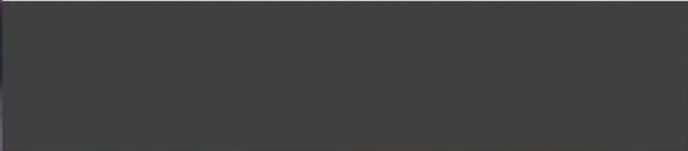


RESTRICTIONS, VACCINES & THE ECONOMY WAVE 9

For Queensland Department of Premier and Cabinet

Prepared by Ipsos
July 2021

For more information contact:



GAME CHANGERS



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EXECUTIVE SUMMARY

1

1

EXECUTIVE SUMMARY – IMPACT

Wave 9 Survey completed 30 June – 4 July 2021

Impact of COVID-19 on work declining

36%

Employees work impacted

Overall, Queenslanders who have had their work situation impacted by Covid-19 has declined compared to Wave 8 (May'21). Incidence of Queenslanders who have lost their jobs has halved (4%) compared to last wave (8%).

55%

Self-employed / business owners impacted

Impact on SMEs and sole traders also declined. 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 over-reacting has increased

71%

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, although significantly lower compared to last wave (78%). Perception of over-reaction (15%) increased significantly from Wave 8 (9%).

Lower perceived risk of catching Covid-19

14%

Likely to get COVID-19

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

19%

Likely family will get COVID-19

Despite the emergence of the Delta strain in the Queensland community during June there is a slight upward trend in perception of 'over-reaction' suggesting a level of mild annoyance possibly due to the 4 day lockdown in some areas. However, the perception of impact on work is continuing to trend downward which indicates that regardless of the inconveniences of lockdown there is mostly general acceptance of Queenslanders' management of the virus.

DASHBOARD – IMPACT

Question	Measure	Benchmark (Wave 1) %	Last wave (Wave 8) %	This wave (Wave 9) %	Trend
Q8 Coronavirus affected work situation (employed)	Not impacted (green)	43	56	62	
	Impacted (red)	56	44	36	
Q9 Coronavirus affected work situation (self-employed/business owner)	Not impacted (green)	21	36	45	
	Impacted (red)	79	64	55	
Q18 How Queenslanders are responding to threat of Coronavirus	Over-reacting (red)	6	9	15	
	Appropriate response (green)	78	78	71	
	Under-reacting (orange)	15	13	14	

The 4 day lockdown which occurred during this fieldwork period has not changed the previous trends with perceptions of impact continuing to trend downwards. While the perception of the appropriate response is trending downwards perceptions of over-reaction and under-reaction have both increased slightly indicating an emerging polarisation within the community. However, the overwhelming majority is supportive of the response of Queenslanders.

EXECUTIVE SUMMARY – EXPECTATIONS & CONFIDENCE

Wave 9 Survey completed 30 June – 4 July 2021

Expectations for the economy are more pessimistic

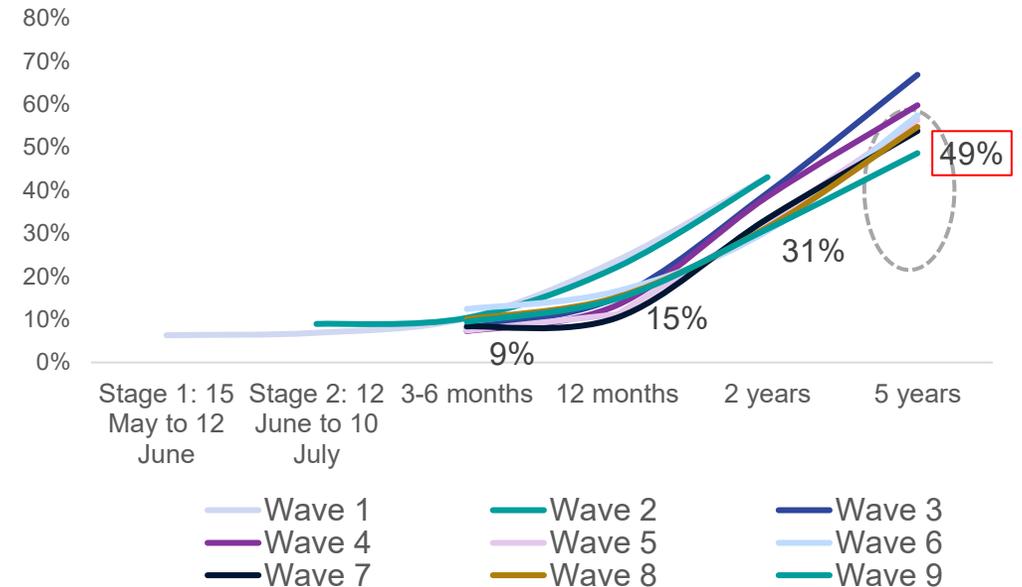
- 31%** **The worst is yet to come** Compared to Wave 8, a significantly greater proportion of Queenslanders are feeling pessimistic, with 31% stating 'the worst is yet to come' and 25% stating we are 'at its worst now' (versus 25% and 16%, respectively in May'21).
- 25%** **At its worst now**
- 18%** **Worst behind us**
- 25%** **Unsure**

Less than half are confident about management of economic recovery and economy in long run

- 47%** **Agree QLD Gov can manage the economic recovery** Queenslanders who are confident in the Queensland Government's management of the economic recovery has significantly declined (47% vs. 53% in Wave 8). Those who are 'not confident' (20%) has increased compared to Wave 8 (17%).
- 49%** **Agree QLD Gov are handling for economic advantage in long run** One in two (49%) Queenslanders believe that the Government has been handling the COVID-19 crisis to the State's economic advantage in the long run; the lowest level observed. Lack of confidence has increased significantly from 14% in Wave 8 to 21% in Wave 9.

Optimism about economic recovery within five years declining

Queenslanders' expectations regarding economic recovery remains long term (5 years), with one in two believing that the economy will fully recover within this time. However, the perception that Queensland will recover within the coming five year period has steadily declined from 67% in Jun'20 (wave 3) to 49% (wave 9).



Pessimism has increased and confidence in the Queensland Government has decreased during this period possibly due to the 4 day lockdown, the emergence of the Delta strain, and the ongoing frustrations with leakages from quarantine and hospitals.

DASHBOARD – ECONOMY (1/2)

Question	Measure	Benchmark (Wave 1) %	This wave (Wave 8) %	This wave (Wave 9) %	Trend
Q19 Expectation with the economy in QLD	Worst is yet to come (red)	52	25	31	
	At their worst now (orange)	19	16	25	
	Worst is behind us (green)	14	37	18	
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	9	
	12 months (orange)	24	15	15	
	2 years (blue)	43	31	31	
	5 years (green)	-	55	49	
Q25 Confidence QLD Govt can manage the economic recovery	Confident (green)	48	53	47	
	Not confident (red)	18	17	20	
Q55 Confidence QLD's handling of COVID-19 will be to the state's economic advantage in the long run	Confident (green)	-	52	49	
	Not confident (red)	-	14	21	
Q46 Heard about major economic initiatives by the State Govt to assist with COVID-19 recovery	Yes, heard	-	25	22	

EXECUTIVE SUMMARY – ECONOMIC STRATEGIES & SUPPORT

Wave 9 Survey completed 30 June – 4 July 2021

Awareness of economic strategy has declined while understanding and support remain steady.

20%

Aware of Economic Strategy

Awareness of the economic recovery strategy has declined from Wave 8 (26%). Overall understanding of the strategy is steady with half of the Queenslanders who are aware of the strategy purporting they understand it.

50%

Understands the Economic Recovery Strategy

55%

Support the Economic Recovery Strategy

85% of Queenslanders who are aware of the strategy and understand it well are supportive of the strategy (compared to 55% support overall).

34%

Agree they have enough information on how QLD economy will recover

Agreement on receiving enough information on how the Queensland economy will recover has declined from the previous wave (39% in Wave 8).

22%

Aware of any major economic initiatives

Awareness of the State Government's major economic initiatives is at the lowest level.

28%

Queenslanders believe the focus of the Queensland Government's economic strategy is on creating jobs by supporting 'traditional' industries.

Perceived Government support to small business and the community has declined

27%

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

'High support' provided by the Government among small business owners/self employed has remained steady from Wave 8 but perceived support for small businesses and for the community has significantly declined.

28%

Enough support to small business through this pandemic and recovery

37%

Enough support to the community through this pandemic and recovery

There is an ongoing increasing concern about support being provided to Queensland small business which may have been amplified this wave with a greater level of impact in regional areas from the latest outbreak.

DASHBOARD – ECONOMY (2/2)

Question	Measure	Benchmark (Wave 1) %	This wave (Wave 8) %	This wave (Wave 9) %	Trend
Q47 Aware of State Govt COVID-19 Economic Recovery Strategy	Yes, seen, read or heard	-	26	20	
Q64 Understanding of the Economic Recovery Strategy	Well (green)	-	46	50	
	Not well (red)	-	18	20	
Q48 Support direction of Economic Recovery Strategy	Support (green)	-	52	55	
	Oppose (red)	-	11	10	
Q49 Getting enough support as small business owner or self-employed	High support (green)	-	25	27	
	Low support (red)	-	44	39	
Q50 Doing enough to support small business through pandemic/recovery	High support (green)	-	36	28	
	Low support (red)	-	24	30	
Q51 Doing enough to support the community through pandemic/recovery	High support (green)	-	47	37	
	Low support (red)	-	17	22	

EXECUTIVE SUMMARY – VACCINES & RESTRICTIONS

Wave 9 Survey completed 30 June – 4 July 2021

While uptake of the COVID-19 vaccine is on the rise, among Queenslanders who are unvaccinated, one in two are still unsure or unlikely to vaccinate

40%

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

While the proportion of Queenslanders who rate the management of the roll out of the COVID-19 vaccine by the Queensland Government as 'well' remained steady compared to the last wave, a significantly higher proportion (27%) rated the management of the roll out as 'not well' (23% in Wave 8).

51%

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'. Results are steady compared to Wave 8.

42%

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

One in three (33%) have received their first dose of the COVID-19 vaccine, with a further 9% who have received their second dose. The proportion of Queenslanders who have had one or both dosages of the vaccination has doubled since Wave 8 (22%).

51%

Likely to get COVID-19 vaccine once available to them

Among those unvaccinated, one in two (51%) intend to get vaccinated once it is available to them, consistent with Wave 8 result (53%).

Confidence in the Government's ability to manage restrictions steady

56%

Confident Queensland Government can manage restrictions

Confidence has significantly declined from Wave 8 with 56% of Queenslanders now stating they have confidence in the Government (67% in May'21). This is the lowest level observed.

Reduced appetite for quick lockdowns and COVID-19 restrictions (although still strong)

70%

Agree they support quick lockdowns

Significantly lower agreement in support for quick lockdowns (70% versus 80% in wave 7, Feb'21) and higher agreement there are too many COVID-19 restrictions (30% versus 17% in wave 7, Feb'21).

30%

Agree there are too many COVID-19 restrictions

DASHBOARD – VACCINES & RESTRICTIONS

Question	Measure	Benchmark (Wave 1) %	This wave (Wave 8) %	This wave (Wave 9) %	Trend
Q24 Confidence the Queensland Government can manage restrictions	Confident (green)	59	67	56	
	Not confident (red)	12	12	18	
V4 How well the Queensland Government is managing the roll out of the vaccines across Queensland	Well (green)	-	37	40	
	Neutral (orange)	-	40	33	
	Not well (red)	-	23	27	
V5 Confidence in receiving a vaccine will protect from COVID-19	Confident (green)	-	53	51	
	Neutral (orange)	-	29	31	
	Not confident (red)	-	18	18	

EXECUTIVE SUMMARY – INFORMATION

Wave 9 Survey completed 30 June – 4 July 2021

Perception of the level of information from the Queensland Government regarding community transmission and how the Queensland economy will recover has declined.

84%

How to prevent the spread of coronavirus

77%

Current coronavirus level of restrictions

70%

How community transmission occurs

55%

Who can cross the border into Queensland

34%

How the Queensland economy will recover

Queenslanders continue to be generally satisfied with the information provided by the Government with regards to preventing spread of the virus and the level of restrictions. However, satisfaction with information on how community transmission occurs and economic recovery has declined significantly (78% and 39% respectively in Wave 8).

Significantly lower results regarding viewing the Queensland Government as a trustworthy source of information and rating the Queensland Government's handling of the pandemic as 'better' than other states/territories compared to Wave 8 (67% and 71% respectively in May'21).

60%

Queensland Government is a trustworthy information source

60%

Queensland Government managed better than other states or territories

The presence of the Delta strain in the Queensland community this wave may have contributed to the decline in agreement that the community is receiving enough information about community transmission.

