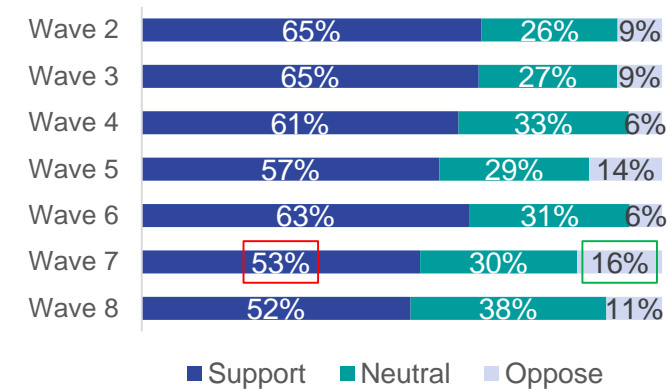
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



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



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



Q47 Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?
Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 N=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
Base: aware of Economic Recovery Strategy Wave 3 n = 211; Wave 4 = 237; Wave 5 n=282; Wave 6 n=310, Wave 7 n=220, Wave 8 n=251

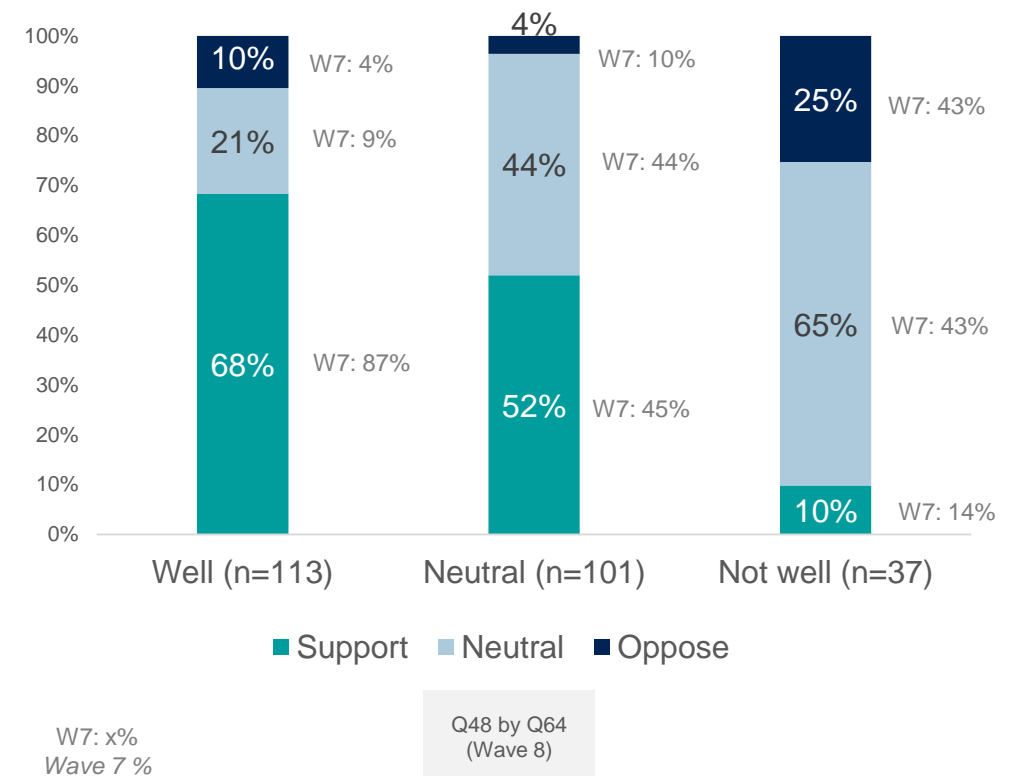
Q48 On a scale of 1 to 10, where 1 is "strongly oppose" and 10 is "strongly support" – Do you support the direction of State Government's Economic Recovery Strategy?
Base: aware of Economic Recovery Strategy Wave 2 n = 252; Wave 3 n=211; Wave 4 n=237; Wave 5 n=282; Wave 6 n=310, Wave 7 n=220, Wave 8 n=251

UNDERSTANDING ASSOCIATED WITH SUPPORT

Continue to build support 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 (68% vs. 52% neutral and 10% not well).

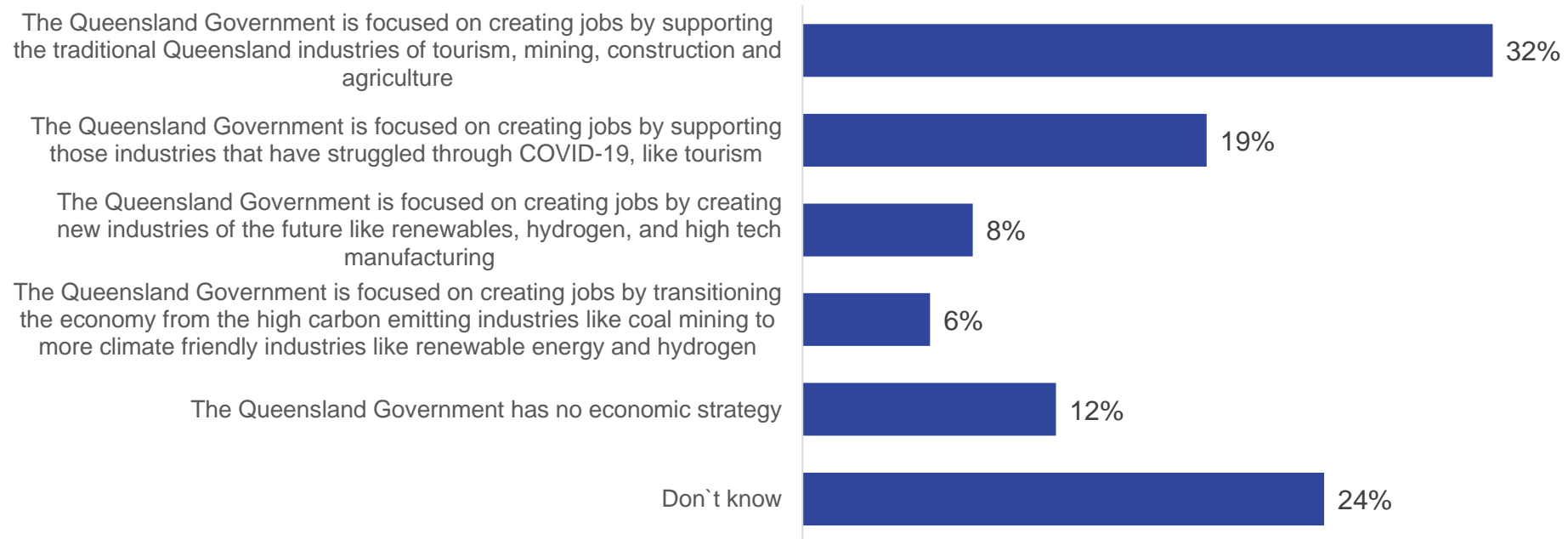
However, declining support is observed among those who believe they understand the strategy (68% in wave 8 compared to 87% in wave 7).



