

# QFES COMMUNITY INSIGHTS SURVEY 2020

**Final Report**

Ipsos

27 October, 2020



# ACKNOWLEDGMENT OF COUNTRY

We acknowledge the First Nations people as the original inhabitants or as the Traditional Owners of the lands across Queensland and pay respect to the Elders – past, present and emerging – for they hold the memories, traditions, the culture and hopes of Aboriginal peoples and Torres Strait Islander peoples across the state.

# CONTENTS

1. EXECUTIVE SUMMARY.....	4
2. BACKGROUND AND OBJECTIVES.....	8
3. COMMUNITY PERCEPTIONS .....	12
4. BUSINESS OWNER PERCEPTIONS.....	26
5. PERCEPTIONS ABOUT QFES.....	30
6. APPENDIX.....	36

# EXECUTIVE SUMMARY

The Queensland Fire and Emergency Services (QFES) Community Insights Survey explores a range of emergency and disaster events, preparedness activities, and service expectations of QFES. In 2020, 2,100 Queenslanders were surveyed across seven regions of Queensland, asked about perceptions of risk and preparedness for individuals within the community and business owners, and perceptions and expectations of QFES.

## Community perceptions of risk and preparedness

- Storms (69%), Pandemics (64%) and Heatwaves (62%) are perceived as the highest risk events (slightly or very likely). They were also the events that people feel the most prepared for (77% feel slightly or very prepared for Storms, 71% for Pandemics and 75% for Heatwaves).
  - There was an increase since 2019 in perceived risk and preparedness for pandemics/widespread disease, due to the global COVID-19 pandemic.
  - Earthquakes (8%), Hazardous materials incidents (10%) and Terrorism (11%) are considered the least likely, and amongst those who do consider terrorism likely, it is also considered the event people are least prepared for (20% prepared).
- The average perceived risk from emergency and disaster events (2.8/5 in 2020, where 5 is the highest perceived risk) has increased since 2019 (2.7/5), particularly in Brisbane (2.7/5 in 2020 from 2.6/5 in 2019) and South East Queensland (2.8/5 in 2020 from 2.6/5 in 2019).
  - Far Northern (4.2/5), Northern (4.2) and Central (3.9) Queenslanders feel significantly more at risk from Cyclones compared to southern regions.
  - Bushfires were a lower perceived risk in 2020 compared to 2019 in Central Queensland (3.1/5 in 2020 compared to 3.5/5 in 2019).
- Eight percent of respondents had experienced a local emergency or disaster event in the past year, with over half of these people feeling prepared for these events (57%), a decrease from 2019 (71%).
  - Three out of five people who had experienced an event (58%) felt that this experience would improve their preparedness.



# EXECUTIVE SUMMARY



## Preparedness activities

When looking at actual actions taken to prepare for emergency and disaster events, there are several areas where there is room for improvement.

- While 98% of Queenslanders have smoke alarms installed (consistent with the 5-year average), only 84% of these have been tested or maintained in the past 12 months.
  - In relation to the new Interconnected Smoke Alarm (ISA) legislation, 20% of Queenslanders already have ISAs, no change from 2019, and 52% of those who don't have ISAs say they are likely to install them in the next 12 months.
- Three quarters (72%) of Queenslanders have home and/or contents insurance, and this increases to 93% for those living in owner-occupied homes.
  - There has been an increase in those who have insurance covering storms (80%), floods (70%) and bushfires (61%) since 2019 (75%, 61% and 53% respectively).
  - Older Queenslanders are more likely to have insurance (85%), whereas those who have moved to Queensland within the last year are less likely to have insurance (48%).
- The majority of Queenslanders do not have fire plans for their household (60%), and this number has increased since 2019 (55% without a fire plan). However, significantly more people have checked the QFES or local council website for information and advice (30%) compared to 2019 (26%). Far Northern, Central, and South West Queenslanders have generally completed more property changes to reduce the impact of emergency and disaster events, while those in Brisbane have generally completed fewer preparedness activities compared to other regions.

# EXECUTIVE SUMMARY

## Perceptions and expectations of QFES

- As seen in 2019, most Queenslanders consider themselves (87% mostly or completely) responsible for preparing their household for emergency and disaster events, with QFES considered the second most responsible (64%).
  - More people considered QFES ‘mostly’ responsible (38%), and the federal government ‘completely’ (20%) responsible compared to 2019 (34% and 16% respectively).
- More people consider local businesses as ‘very important’ (45%) to protect in emergency or disaster events, compared to 2019 (39%), potentially due to the spotlight they have been under due to COVID-19.
- Fire and hazard response is considered the most important service, more so than in 2019 (2.9 in 2020, where 1 is most important and 9 is least important, compared to 3.1 in 2019).
  - This was followed by Warnings and alerts, which was rated as less important compared to 2019 (3.5 in 2020 compared to 3.3 in 2019).
  - Overall Queenslanders are unsure about which services are provided in their local area, with Brisbane and South Eastern residents continuing to indicate less awareness of services within their local area generally, although South West’s awareness for most services has increased since 2019.
- Queenslanders prefer that QFES be available to respond to events (68%) as compared to providing individuals the skills to improve self-reliance (32%), and this has increased since 2019 (63% and 32% respectively in 2019).
- When looking at allocation of resources, Queenslanders would like to move towards a more flexible service (62%) compared to a permanent presence in their local community (38%).
  - This is higher in Brisbane (70%) and South East (64%) compared to other regions, with Central the lowest at only 46%.
- 39% of respondents received a QFES service in the last year, and overall respondents were satisfied with the services.

# EXECUTIVE SUMMARY

## Business owners

- Thirteen percent of respondents were business owners, up from 10% in 2019.
  - Most businesses were locally owned, with 80% based in the same postcode the respondent lived in.
  - Over half (55%) of those who own a business have business insurance, with just 29% having a business continuity plan and 48% undertaking hazard impact mitigation activities.
- Perceived risks and preparedness follows similar patterns to those seen for personal risk and preparedness. The primary differences compared to 2019 are:
  - Increased perceived risk from Pandemics (62% slightly or very likely in 2020 compared to 11% in 2019), and
  - Increased perceived preparedness for Heatwave (77% slightly or very prepared in 2020 compared to 58% in 2019).

# BACKGROUND AND OBJECTIVES OF SURVEY

## BACKGROUND

The Queensland Fire and Emergency Services (QFES) was established in 2013, and encompasses the Fire and Rescue Service (FRS), disaster management services, Rural Fire Service (RFS), and State Emergency Service (SES). In 2019-20, QFES had 3,357 FTE and approximately 36,000 volunteers, and responded to approximately 199 incidents *a day*\*.

The CRC report\*\* found that the total economic costs of natural disasters is growing, and include significant and long-term social impacts. It found that more than nine million Australians have been impacted by a natural disaster or extreme weather event in the past 30 years, and this number is only expected to grow as the intensity and frequency of events increases.

Alongside recording the statistics of these events, it is important to understand the community perceptions around emergency and disaster events, and their perceptions of the QFES response. The Community Insights Survey started approx. 15 years ago as the former 'Households Survey', evolving using the bushfires natural hazards CRC criteria index. It is an annual campaign to explore a broader range of hazards and preparedness activities as well as service expectations of QFES.

## OBJECTIVES

The key objective of this research was to **measure the level of risk perceptions and preparedness and practices for fire and emergency events** among Queensland households.

Specifically, the campaign objectives include:

- Measure the perception of risk and preparedness levels for a broad range of hazard types, for households and businesses;
- Provide greater understanding of the community's service expectations of QFES;
- Measure the satisfaction of those who have received a service
- Measure indicators related to smoke alarm installation
- Compare findings to previous years

\* 2019-20 QFES Annual Report

\*\* National research priorities for natural hazards emergency management, May 2019: [https://www.bnhcrc.com.au/sites/default/files/crc\\_nationalresearchpriorities\\_v5\\_240519.pdf](https://www.bnhcrc.com.au/sites/default/files/crc_nationalresearchpriorities_v5_240519.pdf)



# RESEARCH APPROACH AND SAMPLING

## RESEARCH APPROACH

- Online survey of Queenslanders aged 18+.
- The 15 minute survey was conducted between 10<sup>th</sup> August and 10<sup>th</sup> September 2020.
- This 2020 data is compared to 2019 data, which used the same questionnaire.

## SAMPLE

- In order to provide a representative and robust picture of the level of household preparedness and practices for emergency and disaster events, the sample was drawn from the seven QFES regions:
  - Brisbane
  - South Eastern
  - South Western
  - North Coast
  - Central
  - Northern
  - Far Northern
- Total sample size n=2,100

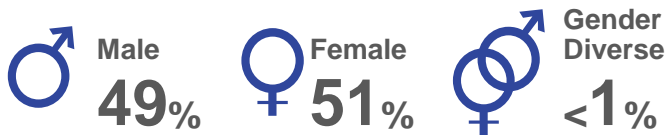
## ANALYSIS

- Sample was weighted to reflect the Queensland population proportions in terms of region, age and gender.
- Statistical significance testing was conducted at a 95% confidence level between the 2020 and 2019 data. These differences are indicated by the following symbols:
  - ▲ significantly higher than 2019 @ 95% CI
  - ▼ significantly lower than 2019 @ 95% CI
- Statistical significance testing was conducted between the demographic categories and are indicated by the following symbols:
  - ↑ significantly higher than other categories @ 95% CI
  - ↓ significantly lower than other categories @ 95% CI

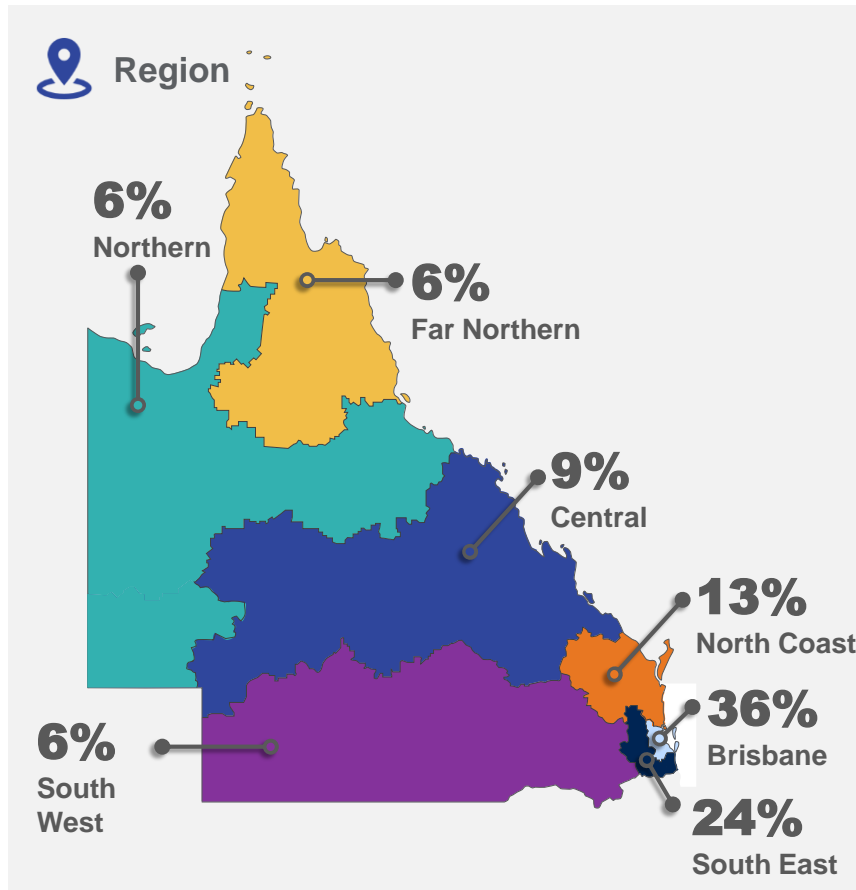
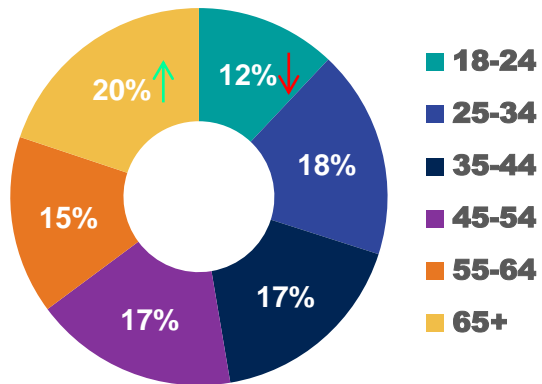
# DEMOGRAPHICS

The 2020 QFES Community Insights Survey respondents comprised 2,100 Queenslanders. The sample overview below shows unweighted data making up the sample. This was then weighted to represent the Queensland population by age, gender and location.