DASHBOARD – INFORMATION

Question	Measure	Benchmark (Wave 1) %	This wave (Wave 8) %	This wave (Wave 9) %	Trend
Q1 Getting enough information to feel confident you know about ... (T2B = 5 very good + 4)	How to prevent the spread (red)	91	88	84	
	Current level of restrictions (orange)	79	76	77	
	How QLD economy will recover (blue)	29	39	34	
Q3 QLD Govt is a trustworthy info source (economic recovery)	Agree (green)	67	67	60	
	Disagree (red)	11	12	15	
Q4 QLD Govt has managed the pandemic better than other states or territories	Agree (green)	65	71	60	
	Disagree (red)	8	9	14	

EXECUTIVE SUMMARY – CAMPAIGN RECOGNITION

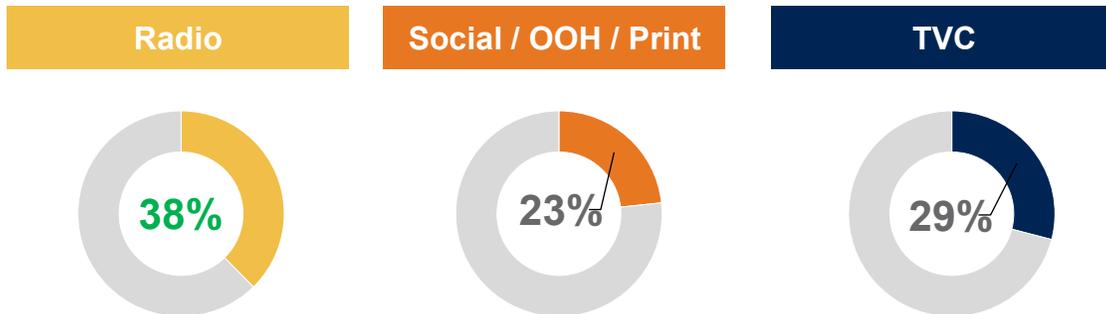
Wave 9 Survey completed 30 June – 4 July 2021

One in two Queenslanders recognised any element of the campaign.

52%

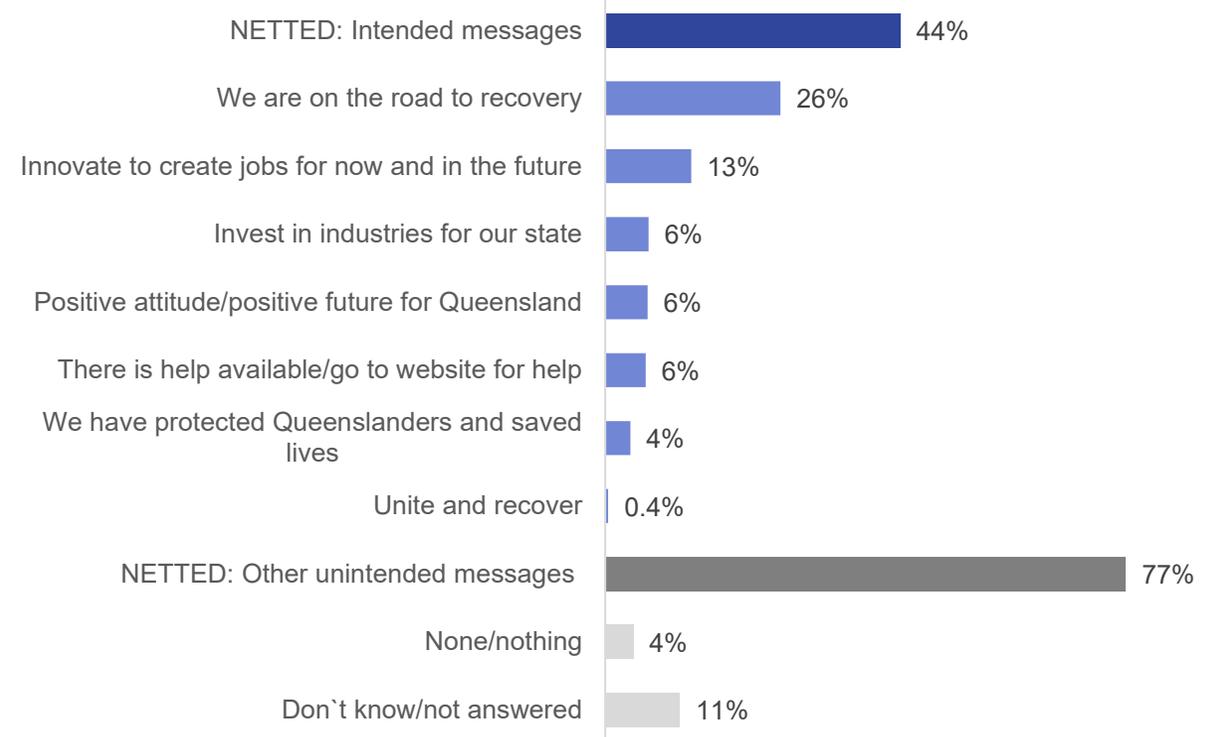
'Economic Recovery' campaign recognition

Recognition of the radio advertising is highest.



Two in five Queenslanders who claim to have seen/heard any of the ads could spontaneously replay a campaign message, with 'we are on the road to recovery' the main message recalled.

Messages you can remember from this ad
(unprompted)



COMMUNICATION RECOMMENDATIONS

Most of the fieldwork was completed when thirteen Local Government Areas (LGAs) in Queensland were in a 3-day lockdown (extended to 4 days) and parts of NSW, WA and NT states were also in lockdown due to community transmission of the Delta strain, with border restrictions for LGAs considered COVID-19 hotspots within these states. The rise in COVID-19 cases across Australia and in Queensland, lockdowns, and border restrictions are the likely drivers of Queenslanders more pessimistic outlook this wave, particularly after a period of relative stability. While a range of measures have declined key are the decline in perceptions regarding the economy, with over one in two stating the economy is at its worst now or yet to come and a significant decline in those who believe the Queensland economy will fully recover within five years.

Ipsos suggests, the following:

1. There is still a need to raise awareness of the Queensland Government's strategy and plans for economic recovery. Provide clarity and details on actions and beneficiaries

Currently only around one in five Queenslanders are aware of the Economic Recovery Strategy or aware of any major economic initiatives, both at the lowest levels observed. Additionally, only one in three Queenslanders feel they receive 'good information' on how the Queensland economy will recover. The need for this communication increases when outbreaks occur, particularly as frustration with lockdowns, even short, can grow over time and particularly after periods of stability.

2. Communicate what the Queensland Government has already achieved and what is being done

Queenslanders who are 'confident' in the Queensland Government's management of the economic recovery and its handling of the COVID-19 crisis to the state's economic advantage in the long run are at their lowest levels* while those 'not confident' in the Queensland Government are at their highest on these metrics. Perception that the Queensland Government provides 'high support' for small businesses and the community are also at the lowest levels observed. While three in five agree the Queensland Government has managed the Coronavirus pandemic better than other states/territories, this is the lowest level observed.

3. Further education of Queenslanders on the safety and efficacy of the COVID-19 vaccination is needed

While the number of Queenslanders who are getting vaccinated is on the rise, among the unvaccinated, one in two are unsure or unlikely to get vaccinated when it is available to them. Further, one in five are not confident in the vaccine's efficacy to protect them against COVID-19.

4. Communication needs to cut-through the clutter

Recognition of the current campaign is considerable at one in two Queenslanders. While two in five who report to have seen any of the ads can spontaneously recall an on-target campaign message, unintended message recall (such as COVID-19 safety directives and COVID-19 vaccinations) is also at the highest level, which suggests that there is a considerable amount of COVID-related messaging currently in-market. It may also reflect that through a positive or stable period the messaging may be less salient.

BACKGROUND

2

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. 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
- Recognition and perception of the 'Economic Recovery' advertising campaign.

This report covers the ninth wave of research which was conducted between 30th June to 4th July 2021. The sample was sourced from commercial research panels. Previous 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 2020; average 17 minutes; n=1001
- Wave 7: 29 January to 12 February 2021, average 17 minutes; n=1019
- Wave 8: 19 May to 26 May 2021, average 18 minutes; n=1006
- Wave 9: 30 June to 4 Jul 2021, average 16 minutes; n=1042

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.

BACKGROUND

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 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.

Wave 9: 3-day lockdown (29 June to 2 July) in the Local Government Areas of Townsville, Palm Island, Brisbane, Ipswich, Logan City, Moreton Bay, Redlands, Sunshine Coast, Noosa, Somerset, Lockyer Valley, Scenic Rim and Gold Coast, which was extended a further day in Brisbane and Moreton Bay. Mask wearing and gathering restrictions continue to apply across all the aforementioned Local Government Areas. Parts of NSW, WA and NT states were also in lockdown during this period due to community transmission, with border restrictions for Local Government Areas considered COVID-19 hotspots within these states.

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									Wave 9								
	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	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	20	96	116	17	73	90	37	169	206
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	73	155	228	74	126	200	147	281	428
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	102	101	203	115	90	205	217	191	408
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	195	352	547	206	289	495	401	641	1042

Diversity

n	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8			Wave 9		
	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	9	18	27
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	59	45	104
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	61	95	156
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	150	161	311

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			Wave 9		
	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	66	102	168
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	106	91	197
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	159	162	321
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	132	83	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	79	49	128
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	5	8	13

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			Wave 9		
	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	211	129	340
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	54	43	97
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	31	18	49
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	21	32	53
Not working or looking for work	335	329	664	157	186	343	224	250	474	236	240	476	229	252	481	215	232	447	266	220	486	271	224	495	220	259	479
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	10	14	24

Employment status now

n	Wave 8			Wave 9		
	SEQ	ROQ	QLD	SEQ	ROQ	QLD
Employed permanent full-time or part-time	176	118	294	189	109	298
Employed, casual/temporary	32	32	64	50	47	97
Self-employed / business owner	37	22	59	31	16	47
Unemployed (looking for work)	28	33	61	32	35	67
Not working or looking for work	279	234	513	233	273	506
Prefer not to say	10	5	15	12	15	27
NET	562	444	1,006	547	495	1,042

QUESTION CHANGES PER WAVE

Focus of this wave is on advertising recognition, economic recovery, restrictions 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			Wave 9		
Screening	SQ1-SQ3			SQ1-SQ5			SQ1-SQ5		
Demographics	Q38, Q40-Q45			Q38, Q40-Q45			Q38, Q40-Q45		
Personal impacts	Deleted	Edited		Deleted		Added Q7a			
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			Added Q46b
Vaccines & 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, V1-V7	Deleted V6-V7	Re-added Q99	
Information	Deleted Q4					Added Q4			
Drought						Added D1-D11	Deleted D1-D11		
Campaign recognition									Added Q68, Q70, Q71, Q76, Q76A, Q77-Q80c

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

3

IMPACTS

3.1



IMPACT OF COVID-19 ON WORK SITUATION DECLINING

Overall, Queenslanders who have had their work situation impacted by COVID-19 has significantly declined compared to wave 8 (May'21) and is at the lowest level observed since the inception of the tracker. A significantly lower proportion state they have lost their job (4% versus 8% in wave 8).

Coronavirus affected work situation EMPLOYED

Column %	Wave 1			Wave 2			Wave 3			Wave 4			Wave 5			Wave 6			Wave 7			Wave 8			Wave 9		
	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%	64%	60%	62%
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%	8%	13%	10%
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%	16%	12%	14%
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%	2%	1%	2%
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%	2%	7%	4%
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%	6%	5%	6%
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%	1%	2%	1%
NET employee impact	55%	57%	56%	66%	56%	61%	54%	41%	48%	53%	40%	47%	60%	39%	50%	59%	50%	55%	47%	45%	46%	46%	41%	44%	35%	38%	36%

Q8 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; Wave 9 n=1042

Total Employee Wave 2 n=520; Wave 3 n= 551; Wave 4 n=472; Wave 5 n=467; Wave 6 n=437; Wave 7 n=397; Wave 8 n=378; Wave 9 n=437

IMPACT OF COVID-19 ALSO AT THE LOWEST LEVEL 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). However, SMEs and sole traders who purport to be affected by COVID-19 is also at the lowest level observed.