MAIN PERCEPTION OF THE QLD GOVERNMENT'S ECONOMIC STRATEGY IS ON TRADITIONAL INDUSTRIES

One in three Queenslanders (32%) believe the focus of the QLD Government's economic strategy is on creating jobs by supporting 'traditional' industries, while a further one in five (19%) purport the focus is creating jobs to support industries that have struggled through COVID-19. Just over one in ten (12%) state there is 'no economic strategy'.

Best description of the Queensland Government's economic strategy?

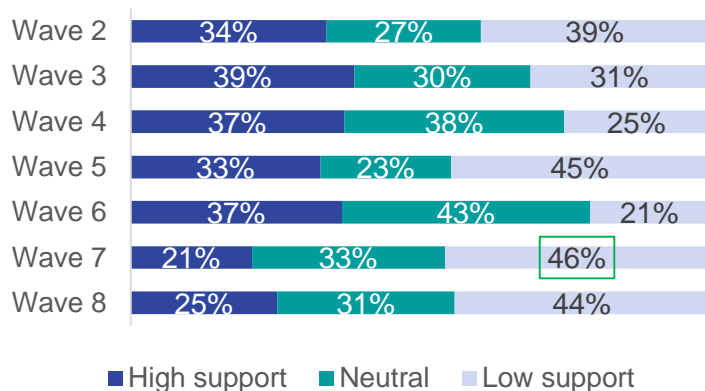


Q104 Which of the following statement best describes the Queensland Government's economic strategy?
Total Wave 8 n=1006

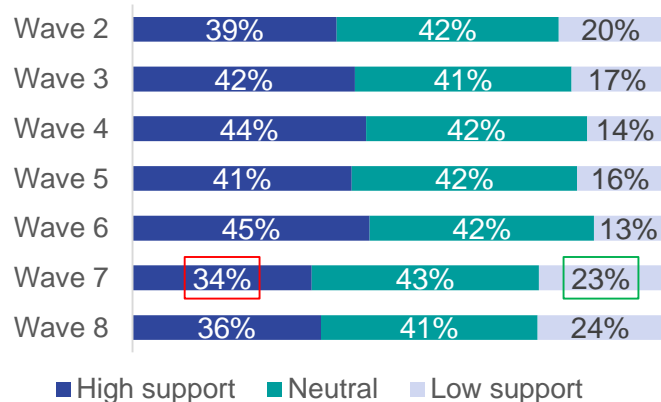
PERCEPTION OF 'SUPPORT' FROM THE QLD GOVERNMENT STEADY

Levels of satisfaction and dissatisfaction among small business and self employed with regards to the support they are getting from Government and among Queenslanders with perceived Government support for small businesses and the community remain steady compared to wave 7.

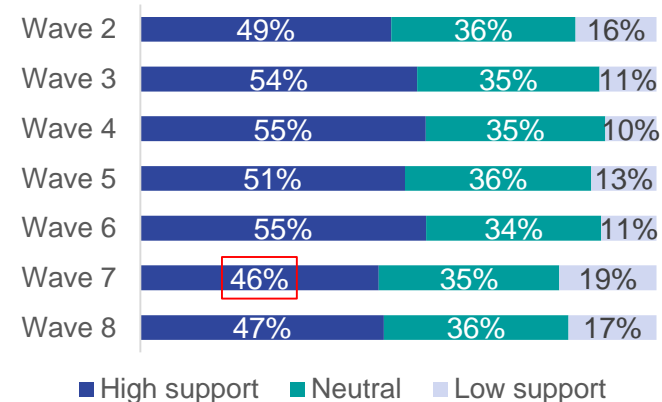
Are you getting enough support from the government as a **small business owner or self-employed**?



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



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



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; Wave 3 n=76; Wave 4 n=60; Wave 5 n = 69; Wave 6 n=48, Wave 7 n=58, Wave 8 n=67

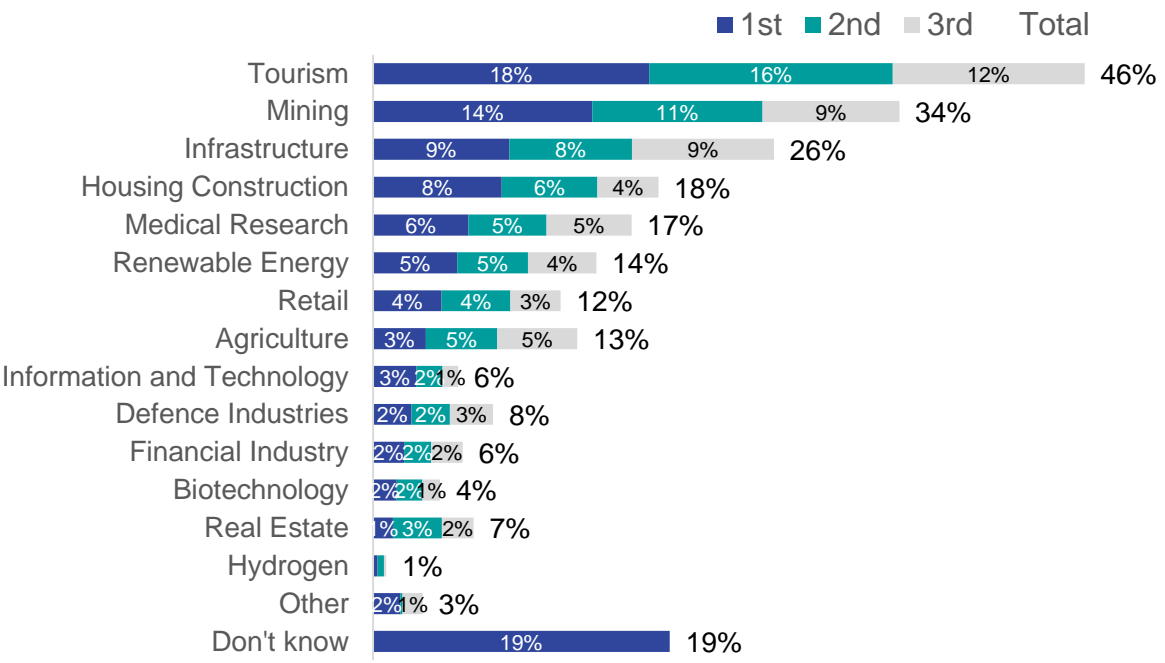
Q50 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support small business through this pandemic and recovery?
Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n = 1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

Q51 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" – Is the Queensland Government is doing enough to support the community through this pandemic and recovery?
Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n = 1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

INDUSTRY PERCEIVED TO RECEIVE THE MOST SUPPORT BY THE QLD GOVERNMENT IS TOURISM

Tourism (46%), followed by mining (34%) and infrastructure (26%), are perceived to receive the most support from the Queensland Government.

