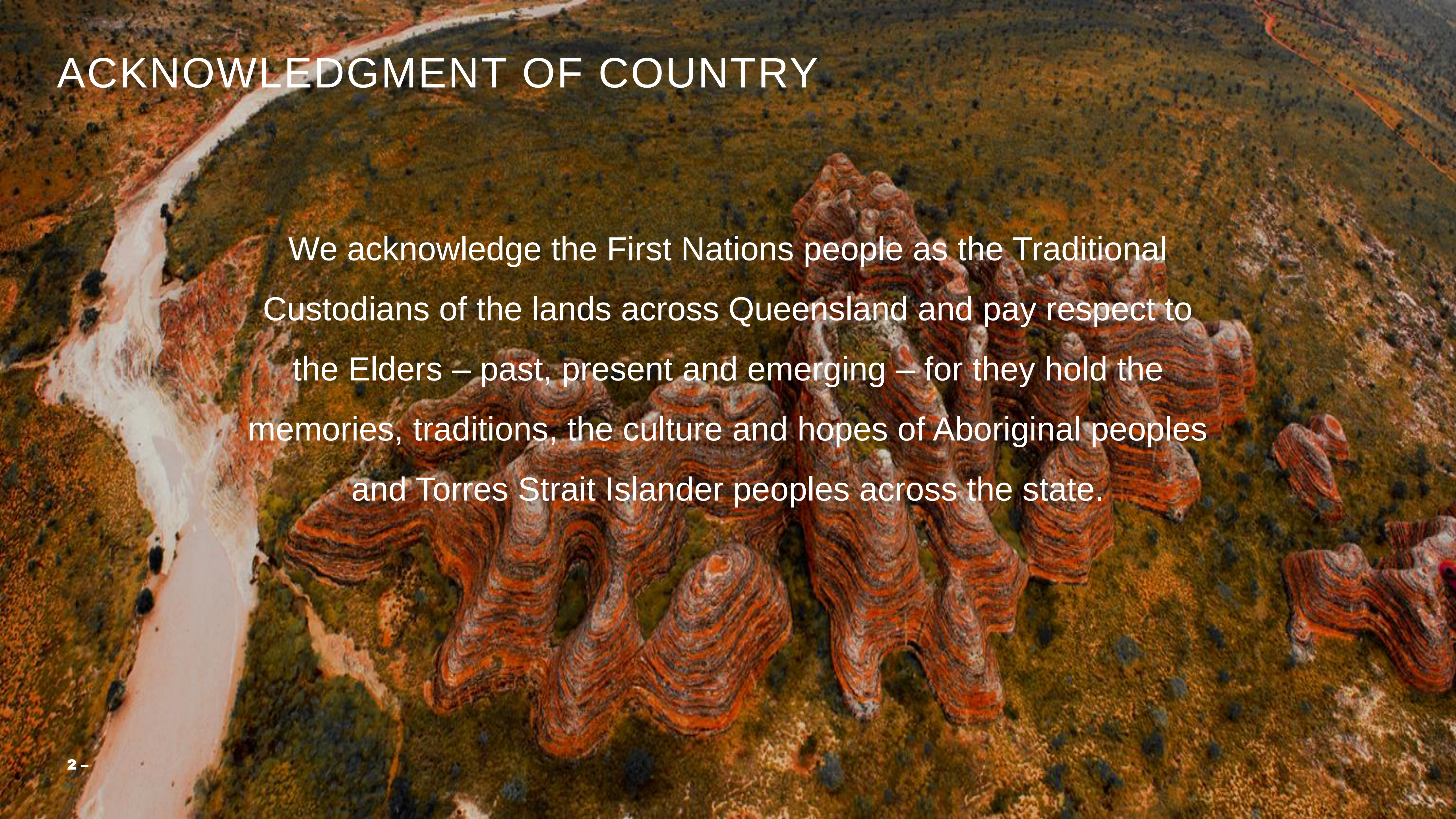
# QFES COMMUNITY INSIGHTS SURVEY 2021

## Final Report

Ipsos

11 January, 2022


GAME CHANGERS



# ACKNOWLEDGMENT OF COUNTRY

We acknowledge the First Nations people as the Traditional Custodians 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

# 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 2021, 2,176 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 (77%), heatwaves (66%) and pandemics (59%) are perceived as the highest risk events (slightly or very likely). They are also the events that people feel the most prepared for (80% feel slightly or very prepared for storms, 77% for heatwaves and 72% for pandemics).
  - In 2021 compared to previous years, more people felt at risk from storms, storm surges and floods.
  - There was a lower risk perceived from pandemics in 2021 compared to 2020, with the initial increase due to COVID-19 settling down but still much higher than before COVID-19 in 2019.
  - Terrorism is the event people feel least prepared for (27%), although few perceive terrorism as a likely risk (11%).
- The average perceived risk for emergency or disaster events (2.8/5 - where 5 is the highest perceived risk) stabilised from 2020 to 2021, after increasing from 2019, while perceived preparedness remains the same (3.8/5).
  - Far Northern (2.9), Northern (3.0) and Central Queenslanders (3.0) generally perceive emergency or disaster events to be significantly more likely than people in other regions.
  - Brisbane (2.7) and Northern (3.0) Queenslanders perceive a higher risk compared to 2019, with no change from 2020.
- Six percent of respondents had experienced a local emergency or disaster event in the past year, down from 2019 (9%), with over half of these people feeling prepared for these events (65%).
  - Three out of five people who had experienced an event (63%) felt that this experience would improve their preparedness.

# EXECUTIVE SUMMARY

## Preparedness activities

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

- Less than a third of Queenslanders have a home escape plan (31%) or have prepared an emergency kit (29%), fewer than in 2019.
- Those living in Far Northern and North Coast Queensland are more likely to be prepared for disaster events, with those living in Brisbane are the least prepared.
- While 98% of Queenslanders have smoke alarms installed (consistent with the 5-year average), only 76% of these have been tested or maintained in the past 12 months, and this is significantly fewer than previous years.
    - In relation to the new Interconnected Smoke Alarm (ISA) legislation, a third (33%) of Queenslanders have ISAs installed (up from previous years), and 59% of those who don't have them installed say they are likely to install them in the next 12 months, also up from previous years.
- Three quarters (73%) of Queenslanders have home and/or contents insurance, and this increases to 92% for those living in owner-occupied homes.
    - There has been an increase in those who have insurance covering bushfires (61%) and storm surges (53%) since 2019.
    - Queenslanders more likely to have insurance include owner occupiers, those living in detached houses, and high income earners.
- Overall, there has been an increase in 2021 in those who believe climate change will impact emergency and disaster events, particularly amongst females and young Queenslanders (18-34 years).
    - SEQ (South East Queensland) residents are more likely to believe there will be an increased impact for structure fires, pandemics, vehicle fires, transport accidents and terrorism, whereas ROQ (Rest of Queensland) residents are more likely to think climate change will increase cyclones. This concern links to those risks being more likely to be faced in these regions.

# EXECUTIVE SUMMARY

## Perceptions and expectations of QFES

- As seen in previous years, 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 (63%).
    - Queenslanders were more likely to say the Federal Government was ‘not at all’ responsible compared to 2020, and more likely to say the Media were ‘not at all’ responsible compared to 2019.
- Medical facilities (95%) were considered the most important to protect in an emergency event, closely followed by residential homes (94%) and water infrastructure (93%).
    - More Queenslanders consider the environment important to protect in 2021 compared to 2020, and more consider local businesses (85%) and residential homes (94%) as important compared to 2019.
- Fire and hazard response is considered the most important service.
    - Hazard reduction activities was third, and has increased in importance compared to 2019. It is also considered more important in ROQ (Rest of Queensland) compared to SEQ (South East Queensland). Furthermore, more Queenslanders indicated this service was provided in their area in 2021 compared to previous years.
    - More people believe it is important that QFES minimises its impact on the environment (79%) in 2021 compared to 2020.
- 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 gap has widened since 2019.
- When looking at allocation of resources, Queenslanders would like to move towards a more flexible service (59%) compared to a permanent presence in their local community (41%). However this gap has decreased since 2019.
- Those respondents who received a QFES service in the last year (39%) indicated they generally satisfied with the services (71% satisfied or higher).

# EXECUTIVE SUMMARY

## Business owners

- Twelve percent of respondents were business owners:
  - Most businesses were locally owned, with 85% based in the same postcode the respondent lived in.
  - Over half (53%) of those who own a business have business insurance, with just 25% 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, although the overall perceived likelihood of risk is lower.
  - There is an increased perceived risk from pandemics compared to 2019 due to COVID-19.

# 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 2020-21, QFES had 3,408 FTE and approximately 36,000 volunteers across the state.

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. 17 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

* 2020-21 QFES Annual Report: https://www.qfes.qld.gov.au/sites/default/files/2021-09/Full-Report-QFES-2020-21-Annual-Report.pdf

** National research priorities for natural hazards emergency management, May 2019: 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 12th October and 29th October 2021.
- This 2021 data is compared to the 2020 and 2019 data, which used the same questionnaire.
- An additional open link for the same survey was provided to capture additional participants in harder to reach LGAs. That data is not included in this report.

## 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= 2,176

## 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 2021, 2020 and 2019 data. These differences are indicated by the following symbols:

▲ significantly higher than 2019/20 @ 95% CI
▼ significantly lower than 2019/20 @ 95% CI

- Statistical significance testing was conducted between the demographic categories *for 2021 data* and are indicated by the following symbols:

↑ significantly higher than other categories @ 95% CI
↓ significantly lower than other categories @ 95% CI

# DEMOGRAPHICS

The 2021 QFES Community Insights Survey respondents comprised 2,176 Queenslanders. The sample overview below shows the unweighted data making up the sample This was then weighted to represent the Queensland population by age, gender and location.