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			Wave 9		
	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%	53%	27%	45%
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%	13%	8%	11%
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%	23%	28%	24%
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%	4%	18%	9%
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%	4%	8%	5%
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%	4%	11%	6%
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%	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%	47%	73%	55%

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

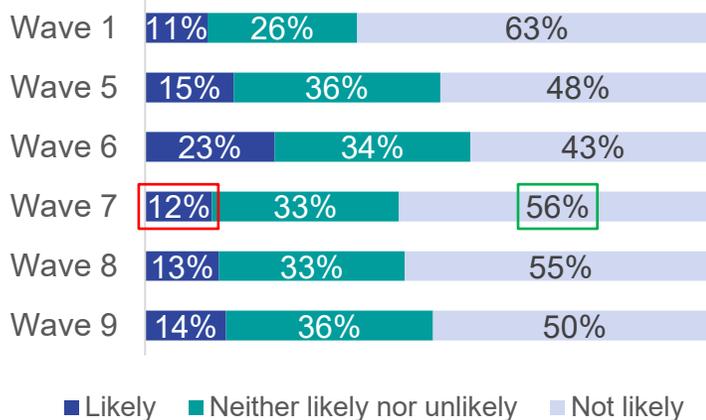
Total: Wave 1 n = 1603, Wave 2 n = 1018, Wave 3 n = 1021, Wave 4 n = 1017, Wave 5 n = 1091, Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006, Wave 9 n=1042

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; Wave 9 n=49

PERCEIVED RISK OF CORONAVIRUS REMAINS STEADY

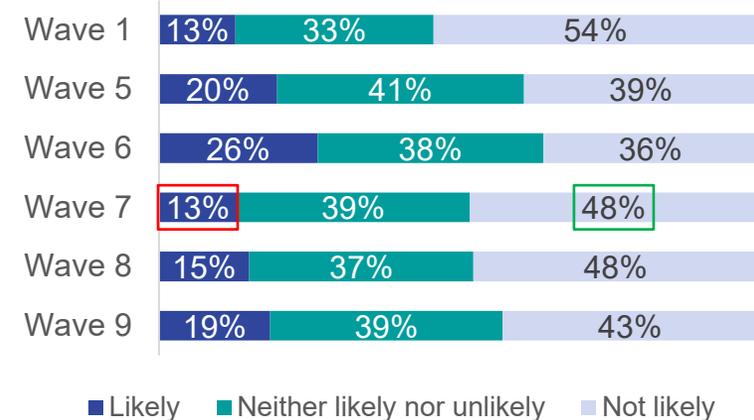
Queenslanders perception of risk remains steady. One in two don't perceive a risk to themselves (50%) or to their family (43%).

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, Wave 9 n=1042

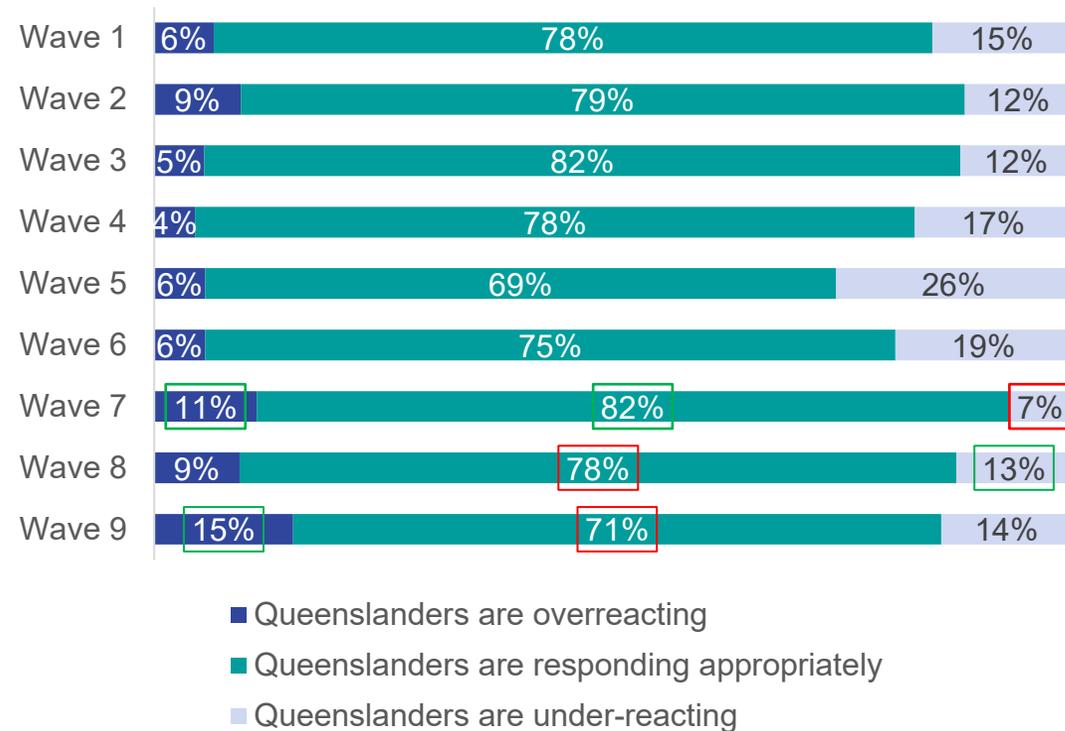
Perceived likelihood someone in your family getting Coronavirus



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, Wave 9 n=1042

MAJORITY STILL FEEL OUR RESPONSE IS APPROPRIATE

71% perceive that Queenslanders are responding appropriately to the COVID threat; significantly lower than wave 8 (78% in May'21). A significantly higher proportion (15%) believe that Queenslanders are over-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, Total Wave 9 n=1042

ECONOMY

Queenslanders views
on economic recovery

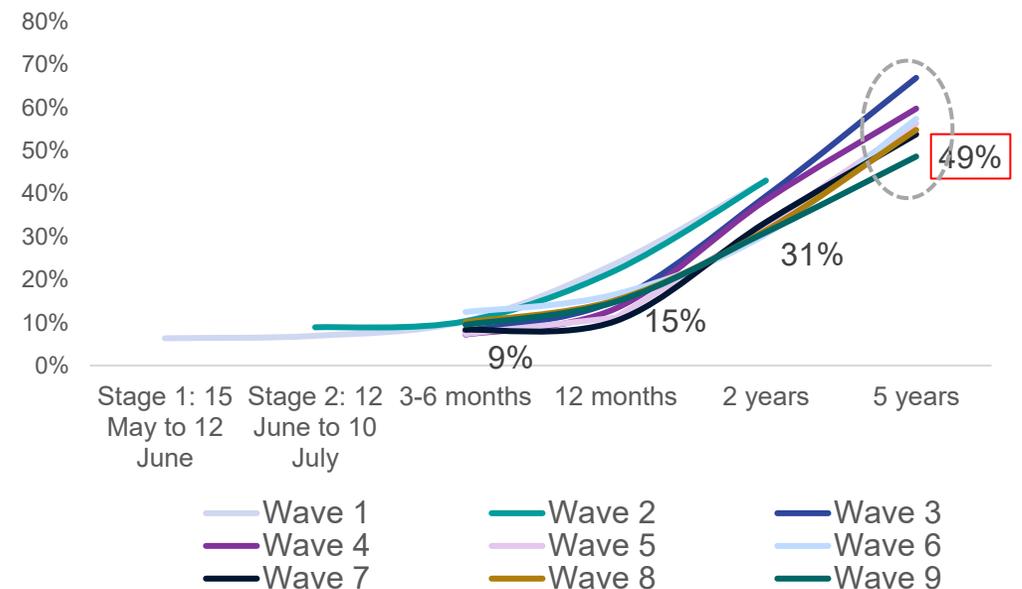
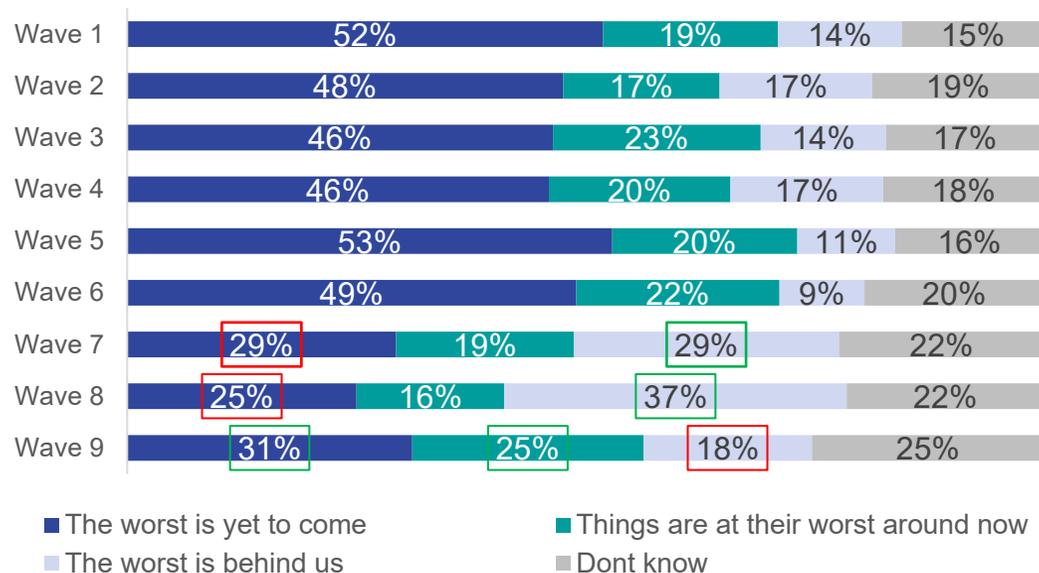
3.2

CLOSED DUE TO
COVID-19

PERCEPTIONS REGARDING THE ECONOMY IS MORE PESSIMISTIC AND RECOVERY REMAINS LONGER TERM

Queenslanders' expectations about the economy is more pessimistic compared to wave 8. A significantly greater proportion are feeling 'the worst is yet to come' and 'things are at their worst around now'.

Queenslanders expectations regarding economic recovery remains long term (5 years), with one in two believing that the economy will fully recover within this time. The perception that Queensland will fully recover within the coming five year period has consecutively declined each wave, from 67% in Jun'20 (wave 3) to 49% (wave 9).

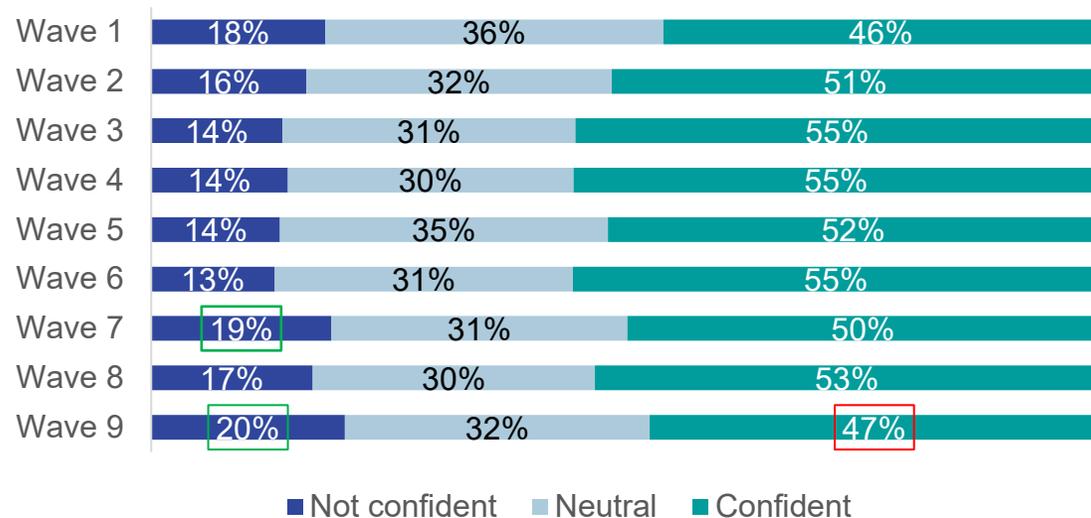


Q19 What do you expect will happen with the economy in Queensland?
 Total Wave 1 n = 1603, Wave 2 n = 1018, Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006; Wave 9 n=1042

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...? NB: Wave 7 - "As restrictions are relaxed" deleted from question wording
 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; Wave 9 n=1042

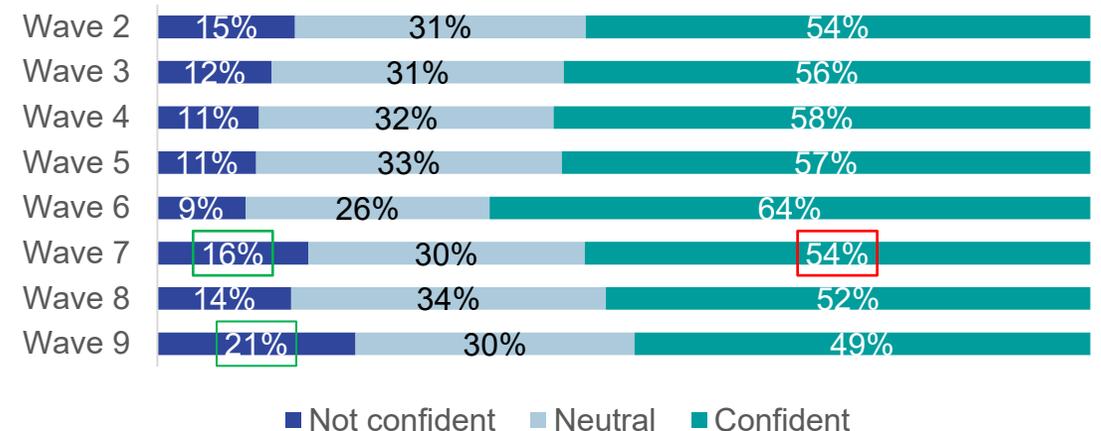
NOT CONFIDENT IN ECONOMIC MANAGEMENT INCREASES

Queenslanders who are 'not confident' in the Queensland Government's management of the economic recovery has significantly increased since wave 8 and is at the highest level observed. However, the largest proportion (47%) are still 'confident' but has declined compared to the last wave (53% in May'21).