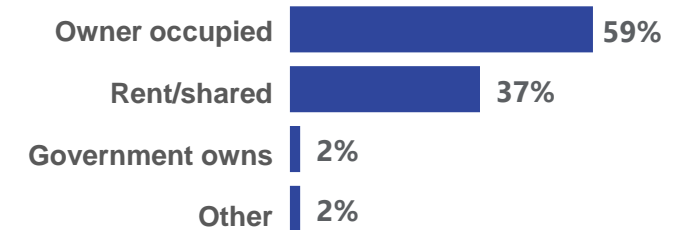
## Gender



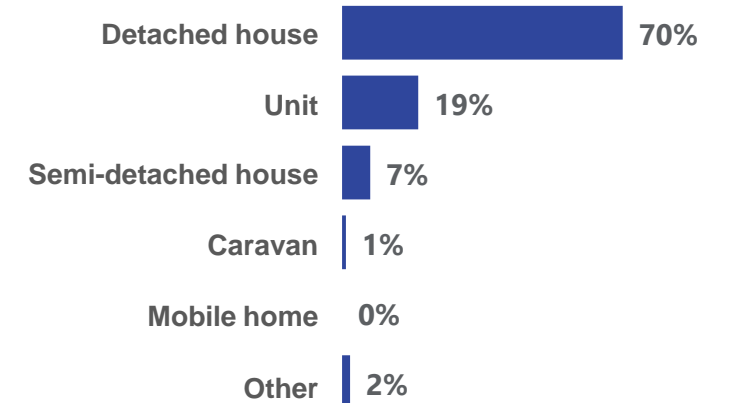
## Age



## Home ownership



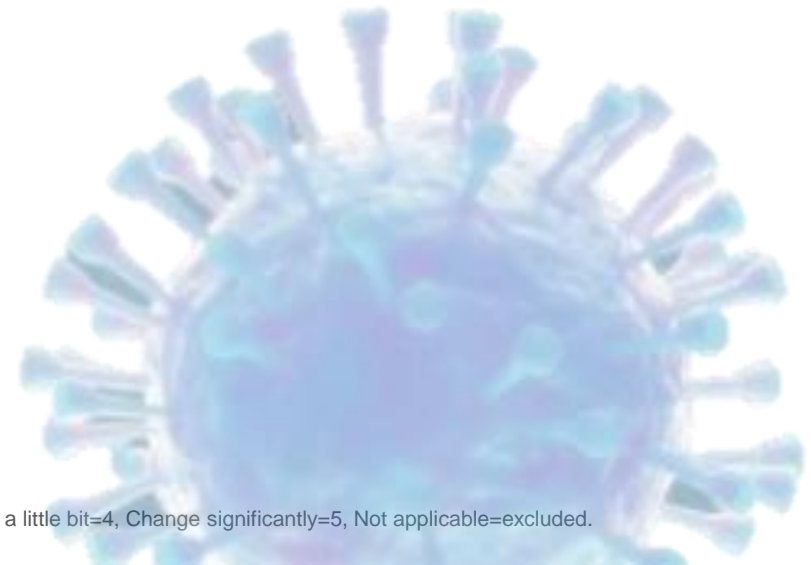
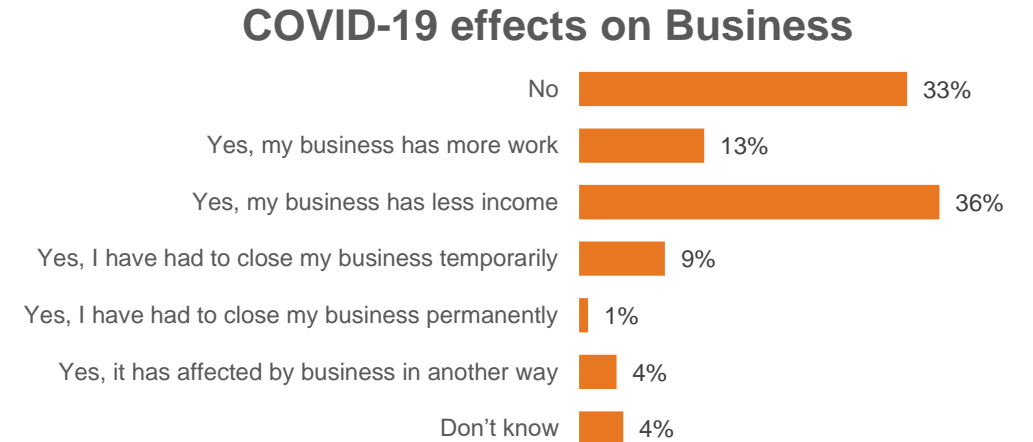
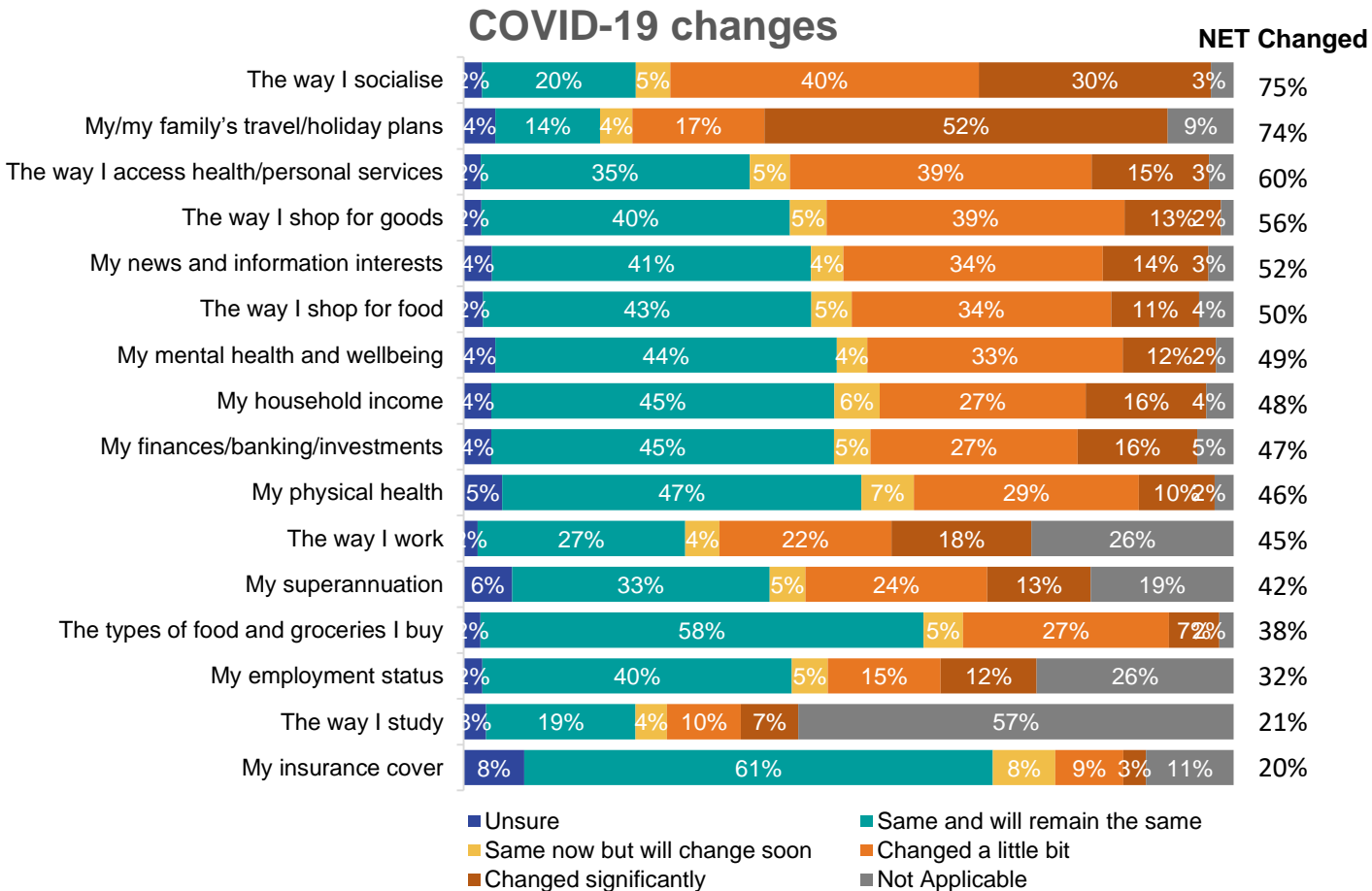
## Type of dwelling



# COVID CONTEXT

COVID-19 has significantly changed how Queenslanders live and work in 2020. Three quarters of Queenslanders report changes in the way they socialise and holiday. Over half say the way they access health and personal services, the way they shop for goods, and their news and information interests have changed. Throughout this report, the COVID-19 changes have been summed across statements and codes to create a COVID-19 change index\*, used to determine whether those who have been more affected by COVID-19 are different across measures compared to those less affected.

Two thirds of business owners indicated that COVID-19 has affected their business, with a third saying their business now has less income.





# COMMUNITY PERCEPTIONS

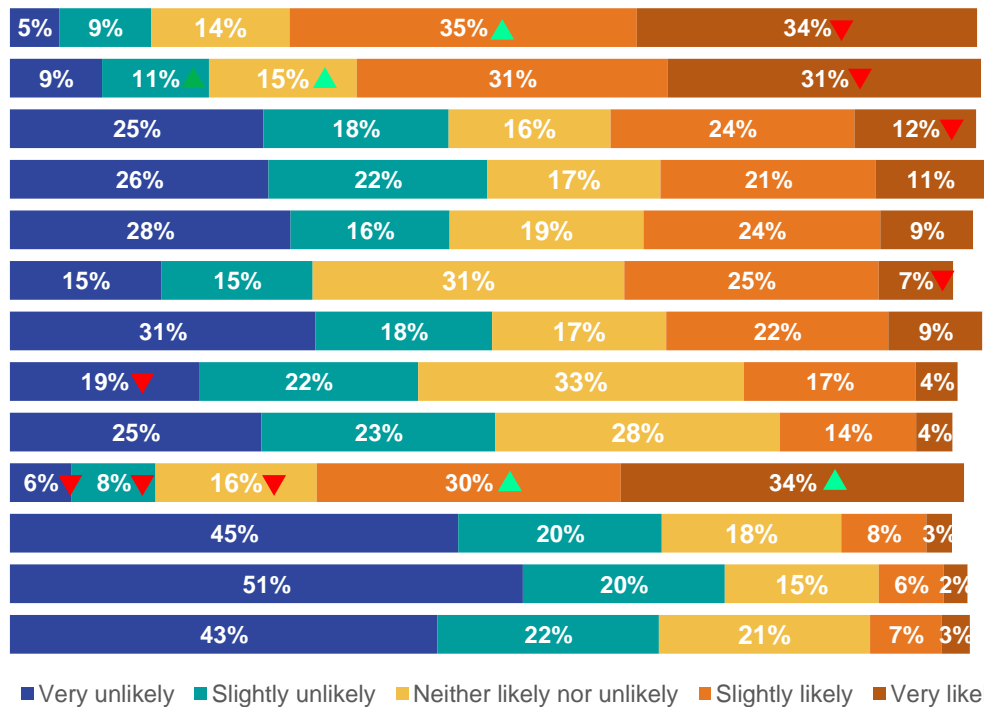


# PERCEPTION OF RISK & PREPAREDNESS

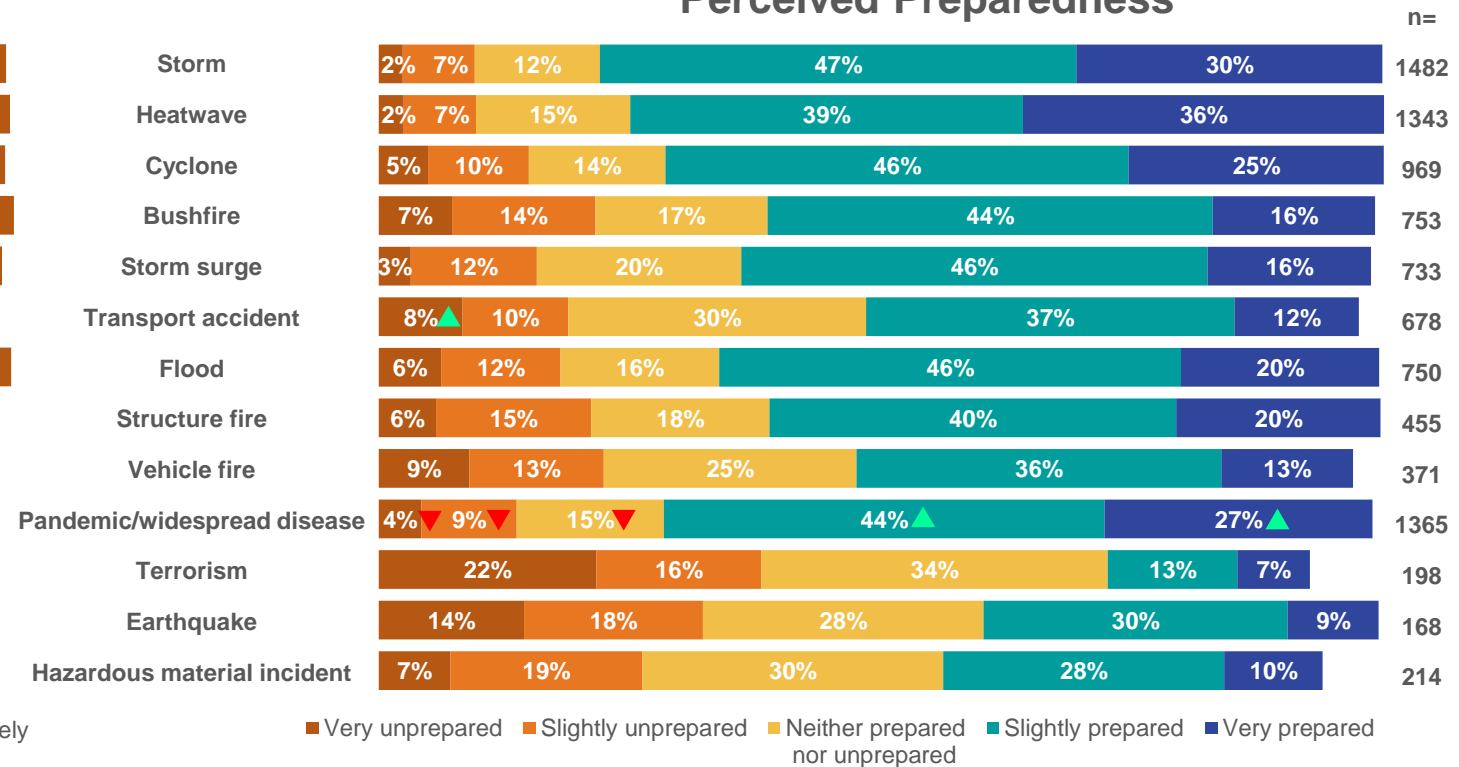
Overall, Queenslanders perceive Storms, Pandemics/widespread disease and Heatwaves as the most likely forms of emergency or disaster events. In 2020, more people felt at risk from Pandemics/widespread disease compared to 2019, which we can safely assume is due to COVID-19. There was less risk (lower 'Very likely' values) perceived from Storms, Heatwaves, Cyclones and Transport accidents compared to 2019.

Respondents felt most prepared for Storms, Heatwaves, Cyclones and Pandemics/widespread disease, with perceived preparedness significantly increasing since 2019 for Pandemics/widespread disease. Terrorism and Earthquakes are the least prepared for events, though few see them as likely. There was a greater feeling of being 'Very unprepared' for Transport accidents in 2020 compared to 2019. When asked about their perceptions of risk, some 'other' event responses included drought, hailstorm, snow and human events (such as riots, home invasions and illness).

## Perceived Risk



## Perceived Preparedness\*





# RISK & PREPAREDNESS

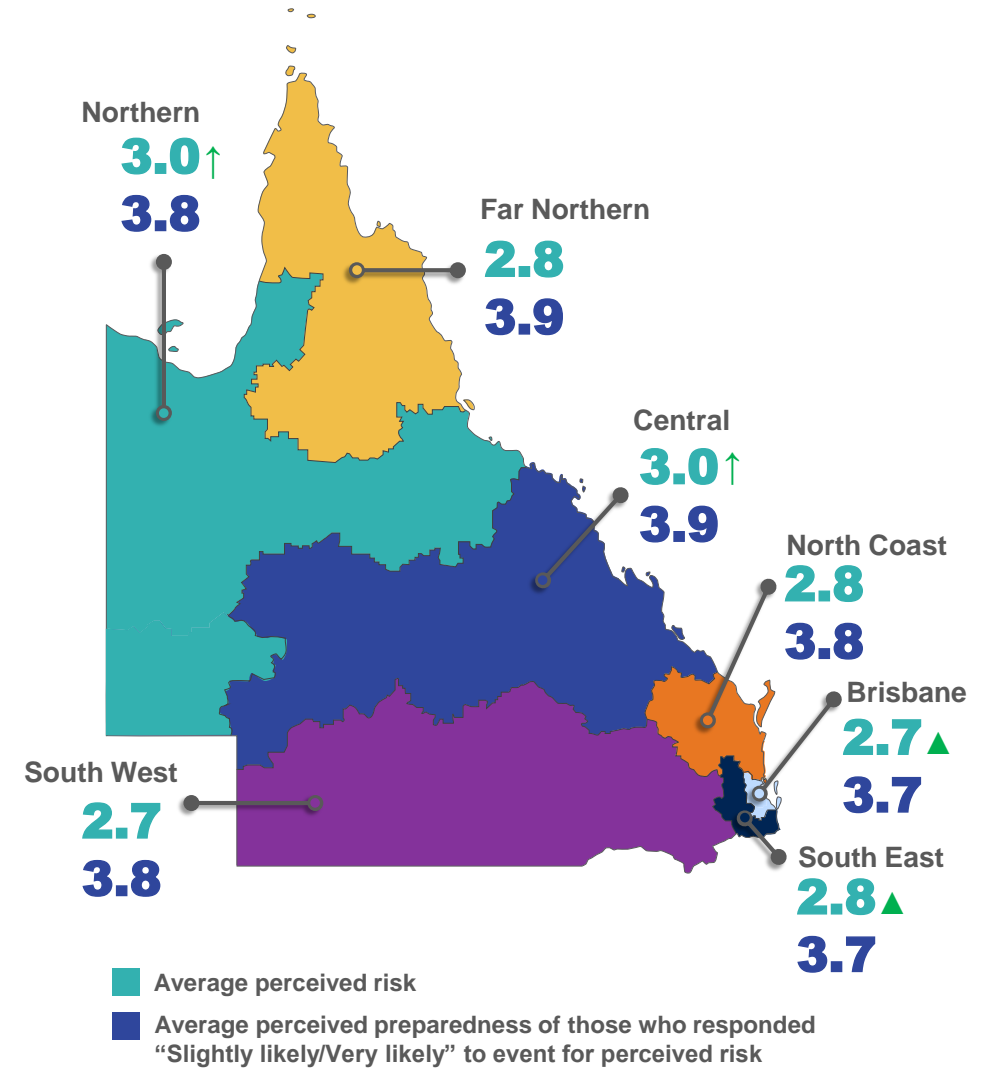
## By region



The average perceived risk for emergency or disaster events has increased in 2020 compared to 2019, while the perceived preparedness remains the same.

Far Northern, Northern and Central Queenslanders generally perceive emergency or disaster events to be significantly more likely than people in other regions, while Brisbane residents perceive a lower risk. Both Brisbane residents and South East Queenslanders perceive a higher risk of emergency or disaster events compared to 2019.

Residents of Northern Queensland on average feel they are more prepared on average for events they perceive as likely, compared to other regions.