Which of the following industries does the Queensland Government most support? *Up to 3 selected*



Q104 Which of the following industries does the Queensland Government most support (pick up to 3)?
Total Wave 8 n=1006



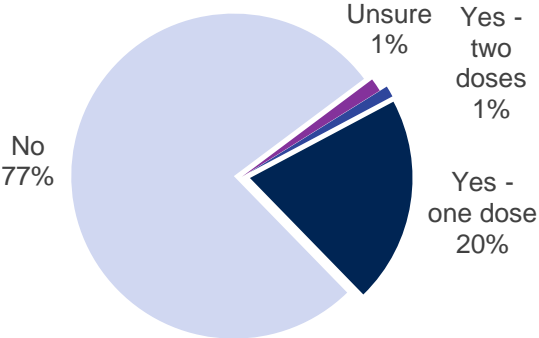
VACCINES & RESTRICTIONS

3.3

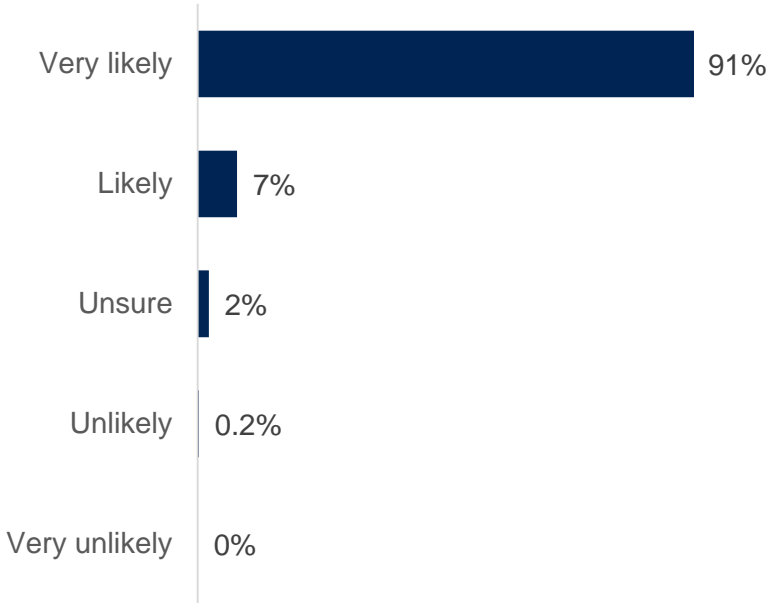
PROPENSITY OF SECOND DOSE VACCINE UPTAKE HIGH WHILE FUTURE INTENTION TO VACCINATE IS BY ONE IN TWO

One in five (21%) Queenslanders have had a COVID-19 vaccination. Nearly all (98%) who have had one dose intend to get their second dose. Just over one in two (52%) intend to get vaccinated once it becomes available to them.

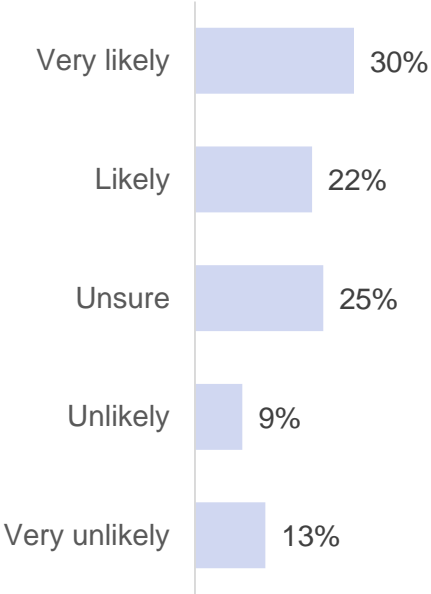
Vaccinated for COVID-19



Likelihood to get second dose of COVID-19 vaccine
(among those who have had 1 dose)



Likelihood to get COVID-19 vaccine once it is available to you
(among those who have not or unsure)



V1 Have you been vaccinated for COVID-19?
Total Wave 8 n=1006

V2 How likely are you to get your second dose of COVID-19 vaccine?
Those who have had 1 dose Wave 8 n=309

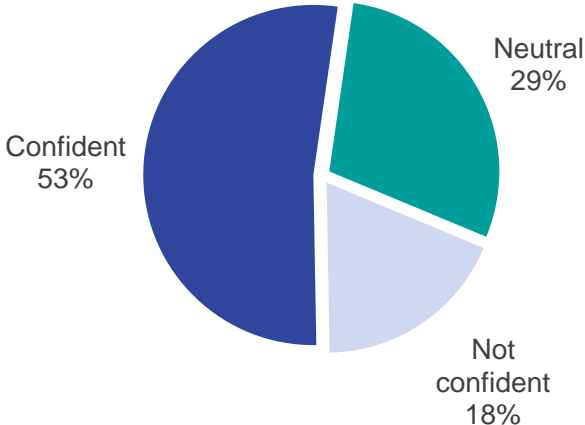
V3 How likely are you to get a COVID-19 vaccine once it is available to you?
Those who have not or unsure if vaccinated Wave 8 n=686



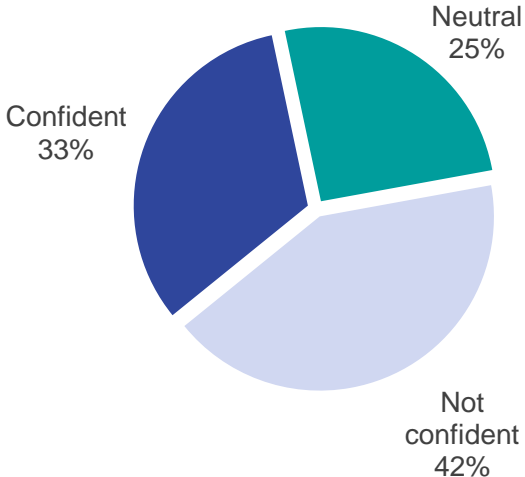
ONE IN TWO CONFIDENT OF THE EFFICACY OF COVID-19 VACCINE, LESS CONFIDENCE FOR ASTRAZENICA

Just over one in two (53%) are confident they vaccine will protect them from COVID-19. Among those aged 50 years and over who are not yet vaccinated, only one in three are confident in receiving the AstraZenica vaccine, with the main worries including blood clots and/or other side effects.