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; 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; Wave 9 n=1042

Queenslanders who are 'not confident' in the Queensland Government's handling of the COVID-19 crisis to the state's economic advantage in the long run has also significantly increased since wave 8 and is at the highest level observed. In addition, confidence in the Queensland Government is at the lowest level observed.

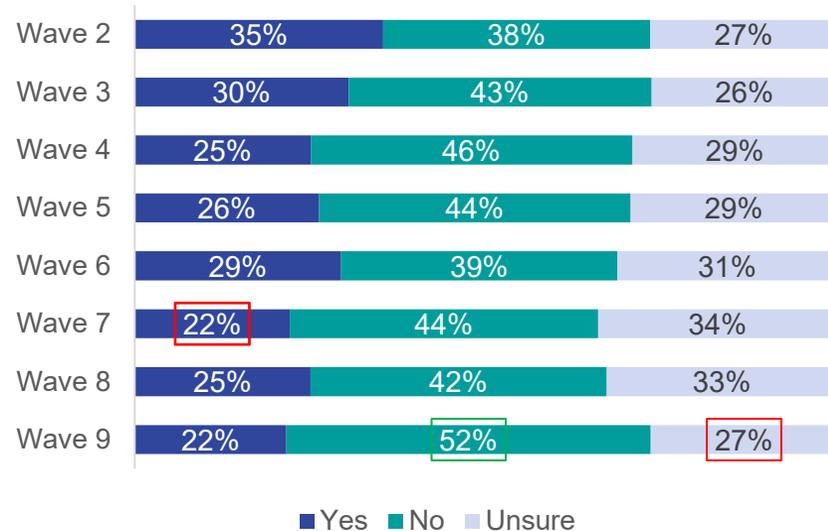


Q55. On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" –How confident that Queensland has handing COVID-19 will be to the State's economic advantage in the long run
 Total Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006; Wave 9 n=1042

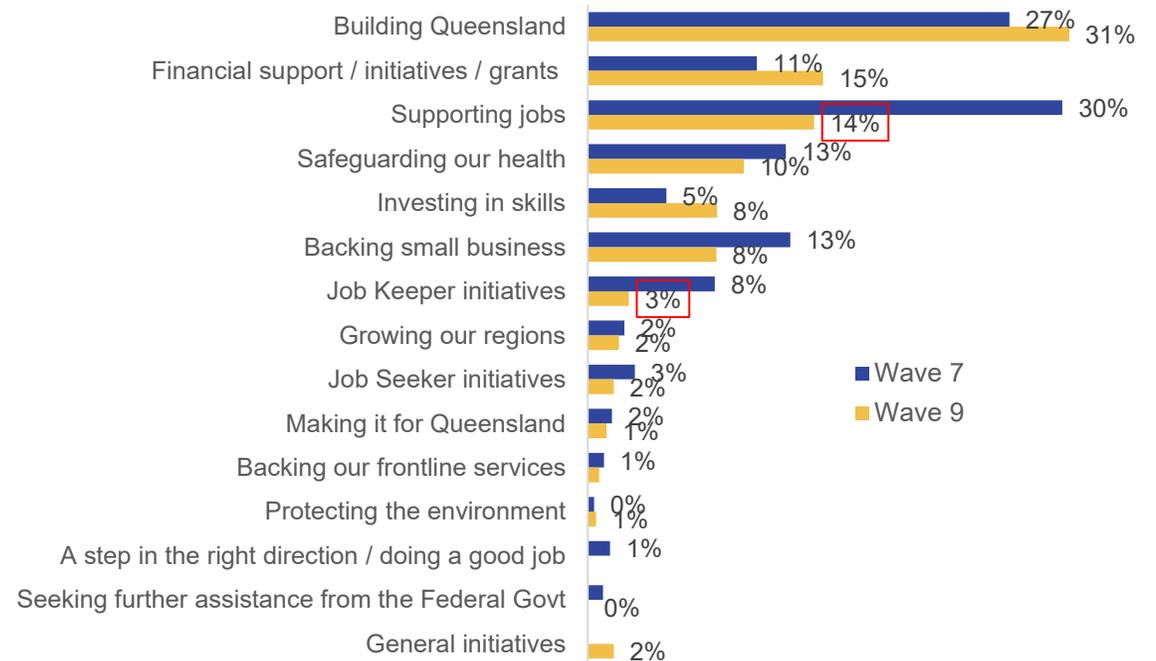
AWARENESS OF ECONOMIC INITIATIVES AT LOWEST LEVEL

One in five (22%) Queenslanders state they have heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery. Of those who are aware, the main initiatives recalled are 'Building Queensland', general financial support and 'Supporting jobs'.

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



What specific initiatives have you heard of?



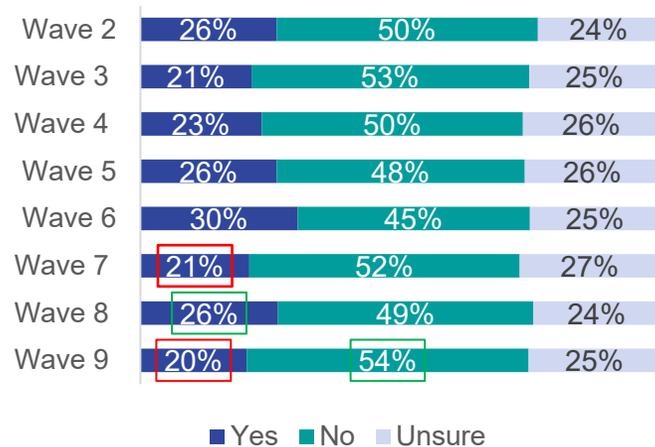
Q46 Have you heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery?
Total Wave 2 n = 1018, Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006, Wave 9 n=1042

Q46b What specific initiatives have you heard of?
Total Wave 7 n=231, Wave 9 n=204

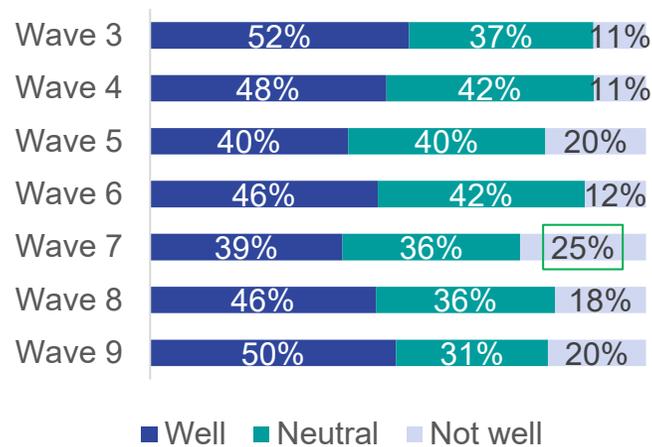
LOWEST AWARENESS OF ECONOMIC RECOVERY STRATEGY

Awareness of the Recovery Strategy is significantly lower (20%) compared to wave 8 and is at the lowest level observed. Among those aware, understanding the strategy 'well' and those who support the strategy remain steady (at 50% and 55% respectively).

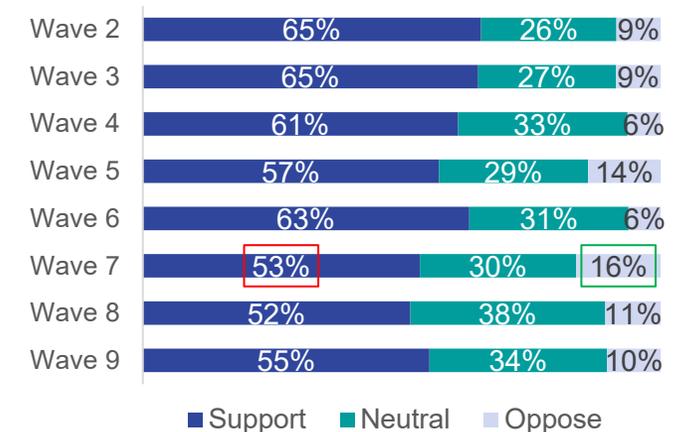
Have you seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy?



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; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006; Wave 9 n=1042

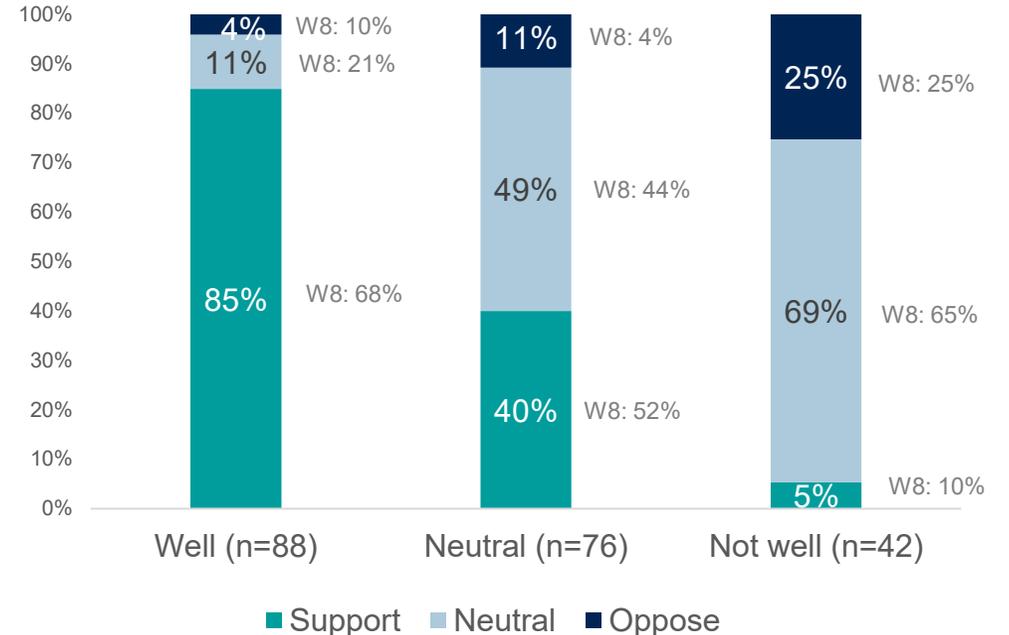
Q64 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – How well do you understand the State Government's Economic Recovery Strategy?
Base: aware of Economic Recovery Strategy Wave 3 n = 211; Wave 4 = 237; Wave 5 n=282; Wave 6 n=310, Wave 7 n=220, Wave 8 n=251, Wave 9 n=206

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, Wave 9 n=206

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 (85% vs. 40% neutral and 5% not well).



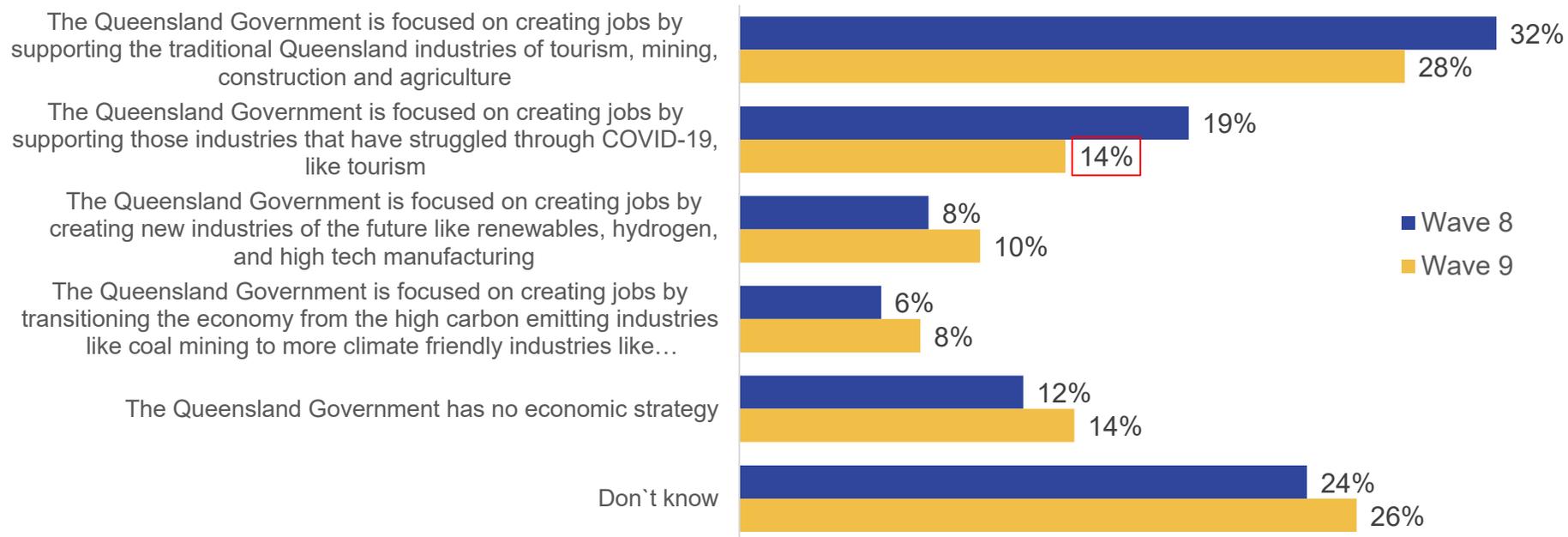
W8: x%
Wave 8 %

Q48 by Q64
(Wave 9)

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

Consistent with wave 8 (May'21), Queenslanders mainly believe the focus of the QLD Government's economic strategy is on creating jobs by supporting 'traditional' industries. This is followed by creating jobs to support industries that have struggled through COVID-19, although nominated less often than compared to last wave (14% versus 19% respectively).