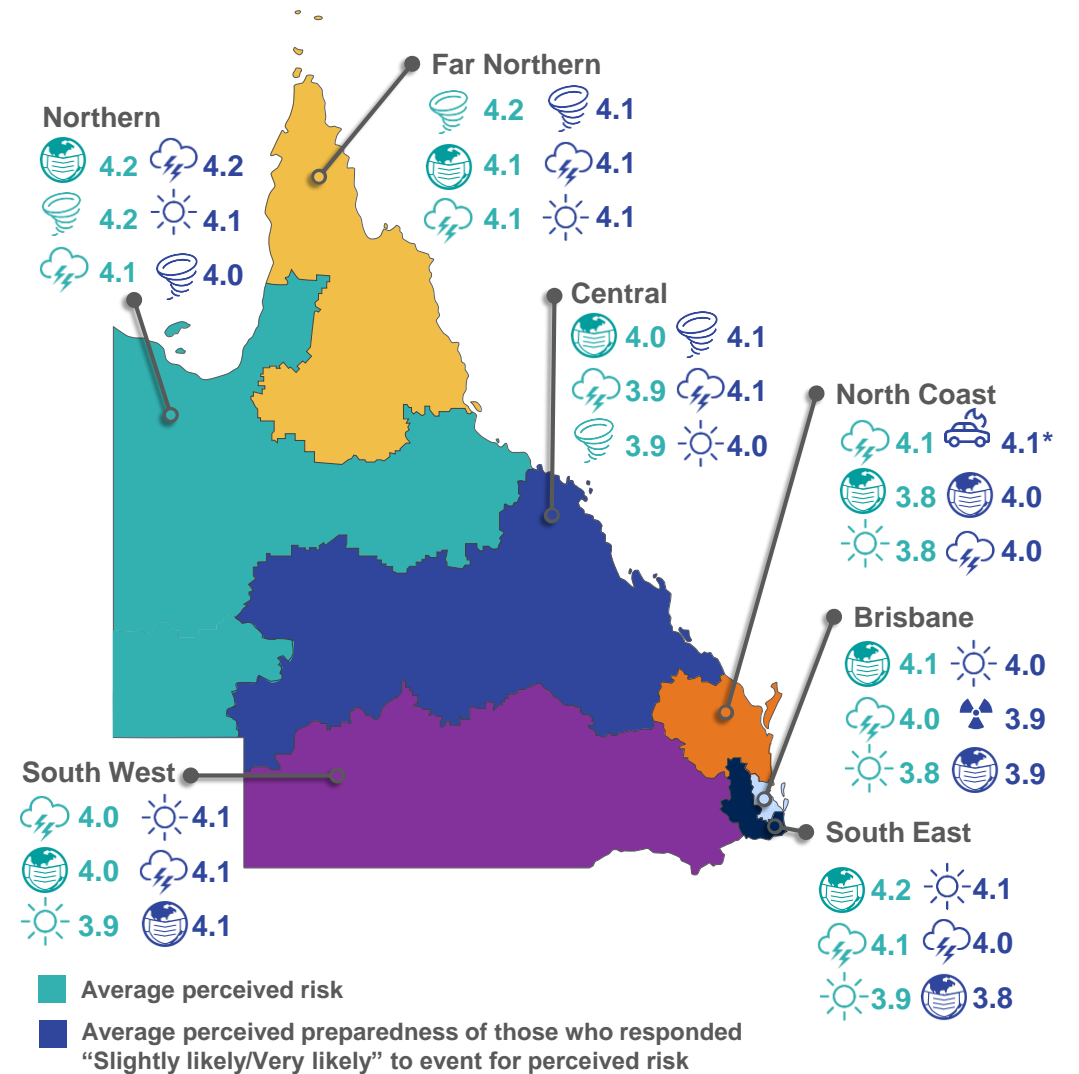
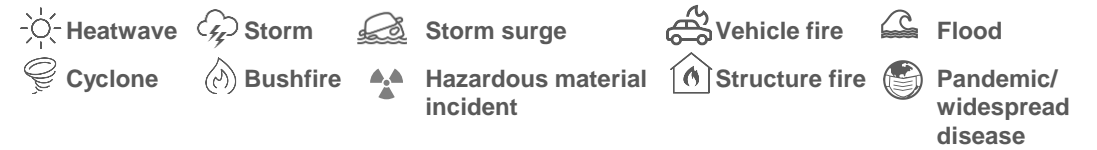
▲ significantly higher than 2019; ▼ significantly lower than 2019  
 ↑ significantly higher @ 95% CI; ↓ significantly lower @ 95% CI – compared to other categories

# RISK & PREPAREDNESS

## Top 3 events by region

### Event & Region Breakdown

- 
 • Unsurprisingly, perceived risk and preparedness for a Pandemic/widespread disease has significantly increased for all regions compared to 2019. The perceived risk is lower in North Coast compared to other regions.
- 
 • Storms made it to the top 3 events in all regions for both perceived risk and perceived preparedness, as seen in 2019.
- 
 • Heatwaves are perceived as a lower risk in 2020 in North Coast and Central Queensland compared to 2019, with North Coast feeling less prepared than in 2019.
- 
 • Cyclones are perceived as a greater risk in Far Northern, Northern and Central Queensland and less of a risk in Brisbane and South Western Queensland, although the perceived risk is lower for those in Far Northern regions compared to 2019. Those in Far Northern and Central Queensland also feel greater preparedness for Cyclones compared to other regions, with no change from 2019.
- 
 • The North Coast has Vehicle fires as the top event for preparedness (after Terrorism, which has a very low base), and Far Northern Queensland perceives the risk of Vehicle fires as lower in 2020 than 2019.
- 
 • Bushfires are perceived as less of a risk in Brisbane compared to other regions. Central Queenslanders perceive Bushfires as less of a risk compared to 2019. Those in South Western Queensland feel more prepared for Bushfires compared to 2019.
- 
 • Flood risk is perceived as significantly higher in Northern Queensland compared to other regions. North Coast perceive a lower flood risk compared to 2019.



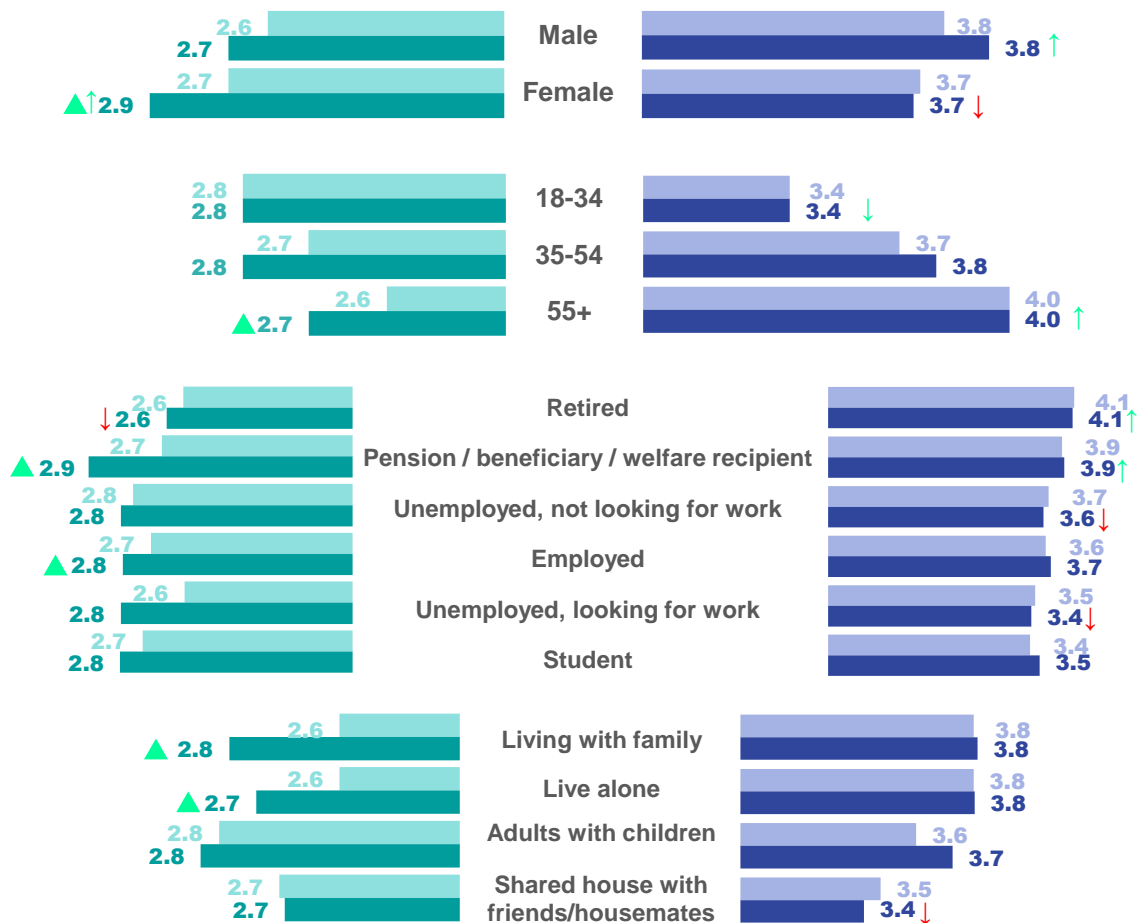
\*Terrorism had the highest preparedness score (4.6) for North Coast, however the base was low (n=14).

# RISK & PREPAREDNESS

## Demographics

2019  
2020 Average perceived risk

2019  
2020 Average perceived preparedness  
(of those who responded "slightly likely/very likely" to event for perceived risk)



16 – © Ipsos | QFES 2020 Community Insights

▲ significantly higher than 2019 ▼ significantly lower than 2019  
 ↑ significantly higher @ 95% CI ↓ significantly lower @ 95% CI – compared to other categories

## Gender

Overall, women have significantly higher perceptions of risk compared to men, and this has increased since 2019. Men feel more prepared than women on average.

## Age

Older Queenslanders (55+) have a greater perception of risk in 2020 compared to 2019. Queenslanders also feel significantly more prepared for emergency or disaster events as they get older.

## Employment status

Queenslanders who are retired have significantly lower perceptions of risk compared to other categories, and those on welfare and employed have greater perception of risk compared to 2019. Those retired and on welfare feel more prepared, while those unemployed feel less prepared.

## Living Situation

Queenslanders living with family or living alone perceive greater risk compared to 2019. Those living in shared houses generally feel less prepared than other living situations.

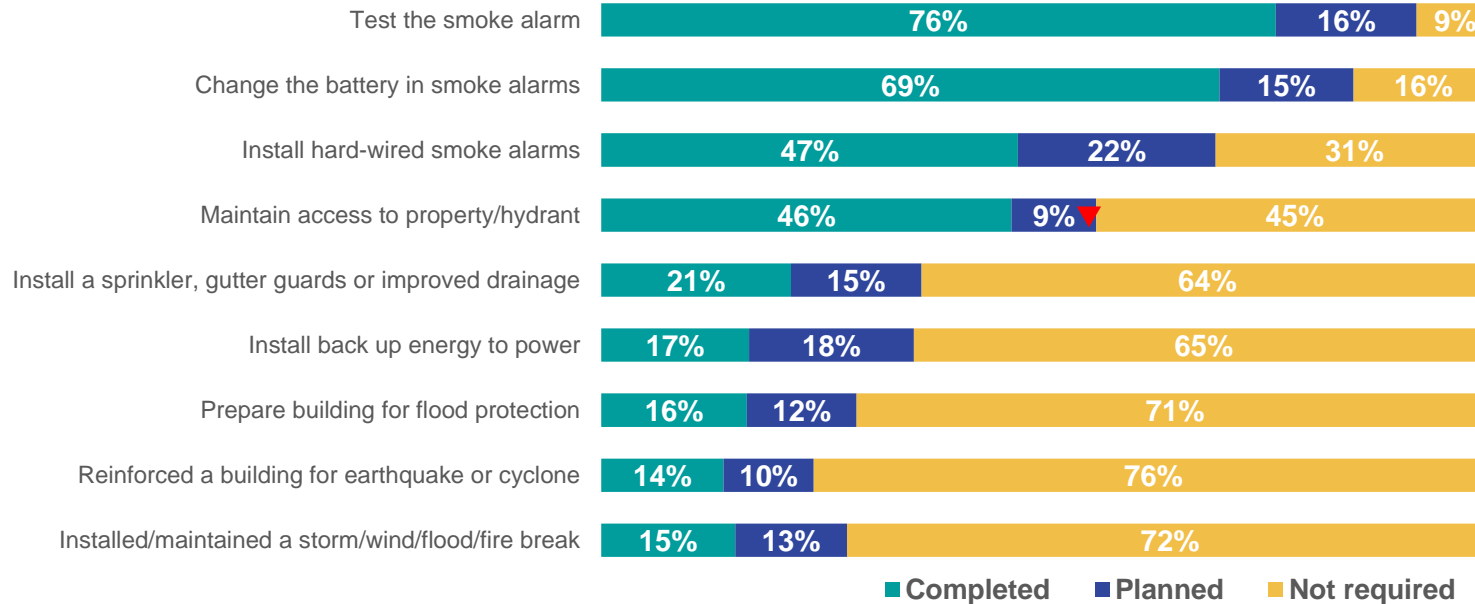
Base: Total sample 2020 n = 2100; 2019 n = 2458. Q1. How do you rate the likelihood that the following emergency or disaster event could impact your home or family in the next year | Q2. (those who responded "Slightly likely/Very likely" to event for perceived risk) Overall, how prepared do you feel to reduce or prevent the impact on your home or family from the following emergency or disaster events | SQ1 What is your age | SQ2 What is your gender | Q34 Which of the following best describes your employment status | Q35. Which of the following best describes your living situation.



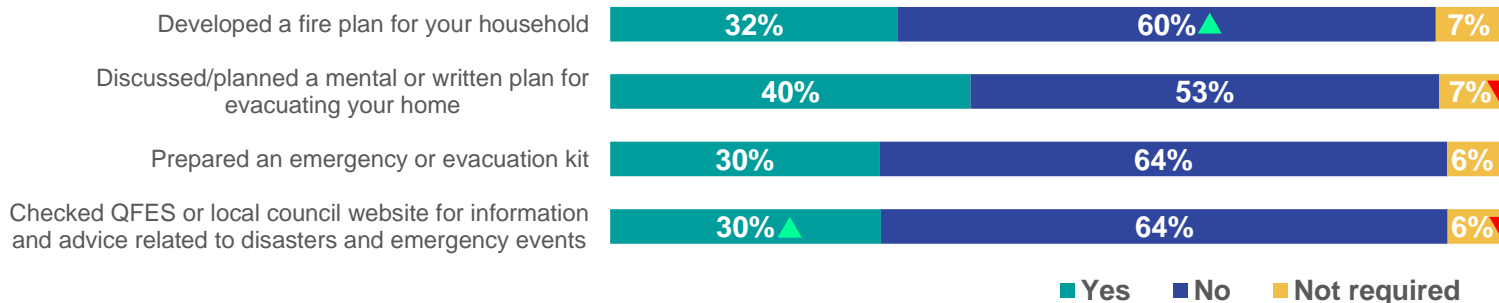
# PREPAREDNESS BEHAVIOUR

## Actions taken

### Property changes to reduce impact of local emergencies or disaster events



### Research and planning for local emergencies or disaster events



17 – © Ipsos | QFES 2020 Community Insights

Base: Total sample 2020 n = 2100. Q17. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event | Q18. In the last year, have you undertaken any of the following activities.

The most common behaviours Queenslanders undertake to prepare their homes and families, are testing and maintaining smoke alarms.

In many instances respondents considered property changes not required. The only change from 2019 was fewer people planning to 'Maintain access to their property or hydrant'.

Between half and two thirds of Queenslanders have not undertaken each of the research and planning activities. In 2020, significantly more people had checked the QFES or local council website for information and advice compared to 2019, and significantly fewer people have developed a fire plan.

Those who have completed these activities and behaviours have been more affected by COVID-19 than those who indicated 'Not required'.

The CRC Report\* indicates that investments in physical and community resilience measures significantly lessen the increase in costs of natural disasters. The findings from this 2020 Community Insights survey indicates there is plenty of potential for targeting events to improve the preparedness of Queenslanders.

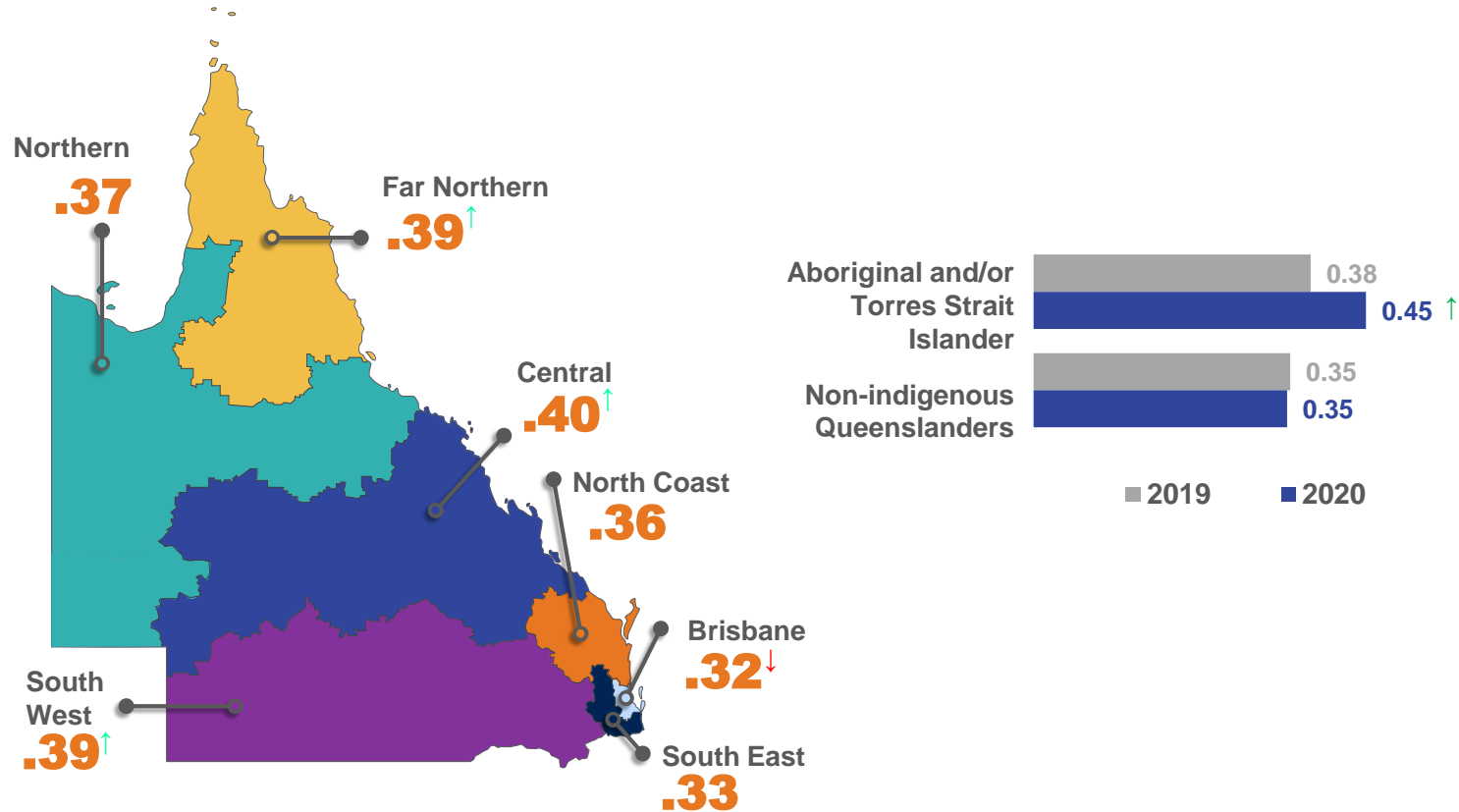
▲ significantly higher than 2019; ▼ significantly lower than 2019

\* National research priorities for natural hazards emergency management, May 2019



# PREPAREDNESS INDEX

The Preparedness Index is a measure of how many activities an individual has completed to prepare their household for an emergency or disaster event. It is calculated by taking the total number of activities that respondents have completed from Q17 & Q18 and dividing by the total number of activities. This results in an index value between 0 (unprepared) and 1 (prepared) for each participant.