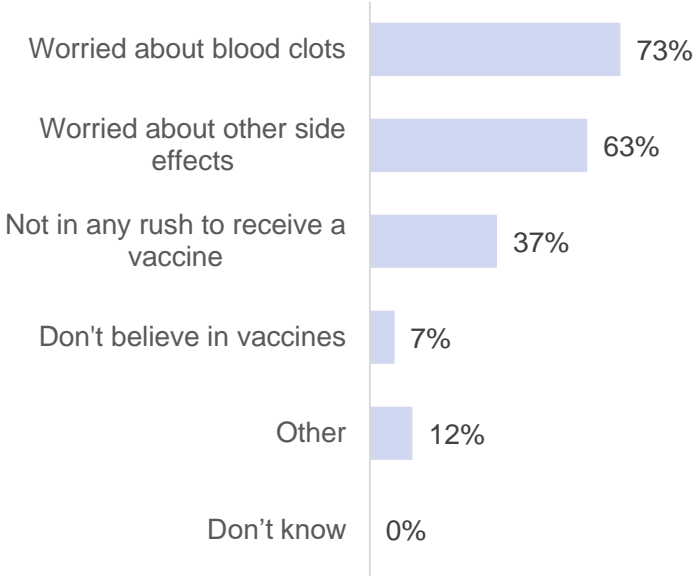
Confidence in COVID-19 vaccination to protect



Confidence in receiving the AstraZenica vaccine (if over 50 years and not yet vaccinated)



Reasons for being not confident in receiving the AstraZenica vaccine (among those who rated 0-5 for confidence level)



V5 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 receiving a vaccine will protect you from COVID-19?
Total Wave 8 n=1006

V6 If you are over 50 and have not yet received a vaccine, on a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident", how confident do you feel receiving the AstraZenica vaccine?
Those aged 50 years and over and have not yet had a vaccine Wave 8 n=458

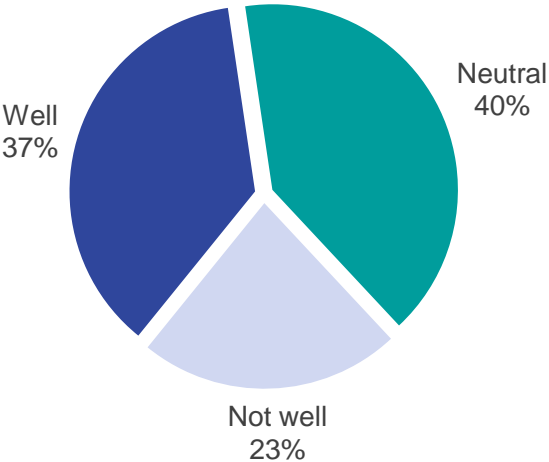
V7 Why are you not confident in receiving the AstraZenica vaccine?
Those who rated 0-5 in question V6 Wave 8 n=273



PERCEPTION OF QLD GOVERNMENT'S MANAGEMENT OF THE VACCINE ROLLOUT IS MIXED

37% believe the QLD Government has managed the roll out of the vaccines across Queensland 'well', 23% rate as 'not well' and 40% are neutral.

Queensland Government's management of the roll out of the vaccines across Queensland

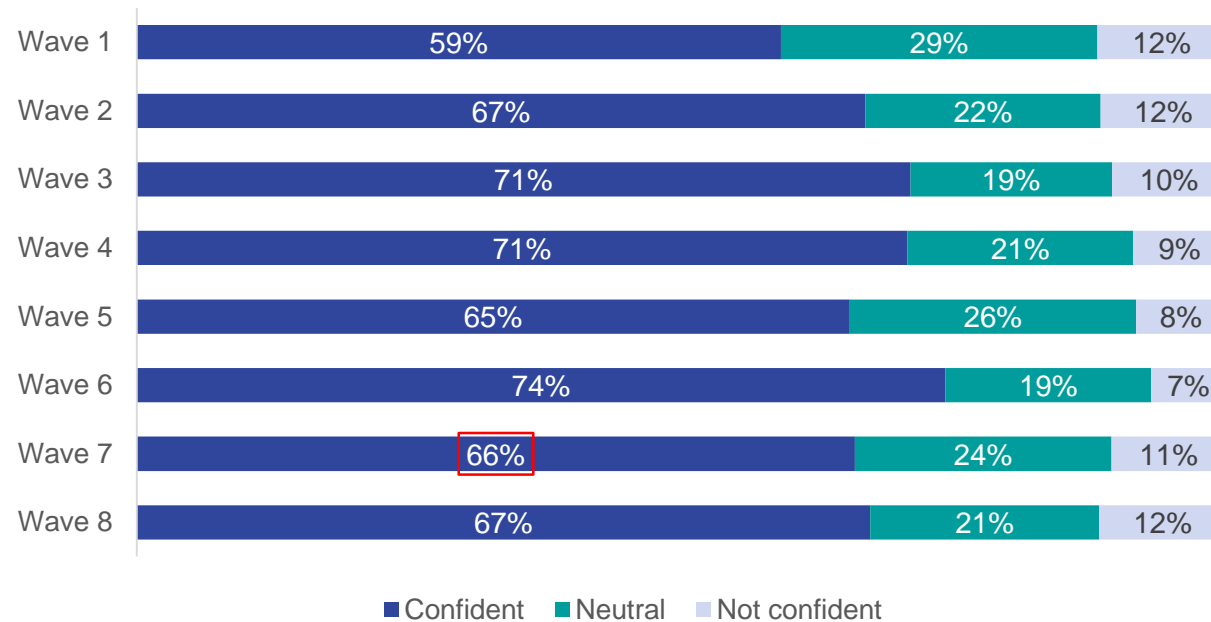


V4 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – how well do you think the Queensland Government is managing the roll out of the vaccines across Queensland?
Total Wave 8 n=1006



CONFIDENCE ON MANAGING RESTRICTIONS STEADY

Public confidence of the Queensland Government's management of restrictions remains steady, with two in three (67%) Queenslanders stating they have confidence in the Government.

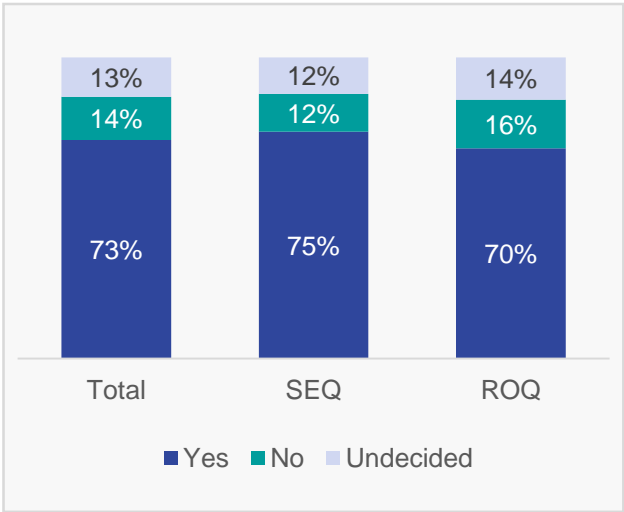
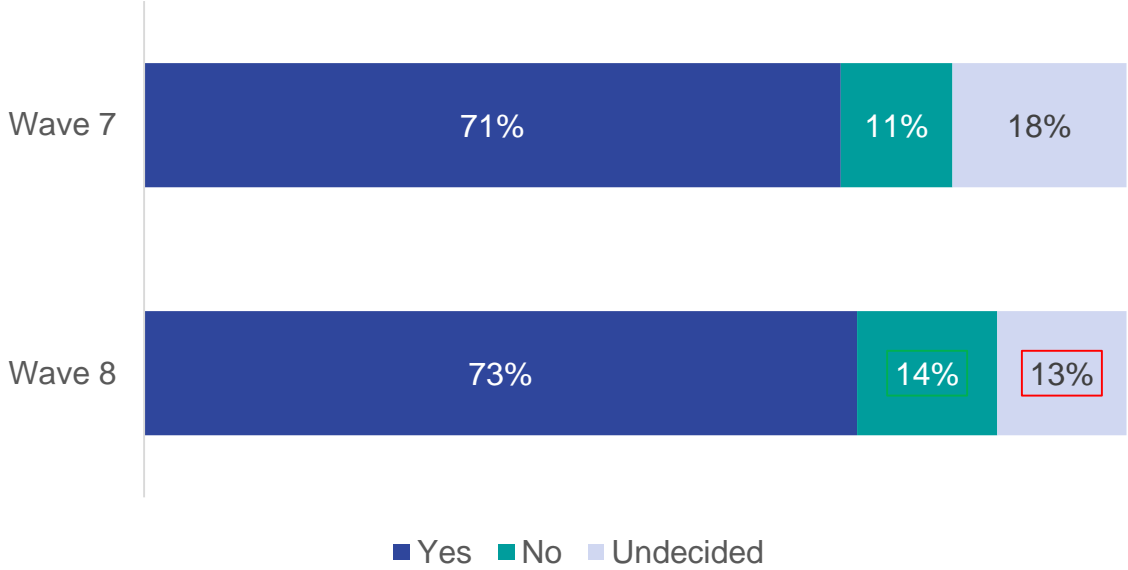