Best description of the Queensland Government's economic strategy?

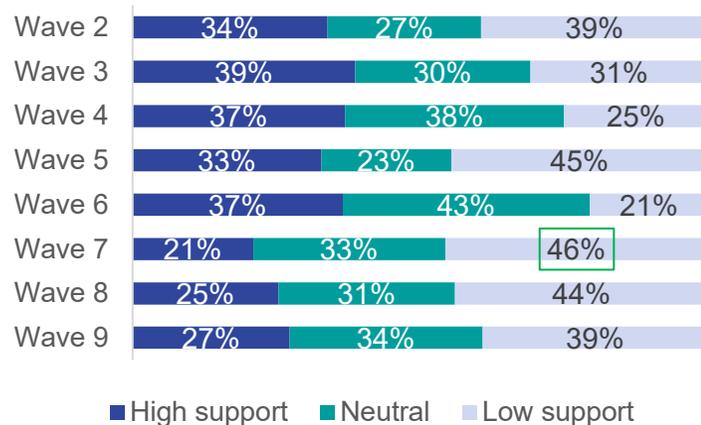


Q105 Which of the following statement best describes the Queensland Government's economic strategy?
Total Wave 8 n=1006; Wave 9 n=1042

PERCEPTION OF SUPPORT FROM THE QLD GOVERNMENT DECLINES

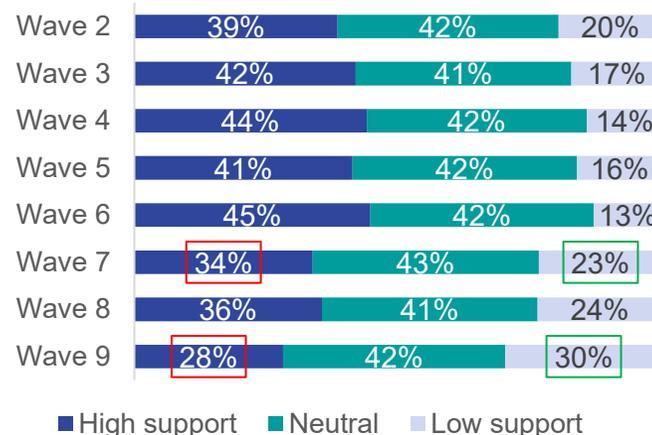
Perceived 'high support' for small businesses and the community from the Queensland Government has significantly decreased compared to wave 8 (May'21) and at the lowest level observed on both metrics.

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



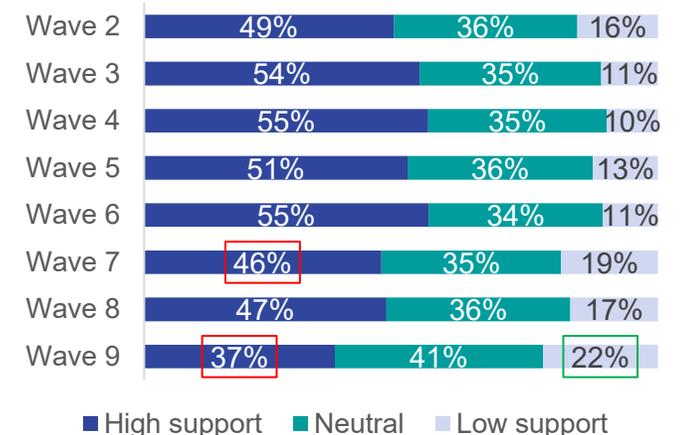
Q49 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" - Are you getting enough support from the government as a small business owner or self-employed?
Total Wave 2 n = 69; Wave 3 n=76; Wave 4 n=60; Wave 5 n = 69; Wave 6 n=48, Wave 7 n=58; Wave 8 n=67; Wave 9 n=49

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



Q50 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" - Is the Queensland Government is doing enough to support small business through this pandemic and recovery?
Total Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n = 1091; Wave 6 n=998; Wave 7 n=1019; Wave 8 n=1006; Wave 9 n=1042

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

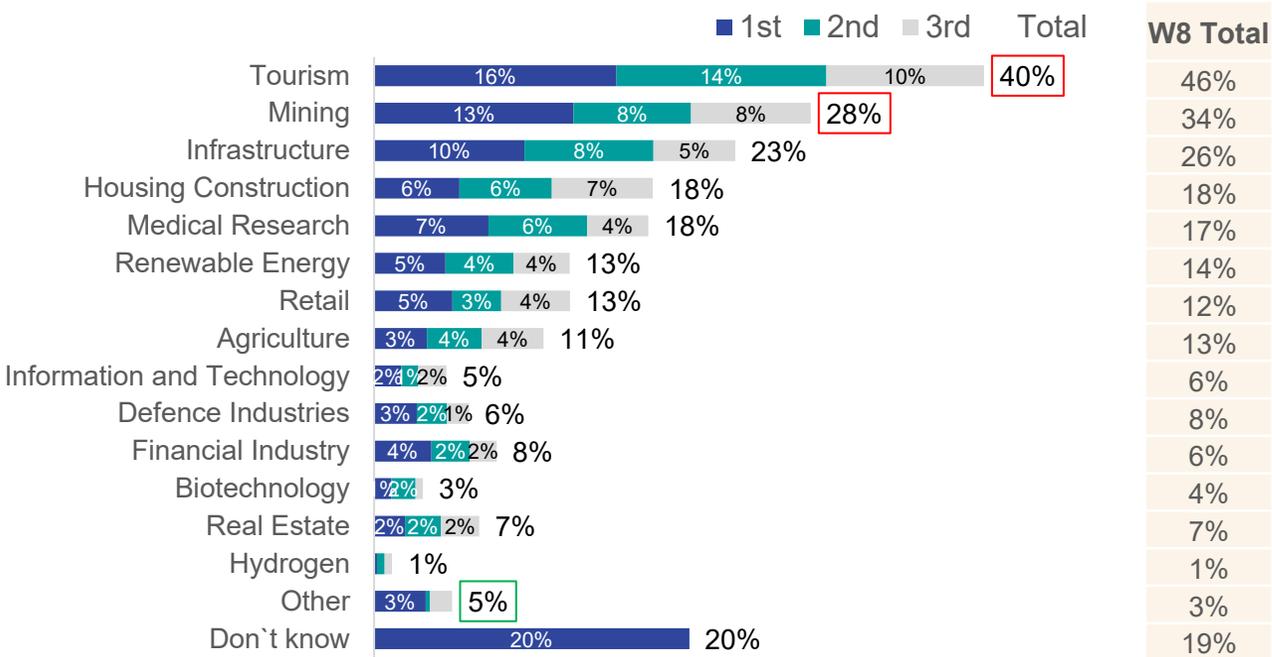


Q51 On a scale of 1 to 10, where 1 is "no support" and 10 is "very good support" - Is the Queensland Government is doing enough to support the community through this pandemic and recovery?
Total Wave 2 n = 1018; Wave 3 n=1021; Wave 4 n=1017; Wave 5 n = 1091; Wave 6 n=998, Wave 7 n=1019, Wave 8 n=1006; Wave 9 n=1042

TOURISM CONTINUES TO BE PERCEIVED AS RECEIVING THE MOST SUPPORT FROM THE QLD GOVERNMENT

Tourism, mining and infrastructure continue to be perceived as the recipients of 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 9 n=1042



VACCINES & RESTRICTIONS

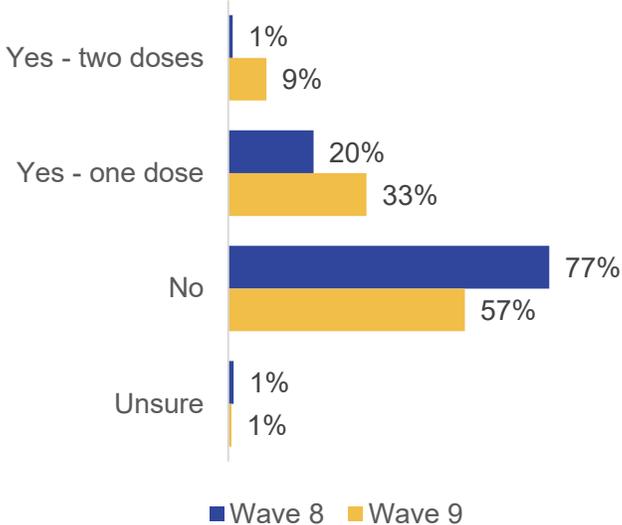
3.3



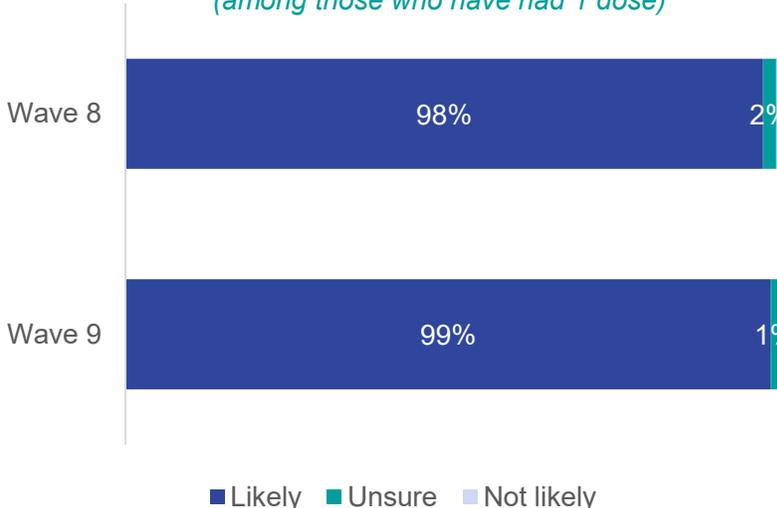
PROPORTION VACCINATED DOUBLES WHILE FUTURE INTENTION TO VACCINATE REMAINS STEADY

Two in five (42%) Queenslanders have had any COVID-19 vaccine doses, which is double the proportion reported in wave 8 (May'21). Among those unvaccinated, one in two (51%) intend to get vaccinated once it is available to them.

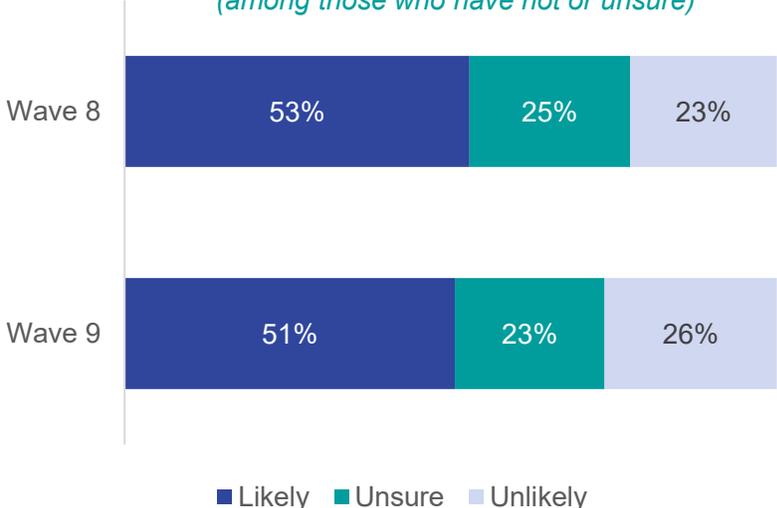
Vaccinated for COVID-19



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; Wave 9 n=1042

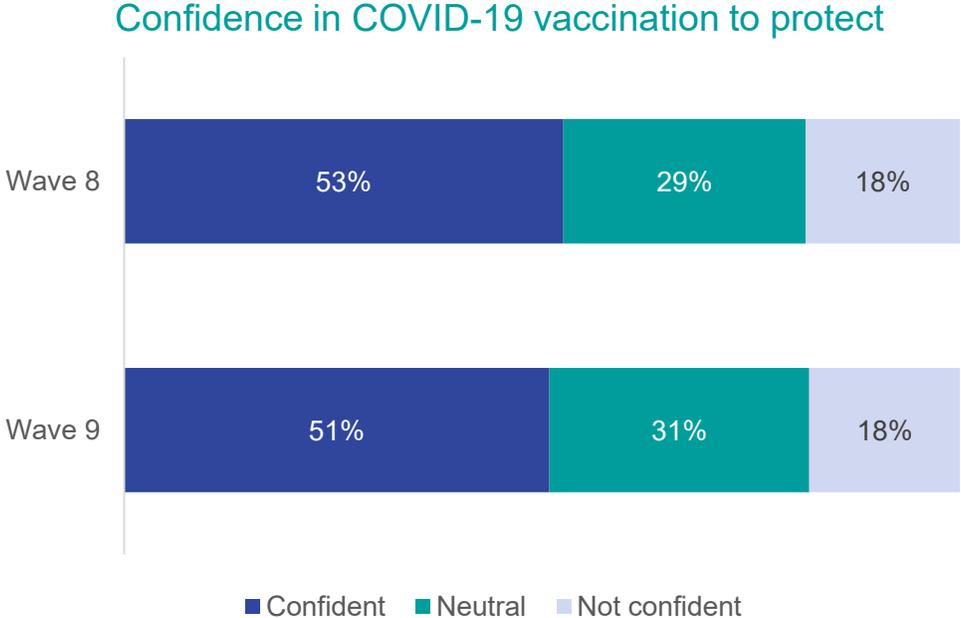
V2 How likely are you to get your second dose of COVID-19 vaccine?
Those who have had 1 dose Wave 8 n=309; Wave 9 n=415

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; Wave 9 n=517



CONFIDENCE IN COVID-19 VACCINE EFFICACY STEADY

One in two (51%) are confident the vaccine will protect them from COVID-19. One in five (18%) are 'not confident' in the vaccine's efficacy.