## Region

Far Northern, Central, and South West Queenslanders have completed significantly more activities to prepare for events, with Brisbane respondents completing significantly fewer.

## Aboriginal and/or Torres Strait Islander people

Aboriginal and/or Torres Strait Islander Queenslanders have completed significantly more activities on average to prepare their households, compared to non-indigenous Queenslanders.

## Other

There was no difference in the Preparedness Index between any other demographics, and no changes from 2019 data.

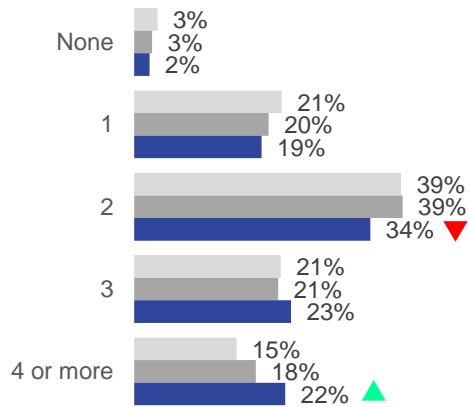
It is worth noting that in many instances, it's likely that some activities aren't required, resulting in a lower preparedness index.



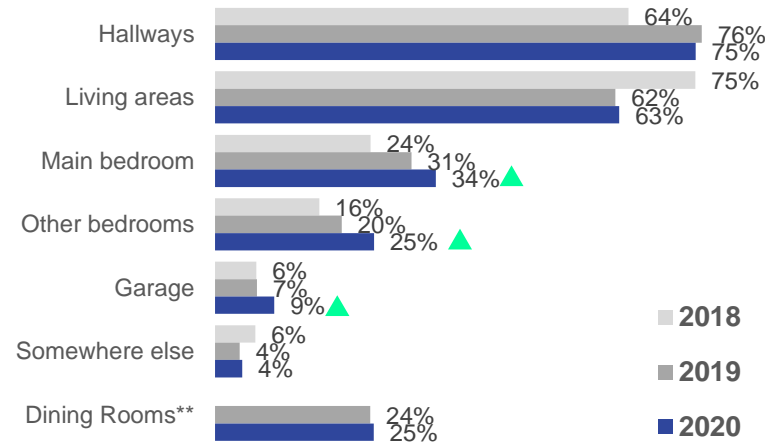
# SMOKE ALARMS

Average number of smoke alarms **2.6**

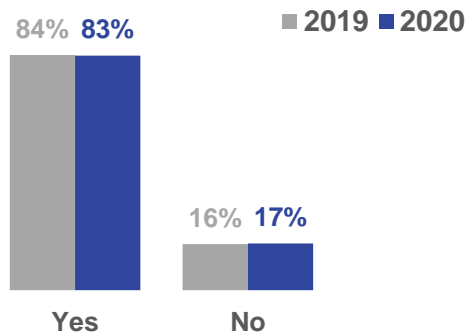
## Number of smoke alarms installed



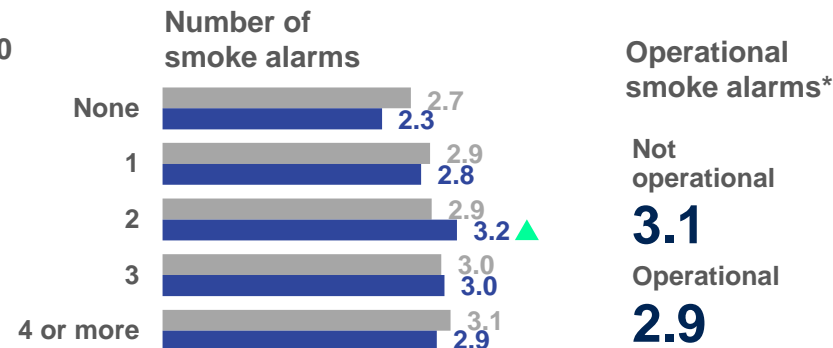
## Smoke alarm location



## Households with operational smoke alarms\*



## Average perceived risk for structure fire



Most Queenslanders (98%) have one or more smoke alarms in their homes and of those, 83% are considered operational\*. The most common number of smoke alarms to have in the home is two, although there are fewer homes that have two installed compared to 2019, and more homes that have four or more installed.

Queensland homes in Northern and South Western regions have more smoke alarms installed on average compared to other regions. Those with higher household incomes also have more smoke alarms than those with lower household incomes. This latter effect is possibly related to house size.

The most common areas for smoke alarms are hallways and living areas. The proportion of households with alarms in bedrooms and garages has increased since 2019.

The perceived risk of structure fires is higher for those homes with more smoke alarms, with significantly greater perceived risk among those who have two smoke alarms installed. This suggests that residents more concerned about fire risk are taking preventative measures. There is no significant difference between perceptions of structure fire risk for operational and non-operational smoke alarm households.

Base: Total sample 2020 n = 2100; 2019 n = 2458. Q20. How many smoke alarms are installed in your home | Q20B Where in your house are your smoke alarms located | Q17. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event | 2018: Q6 Number of smoke alarms installed | Q7 In your opinion, how important is it to protect the following from an emergency or disaster event | Q2. Overall, how prepared do you feel to reduce or prevent the impact on your home or family from the following emergency or disaster events (Structural fire).

\*Operational smoke alarms are those the owner has taken action to test or maintain in last 12 months

\*\* 'Dining Rooms' was not a selection option in 2018

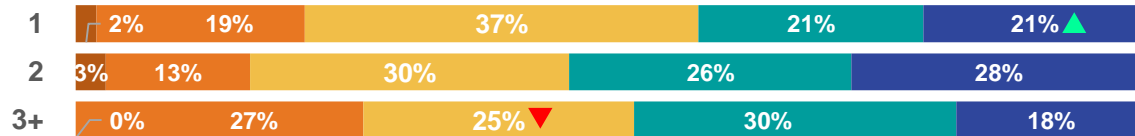
▲ significantly higher than 2019; ▼ significantly lower than 2019



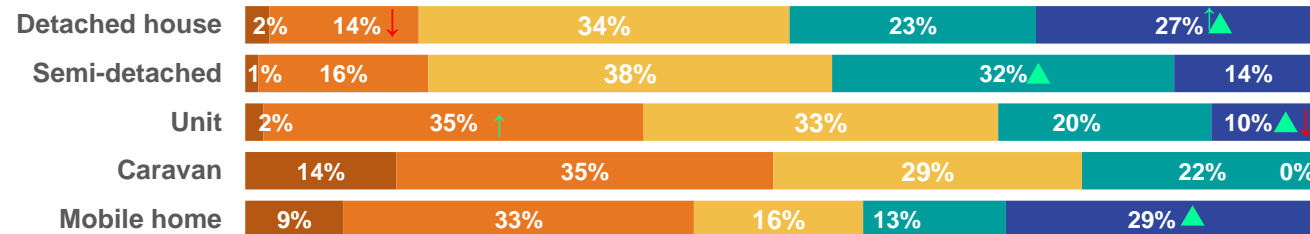
# SMOKE ALARMS

## Dwelling demographics by smoke alarms

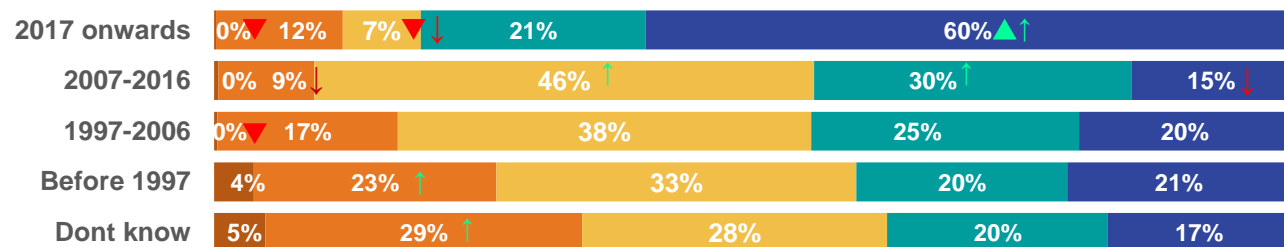
### Number of levels in dwelling



### Type of dwelling



### When dwelling was built



■ No smoke alarms ■ 1 ■ 2 ■ 3 ■ 4+

The number of smoke alarms doesn't vary significantly with number of levels in a home. However, there are significantly fewer 3+ level homes with 2 smoke alarms installed compared to 2019.

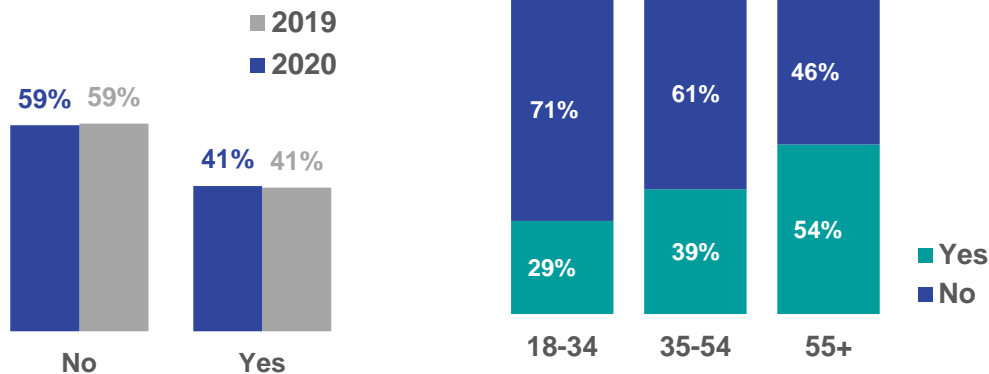
Detached homes are more likely to have 4+ smoke alarms, and this has increased since 2019. While units are less likely to have 4+ smoke alarms than other dwellings, there are a greater proportion of units with 4+ smoke alarms compared to 2019, and also more mobile homes with 4+ alarms.

Homes built from 2017 onwards are significantly more likely to have 4+ smoke alarms than those built before 2017 - following a general trend of newer houses having more smoke alarms since the 2017 interconnected smoke alarm legislation changes. In comparison to 2019, there are more homes built from 2017 onwards with 4+ alarms in 2020. There are also fewer homes built from 1997 onwards with no smoke alarms, compared to 2019.

# SMOKE ALARMS

## Interconnected

### Awareness of new legislation

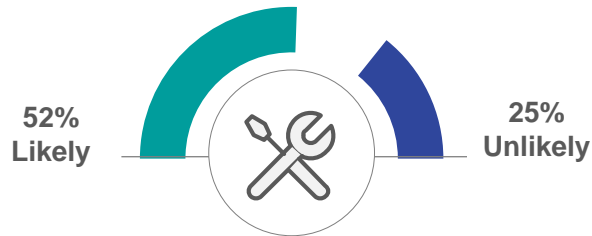


### Installation of Interconnected Smoke Alarms (ISA)

**20%**

Already have Interconnected Smoke Alarms

Likelihood to install in the next 12 months\*



Base: Total sample 2020 n = 2100; 2019 n=2458. Q21. Before today, were you aware of the new Interconnected Smoke Alarm legislation | Q22. Based on this information about Interconnected Smoke Alarm legislation, how likely or unlikely are you to install interconnected smoke alarms over the next 12 months. 2018: Q6 Number of smoke alarms installed | Q7 Smoke alarm location.

21 – © Ipsos | QFES 2020 Community Insights

\*Excluding those who already have interconnected smoke alarms installed.

**Over a third of Queenslanders have heard of interconnected smoke alarms (ISAs), with no change in awareness since 2019.**

Awareness of the new legislation increases with age. Those retired (55%) are also more aware than other employment statuses. Awareness is not significantly different across gender or location.

Queenslanders aware of the new legislation are more likely to have 4+ smoke alarms (31% vs. 16% unaware), and more likely to have operational smoke alarms (89%) than those unaware of the new legislation (77%).

**One fifth of Queenslanders already have interconnected smoke alarms, the same as seen in 2019. Of those who don't, just over half say they are likely to install them in the next 12 months.**

Younger Queenslanders (18-34: 59%) are significantly more likely to indicate they would install ISAs in the next 12 months compared to older Queenslanders. ISA installation does not differ across regions.

Those who have received a QFES service in the last 12 months (58%) are significantly more likely to install ISAs in the next 12 months. Queenslanders with generally higher perceptions of risk are more likely to install ISAs in the next 12 months, with no difference in preparedness.

▲ significantly higher than 2019; ▼ significantly lower than 2019  
 ↑ significantly higher @ 95% CI; ↓ significantly lower @ 95% CI compared to other categories



# INSURANCE BEHAVIOURS

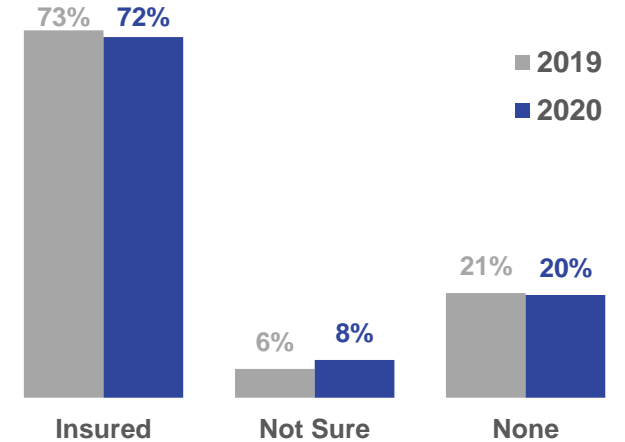
## Home Insurance

Three quarters of respondents have home and/or contents insurance, with 8% of respondents unsure if they have insurance. Those living in owner-occupied (92%) and detached homes (79%) were more likely to have insurance, with no differences compared to 2019.

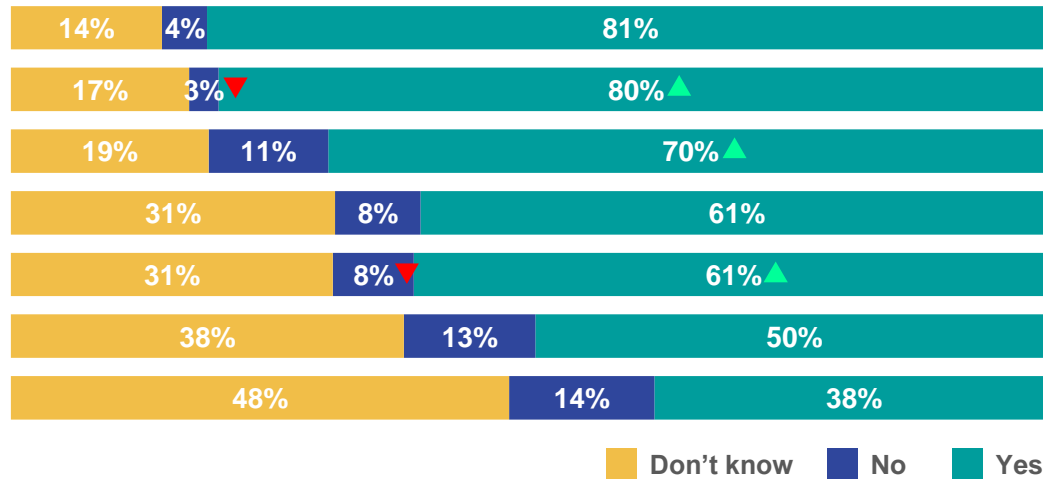
On average, Queenslanders who have insurance are confident it covers emergency and disaster events (3.7/5). The most common insurance is for Structure fires and Storms, followed by Floods. However, many people are unsure if their insurance covers Storm surges and Earthquakes.

Overall, people are confident in their insurance. More people have insurance for Storms, Floods and Bushfires compared to 2019, with no significant changes in confidence.