Q24 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998, Total Wave 7 n=1019, Total Wave 8 n=1006

MAJORITY CONSENSUS REGARDING ESTABLISHMENT OF QUARANTINE FACILITIES IN REGIONAL QUEENSLAND

Nearly three in four Queenslanders (73%) support establishing quarantine facilities in regional Queensland, with marginally higher support from SEQ residents (75%) compared to ROQ residents (70%).

Support establishing quarantine facilities in regional Queensland



Total Wave 8 n=1006, SEQ n=562, ROQ n=444

Q103 Do you support establishing quarantine facilities for international travellers in regional Queensland?
Total Wave 7 n=1019, Wave 8 n=1006

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



AWARENESS OF SOCIAL DISTANCING 3.4

Please be mindful of maintaining appropriate social distancing when in our store. Take your time, respect the personal space of fellow customers and allow others to move around and leave the store with ease. Just be sensible and keep a wide berth where possible.

Thanks for being considerate, kind and continuing to support Messina.

MESSINA

EST. 2002

INFORMATION GAPS FOR ECONOMIC RECOVERY AND BORDER RESTRICTIONS

Queenslanders continue to be generally satisfied with the information provided by the Government, especially how to prevent the virus spread, how community transmission occurs and the level of restrictions. Communication gaps regarding economic recovery and restrictions on who can cross the border remain.

88%

How to prevent the spread of coronavirus

78%

How community transmissions occur

76%

Current coronavirus level of restrictions

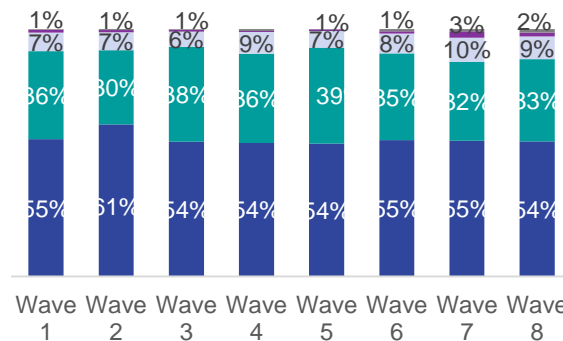
61%

Who can cross the border into Queensland

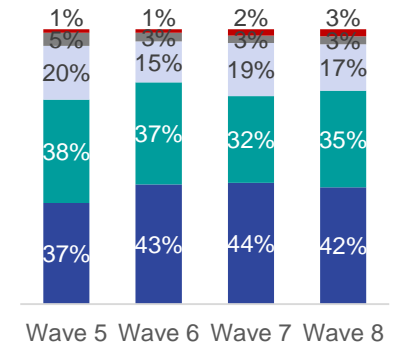
39%

How the Queensland economy will recover

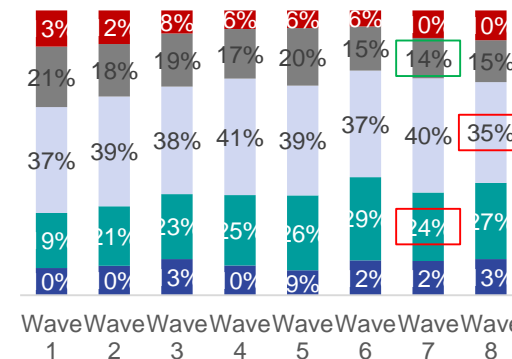
How to prevent the spread of coronavirus



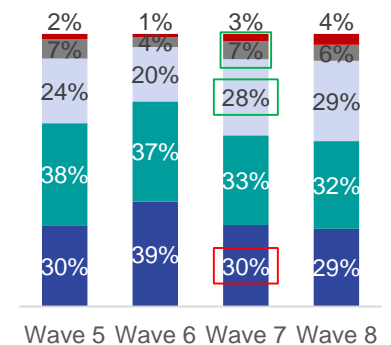
How community transmissions occur



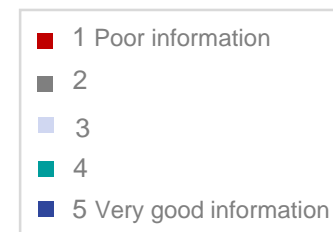
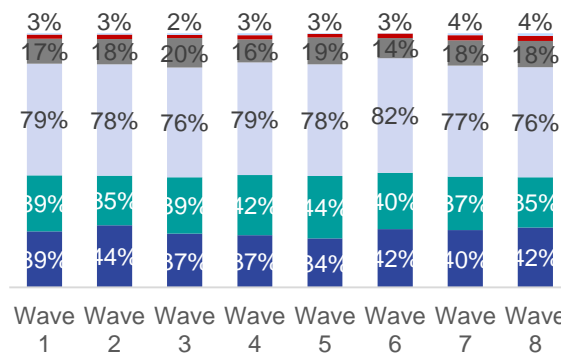
How the Queensland economy will recover



Who can cross into Queensland



Current coronavirus level of restrictions



Q1 Have you been getting enough information to feel confident you know about
 Total Wave 1 n = 1603; Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017, Wave 5 n=1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006

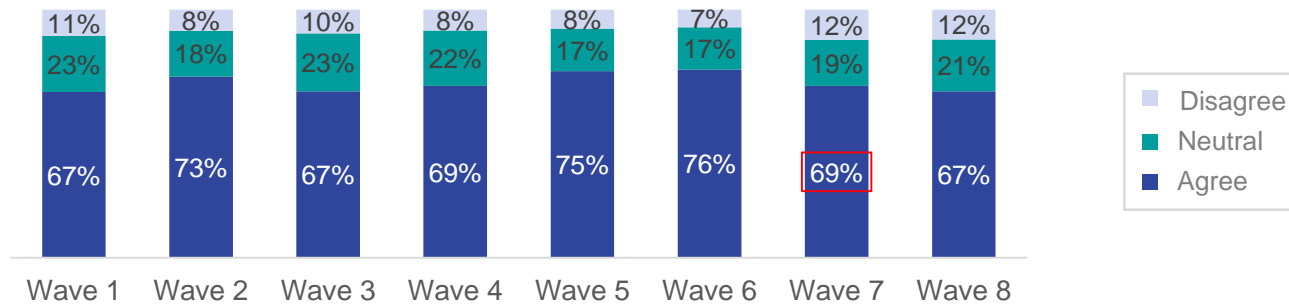
Significantly higher / lower than previous wave – 95% CI.