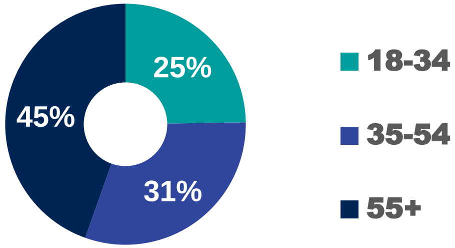
## Gender

Male 45%

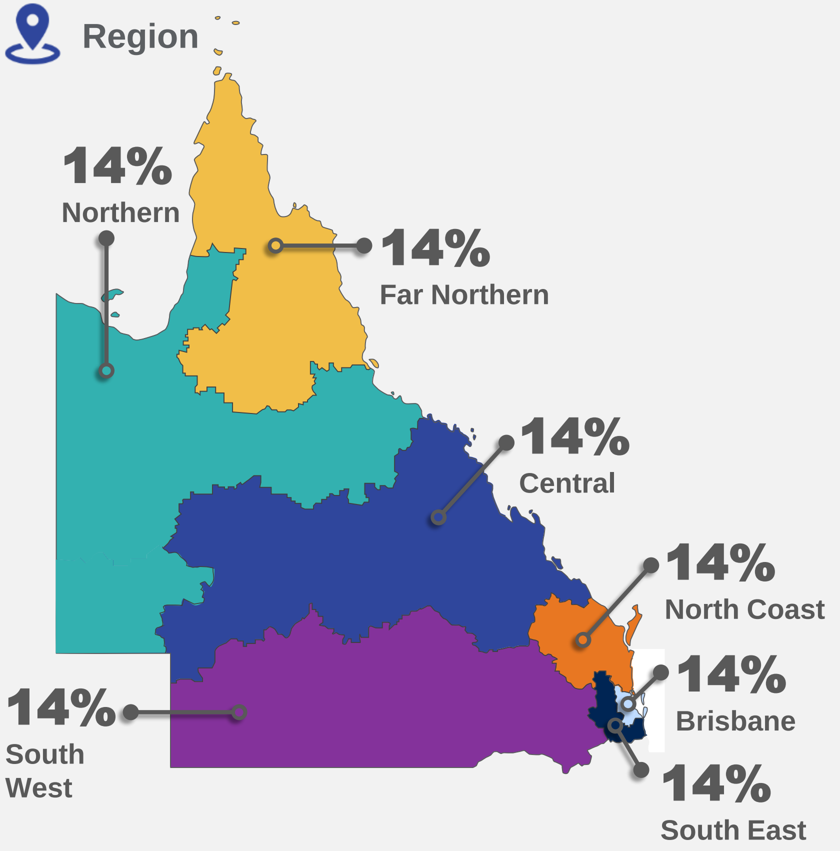
Female 55%

Gender Diverse 0%

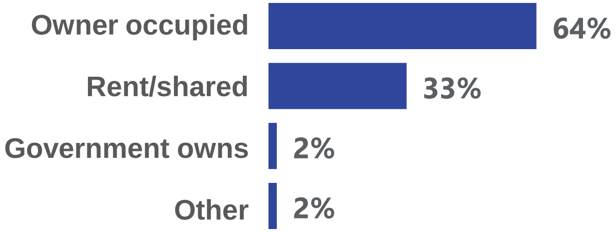
## Age



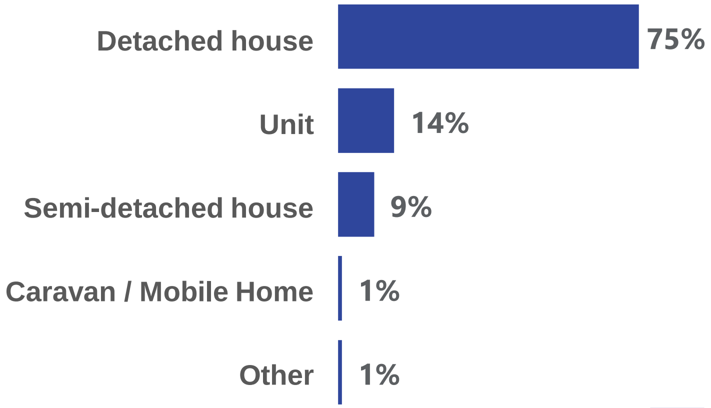

## Region




## Home ownership




## Type of dwelling





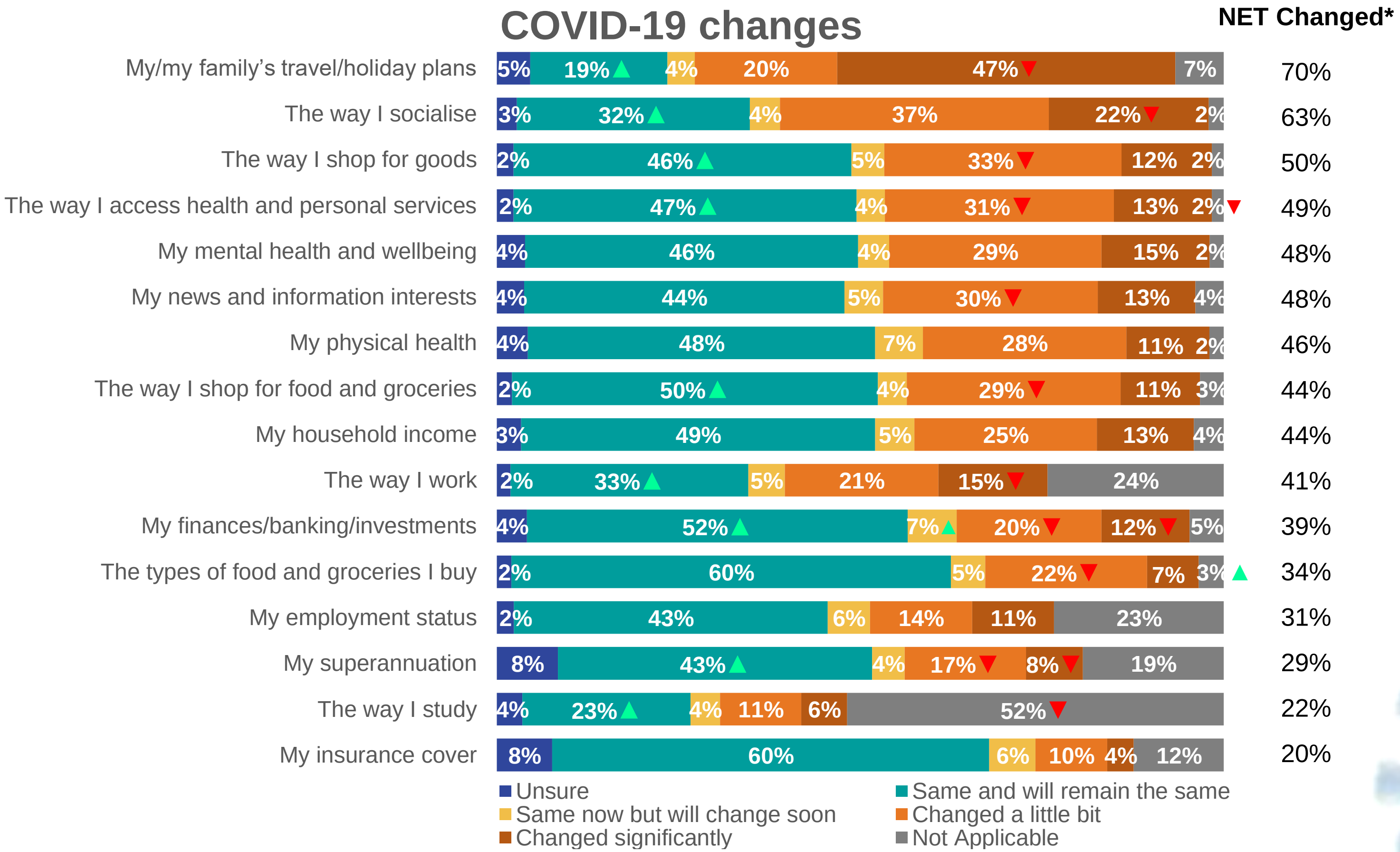

Base: *Total sample; Unweighted; n = 2176*

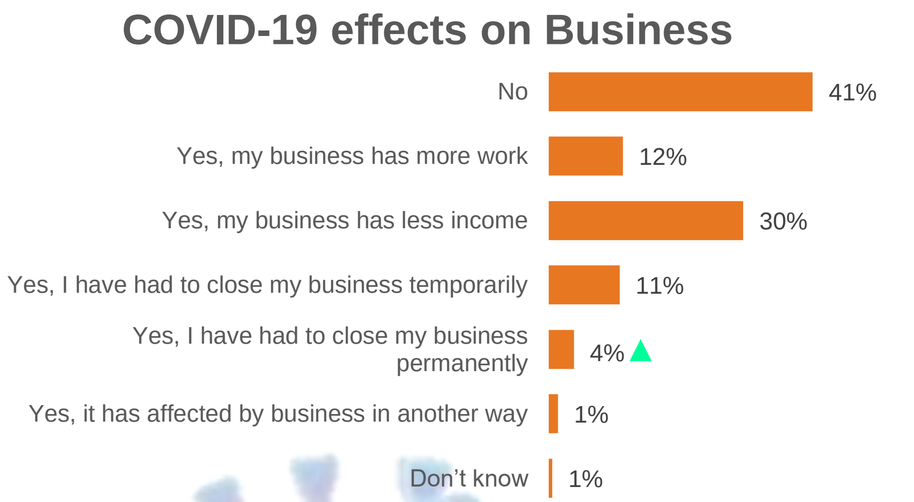
Source: SQ1 What is your age I SQ2 What is your gender | SQ5 Which suburb do you live in | Q25 Do you or your family own or rent your home | Q26 How would you best describe the type of dwelling you live in.

# COVID CONTEXT

COVID-19 has significantly changed how Queenslanders live and work since 2020. Slightly under three quarters (70%) of Queenslanders say that their holiday plans have changed, with a majority also indicating changes in socialising (64%), work (54%), shopping for goods (50%), access of health and personal services (50%), and news and information interests (50%). However, most aspects show fewer changes when compared to September 2020.

Three in every five business owners indicated that COVID-19 has affected their business, with a third saying that their business now has less income.






Base: Total sample; n = 2176. Q23 COVID-19 Changes | Q23B COVID-19 Business effects
*Q23 COVID-19 NET changed summed across: Same now but will change soon=3, Change a little bit=4, Change significantly=5, excluding Not Applicable.

▲/▼ Significantly higher/lower than 2020 @ 95% CI

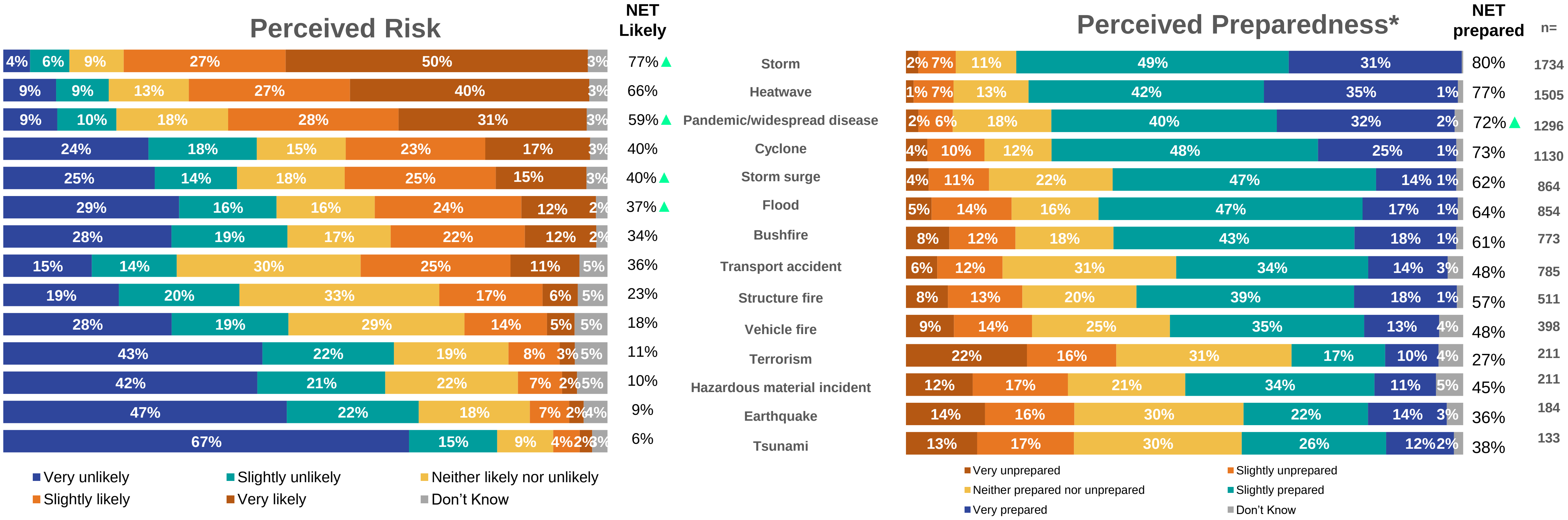
# COMMUNITY PERCEPTIONS

# PERCEPTION OF RISK & PREPAREDNESS

Overall Queenslanders perceive storms, heatwaves and pandemics as the most likely forms of emergency or disaster events. In 2021 compared to previous years, more people felt at risk from storms, storm surges and floods. There was a lower perceived risk from pandemics in 2021 compared to 2020, with the initial increase resulting from COVID-19 settling down, however the perceived risk was still much higher than before COVID-19 in 2019.

Of those who perceived a risk from events, people felt most prepared for storms, heatwaves and pandemic, with no changes compared to 2020. Terrorism is the event people feel least prepared for, although few perceive terrorism as a likely risk.

Note that Tsunami was an added event in 2021, and no comparison to previous years is available.