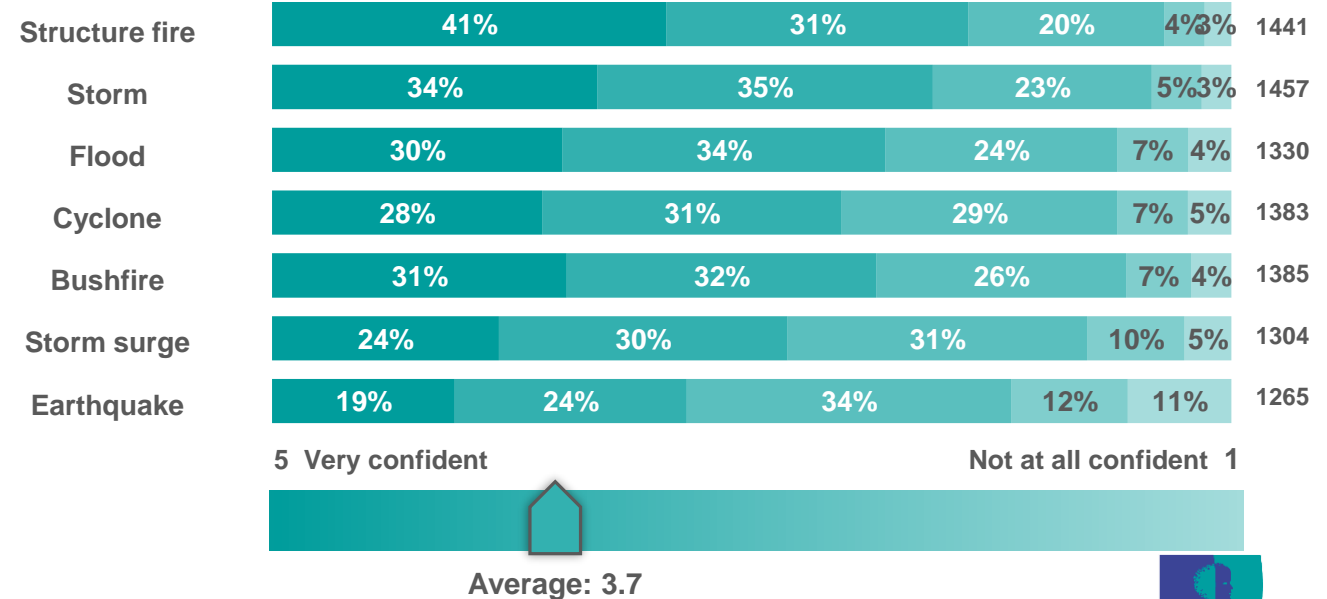
## Insurance



## Insurance coverage

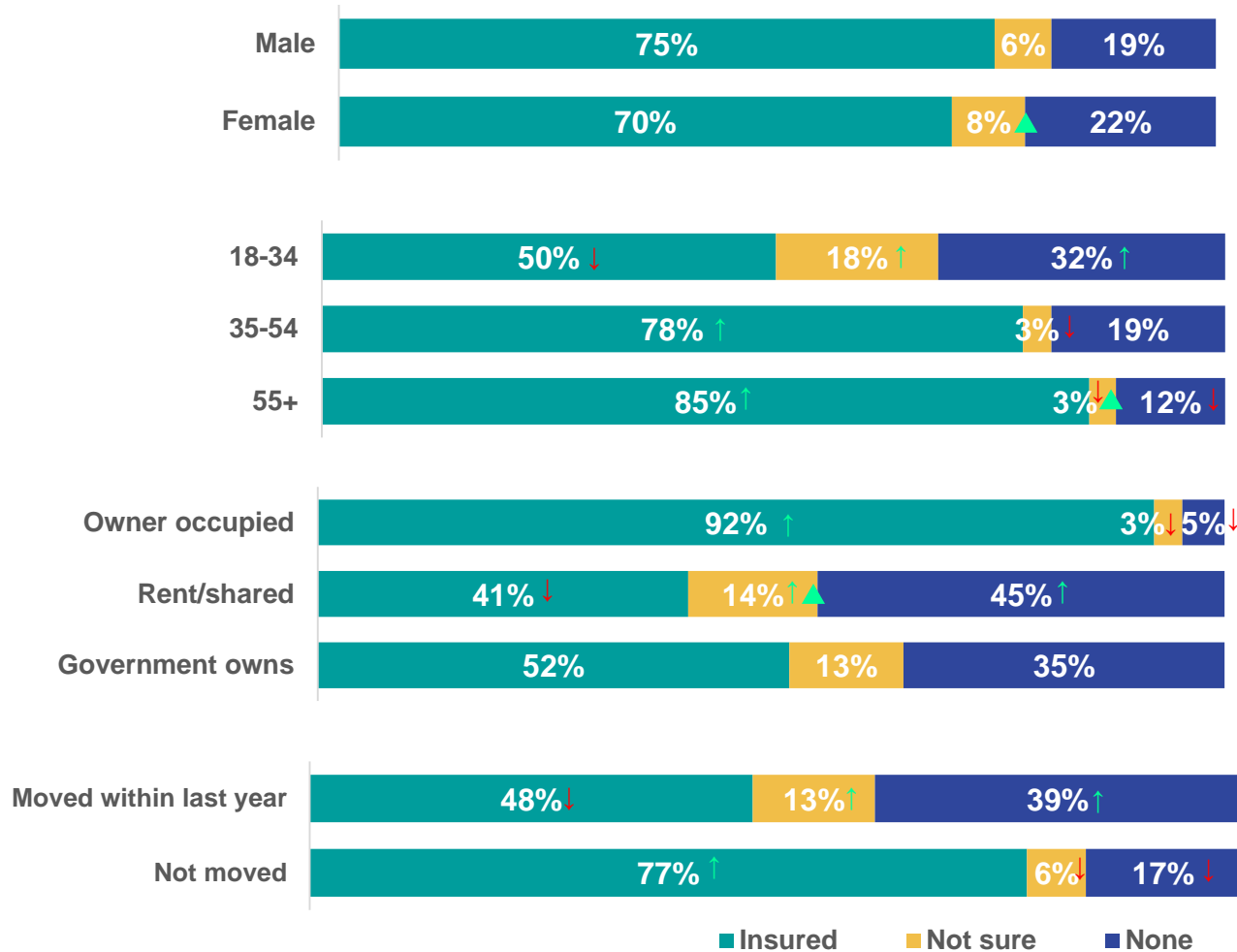


## Confidence in insurance coverage



# INSURANCE BEHAVIOURS

## Demographics



### Gender

There were no significant differences between genders for insurance coverage. Females are more likely to be unsure compared to 2019.

### Age

Younger Queenslanders (18-34) were significantly less likely to have insurance, and significantly more likely to be unsure about whether they had insurance. More older Queenslanders (55+) were unsure compared to 2019.

### Owner or renter

Most Queenslanders who own their homes have home and/or contents insurance. Queenslanders renting or living in shared homes were more unsure about their insurance compared to 2019.

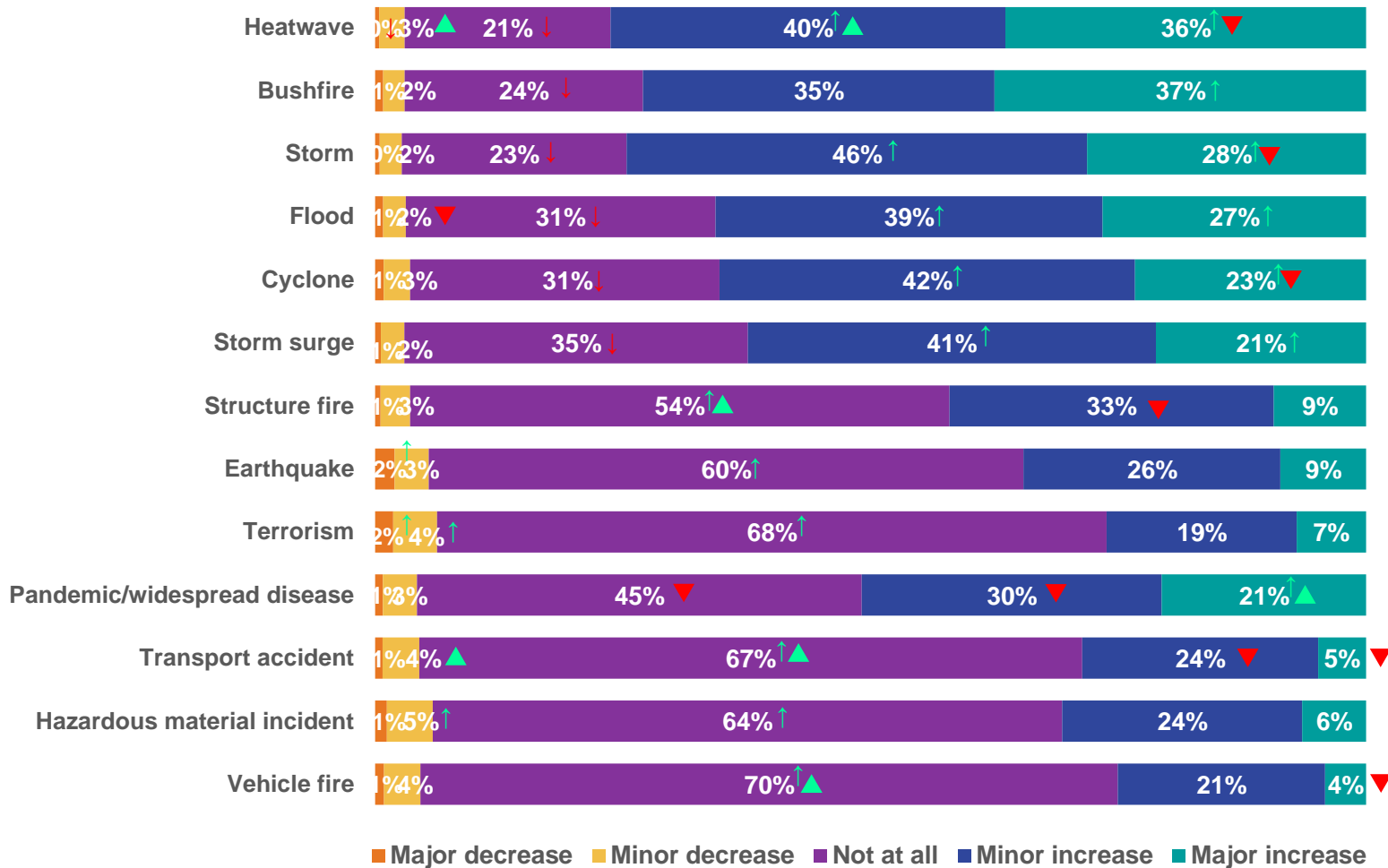
### Moved house within the last year

Respondents who had moved recently were significantly less likely to have home insurance, and more likely to be unsure, with no change from 2019.



# CLIMATE CHANGE

Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following events?



Three quarters of respondents believe that climate change will increase the impact of Heatwaves, Bushfires and Storms, and two thirds believe it will increase the impact of Floods, Cyclones and Storm surges.

Overall, more people believe that climate change will increase ('Major increase' + 'Minor increase') pandemics compared to 2019, with fewer people indicating an increase for transport accidents. However, there were fewer people in 2020 choosing 'Major increase' across a range of categories.

By region, Queenslanders living in the South Western region are less likely to believe climate change will increase the impacts of Cyclones and Storm surges.

Younger Queenslanders (18-35) are significantly more likely to feel there will be an increase in events across the board compared to older respondents, as are females compared to males.

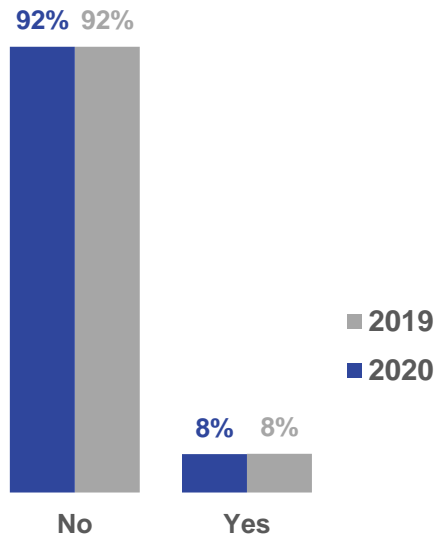
Queenslanders who were more greatly affected by COVID-19 changes were more likely to believe that climate change will change events across the board.

# EXPERIENCE OF A LOCAL EVENT

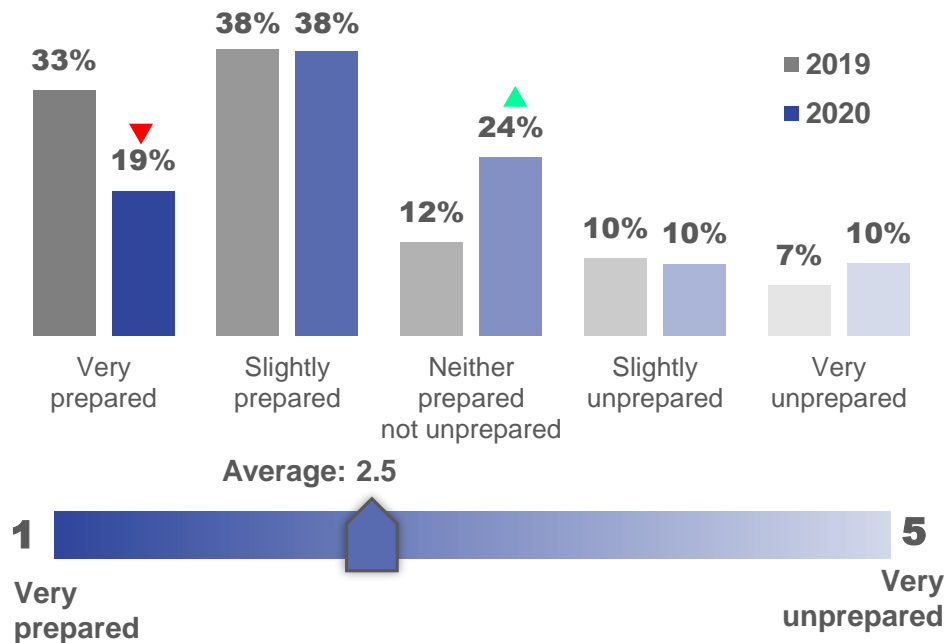
## Change in preparedness

Eight percent of respondents had experienced a local emergency or disaster event in the last year. Over half (57%) of those who had experienced an event said they were prepared, and feel they are now more prepared for future events (58%). These respondents had a significantly higher Preparedness Index\* (.46) compared to those who hadn't experienced a recent event (.34). However, fewer people said they were very prepared for the event and more people said they were neither prepared nor unprepared compared to 2019.

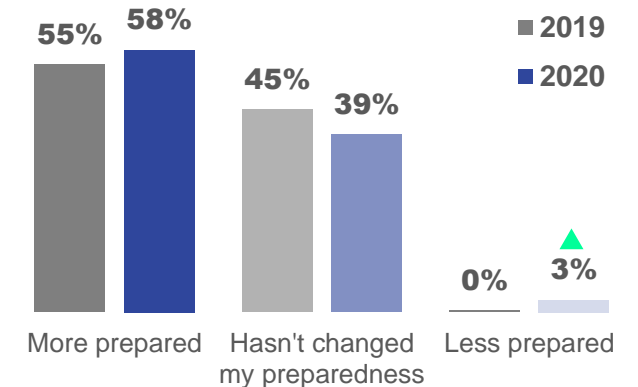
Experienced a local emergency or disaster event in the last 12 months



Preparedness for the emergency or disaster event



Impact of event on preparedness



\*Preparedness Index takes the number of activities that respondents have completed from Q17 & Q18, divided by the total number of activities.



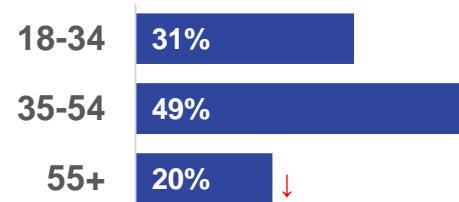
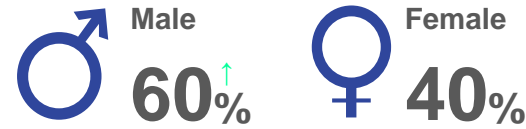
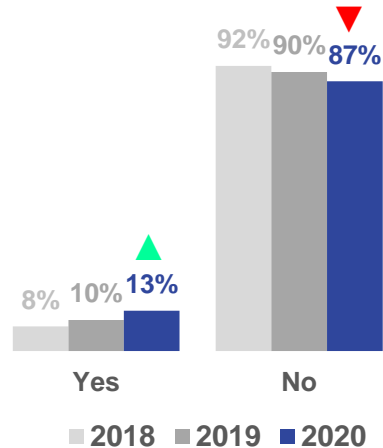
# BUSINESS OWNER PERCEPTIONS



# BUSINESS OWNERS

## Demographics

**13%**  
of respondents own a business



### Gender

Three fifths of business owners were male, significantly more than females, with no difference compared to 2019.