SENTIMENT REGARDING QLD GOVERNMENT'S MANAGEMENT OF PANDEMIC COMPARED TO OTHER STATES DECLINES

The Queensland Government remains a trustworthy source of information for over two in three (67%) Queenslanders. Perception of how the Queensland Government has managed the pandemic compared to other states/territories has declined with (71% in wave 8 versus 81% in wave 6 rating 'better').

Trustworthy information source

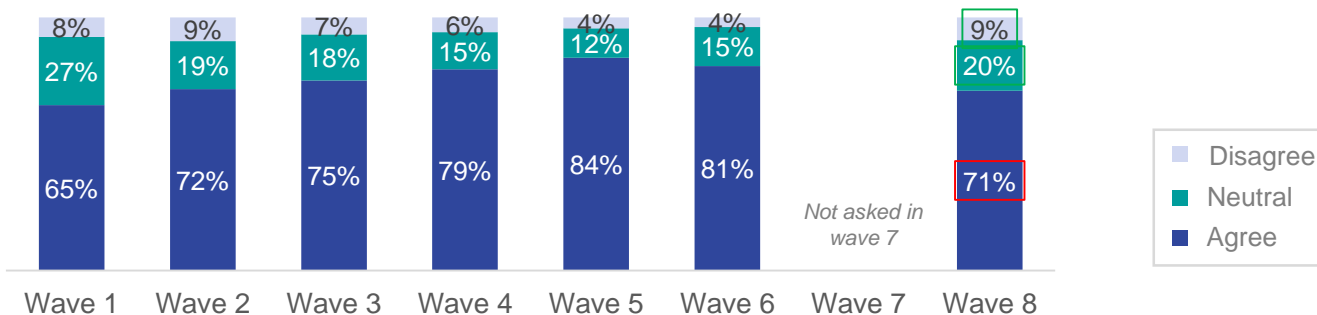


67%

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; Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006

Managed the coronavirus pandemic better than other states or territories



71%

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; Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091, Wave 6 n=998, Wave 8 n=1006

DROUGHT

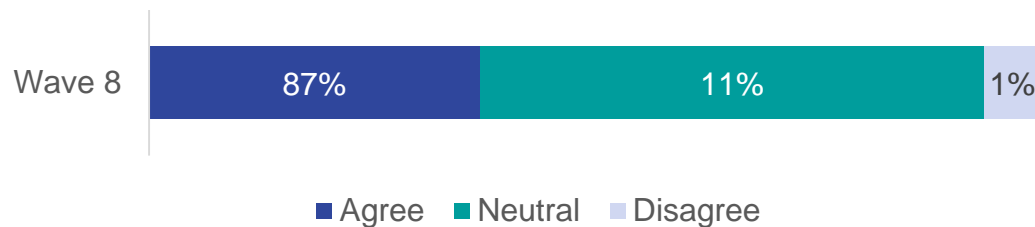
3.5



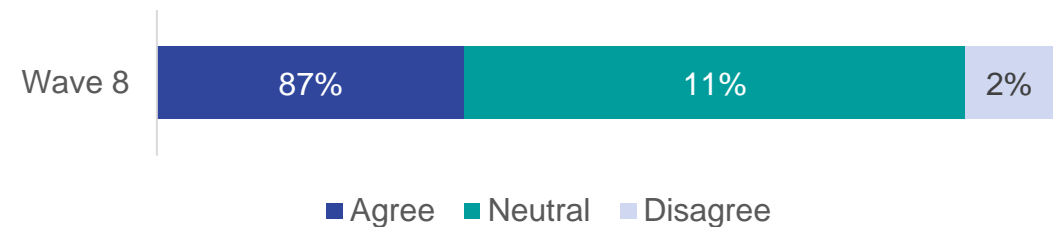
PERCEPTIONS & ATTITUDES REGARDING THE VALUE OF WATER IS HIGH

Nearly nine in ten (87%) Queenslanders believe water is a precious resource and that they use water responsibly; while perceptions of responsible water usage by neighbours is lower at 58%. Four in five (82%) agree water conservation measures and drought response plans will be required to manage climate changes and drought.

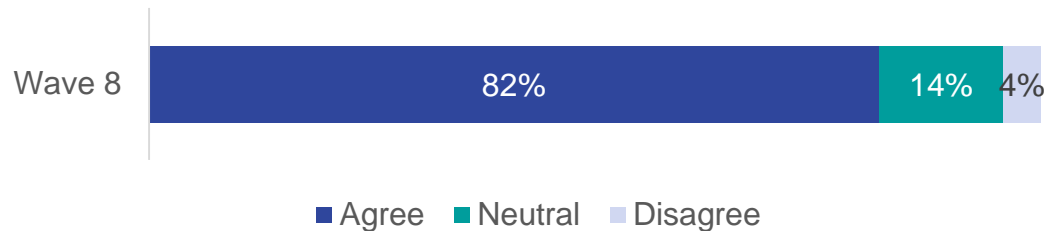
I believe water is a precious resource, and it doesn't always rain where and when we need to keep dams full



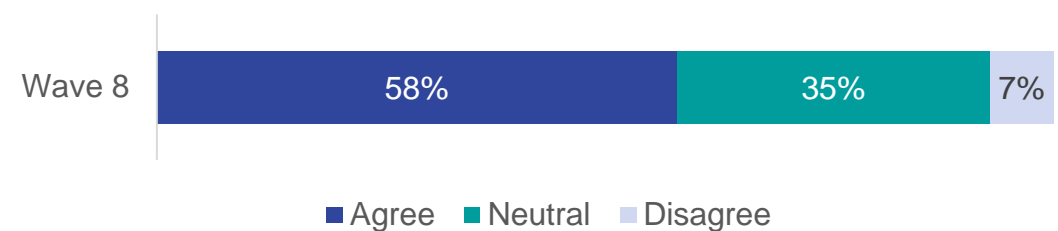
I try to use water responsibly



Water conservation measures and drought response plans will be needed to manage climate changes and drought