▲/▼ Significantly higher/lower than 2019/20 @ 95% CI

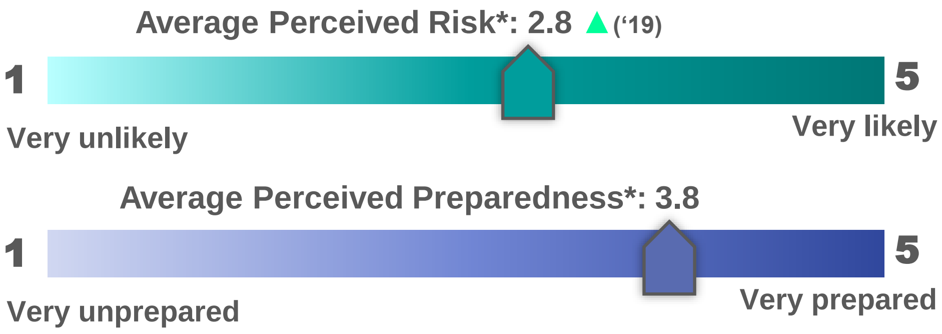
 

Base: *Total sample base n = 2176 | Q2 n = from 13 to 1729*

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 *"Don't know" responses not shown.* ***of those who responded 'Slightly likely/Very likely' to event for perceived risk***

# RISK & PREPAREDNESS

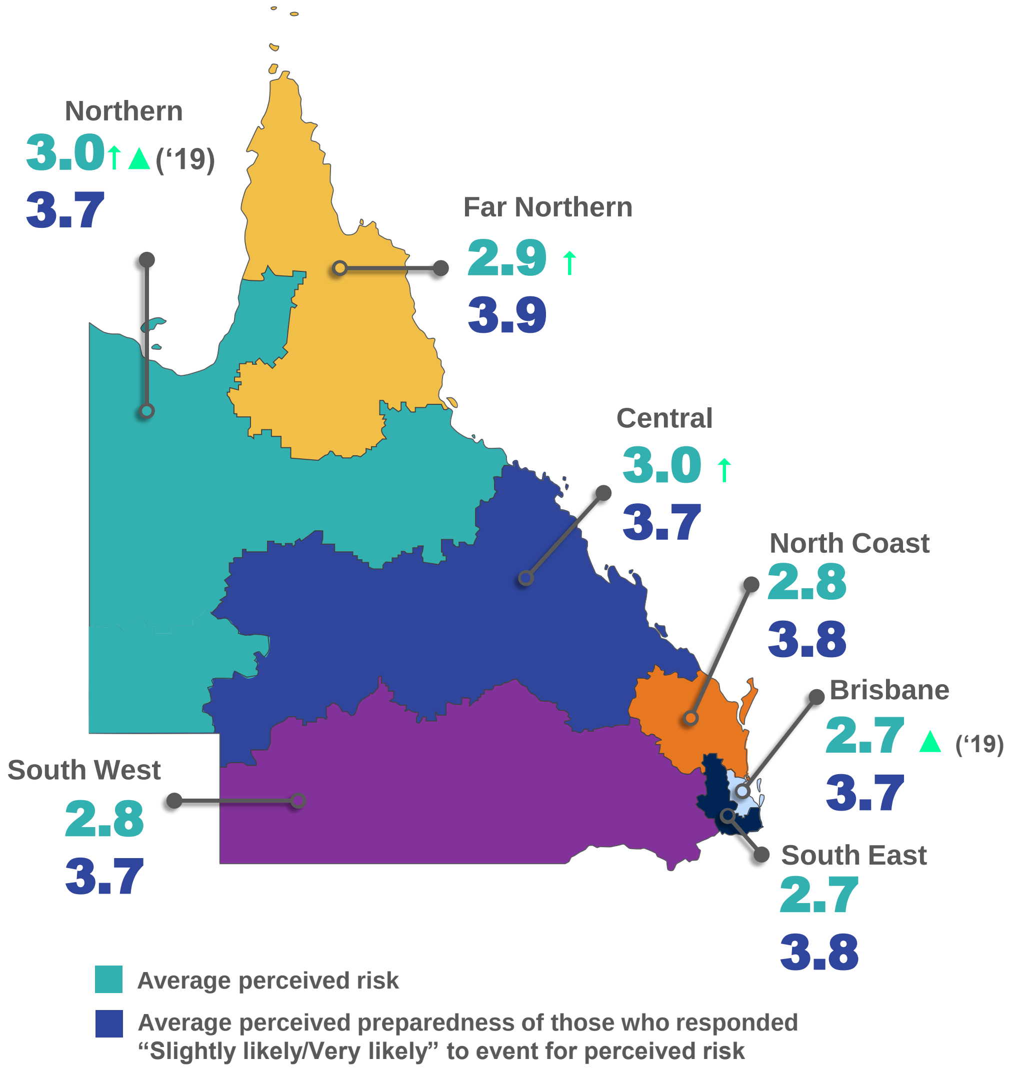
## By region




The average perceived risk for emergency or disaster events stabilised from 2020 to 2021, after increasing from 2019, while perceived preparedness remains steady.

Far Northern, Northern and Central Queenslanders generally perceive emergency or disaster events to be significantly more likely than people in other regions. Brisbane and Northern Queenslanders perceive a higher risk compared to 2019, with no change from 2020.

There are no significant differences between regions in perceived preparedness, and this has remained stable since 2019.




▲▼ Significantly higher/lower than 2019/20 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)



Base: *Total sample 2021 n = 2176 | Q2 n = from 13 to 1749.* 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 | SQ5 Which suburb do you live in.

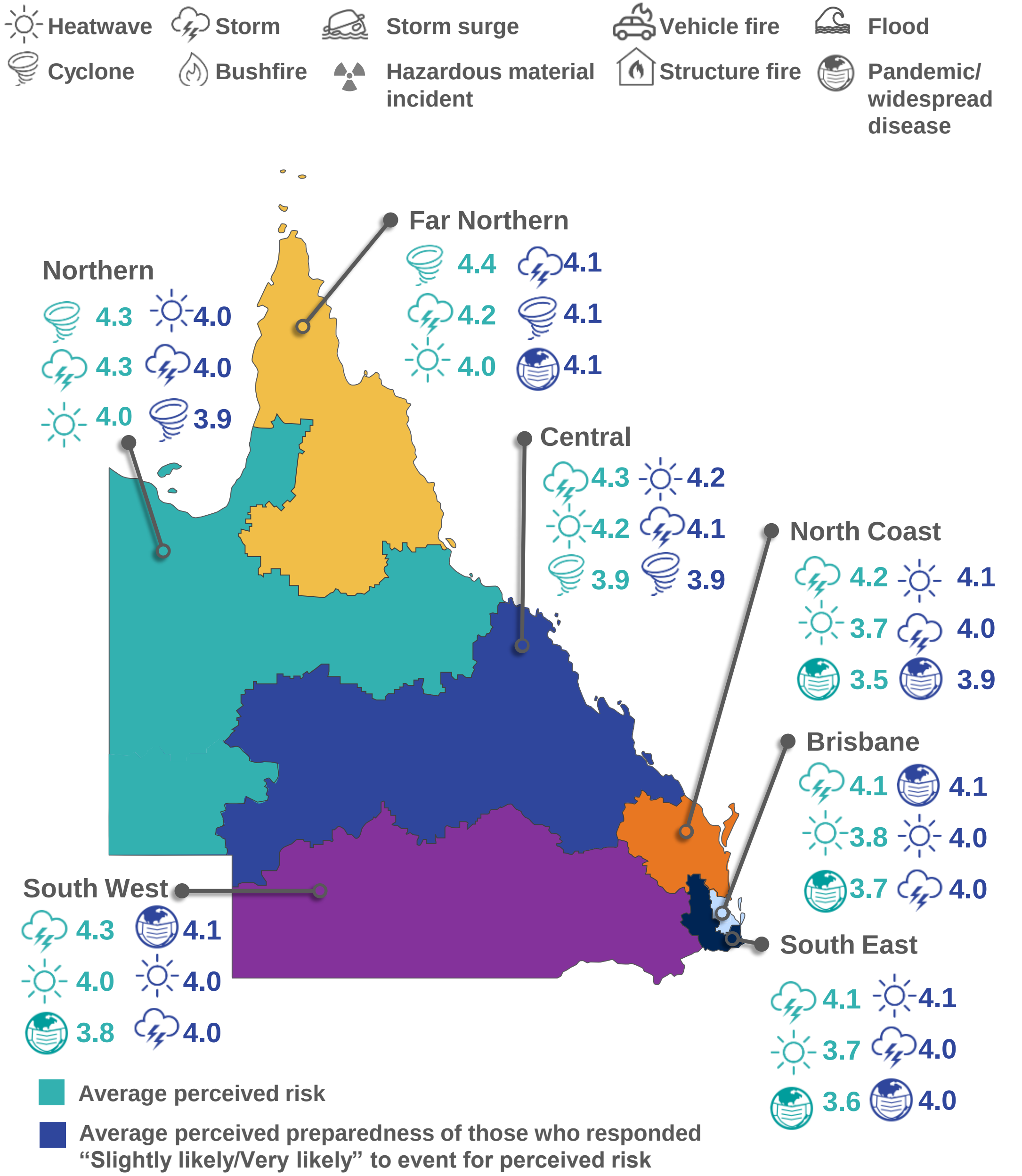
*Note that average perceived risk and preparedness calculations have both changed slightly from 2020 with the inclusion in 2021 of the disaster code 'Tsunami'.

# RISK & PREPAREDNESS

## Top 3 events by region

### Event & Region Breakdown

- Perceived risk and preparedness for pandemics has significantly increased across all areas since 2019, however the perceived risk has decreased since 2020 in the South East, Central and Northern Queensland, while South East and Far Northern Queenslanders feel more prepared than in 2020.
- Storms made it to the top 3 events in all regions for both perceived risk and perceived preparedness, with increased risk compared to 2020 perceived in all regions except the South East.
- Heatwaves are in the top 3 events for perceived risk across all regions, with risk perceived to be higher in Central Queensland, and higher than in 2020 for Central and Far Norther Queensland.
- Cyclones are perceived to be a greater risk in Far Northern, Northern and Central Queensland and lower in the South East, South West and Brisbane, with an increase in perceived risk since 2020 in Far Northern, Northern and South West Queensland.
- Queenslanders in Brisbane and the South West are more concerned about the risk of storm surges in 2021 compared to 2020.
- Queenslanders in Far Northern, Northern and Central Queensland are more concerned about the risk of floods, with a lower perceived risk in Brisbane. However, the perceived risk of floods has increased in 2019 in Brisbane and the South East.
- Queenslanders in Central and South West Queensland perceive a greater risk from bushfires, with a lower risk perceived in Brisbane. The perceived risk is lower in 2021 compared to 2019 for South West and North Coast.



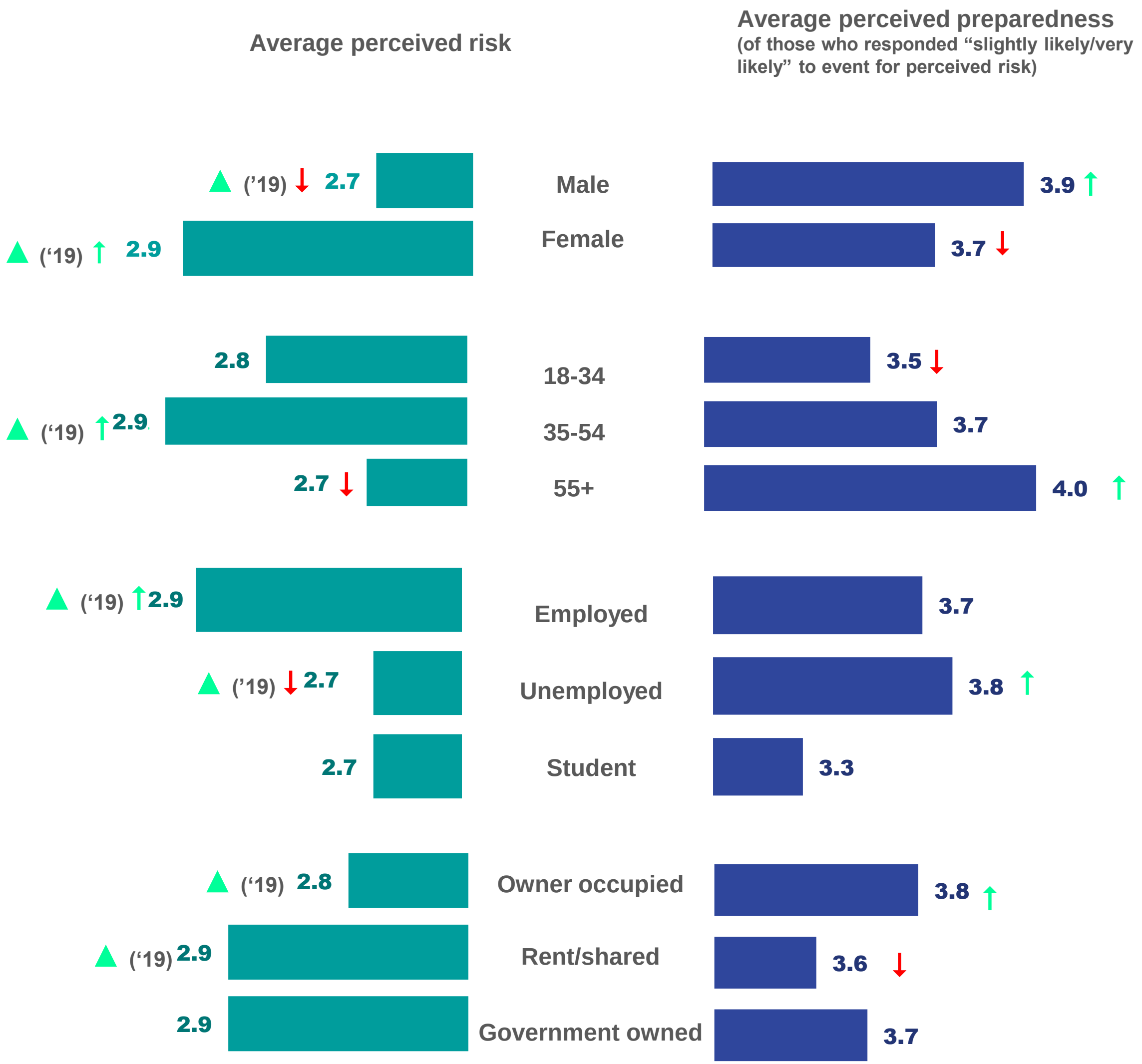

*Terrorism had the highest preparedness score (4.6) for North Coast, however the base was low (n=14).