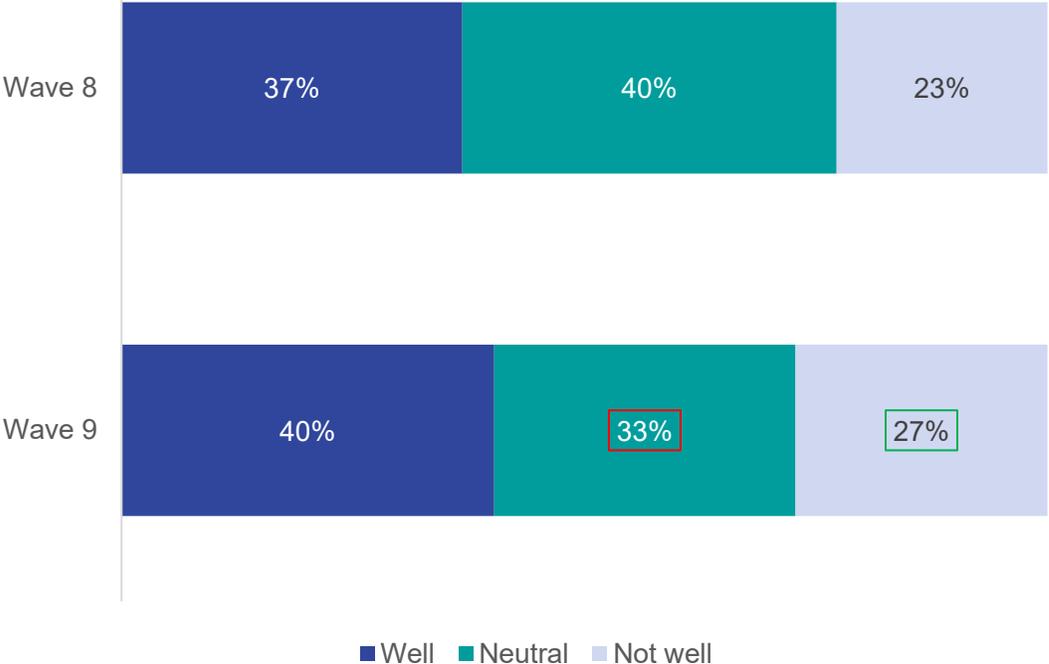
V5 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that receiving a vaccine will protect you from COVID-19?
Total Wave 8 n=1006; Wave 9 n=1042



INCREASED NEGATIVE PERCEPTION OF THE QLD GOVERNMENT'S MANAGEMENT OF THE VACCINE ROLLOUT

While perception of the Queensland Government's management of the vaccine roll out remains mixed, a significantly higher proportion rate the roll out 'not well' compared to the last wave (27% versus 23% respectively).

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

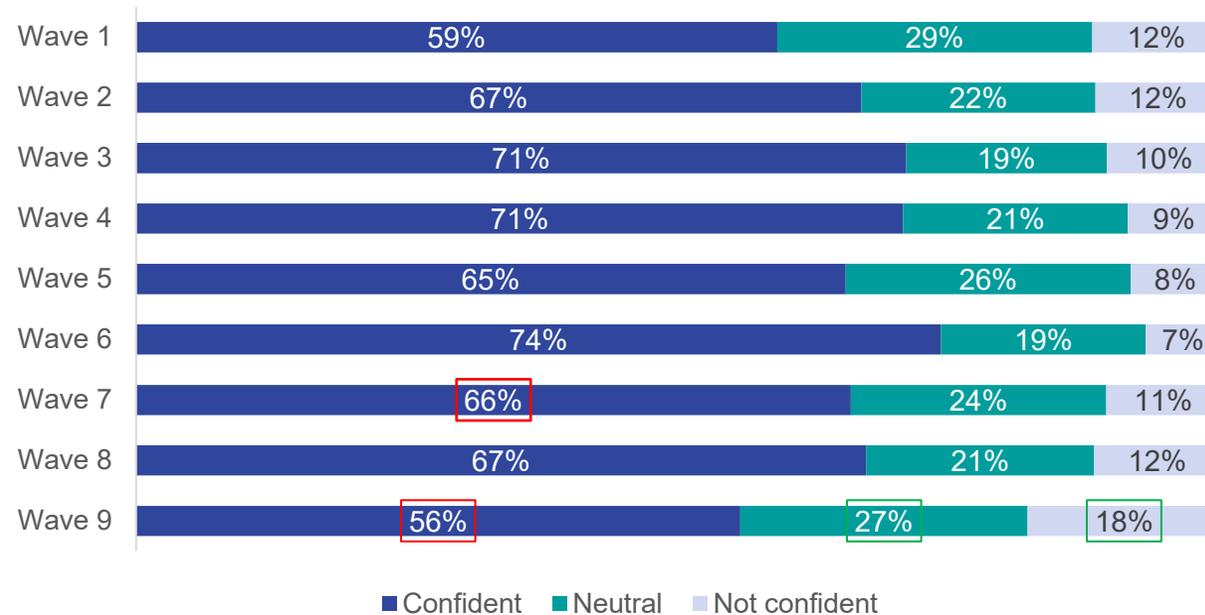


V4 On a scale of 1 to 10, where 1 is "Not very well" and 10 is "Very well" – how well do you think the Queensland Government is managing the roll out of the vaccines across Queensland?
Total Wave 8 n=1006; Wave 9 n=1042



CONFIDENCE ON MANAGING RESTRICTIONS DECLINES

Public confidence in the Queensland Government's management of restrictions has declined to its lowest level, at 56% who are 'confident'.

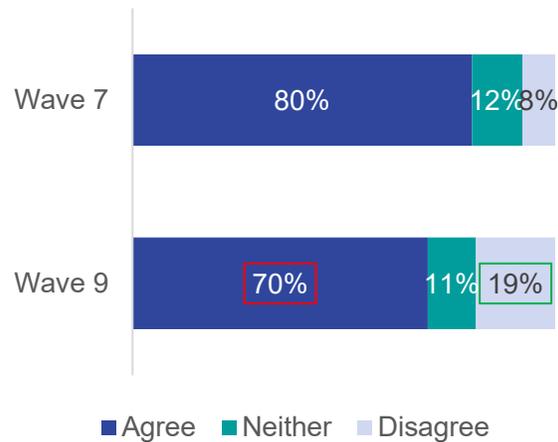


Q24 On a scale of 1 to 10, where 1 is "not at all confident" and 10 is "very confident" – how confident do you feel that Queensland Government can manage restrictions?
Total Wave 1 n = 1603; Total Wave 2 n = 1018; Total Wave 3 n=1021; Total Wave 4 n=1017; Total Wave 5 n=1091; Total Wave 6 n=998; Total Wave 7 n=1019; Total Wave 8 n=1006; Wave 9 n=1042

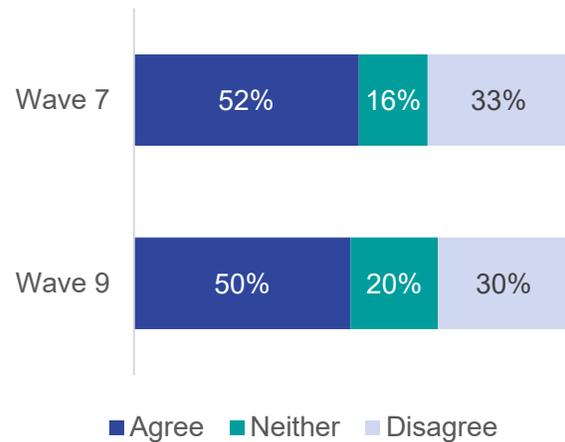
LESS AGREEMENT WITH LOCKDOWNS AND RESTRICTIONS

While three in five (63%) Queenslanders agree that more restrictions are needed due to the new Delta strain, the appetite for quick lockdowns and general restrictions are significantly lower compared to Feb'21 (wave 7). 70% support quick lockdowns compared to 80% (in Feb'21) while 30% agree there are too many COVID-19 restrictions compared to 17% (in Feb'21).

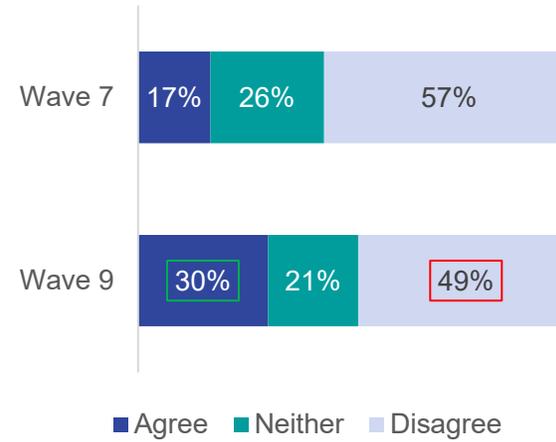
I support quick lockdowns
(eg. recent 3-day lockdown)*



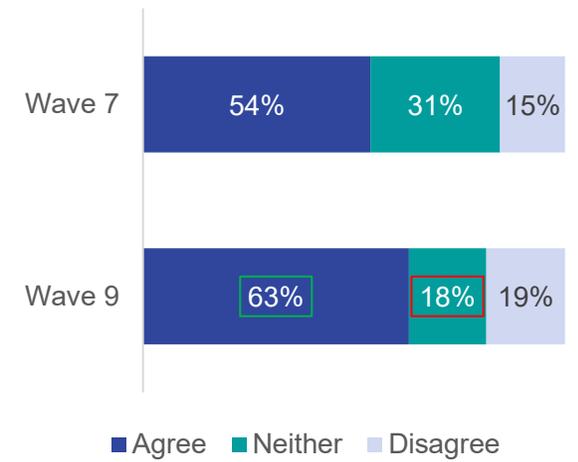
We should wait to see if there is community spread before increasing restrictions/lockdowns



There are too many COVID-19 restrictions



More restrictions are needed because of the new Delta strain*

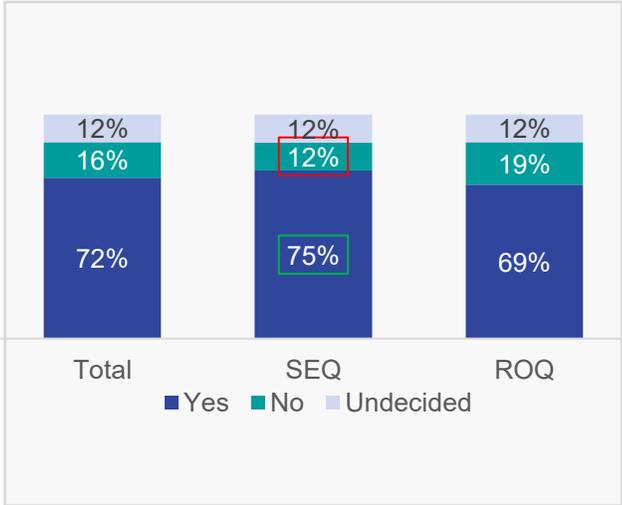
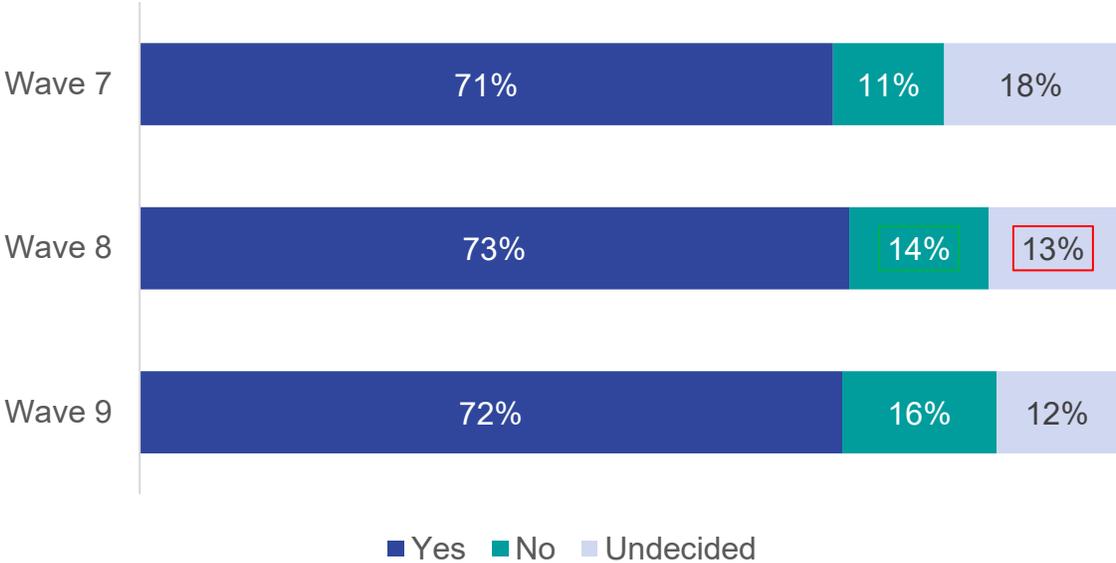


Q99 Please indicate how much you agree or disagree with the following statements?
Total Wave 7 n=1019, Wave 9 n=1042
*Wave 7 "... eg. recent 3-day Greater Brisbane lockdown", "... the new UK strain"

CONSENSUS REGARDING ESTABLISHMENT OF QUARANTINE FACILITIES IN REGIONAL QLD STEADY

Nearly three in four Queenslanders (72%) support establishing quarantine facilities in regional Queensland, with higher support from SEQ residents (75%) compared to ROQ residents (69%).