I believe my neighbours use water responsibly

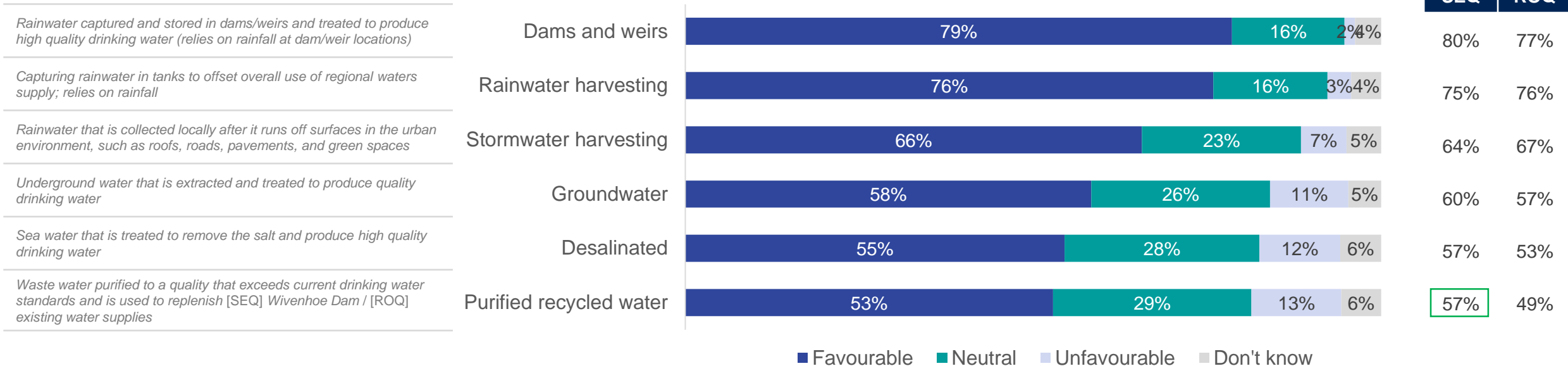


D1/D2/D6/D7 To what extent do you agree or disagree with the following statements. Where 0 means 'Completely disagree', and 10 means 'Completely agree'
Total Wave 8 n=1006

DAMS/WEIRS AND RAINWATER HARVESTING ARE THE MOST FAVOURED DRINKING WATER OPTIONS

Dams and weirs (79%) and rainwater harvesting (76%) are the most preferred drinking water options. Purified recycled water is the least preferred option, with 53% rating this option as favourable; 'favourable' significantly higher among SEQ residents (57%) than ROQ residents (49%).

[Prompted] In addition to the impact of COVID-19, many parts of Queensland are in drought and dam levels have continued to drop. For economic and drought recovery, purified recycled water may be an option for some areas of Queensland
Favourable or unfavourable towards the following water options for drinking water to Queensland in the future



Rainwater captured and stored in dams/weirs and treated to produce high quality drinking water (relies on rainfall at dam/weir locations)

Capturing rainwater in tanks to offset overall use of regional waters supply; relies on rainfall

Rainwater that is collected locally after it runs off surfaces in the urban environment, such as roofs, roads, pavements, and green spaces

Underground water that is extracted and treated to produce quality drinking water

Sea water that is treated to remove the salt and produce high quality drinking water

Waste water purified to a quality that exceeds current drinking water standards and is used to replenish [SEQ] Wivenhoe Dam / [ROQ] existing water supplies

D3 How favourable or unfavourable are each of the following water options for drinking water to Queensland in the future? Where 0 is 'Very unfavourable' and 10 is 'Very Favourable'?
 Total Wave 8 n=1006
 SEQ n=562, ROQ n=444

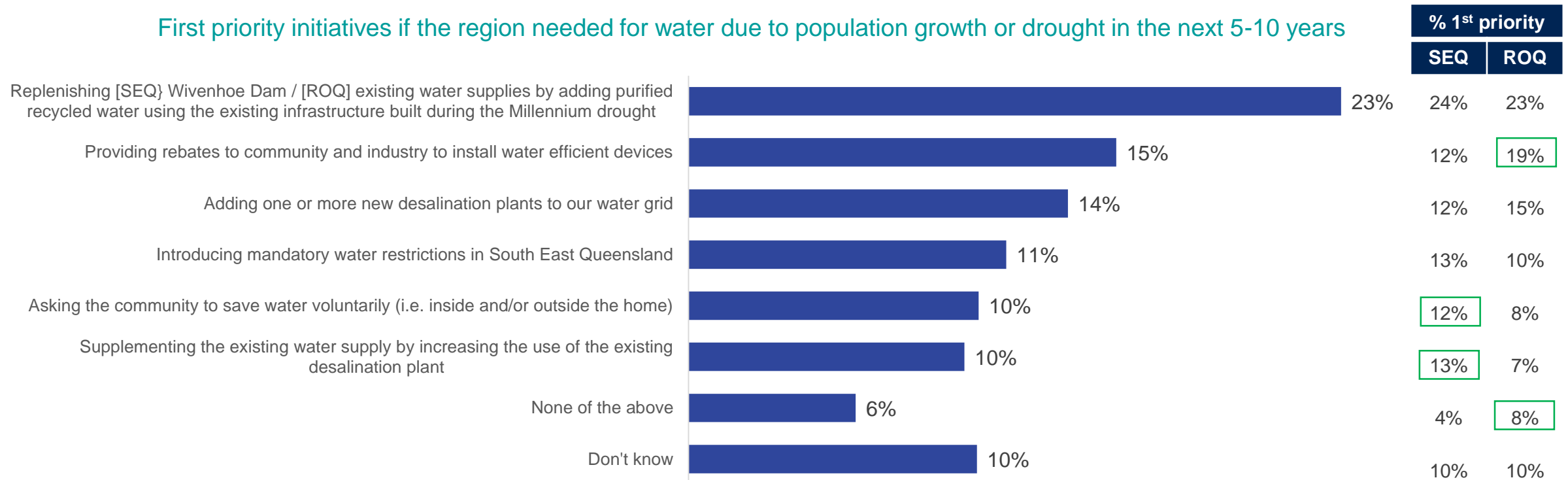
57% Significantly higher than other location – 95% CI.



FRAGMENTED SUPPORT FOR THE RANGE OF PRIORITY INITIATIVES TO MEET WATER DEMAND

While replenishing Wivenhoe Dam/existing water supplies by adding purified recycled water is selected most often (23%), support for the initiatives is fragmented across all options. Differences between SEQ and ROQ residents observed.