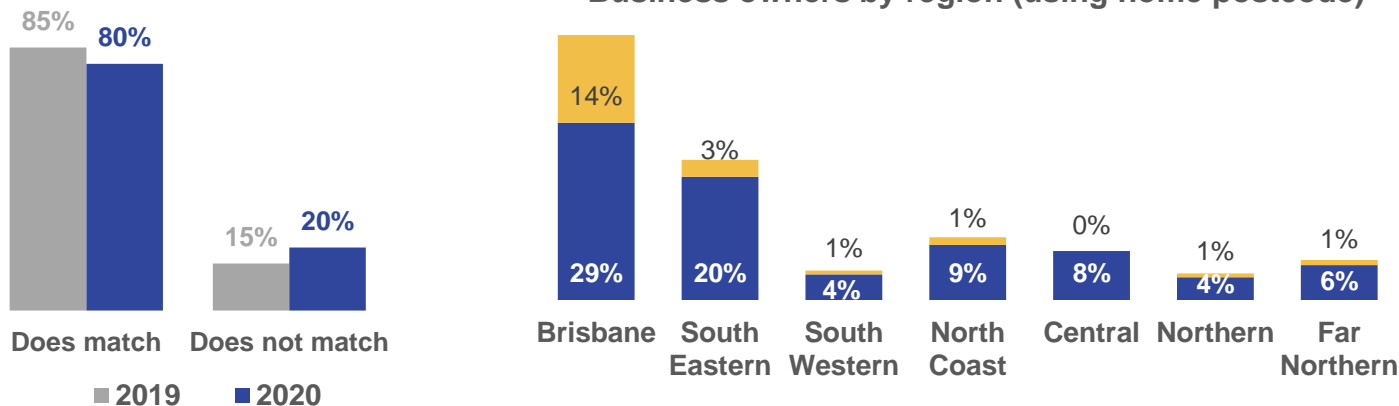
### Age

Significantly fewer business owners were 55+, with almost half aged 35-54, again similar to 2019.



### Most business postcodes matched home postcodes

Business owners by region (using home postcode)



### Region

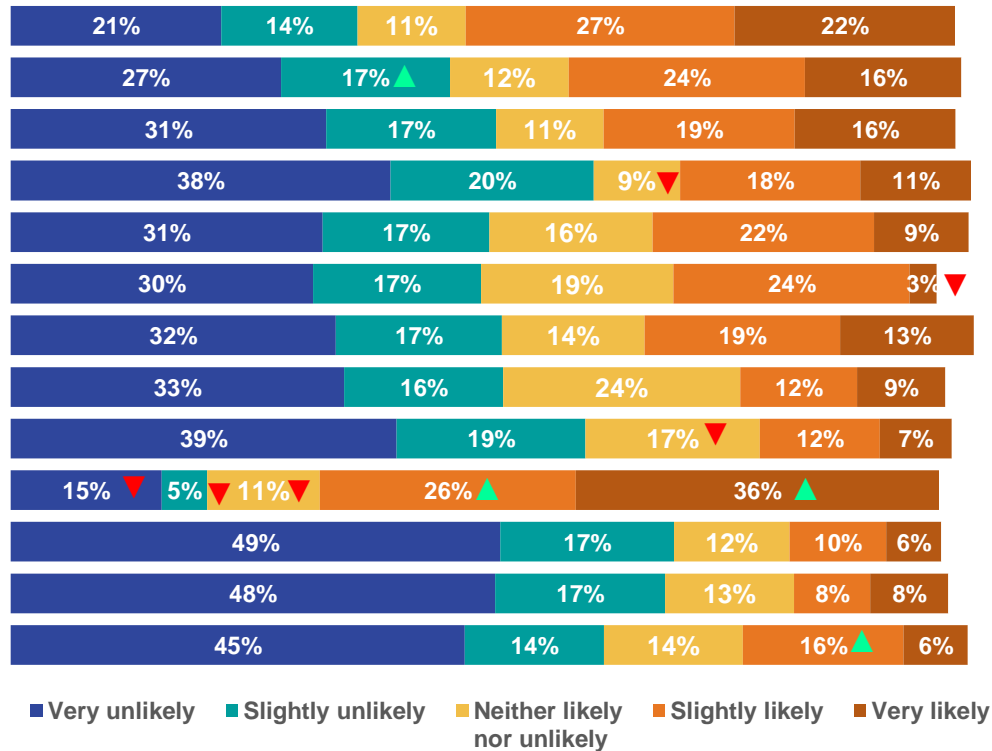
Business owners were spread across the seven regions, with a trend towards more business owners in Brisbane and the South East. The majority of businesses outside of the residents home postcode were owned by people living in Brisbane.

# BUSINESS OWNERS

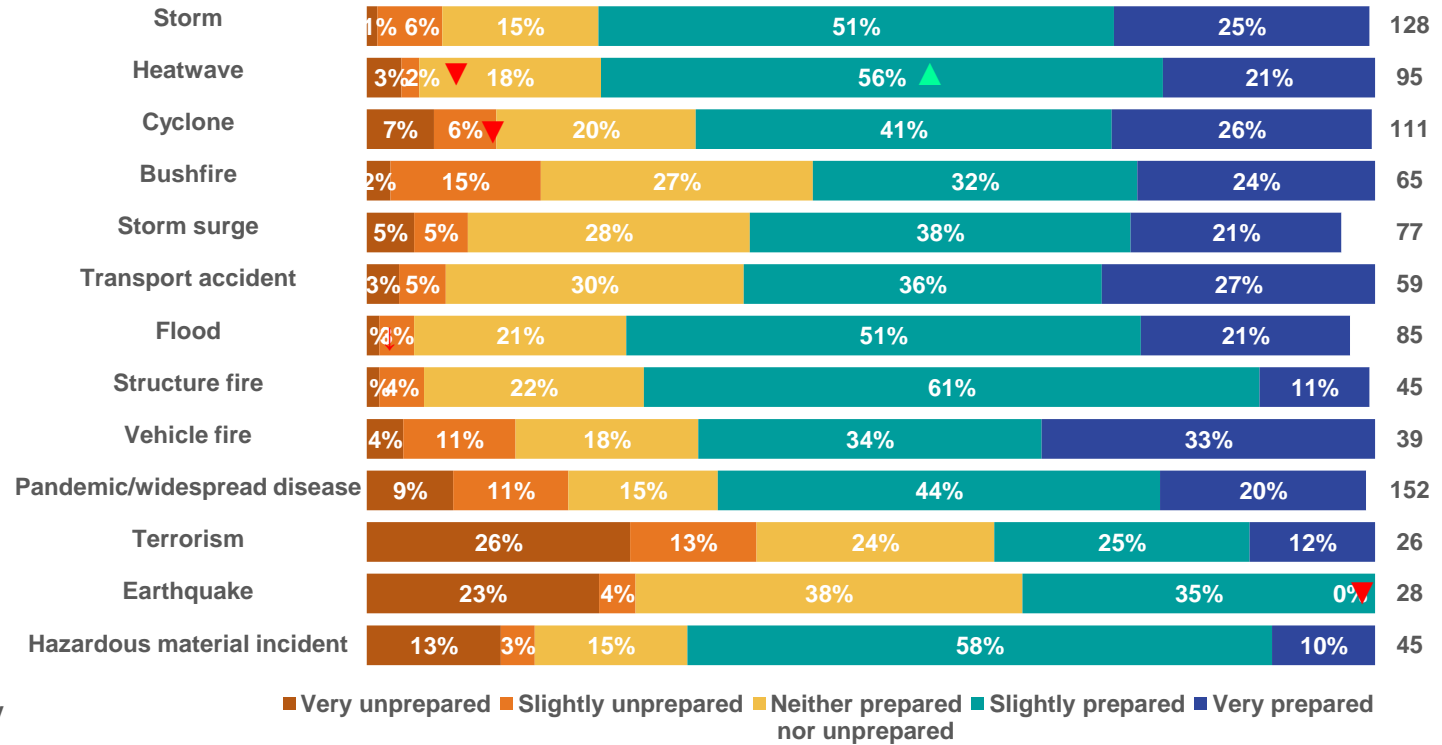
## Perceived Risks & Preparedness

Business owners perceive similar risks to their business as to their home, with Pandemics/widespread disease, Storms and Heatwaves the highest perceived risk. Although this was lower than the perceived risk to homes - a similar trend to 2019. As with their homes, business owners felt significantly more at risk from Pandemic/widespread disease compared to 2019 due to COVID-19. There was more risk perceived from Hazardous material incidents for business owners compared to 2019. Perceived preparedness was highest for Storms, Heatwave, Flood and Structure fires - with preparedness for Heatwaves increasing since 2019. There was no statistically significant difference in preparedness for Pandemics/widespread disease for business owners compared to 2019, likely due to smaller based numbers.

### Perceived Risk



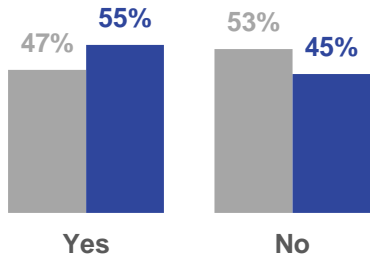
### Perceived Preparedness\*



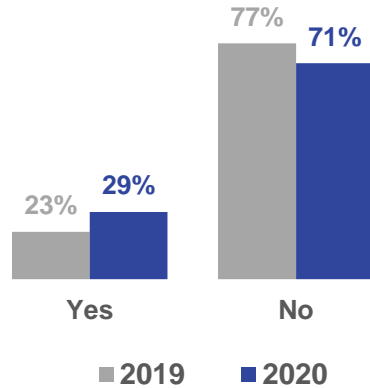
# BUSINESS OWNERS

## Insurance

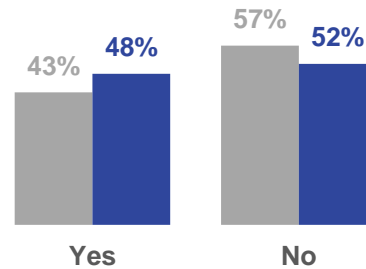
### Business Insurance



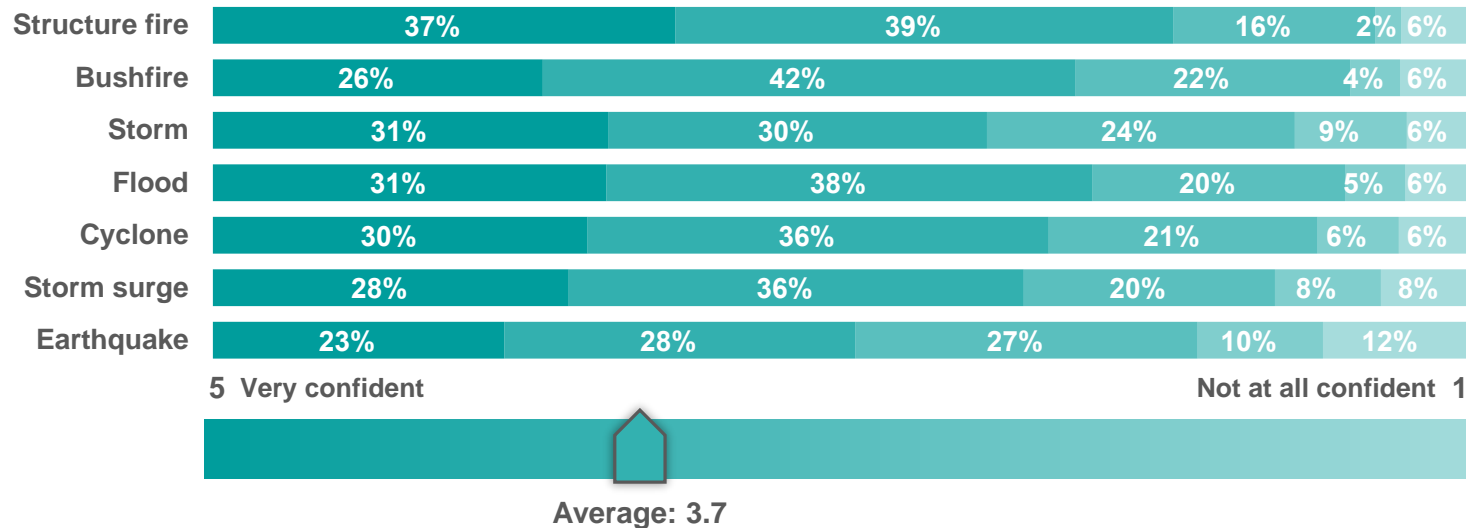
### Business Continuity Plan



### Hazard impact mitigation



### Confidence in insurance coverage



Just over half (55%) of Queensland business owners have business insurance, not significantly different from 2019.

Those who do have insurance are confident that their insurance will cover their business, particularly for Structure fires and Floods, and to a lesser degree Bushfires and Cyclones.

Only one in three business owners have a Business Continuity Plan and only half (48%) have identified ways to mitigate the impact of hazards on their business, despite the COVID-19 pandemic.



# PERCEPTIONS OF QFES

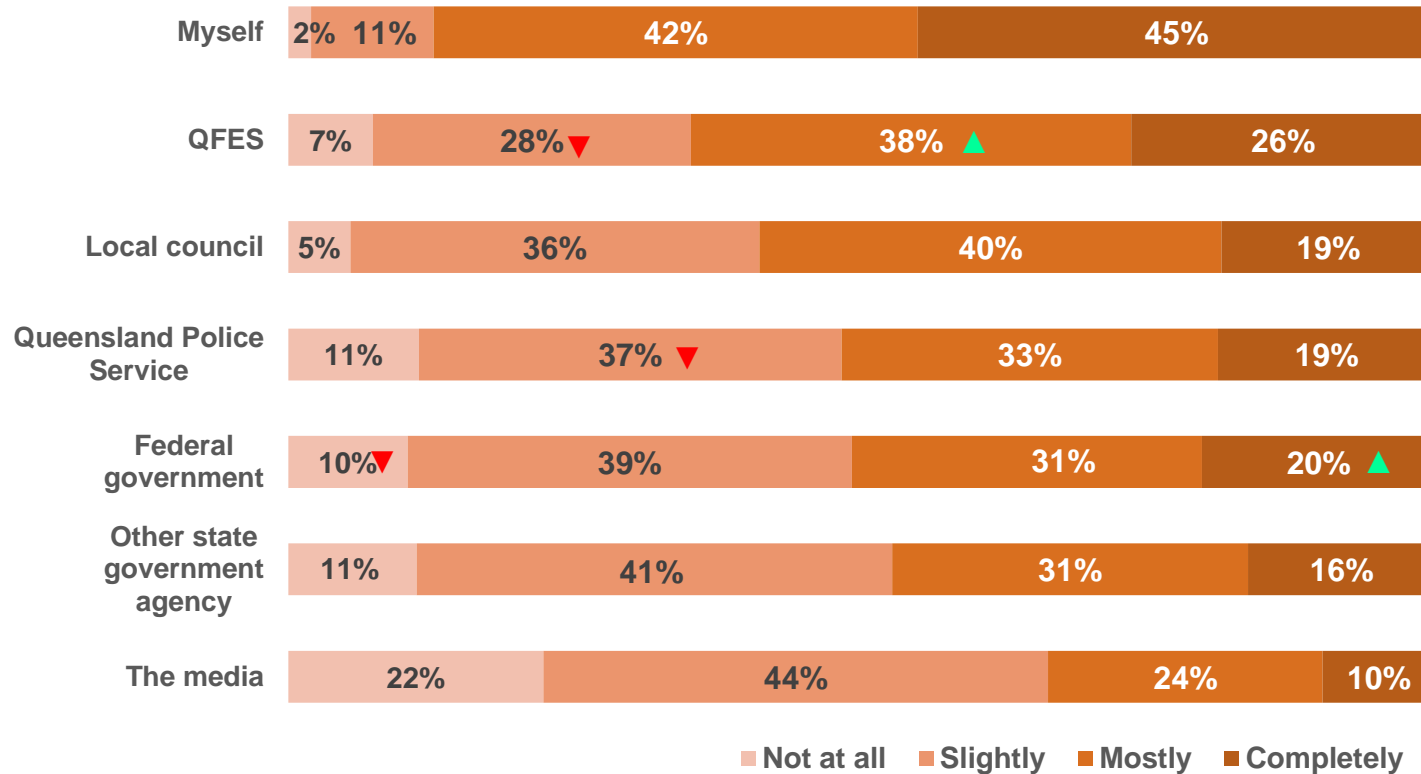




# QFES

## Who is perceived to be responsible?

Thinking of preparing your household for disasters and emergency events, how responsible do you believe each of the following should be?



When respondents were asked who they perceived to be responsible for preparing their household for disaster and emergency events, 87% said 'Myself' as being 'Mostly' or 'Completely' responsible.

More people considered QFES 'Mostly' responsible, and the federal government 'Completely' responsible compared to 2019.

Younger respondents were less likely to consider themselves responsible, with 82% of 18-34 year old's compared to 88% of 35-54 year old's and 92% of 55+ year old's.

Females held the Queensland Police Service more responsible (56% versus 48% males).