Support establishing quarantine facilities in regional Queensland



Total Wave 9 n=1042, SEQ n=547, ROQ n=495

Q103 Do you support establishing quarantine facilities for international travellers in regional Queensland?
Total Wave 7 n=1019, Wave 8 n=1006; Wave 9 n=1042

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

 Significantly higher / lower than ROQ – 95% CI.



AWARENESS OF INFORMATION 3.4



RATING OF INFORMATION OF ECONOMIC RECOVERY AND COMMUNITY TRANSMISSION HAS DECLINED

Positive ratings with regards to the Queensland Government's information on community transmission (70% vs. 77% in May'21) and economic recovery (34% vs. 40% in May'21) have significantly declined compared to the last wave.

84%

How to prevent the spread of coronavirus

77%

Current coronavirus level of restrictions

34%

How the Queensland economy will recover

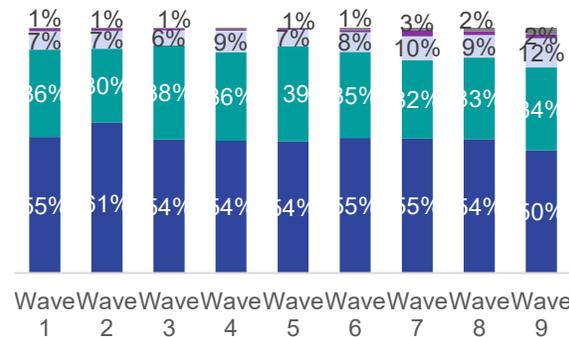
70%

How community transmissions occur

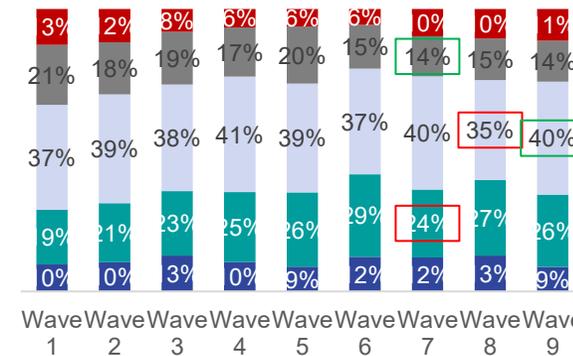
55%

Who can cross the border into Queensland

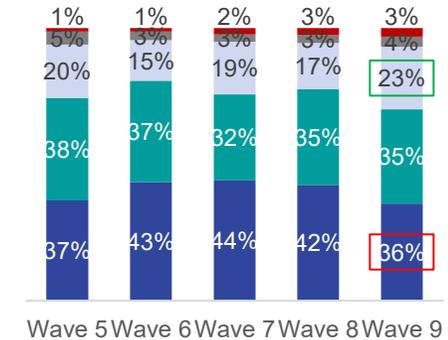
How to prevent the spread of coronavirus



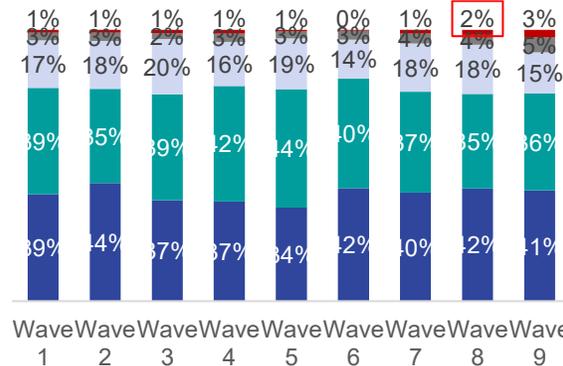
How the Queensland economy will recover



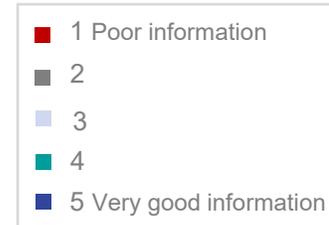
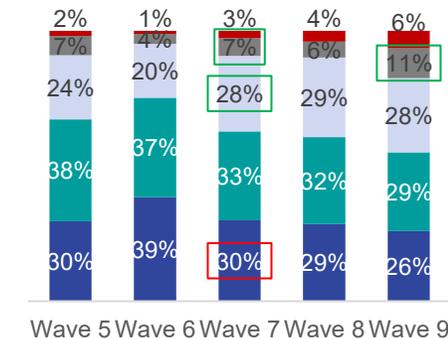
How community transmissions occur



Current coronavirus level of restrictions



Who can cross into Queensland



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; Wave 9 n=1042

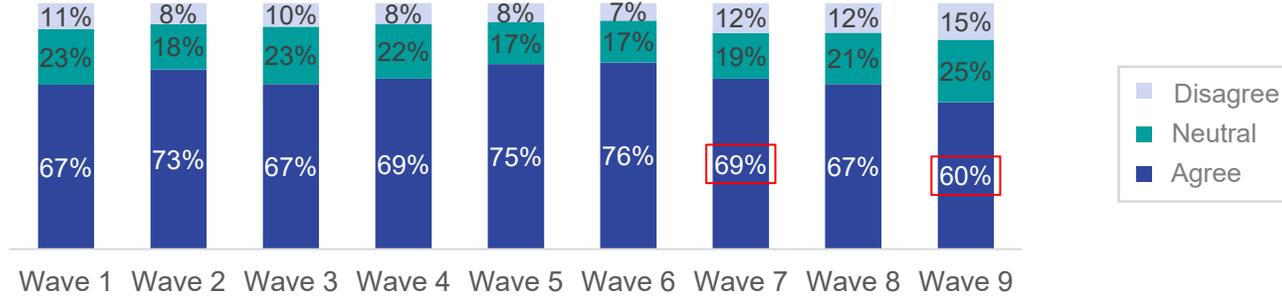
Significantly higher / lower than previous wave – 95% CI.



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

Three in five Queenslanders perceive the Queensland Government to be a trustworthy source of information, significantly lower compared to last wave (67%). Three in five also rate the Queensland Government's management of the pandemic as 'better' compared to other states/territories, also significantly lower compared to last wave (71%). Agreement levels on both metrics are at the lowest level observed.

Trustworthy information source

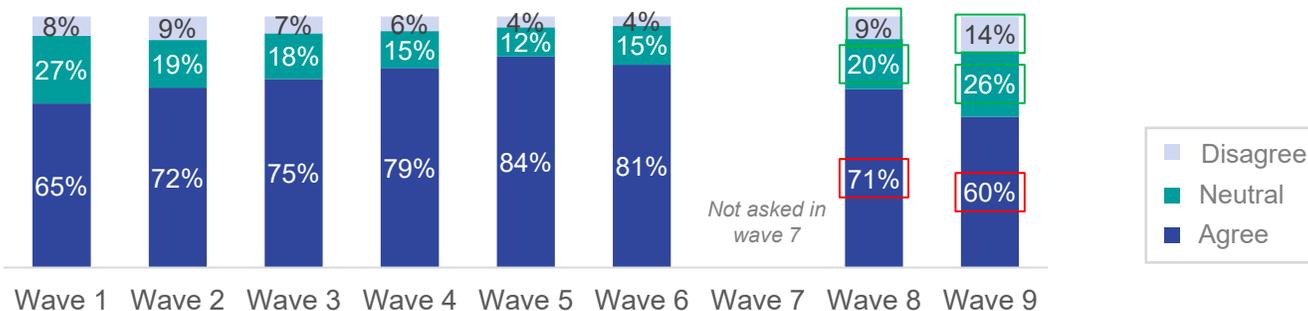


60%

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; Wave 9 n=1042

Managed the coronavirus pandemic better than other states or territories



60%

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; Wave 9 n=1042



CAMPAIGN RECOGNITION



Advertising stimulus

TVC



TVC and Radio transcript

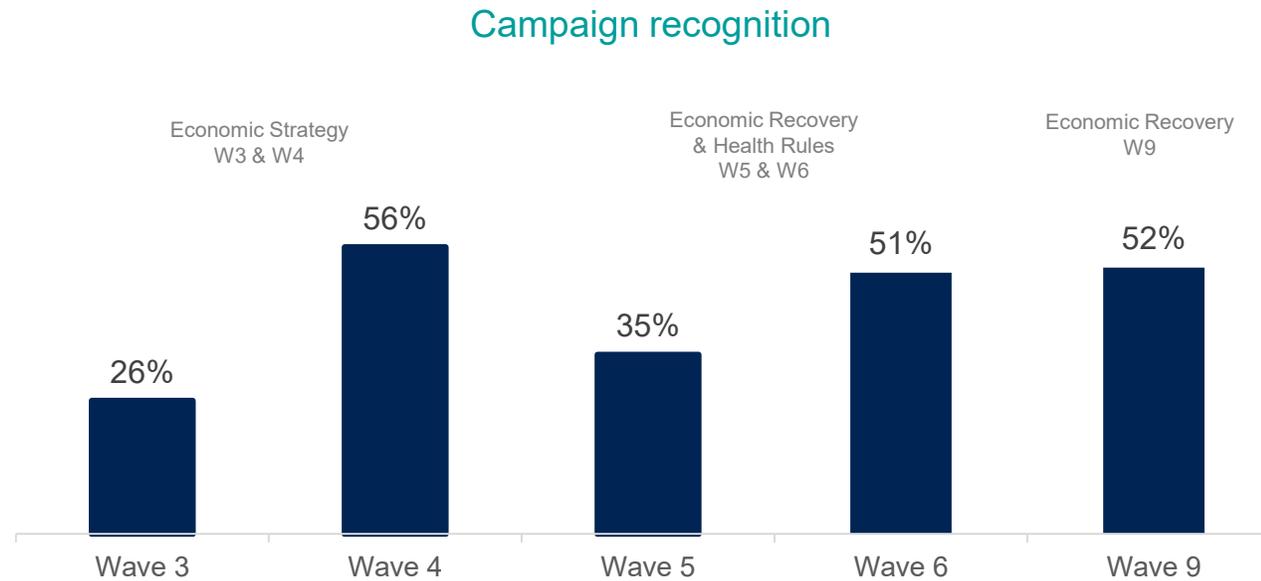
*Right now, Queensland is the place to be.
Our strong health response to COVID-19 means
Our economic recovery is well underway.
We're creating jobs in growth industries like tourism and agriculture;
Investing in advanced manufacturing and the resources of the future;
And we're attracting more business to Queensland.
So whether you're getting back on your feet...
...Or looking for the next big opportunity...
...Find out how our COVID-19 economic recovery plan can help you...
...At covid19.qld.gov.au
Authorised by the Queensland Government, Brisbane.*

Social, Print and Out of Home



ECONOMIC RECOVERY CAMPAIGN SEEN BY ONE IN TWO

The 'Economic Recovery' campaign is recognised by just over one in two (52%) Queenslanders.