Base: *Total sample 2021 n = 2176 | Q2 n = from 22 to 1482.* 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 | SQ5 Which suburb do you live in.

# RISK & PREPAREDNESS

## Demographics




### Gender

Overall, women have significantly higher perceptions of risk compared to men. Men have a significantly higher average perceived preparedness despite the directionally lower perception of risk in comparison to women.

### Age

Older Queenslanders (55+ years) perceive lower risk on average compared to other ages, with those 35-54 years perceiving higher risk. Older Queenslanders feel more prepared, whereas younger Queenslanders (18-34 years) feel less prepared.

### Employment status

Queenslanders who are employed perceive a greater risk on average, and those employed and students feel less prepared than those unemployed.

### Owner/Renter

Queenslanders who own their own home feel more prepared for emergency or disaster events than those who rent.

Base: *Total sample 2021 n= 2176 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 I 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.



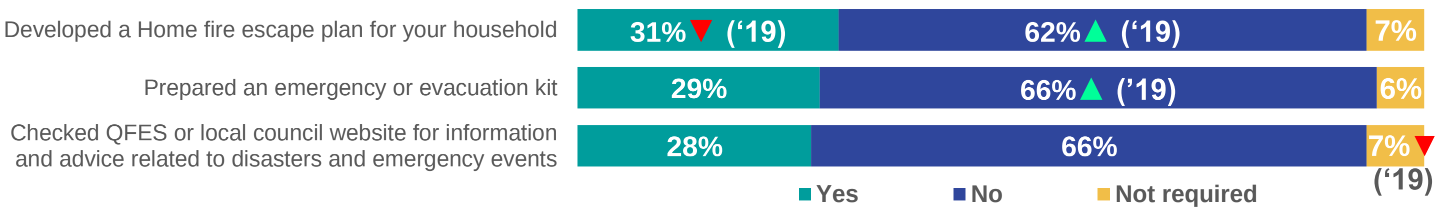
▲▼ Significantly higher/lower than 2019/20 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)

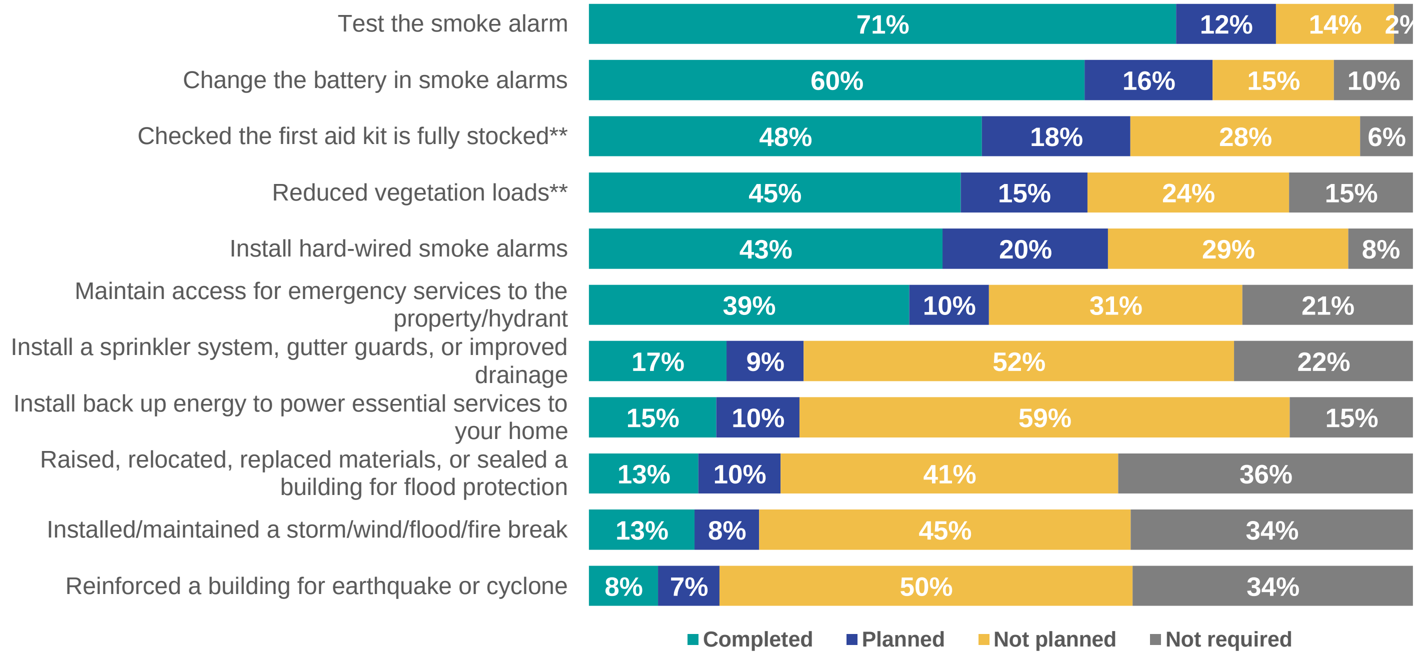
# PREPAREDNESS BEHAVIOUR

## Actions taken

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




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




Less than a third of Queenslanders have researched or planned for emergencies, with fewer Queenslanders having a home escape plan or preparing an emergency kit compared to 2019.

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

Survey respondents indicated lower levels of completion of all the listed behaviours compared to previous years, however it should be noted that there was an additional response option 'Not planned' in 2021.

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

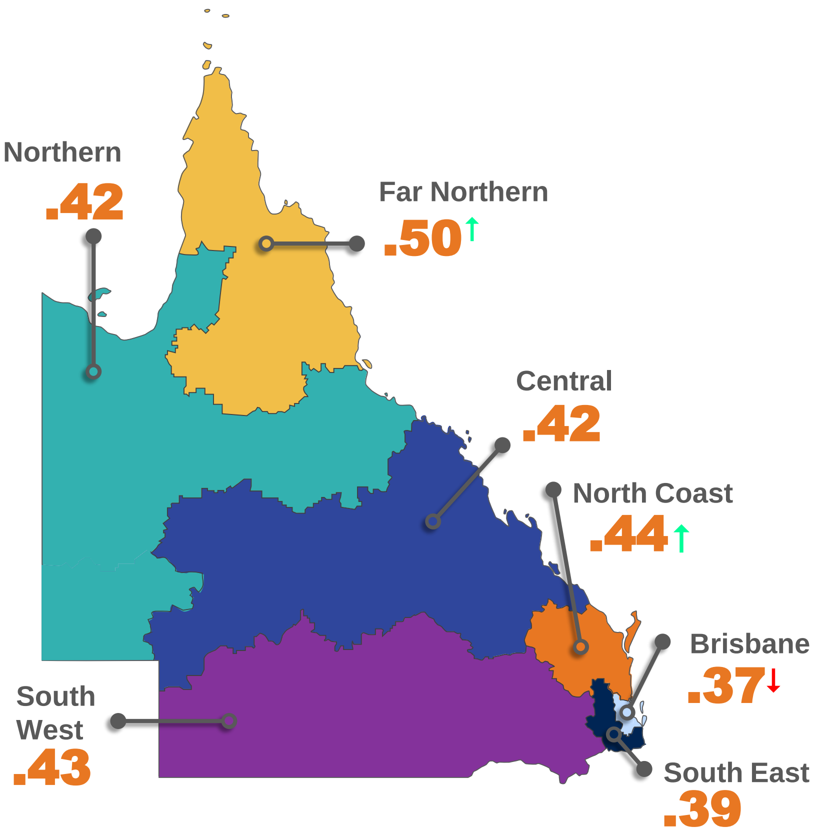
*Question response option 'Not planned' added in 2021, no significance testing done due to this.
**Response codes added in 2021



Base: *Total sample* 2021 *n = 2176*. Q17. In the last year, have you undertaken any of the following emergency or disaster planning. | Q18. 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

# 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. Far Northern and North Coast Queenslanders are more prepared for emergency or disaster events, and Brisbane residents have a significantly lower preparedness index.




The Preparedness Index is calculated by taking the total number of activities that respondents have completed from Q17 & Q18 and dividing by the total number of activities excluding those indicated 'not required', resulting in an index value between 0 (unprepared) and 1 (prepared) for each participant. Note this is not directly comparable to 2019 and 2020 data as these questions have been changed in 2021.

↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)

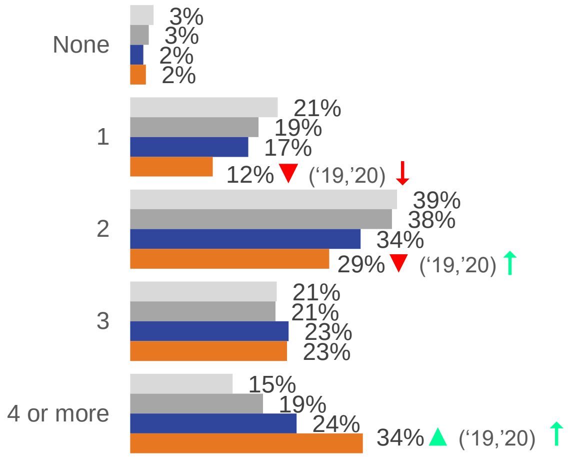


Base: *Total sample* 2021 *n = 2176*. Q17. In the last year, have you undertaken any of the following emergency or disaster planning. | Q18. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event

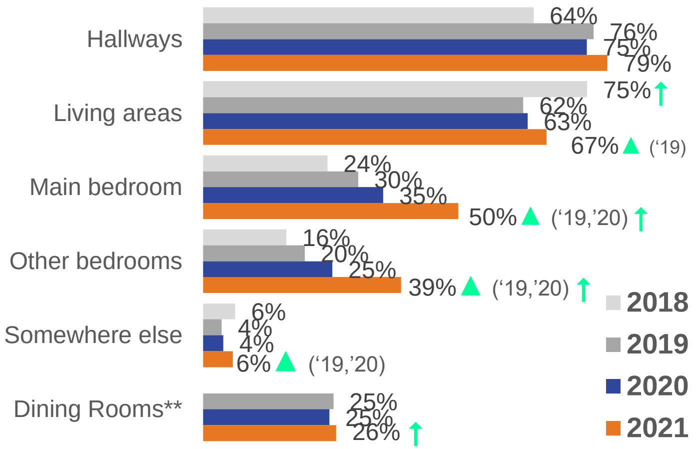
# SMOKE ALARMS

Average number of smoke alarms **2.9**

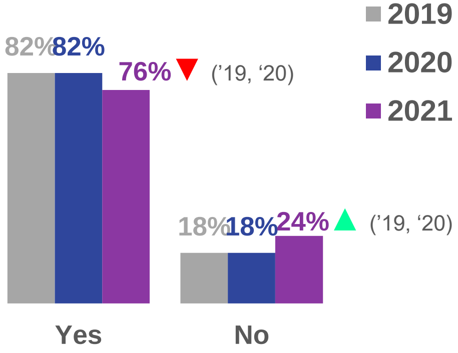
### Number of smoke alarms installed



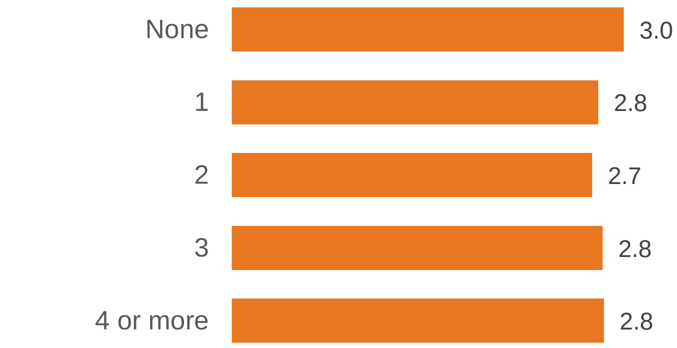

### Smoke alarm location




### Households with operational smoke alarms*




### Average perceived risk for structure fire




Most Queenslanders (98%) have one or more smoke alarms in their homes, although only 76% are considered operational*, significantly fewer than past years. The most common number of smoke alarms to have in the home is four, and this has increased since 2020.

Those who live in houses have more smoke alarms on average than those in apartments, and those who have moved house in the last 12 months have more smoke alarms on average than those who haven't moved.