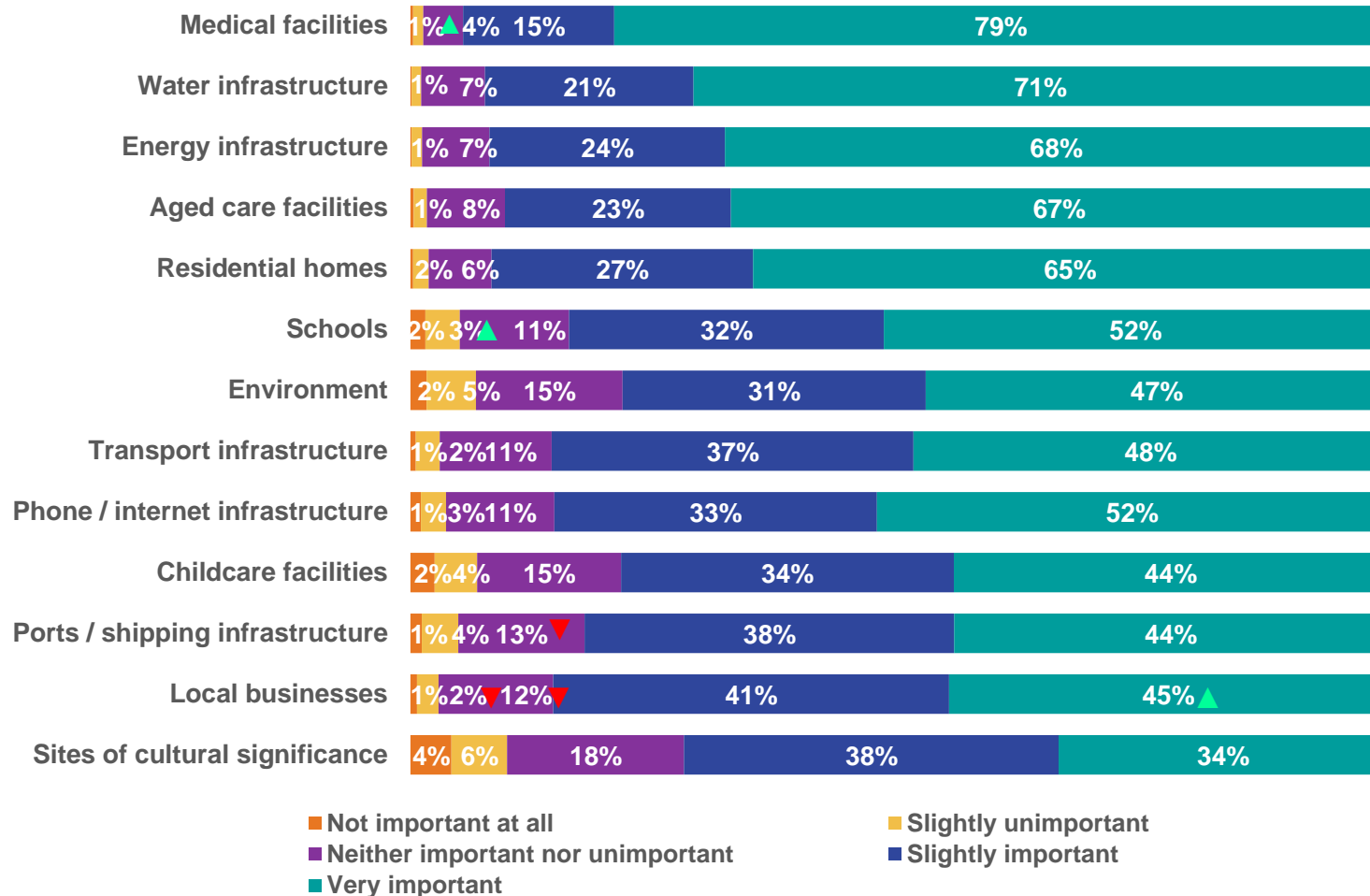
There were no differences between regions for who they perceived to be responsible.

Of those who selected 'other', most stated that there should be a shared responsibility within their household and the local community together including responses such as the community, neighbours, friends, family and hospitals.

# QFES

## Infrastructure protection

How important is it to protect the following from an emergency or disaster event?



Medical facilities were considered the most important to protect in an emergency event for the third year in a row, with four in five Queenslanders indicating they consider this 'Very important'.

More people consider Local businesses as 'Very important' compared to 2019, potentially due to the spotlight they have been under due to COVID-19.

Responses were consistent across regions, with the exception of Schools (91%) and Childcare facilities (87%), which South Western respondents considered significantly more important compared to other regions.

Older Queenslanders (55+) considered everything as significantly more important compared to other age groups, except for the Environment and Sites of cultural significance. Middle aged Queenslanders (35-54) considered most infrastructure to be significantly more important to protect than younger Queenslanders (18-34).

Women considered most sites as more important compared to males, as did respondents in owner occupied homes compared to renters.

# QFES

## Service delivery and importance

Importance of services ranked\*



\*1=most important, 9=least important

■ Yes ■ Not sure ■ No

Which QFES services were provided in your local area in the past 12 months?

Importance of activities ranked\*\*

- 4.6 Helps in the event of an emergency or disaster wherever I am in Queensland
- 4.4 Provides ongoing assistance following an emergency or disaster event
- 4.5 Supports my local council with disaster management in my area
- 4.4 Provides advice and support to disaster management groups
- 4.3 Improves communities' ability to understand their risks and how to manage them
- 4.3 Provides general information about how to lessen or prevent the impact of emergency or disaster events
- 4.4 Provides specific information relevant to my location and circumstances to lessen or prevent the impact of emergency or disaster events
- 4.2 Provides value for money services to Queensland
- 4.1 Activity seeks innovative ways to deliver services
- 4.0 Minimises its impact on the environment

\*\*5=Very important, 1=Not important at all

The importance of Fire and hazard response increased significantly since 2019, continuing to be considered the most important service provided by QFES. Despite a significant decrease in importance ranking, Warnings and alerts was ranked second again.

Those in the Brisbane and South Eastern regions continue to indicate less awareness of services within their local area, although South Western's awareness for most services has increased since 2019.

In contrast to 2019, Brisbane considered Fire and hazard response to be the most important service this year (3.0 compared to 3.6 for Warnings and alerts). Far North Queenslanders consider Fire and hazard response to be significantly less important than other regions. Search and Rescue is less important to Brisbane and South East, and Hazard reduction activities are less important to most regions, with South West considering it to be more important.

Younger respondents (18-34) were significantly more likely to say that QFES services were provided in their local area in the last 12 months, and consider Education and Research more important compared to older (35+) respondents.

For specific activities, older Queenslanders (55+) considered all services significantly more important compared to younger Queenslanders (18-34), as did females compared to males. They did not differ significantly by region.

Base: Total sample 2020 n = 2100. Q4. Which of the following QFES services were provided in your local area in the past 12 months | Q5. Please rank the importance of QFES delivering the following services in your local area? Please rank from 1-9 | Q6. How important to you is it that QFES performs following activities in your local area.

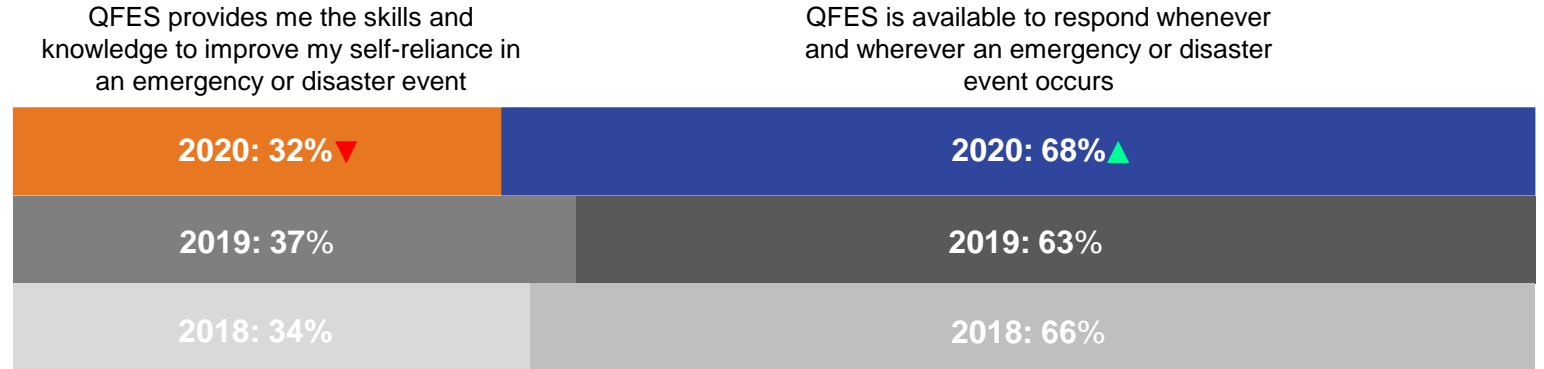


# QFES

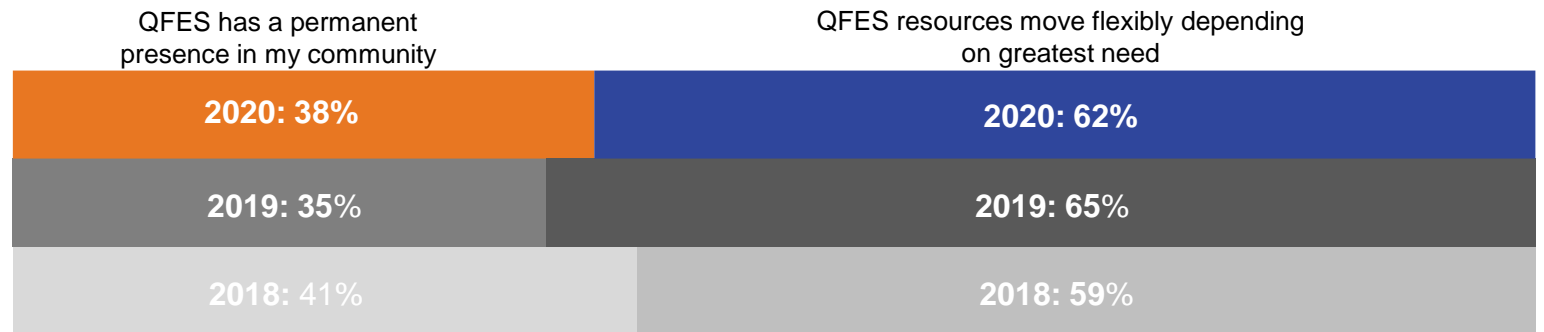
## Service delivery preference

Reliance on QFES to respond to emergency and disaster events has increased significantly compared to 2019. In line with previous years, the majority of respondents would prefer QFES resources move flexibly rather than having a permanent presence.

Older respondents (55+) are more likely to rely on QFES than other age groups and have a lower preference of being taught self-reliance skills. As in 2019, service delivery preference does not change across regions or gender.



Preference for flexibility of QFES resource distribution is significantly higher in Brisbane (70%) and South East (64%) compared to other regions, with Central the lowest at only 46%. Brisbane (30%) and South East have a significantly lower preference for QFES having a permanent presence than all other regions.

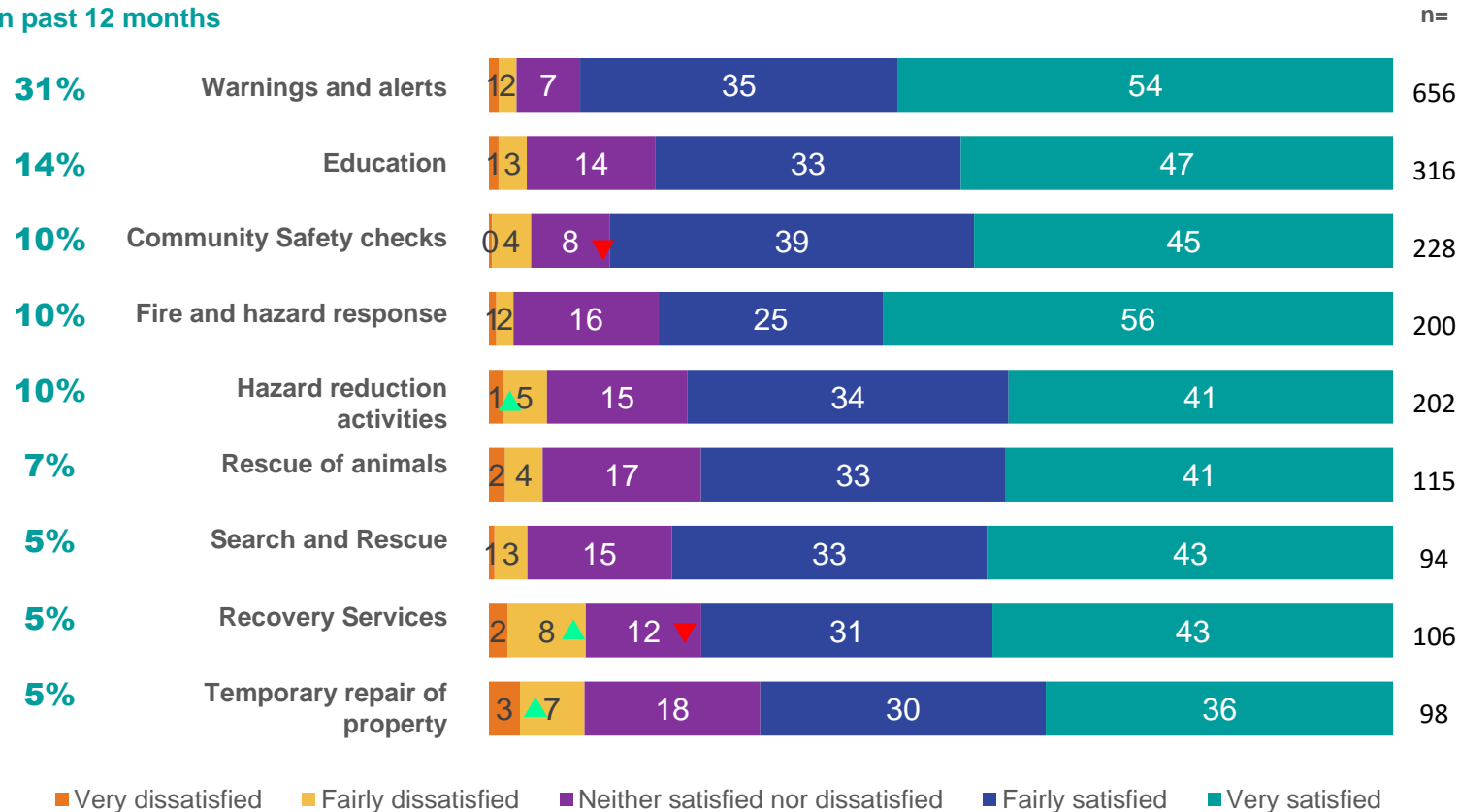


# QFES

## Service satisfaction

Have you received a QFES service in the last year? How satisfied were you with the service?

Received service in past 12 months



In total, 39% of respondents had received a QFES service in the last year, and overall respondents were satisfied with the services.

Warnings and alerts continue to be the most commonly received service, with Search and rescue, Recovery services and Temporary repair of property tied for the least used. Those receiving Temporary repair of property services were the most dissatisfied, but this was not significantly different from other services.

Northern Queenslanders used Rescue of animal services less (2%) than other regions, and were more satisfied with Education services (95%) and Fire and hazard response services (98%). Females were more likely to be satisfied with services in general. Older Queenslanders (55+) were significantly more satisfied with the Education service than other age groups.

Queenslanders who have received a QFES service have lower perceived risk and preparedness levels for emergency and disaster events compared to those who hadn't received a service - which is the opposite of the 2019 findings.

Queenslanders who have received a QFES service also scored lower on the Preparedness Index compared to those who didn't receive a service.



# APPENDIX

# QUESTIONNAIRE

**SQ1.** What is your age?

**SQ2.** What is your gender?

**SQ3.** Do you work or volunteer for QFES?

**SQ4.** What is your home postcode?

**SQ5.** Which suburb do you live in?

**SQ6.** Do you own a business?

**SQ6B.** What is your business postcode?

**Q1.** How do you rate the likelihood that the following emergency or disaster event could impact your home or family in the next year?

**Q1B.** How do you rate the likelihood that the following emergency or disaster event could impact your business in the next year?

**Q2.** Overall, how prepared do you feel to reduce or prevent the impact on your home or family from the following emergency or disaster events?

**Q2B.** Overall, how prepared do you feel to reduce or prevent the impact on your business from the following emergency or disaster events?

**Q3.** How responsible do you believe each of the following should be?

**Q4.** Which of the following QFES services were provided in your local area in the past 12 months?

**Q5.** Please rank the importance of QFES delivering the following services in your local area? Please rank from 1-9

**Q6.** How important to you is it that QFES performs following activities in your local area?

**Q7.** In your opinion, how important is it to protect the following from an emergency or disaster event?

**Q8.** What is more important to you?

**Q9.** What is more important to you?

**Q10.** Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following?

**Q11.** Have you received/used a service delivered by QFES in the last year?

**Q11B.** How satisfied were you with the X?

**Q12.** What type of insurance cover do you have for your home?

**Q13.** What type of events does your insurance cover?

**Q13B.** How confident are you that your insurance cover would adequately cover the damage or replacement of your house and contents if you were impacted by one of the following emergency or disaster events?

**Q14.** Do you have insurance for your business?

**Q14B.** How confident are you that your insurance cover would adequately cover the damage or replacement of your business if it were impacted by one of the following emergency or disaster events?