First priority initiatives if the region needed for water due to population growth or drought in the next 5-10 years



D4 If our region needed more water due to population growth or drought in the next 5-10 years, which of the following initiatives would you see as the **first priority**?
 Total Wave 8 n=1006
 SEQ n=562, ROQ n=444

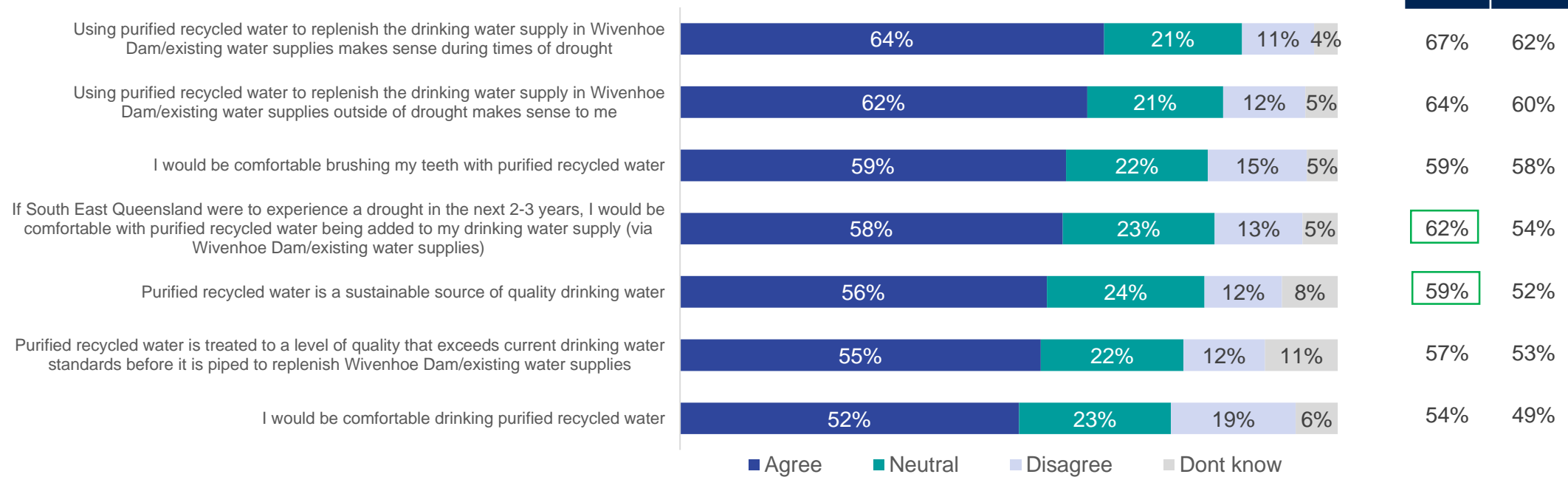
 Significantly higher than other location – 95% CI.

AGREEMENT WITH USE OF PURIFIED RECYCLING WATER DURING AND OUTSIDE TIMES OF DROUGHT IS HIGHEST

Just over three in five Queenslanders agree that using purified recycled water to replenish the drinking water supply makes sense during times of drought (64%) and outside times of drought (62%). Lowest agreement is with being comfortable to drink purified recycled water (52%).

[Prompted] Purified recycled water - wastewater purified to a quality that exceeds current drinking water standards can be used to replenish Wivenhoe Dam or other existing water supplies

Agreement or disagreement with ...

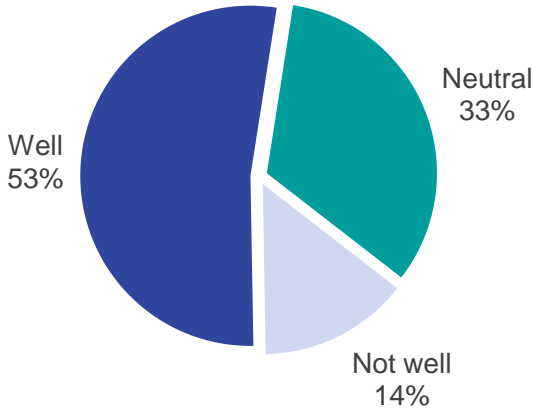


D5 To what extent do you agree or disagree with the following statements about purified recycled water? Where 0 means 'Completely disagree', and 10 means 'Completely agree'?
Total Wave 8 n=1006

ONE IN TWO UNDERSTAND PURIFIED RECYCLING WATER

Further education of Queenslanders on purified recycled water with just over one in two (53%) purporting to understand purified recycled water well.

Understanding of what purified recycled water is



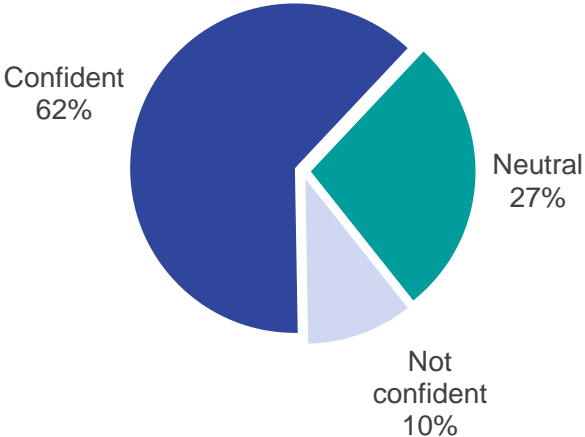
D8 On a scale of 0 to 10, where 0 is "Not very well" and 10 is "Very well" – how well do you understand what purified recycled water is?
Total Wave 8 n=1006



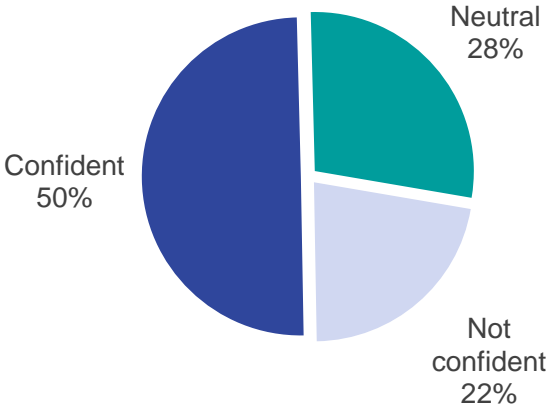
MORE CONFIDENCE TO USE PURIFIED RECYCLED WATER AROUND THE HOUSE THAN TO DRINK

While 62% of Queenslanders would be confident to use purified recycled water around their house, a lower proportion (50%) would be confident to drink it. Further, only one in three (35%) believe that most Queenslanders would support recycling water to help solve the water crisis during times of drought.

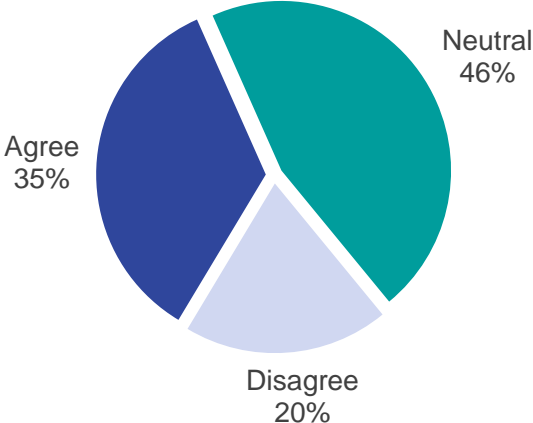
Confidence to use purified recycled water around your house if the drought continues and purified recycled water was needed in your region



Confidence to drink purified recycled water



Most Queenslanders support recycling water to drinking standards to help solve the water crisis during times of drought



D9/D10 On a scale of 0 to 10, where 0 is "not at all confident" and 10 is "very confident", how confident are you to ... ?...
Total Wave 8 n=1006

D11 On a scale of 0 to 10, where 0 is "strongly disagree" and 10 is "strongly agree" - do most Queenslanders support recycling water to drinking standards to help solve the water crisis during times of drought?
Total Wave 8 n=1006



**THANK
YOU**

GAME CHANGERS