The most common areas for smoke alarms are hallways and living areas. The proportion of households with alarms in bedrooms has increased since 2020, with an increase in living area alarms since 2019.

The perceived risk of structure fires is higher for those homes with more smoke alarms, suggesting that residents more concerned about fire risk are taking preventative measures.

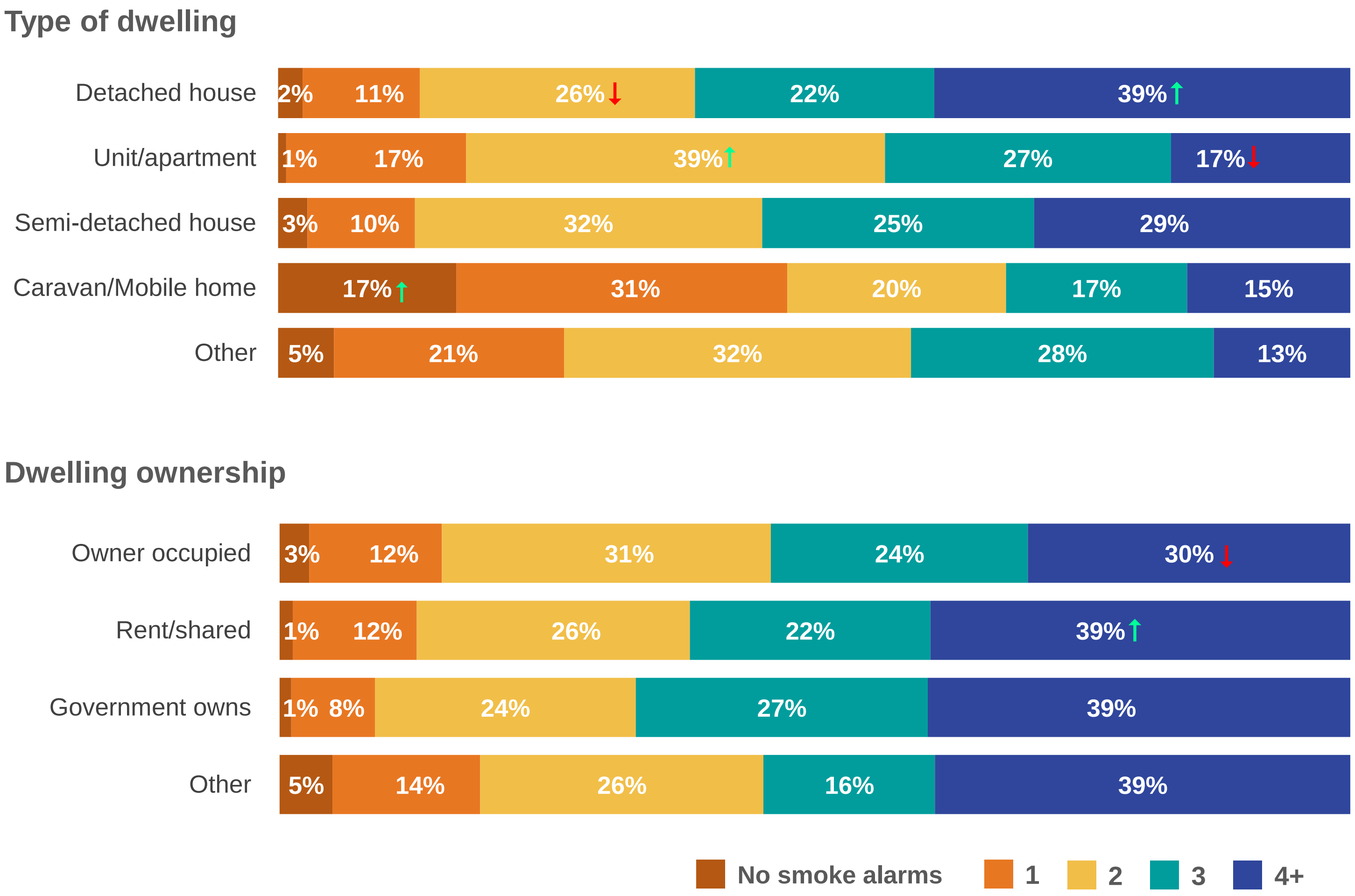
Base: *Total sample 2021 n= 2176; 2020 n = 2100; 2019 n=2458.* Q20. How many smoke alarms are installed in your home | Q20B Where in your house are your smoke alarms located | Q18. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency 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/lower than 2019/20 @ 95% CI
↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)

# SMOKE ALARMS

## Dwelling demographics by smoke alarms




Detached homes are more likely to have 4+ smoke alarms, with units less likely to have 4+ alarms. This is balanced out by units being more likely to have 2 alarms, likely related to the size of the home. Caravans appear more likely to have no alarms, however this is a low base (n=17).

Queenslanders who are renting are more likely to have 4+ smoke alarms than those who own their own home. There is no difference in operational smoke alarms between owners or renters.



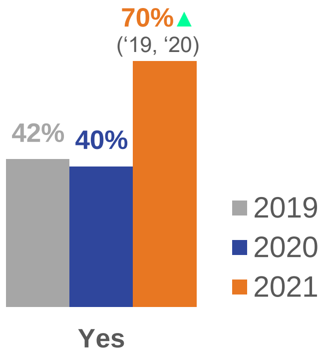
Base: *Total sample 2021 n = 2176.* Q20. How many smoke alarms are installed in your home Q27. How would you best describe the type of dwelling you live in |Q25. Do you or your family own or rent your home?

↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)

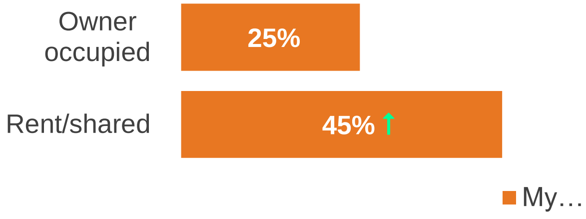
# SMOKE ALARMS

## Interconnected

### Awareness of new legislation




### Interconnected smoke alarms by Dwelling ownership

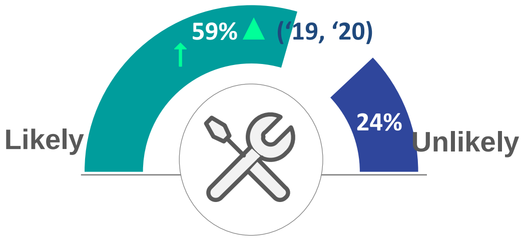



### Installation of Interconnected Smoke Alarms (ISA)

**33%** ('19, '20)

**Already have Interconnected Smoke Alarms**

### Likeliness to install in the next 12 months*




Base: *Total sample 2021 n=2176; 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.



*Excluding those who already have interconnected smoke alarms installed.

**Seven in ten Queenslanders have heard of interconnected smoke alarms (ISAs), a significant increase since 2020.**

Awareness of the new legislation increases with age, and males are more likely to be aware of the new legislation than females. There are no significant differences between regions for awareness.

Queenslanders aware of the new legislation are more likely to have operational smoke alarms (79%) than those unaware of the new legislation (69%).

Queenslander who rent are significantly more likely to already have interconnected smoke alarms, and more home owners (27%) indicate they are 'unlikely' to install interconnected alarms in the next 12 months (16% renters).

**A third of Queenslanders already have interconnected smoke alarms installed, an increase compared to previous years. Of those who don't have interconnected smoke alarms, 59% say they are likely to install them in the next 12 months, an increase from previous years.**

ISA installation intention does not differ across regions. Those with a higher percentage of 'unlikely' to install in the next 12 months include those aged 55+ years, males and those living in owner-occupied houses.

Those who have received a QFES service in the last 12 months are significantly more likely to install ISAs in the next 12 months. Those likely to install ISAs in the next 12 months have a higher average perceived risk compared to those unlikely to install. Queenslanders with higher average perceived risk are more likely to install ISAs in the next 12 months.

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)

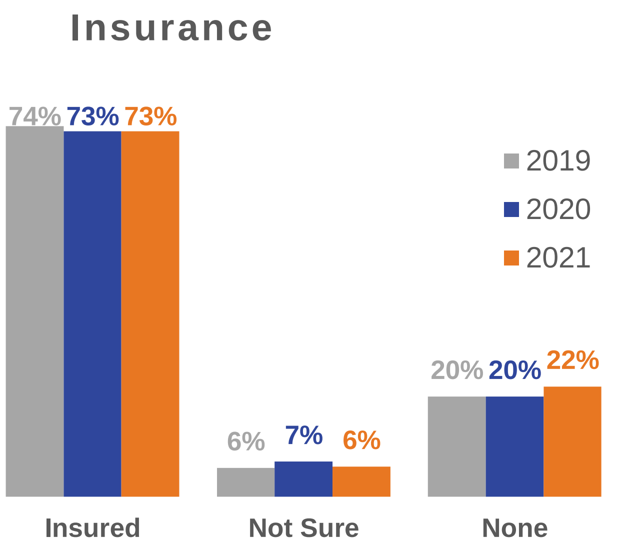
# INSURANCE BEHAVIOURS

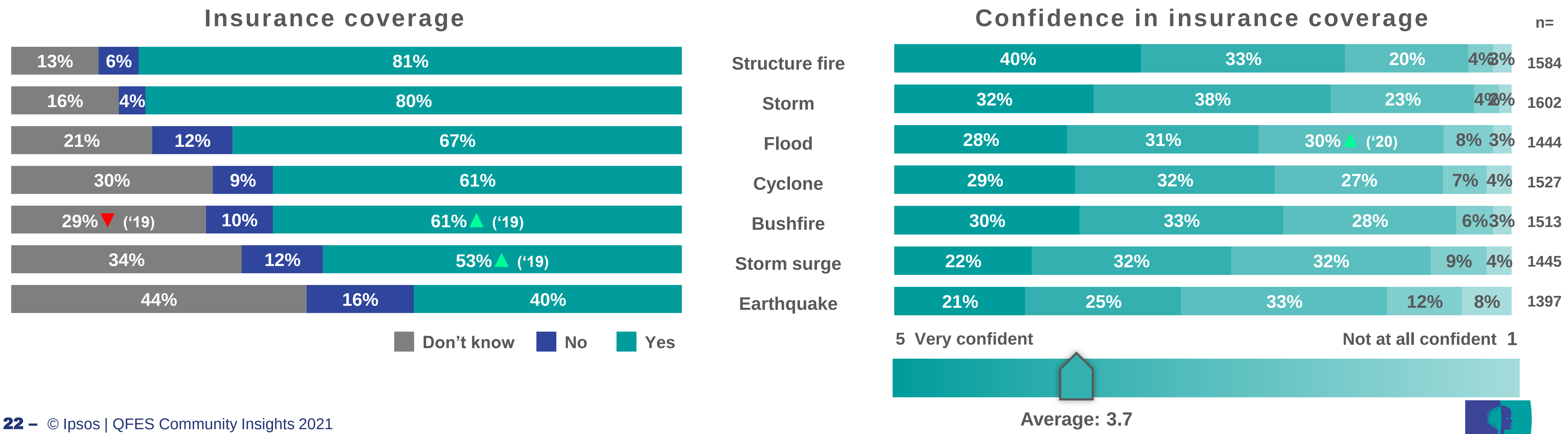
## Home Insurance

Three quarters of respondents have home and/or contents insurance, with 6% of respondents unsure if they have insurance, with no change since 2019. Those living in owner-occupied (92%) and detached homes (78%), and those living with children (78%) are more likely to have insurance.

The most common insurance is for structure fires and storm, and there has been an increase in insurance coverage for bushfires and storm surges since 2019. However, many Queenslanders are unsure what the events their insurance covers.

On average, Queenslanders who have insurance are confident it covers emergency and disaster events (3.7/5), with no significant changes in confidence over the past few years.




▲▼ Significantly higher/lower than 2019/20 @ 95% CI

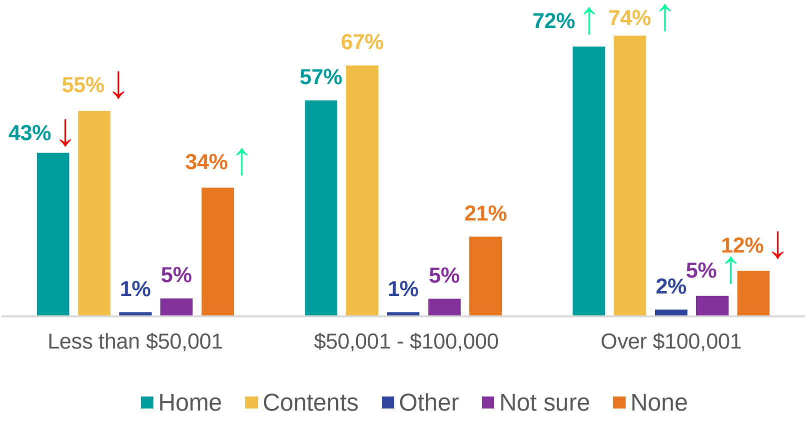


Base: *Total sample 2021 n= 2176; 2020 n = 2100; 2019 n=2458.* Q12 What type of insurance cover do you have for your home | Q13. What type of events does your insurance cover | Q13B (those who responded "Yes" to Insurance Coverage) How confident are you that your insurance cover would adequately cover the damage or replacement of your house and contents if you were impacted by one of the following emergency or disaster events.