**Q15.** Do you have a Business Continuity Plan?



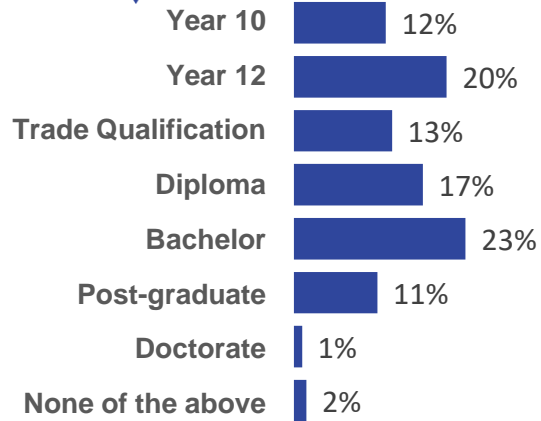
# QUESTIONNAIRE CONT.

- Q16.** Have you identified ways to mitigate the impacts of hazards that would disrupt your business?
- Q17.** What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event?
- Q18.** In the last year, have you undertaken any of the following activities?
- Q19.** Have you or your family been involved in a local emergency or disaster event in the past 12 months?
- Q19B.** How prepared were you for the emergency or disaster event?
- Q19C.** How did this past event change how prepared you are for future emergency or disaster events?
- Q20.** How many smoke alarms are installed in your home?
- Q20B.** Where in your house are your smoke alarms located?
- Q21.** Before today, were you aware of the new Interconnected Smoke Alarm legislation?
- Q22.** Based on this information about Interconnected Smoke Alarm legislation, how likely or unlikely are you to install interconnected smoke alarms over the next 12 months?
- Q23.** Have you moved house within the past 12 months?
- Q23B.** Where have you moved from?
- Q23C.** Coronavirus (COVID-19) has affected people from many countries around the world. What has changed for you?
- Q23D.** Has the Coronavirus (COVID-19) affected your business?
- Q24.** Do you or your family own or rent your home?
- Q25.** To the best of your knowledge, when was your house built?
- Q26.** How would you best describe the type of dwelling you live in?
- Q27.** How many levels does your home have? (If you live in a unit only count the levels of your unit, not the entire building.)
- Q28.** Do you usually speak a language other than English at home?
- Q28B.** What is the main language other than English that you speak at home?
- Q29.** Does anyone in your household have any limitations that would affect response to an emergency or disaster situation?
- Q30.** What is your country of birth?
- Q31.** Do you identify as Aboriginal and/or Torres Strait Islander?
- Q32.** What is the highest level of education you have received?
- Q33.** Which of the following best describes your employment status?
- Q34.** Which of the following best describes your living situation? (Include dependant children if in shared care arrangements with another partner.)
- Q35.** What is your estimated household income?
- Q36.** Do you have any other questions/comments about the services provided by QFES?

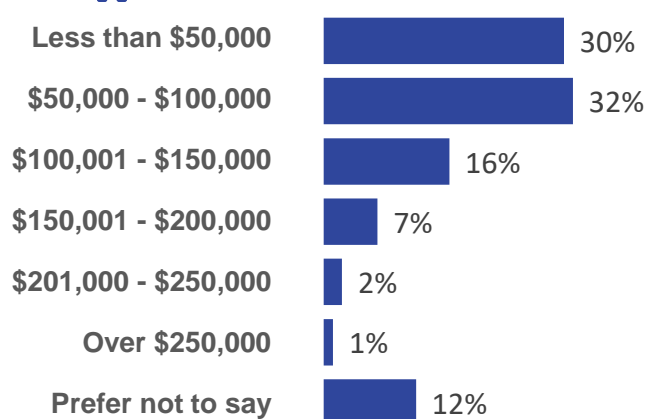
# DEMOGRAPHICS

## General

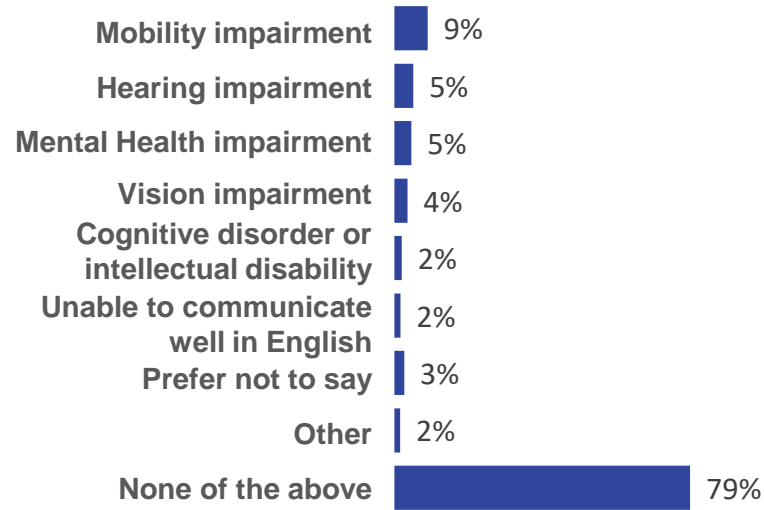
### Highest level of education



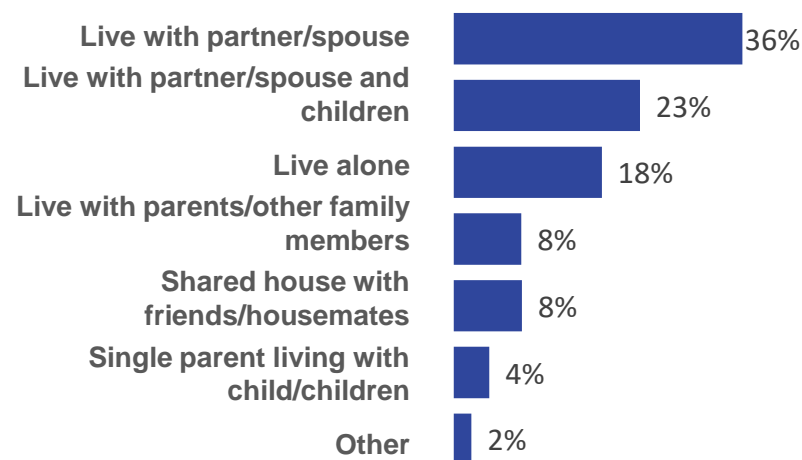
### Household income



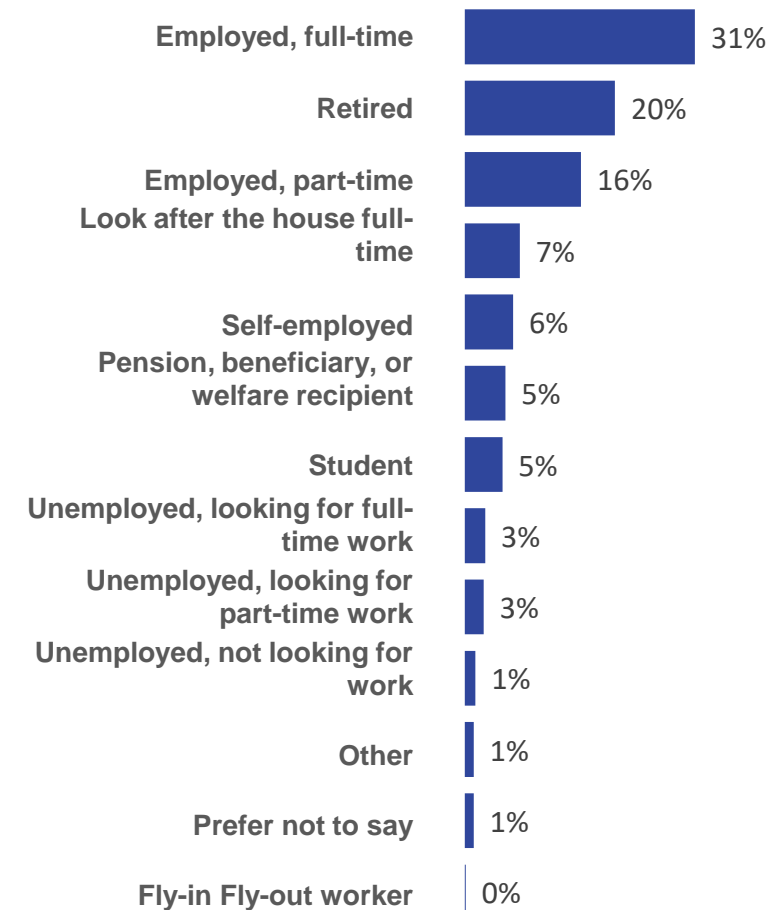
### Household members' limitations or impairment



### Living Situation



### Employment status

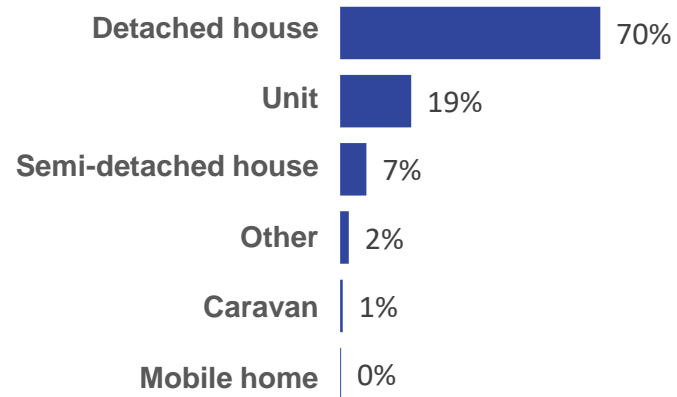


# DEMOGRAPHICS

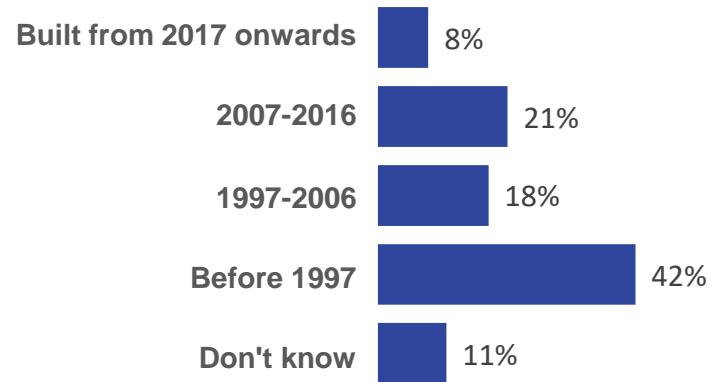
## Dwelling details



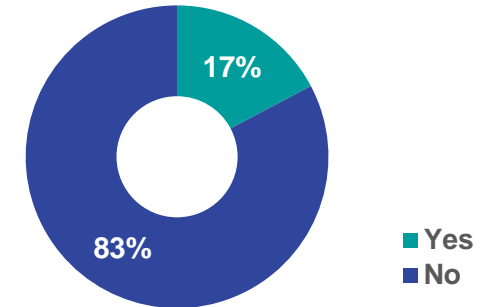
### Type of dwelling



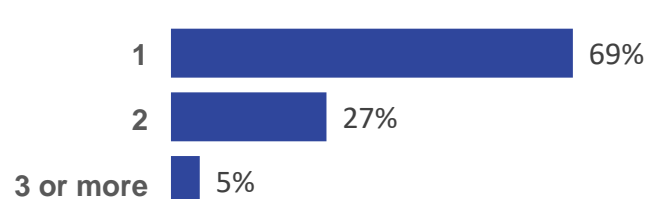
### Year of house construction



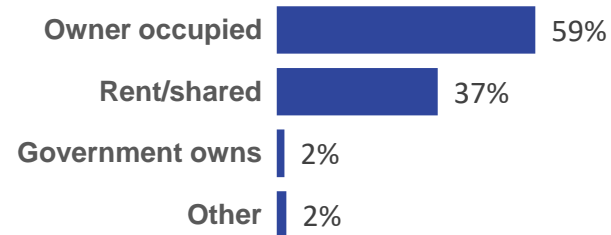
### Moved house in the last 12 months



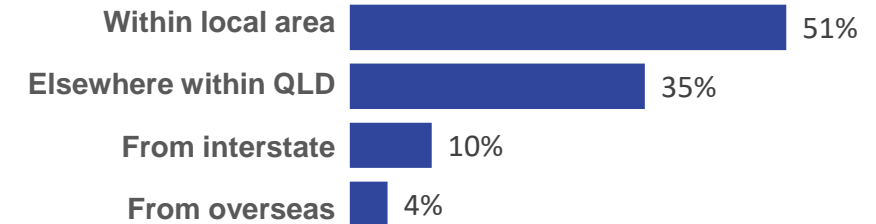
### Number of levels in home



### Home ownership



### Relocated from

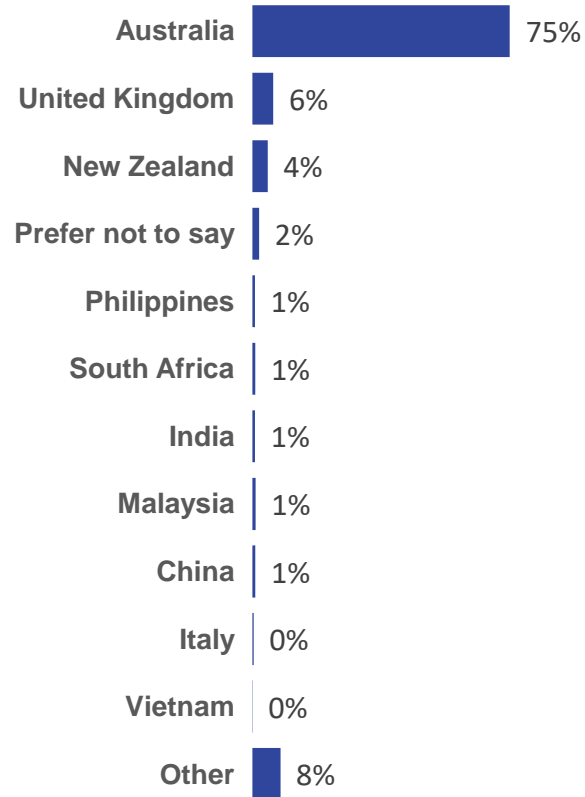


# DEMOGRAPHICS

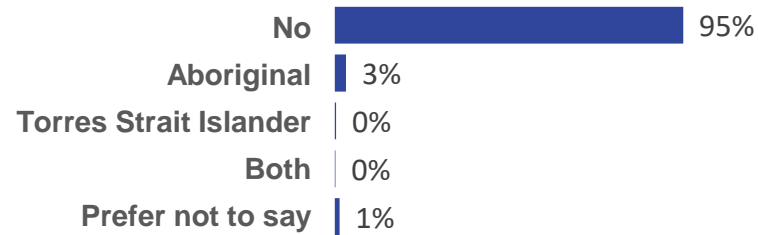
## Cultural and Linguistics



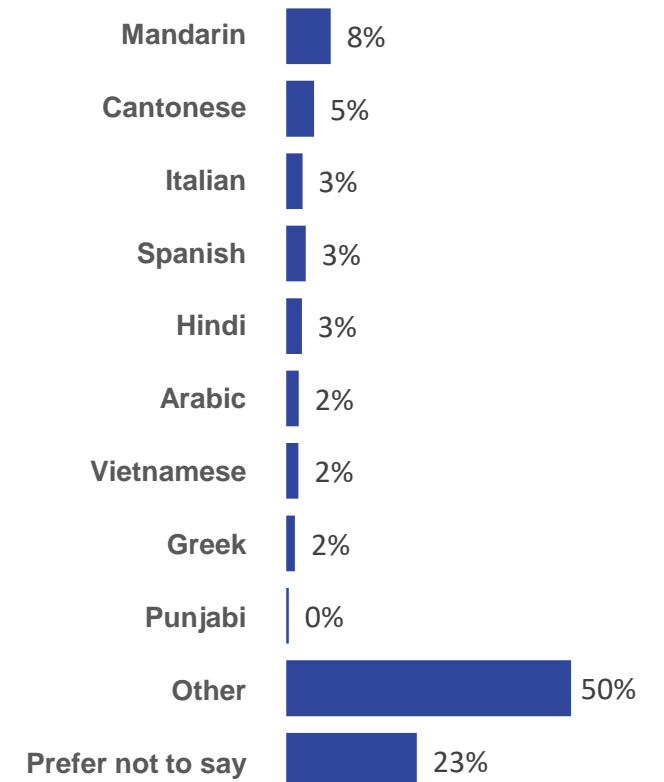
Country of birth



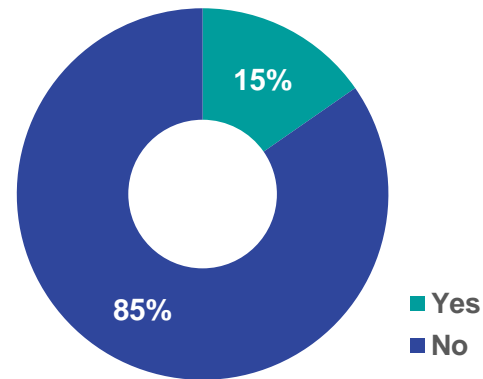
Indigenous Status



Main language other than English at home



Language other than English at home





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