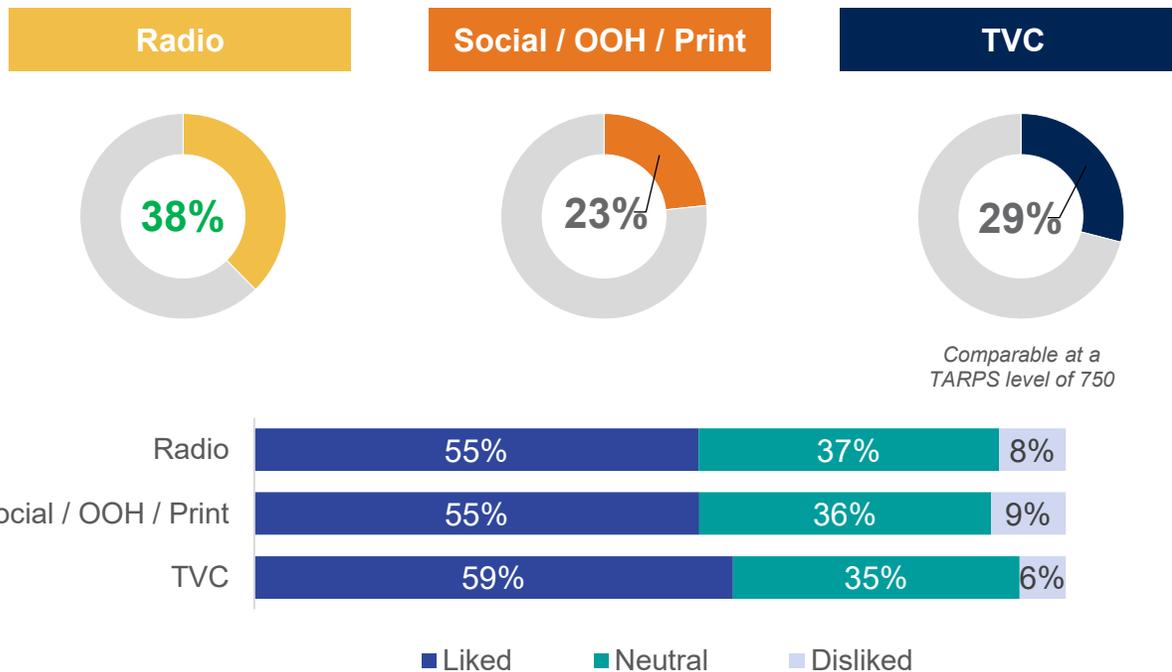
Campaign recognition Q68/Q77/Q79/Q79e Have you seen/heard any of these ads?
Total Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998; Wave 7 n=1042
See notes for media inclusions

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.

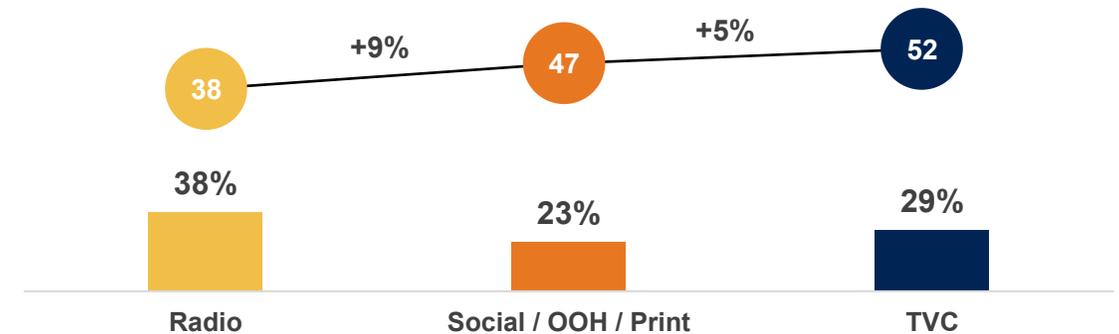
RADIO PROVIDES THE GREATEST REACH

Radio advertising achieved the highest recognition, heard by two in five Queenslanders. TVC and social media / out of home / print are recognised by 29% and 23% of Queenslanders respectively, with these channels adding considerable incremental reach to the campaign. The ads have been positively received with more than half saying they liked the advertising, consistent across all media channels.

Recognition by channel



Incremental reach by channel

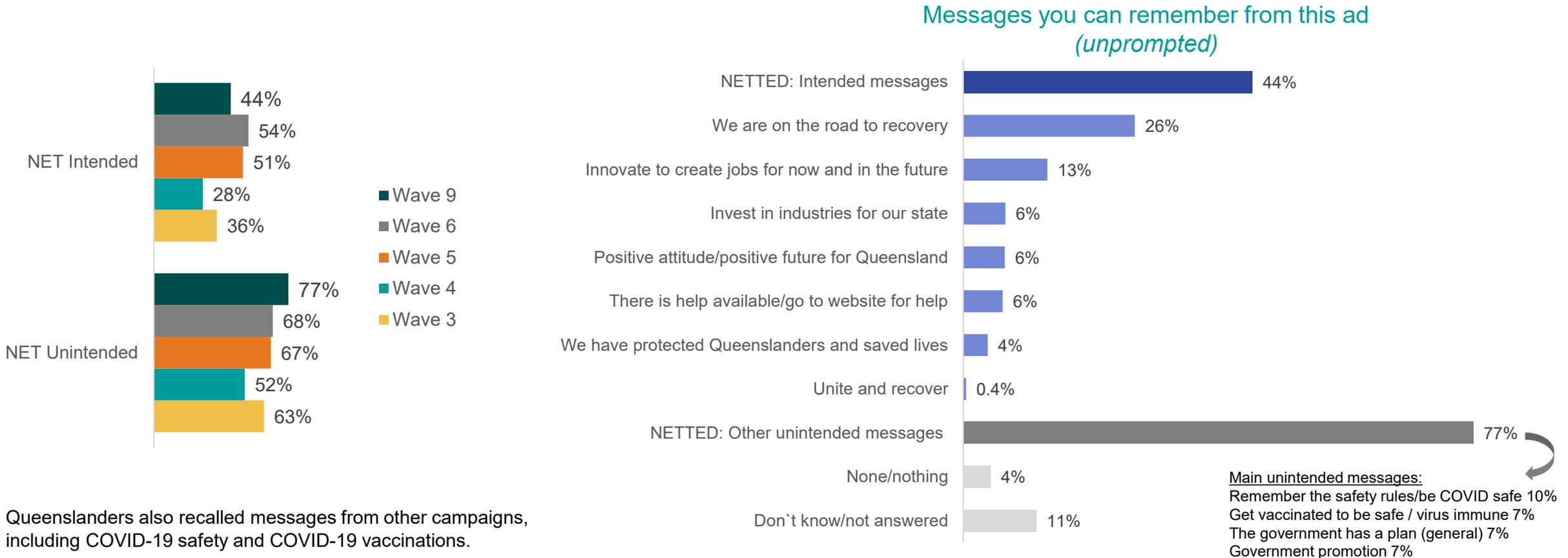


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 Total Wave 4 n=1017; Wave 5 n=1091; Wave 6 n=998; Wave 7 n=1042
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TWO IN FIVE COULD REPLAY ON-TARGET MESSAGING

Just over two in five (44%) who claim to have seen or heard the ads could spontaneously replay a campaign message, with 'we are on the road to recovery' the main message recalled. The highest level of unintended messages recalled is observed this wave.

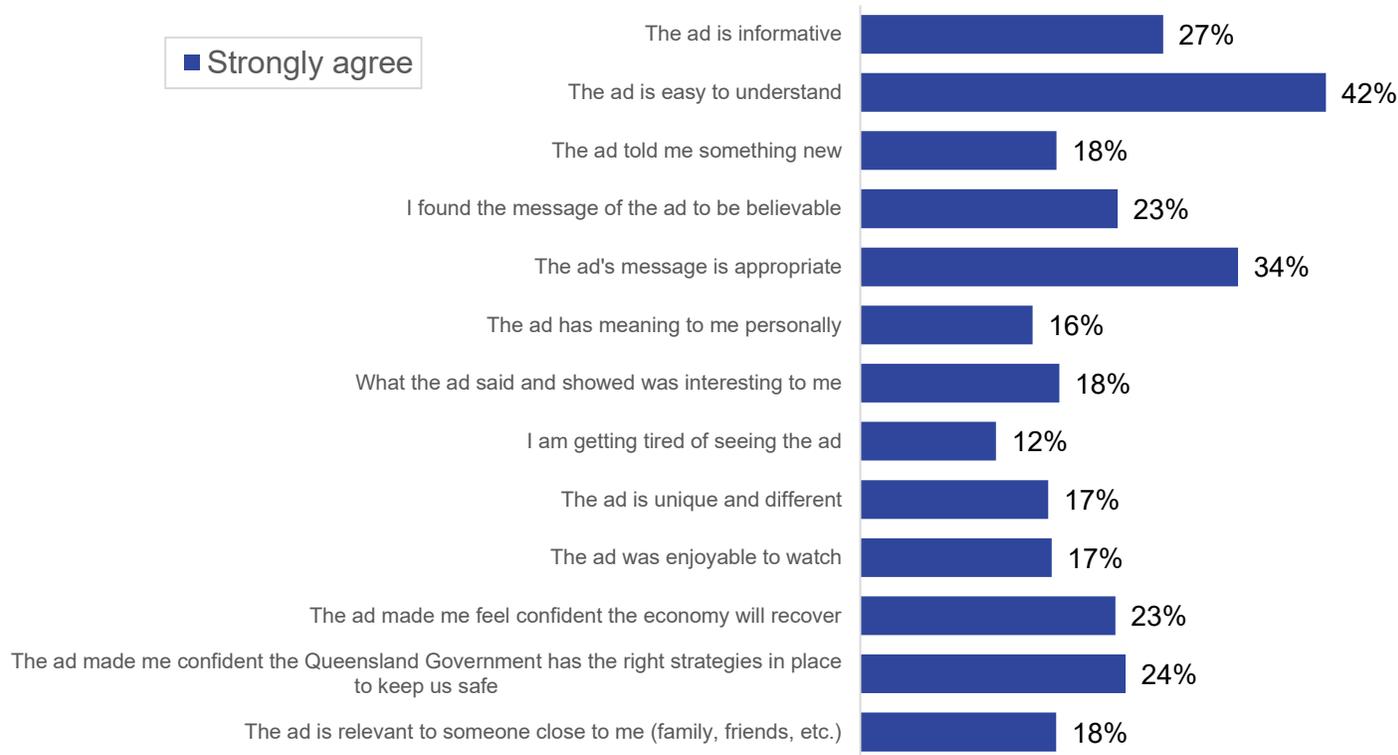


Queenslanders also recalled messages from other campaigns, including COVID-19 safety and COVID-19 vaccinations.

Q70 What are all the messages you can remember from this ad?
 Seen ads at Q68 Wave 4 n = 404, wave 5 n = 404, wave 6 n=540, wave 9 n=320.
 NB: Ad stimulus was de-messaged in wave 9

CAMPAIGN DIAGNOSTICS

The campaign performs below Ipsos norms on all available diagnostics. This campaign's performance is generally on par with the previous campaign in waves 3 and 4, with the exception of 'ad is informative' and 'easy to understand' which are rated higher for the current campaign.



Wave 7	Wave 6	Wave 5	Wave 4	Wave 3	Norm
27%	62%	58%	17%	15%	42%
42%	75%	71%	32%	28%	60%
18%	24%	19%	19%	15%	27%
23%	67%	59%	27%	23%	51%
34%	71%	72%	29%	33%	n/a
16%	38%	32%	16%	19%	34%
18%	43%	38%	26%	19%	35%
12%	9%	7%	12%	12%	15%
17%	18%	18%	18%	16%	32%
17%	22%	26%	15%	11%	36%
23%	28%	23%	15%	12%	n/a
24%	48%	39%	23%	18%	n/a
18%	30%	27%	19%	17%	47%

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, Wave 5 Seen ad (unprompted) n=404; Wave 6 Seen ad (unprompted) n=540, Wave 9 Seen ad(s) n=502

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■ ■ Significantly higher or lower than Norm at 95% C.I.
➡ ➡ Significantly higher or lower than previous wave at 95% C.I.

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 video 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.



CAMPAIGN MAY HAVE CONTRIBUTED TO POSITIVE IMPACT ON PERCEPTIONS

The 'Economic Recovery' campaign may have contributed to a higher incidence of positive ratings on a number of metrics.



Information

Among campaign recognisers,

30%

Heard about any major economic initiatives implemented by the State Government to assist with COVID-19 recovery (vs. 12% not seen)

31%

Seen, read or heard about the State Government's COVID-19 Economic Recovery Strategy (vs. 9% not seen)

41%

Confident getting enough information regarding how the Queensland economy will recover (rating 4 or 5) (vs. 27% not seen)



Economy

Among campaign recognisers,

53%

Confident that the Queensland Government's handling COVID-19 will be to the State's economic advantage in the long run (vs. 44% not seen)

35%

Nominate the best description of the QLD Government's economic strategy is its focus on creating jobs by supporting the traditional Queensland industries of tourism, mining, construction and agriculture (vs. 20% not seen)

7%

Oppose the direction of the State Government's Economic Recovery Strategy (vs. 23% not seen)



Community

Among campaign recognisers,

42%

Queensland Government is doing enough to support the mental health and wellbeing through pandemic and recovery (high support) (vs. 31% not seen)

Analysis of the data, using wave 8 (May'21) results as a pre-read, shows predisposition with possible campaign effect across all of these metrics.

Campaign effect observed for 'confident that the Queensland Government's handling COVID-19 will be to the State's economic advantage in the long run'.

Wave 9 - % seen is significantly higher than % not seen at 95% c.i.

Information - Q46, Q47, Q1

Economy - Q55, Q105, Q48

Community - Q51

**THANK
YOU**

GAME CHANGERS