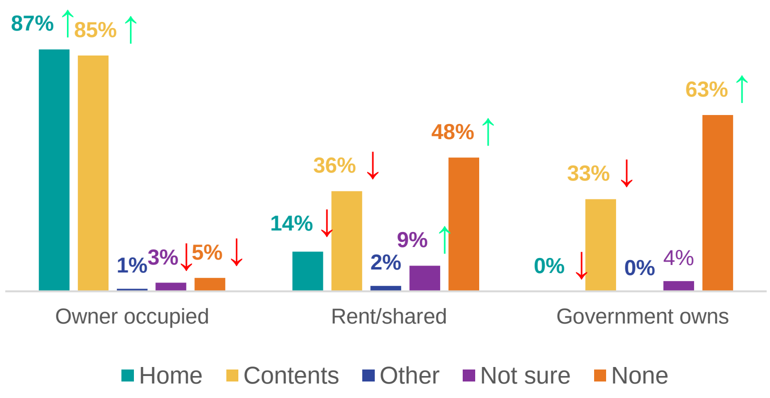
# INSURANCE BEHAVIOURS

## Demographics

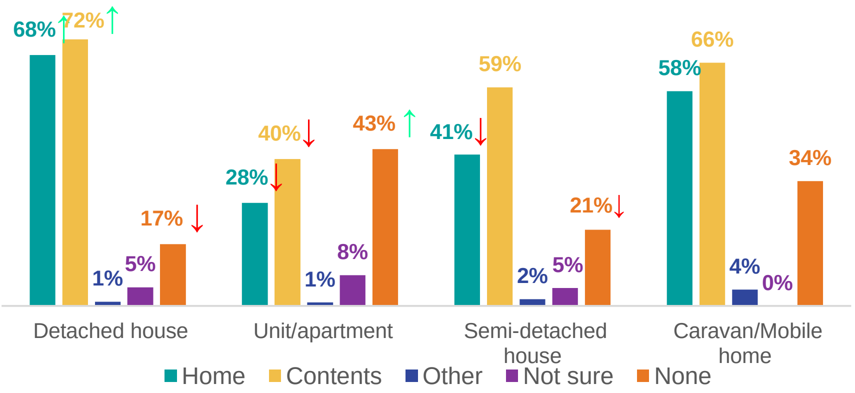
### Household income




### Owner/renter




### Dwelling type




Those earning over $100,000 household income are more likely to have home and contents insurance.

Queenslanders living in owner-occupied homes are more likely to have home and contents insurance than those renting.

Queenslanders living in detached houses are more likely to have home and contents insurance compared to those living in apartments, with those in semi-detached houses less likely to have home insurance.

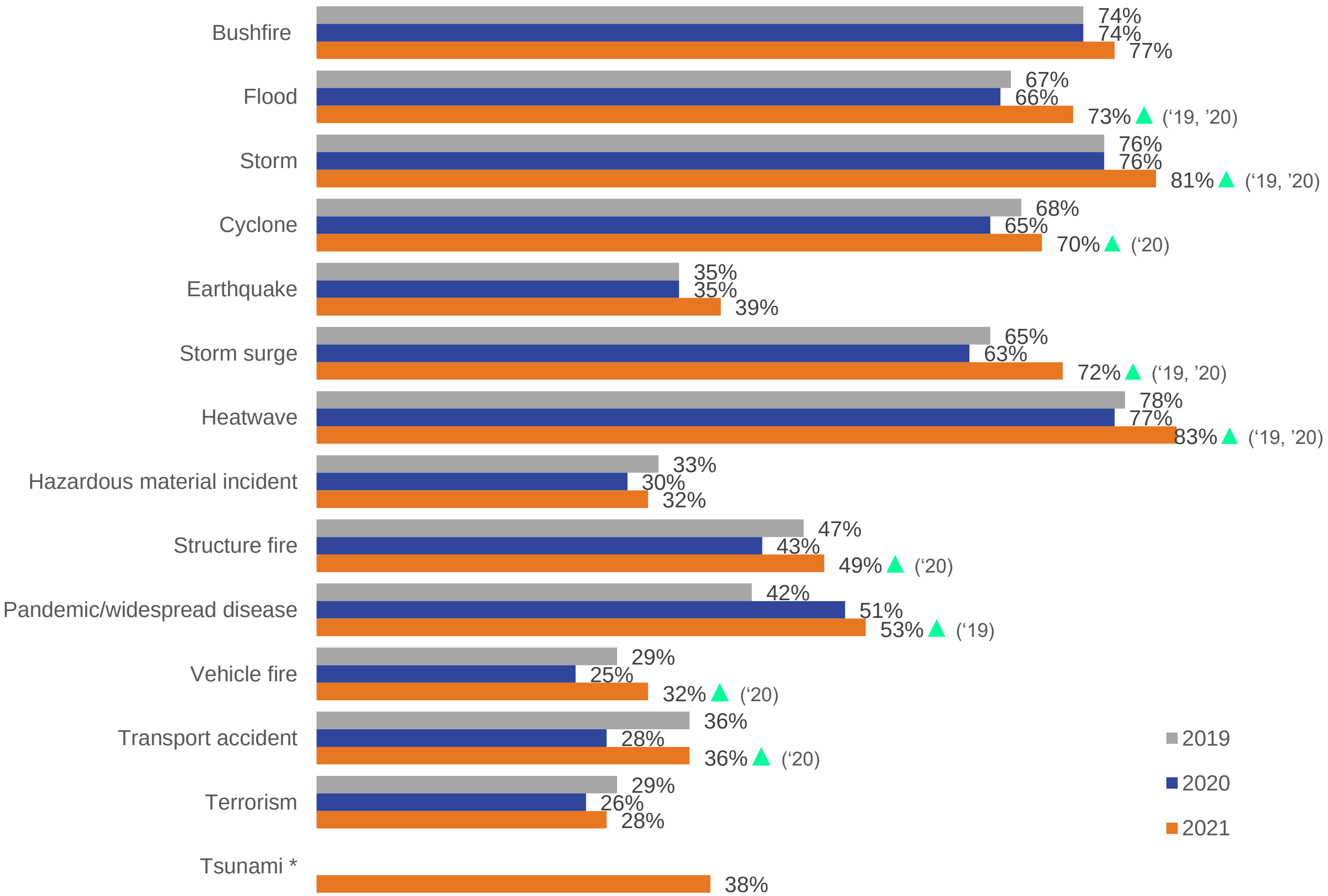
↑↓ Significantly higher/lower than other categories @ 95% CI (2021 data)



Base: *Total sample 2021 n= 2176.* Q12 What type of insurance cover do you have for your home | Q24. Have you moved house within the past 12 months? | Q25. Do you or your family own or rent your home? | SQ1 What is your age I SQ2 What is your gender.

# 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?**




Over three quarters of respondents believe that climate change will increase the impact of heatwaves, storms and bushfires, and more than two thirds believe it will increase the impact of floods, storm surges and cyclones.

Overall, more people in 2021 (compared to 2020) believe that climate change will increase the impact of heatwaves, storms, floods, storm surges, cyclones, structure fires, transport accidents and vehicle fires.

By region, SEQ are more likely to believe there will be an increase for structure fires, pandemics, vehicle fires, transport accidents and terrorism, whereas ROQ residents are more likely to think climate change will increase cyclones. This concern links to those risks more likely to be faced in these regions.

Younger Queenslanders (18-34) are more likely to believe climate change will cause an increase in events across the board compared to older respondents, as are females compared to males.



Base: *Total sample 2021 n = 2176. Q10. Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following. * Code added in 2021. *NET of 'mostly' and 'completely'*

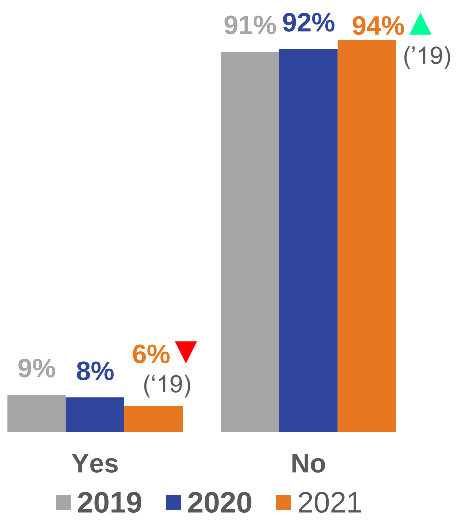
▲▼ Significantly higher/lower than 2019/20 @ 95% CI

# EXPERIENCE OF A LOCAL EVENT

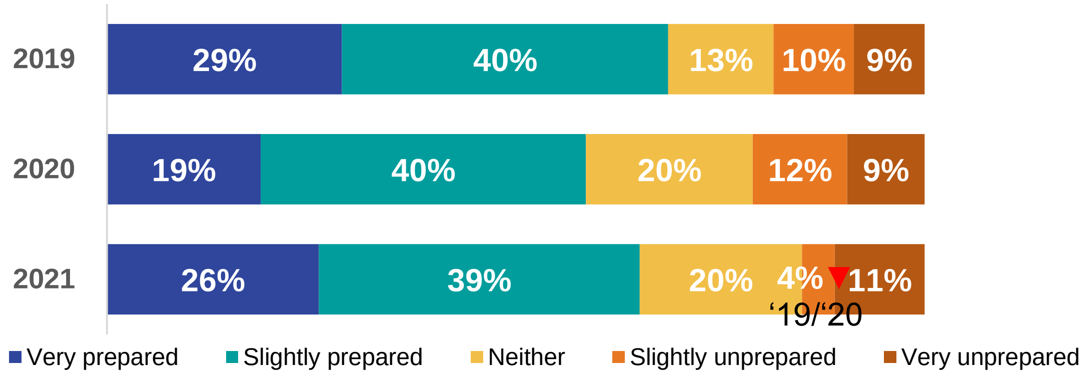
## Change in preparedness

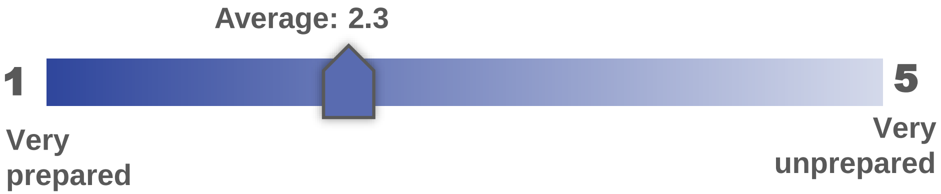
Six percent (n=127) of respondents had experienced a local emergency or disaster event in the last year. Of those who had experienced an event, 65% said they were prepared and feel they are now more prepared for future events (63%). These respondents perceived a higher average risk of emergency or disaster events.

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

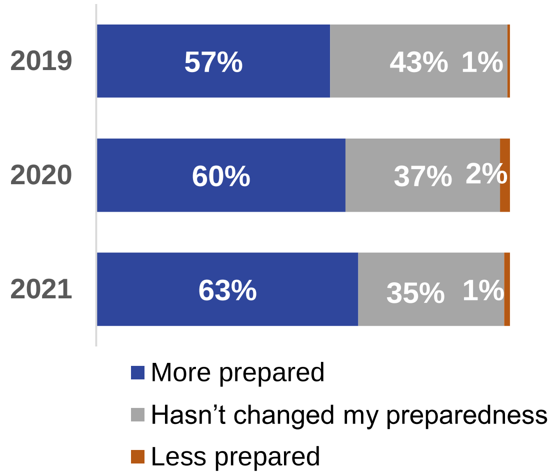



### Preparedness for the emergency or disaster event




### Impact of event on preparedness






Base: *Total sample 2021 n=2176; 2020 n = 2100; 2019 n=2458. Q19. Have you or your family been involved in a local emergency or disaster event in the past 12 months? | Q19B.* (those who responded "Yes" to experienced an event) *How prepared were you for the emergency or disaster event? 2021 n= 127; 2020 n=215; 2019 n=311 | Q19C.* (those who responded "Yes" to experienced an event) *How did this past event change how prepared you are for future emergency or disaster events?*

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

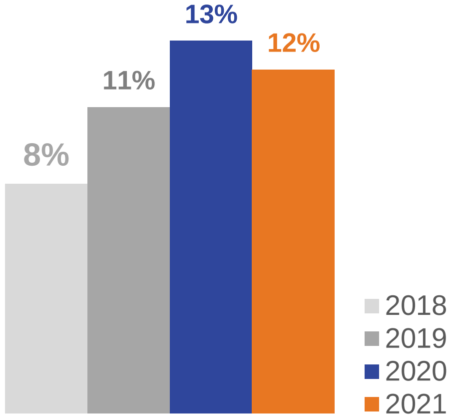
Ipsos

# BUSINESS OWNER PERCEPTIONS

# BUSINESS OWNERS

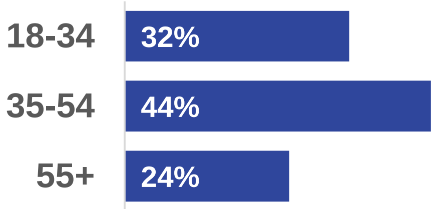
## Demographics

**12%**
**of respondents own a business**

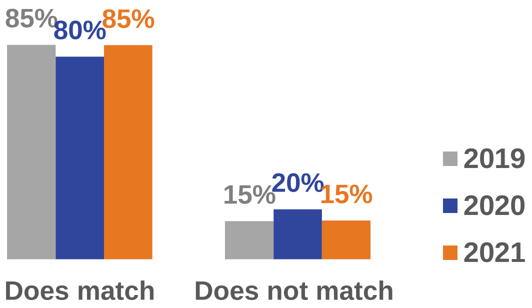



Male **60%**

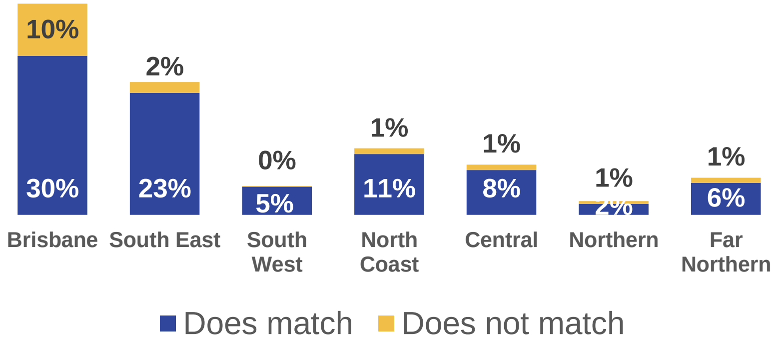
Female **40%**




### Most business postcodes matched home postcodes




### Business owners by region (using home postcode)




**Gender**

Three fifths of business owners were male, significantly more than females, with no difference in age.

**Age**

Significantly fewer business owners were 55+ years, with almost half aged 35-54.

**Region**

Business owners were spread across the seven regions, with fewer business owners representing Northern Queensland. The majority of businesses outside of the residents home postcode were owned by people living in Brisbane.



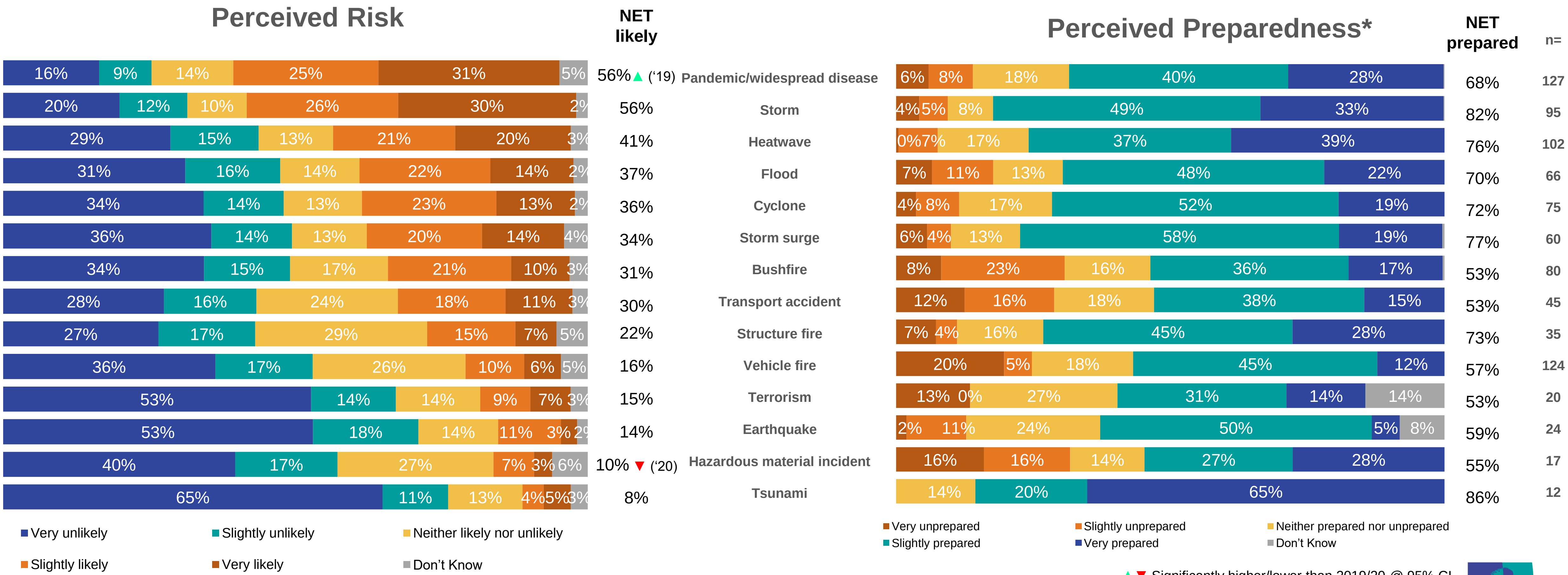
Base: *Total sample 2021 n= 2176; 2020 n = 2100; 2019 n=2458. Total own a business 2021 n=231; 2020 n=245; 2019 n=263.* SQ6 Own a business | SQ6B Business post code | SQ4 Home post code. | SQ6B.Business post code

# BUSINESS OWNERS

## Perceived Risks & Preparedness

Business owners perceive similar risks to their business as to their home, with pandemics, storms and heatwaves the highest perceived risk. However, the perceived likelihood of these risks is overall lower for businesses compared to homes. As with their homes, business owners felt more at risk from pandemics compared to 2019 due to COVID-19.

Perceived preparedness was highest for tsunamis, storms, storm surges, heatwave and then structure fires, although low base numbers require caution for interpretation.




▲▼ Significantly higher/lower than 2019/20 @ 95% CI

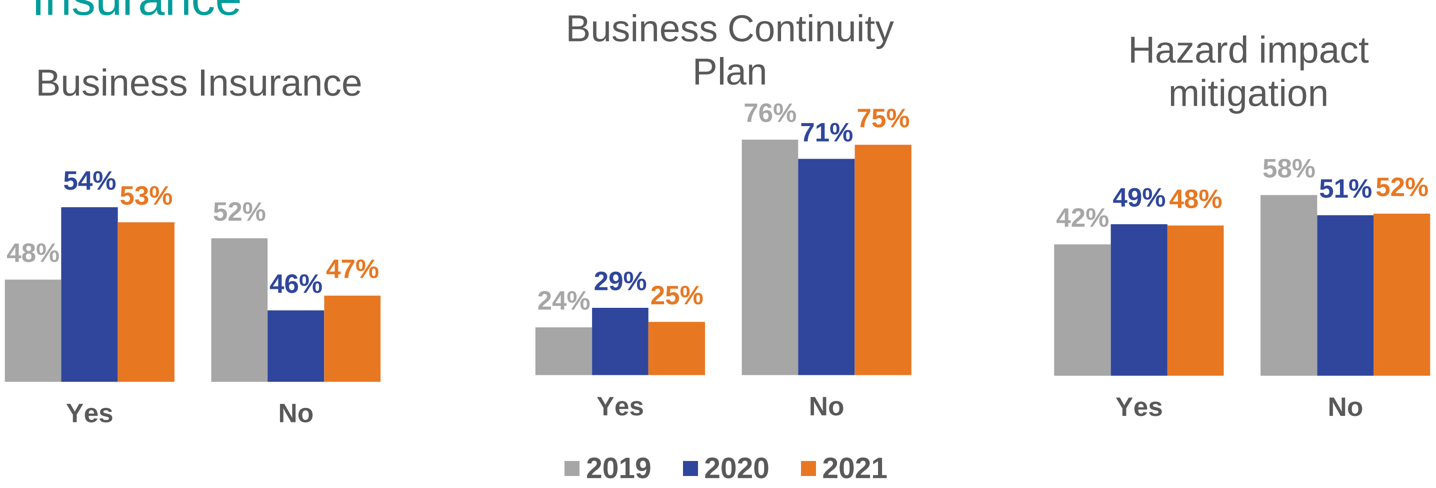


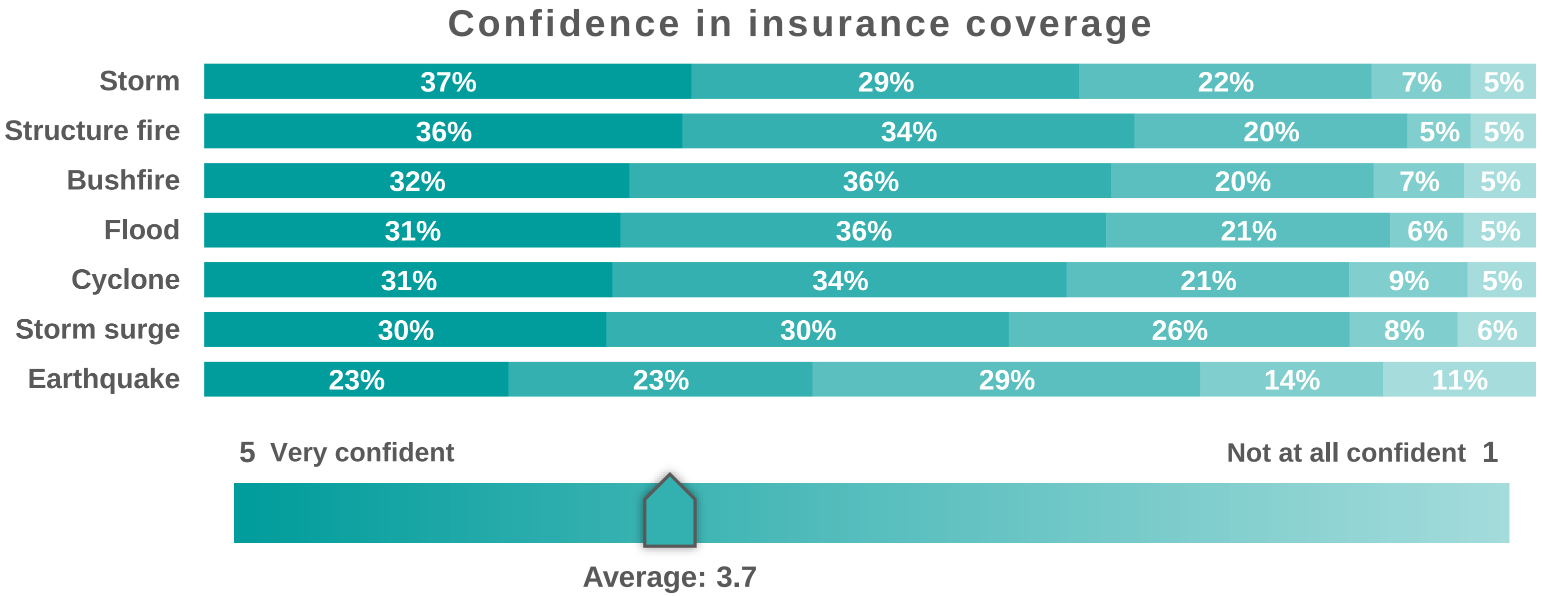
Base: *Total own a business 2021 n= 231 2020 n=245; 2019 n=263.* Q1B How do you rate the likelihood that the following emergency or disaster event could impact your business in the next year | Q2B. (those who responded "Slightly likely/very likely" to event for perceived risk) Overall, how prepared do you feel to reduce or prevent the impact on your business from the following emergency or disaster events.

***of those who responded "Slightly likely/Very likely" to event for perceived risk***

# BUSINESS OWNERS

## Insurance




Just over half (53%) of Queensland business owners have business insurance, not significantly different from previous years.

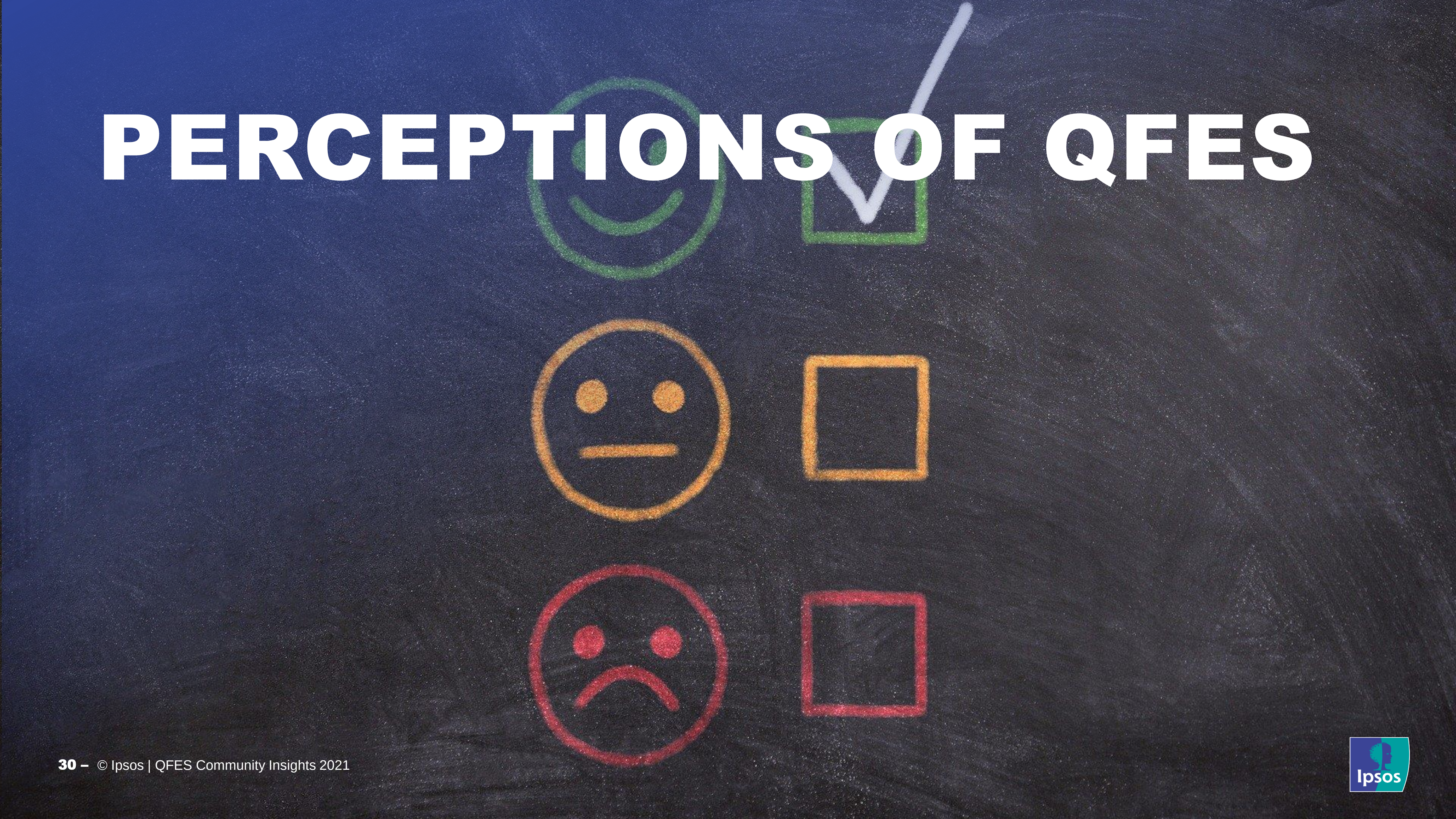
Only a quarter of business owners have a Business Continuity Plan and less than half (48%) have identified ways to mitigate the impact of hazards on their business, despite the COVID-19 pandemic.

Those who do have insurance are confident that their insurance will cover their business, particularly for structure fires, bushfires and floods.



Base: *Total own a business 2021 = 127; 2020 n=245; 2019 n=263.* 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 | Q16 Have you identified ways to mitigate the impacts of hazards that would disrupt your business.

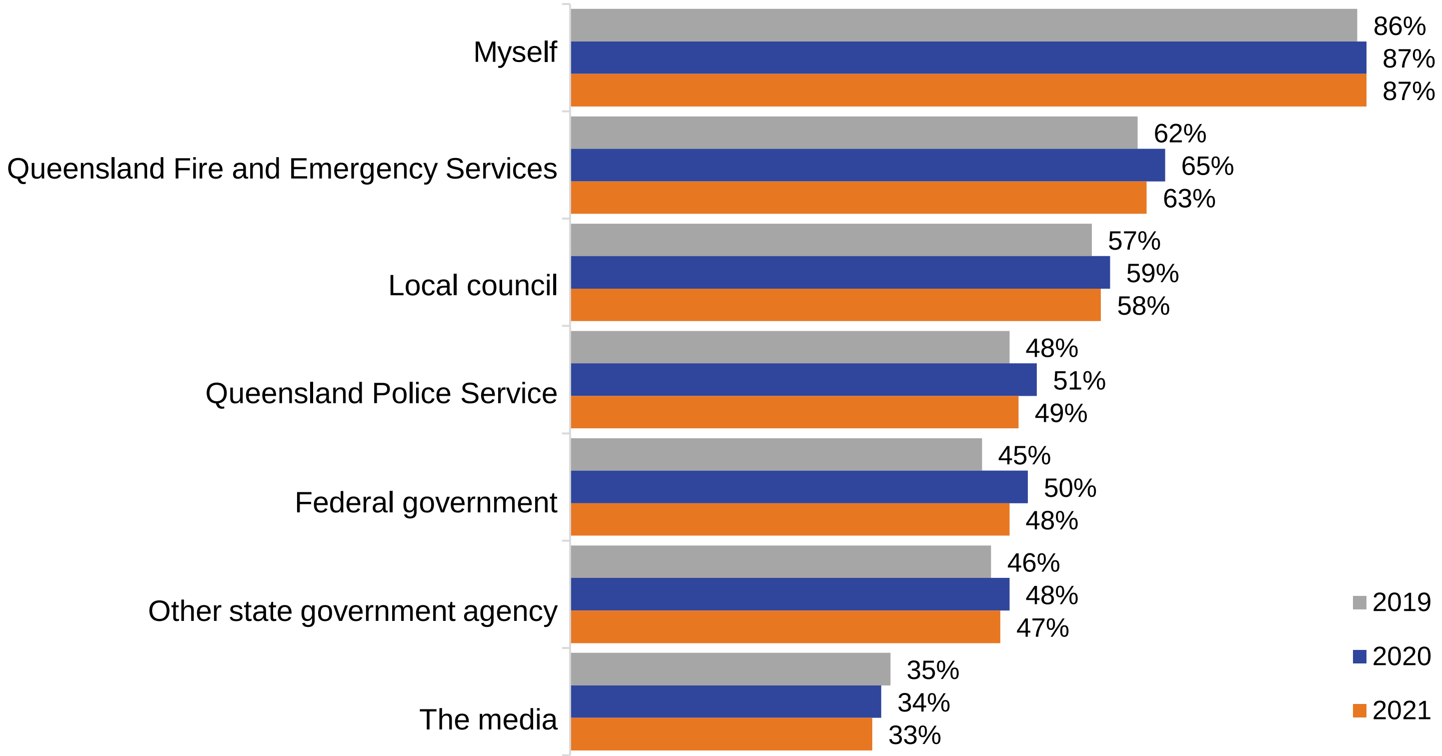
# PERCEPTIONS OF QFES



# 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, most include themselves (as being 'Mostly' or 'Completely' responsible).

Queenslanders were more likely to say the Federal Government was 'not at all' responsible compared to 2020, and more likely to say the Media were 'not at all' responsible compared to 2019.

Younger Queenslanders (18-34 years) were less likely to consider themselves responsible.

Within regions, those in Northern Queensland were more likely to consider themselves responsible, and those on the North Coast were less likely to consider the Federal Government 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, body corporate, neighbours, friends, family and hospitals.



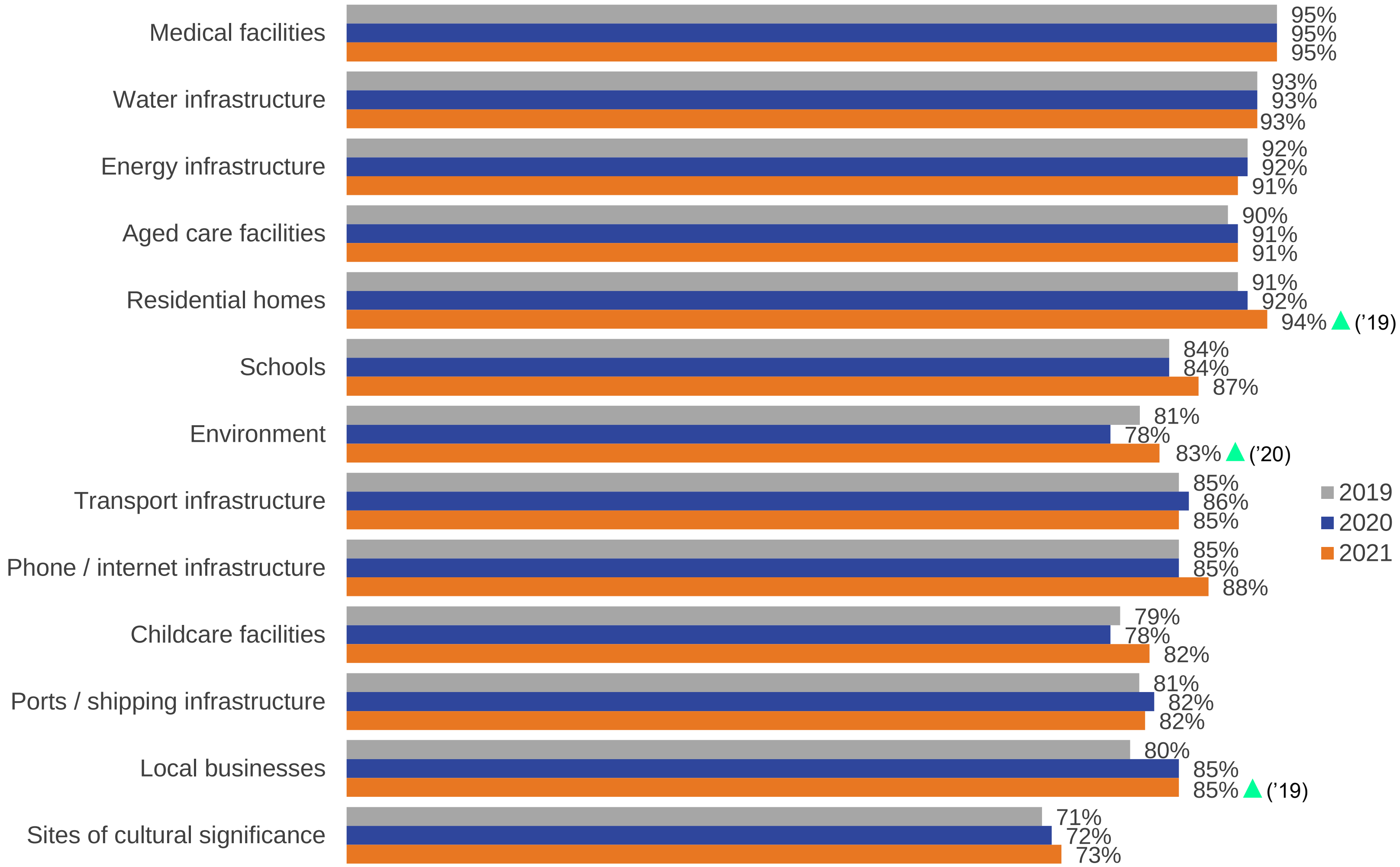
Base: *Total sample 2021 n= 2176; 2020 n = 2100; 2019 n=2458. Q3. Thinking of preparing your household for disasters and emergency events, how responsible do you believe each of the following should be?*

**NET of 'mostly' and 'completely'*

# 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, closely followed by residential homes and water infrastructure.

More people consider local businesses and residential homes as important compared to 2019, and more Queenslanders consider the environment important to protect in 2021 compared to 2020.

Responses were consistent across regions.

Older Queenslanders (55+ years) considered everything as more important compared to other age groups, except for the environment and sites of cultural significance.

Females consider the environment and sites of cultural significance more important than males.

Queenslanders living in owner-occupied homes considered energy infrastructure as more important compared to those renting.



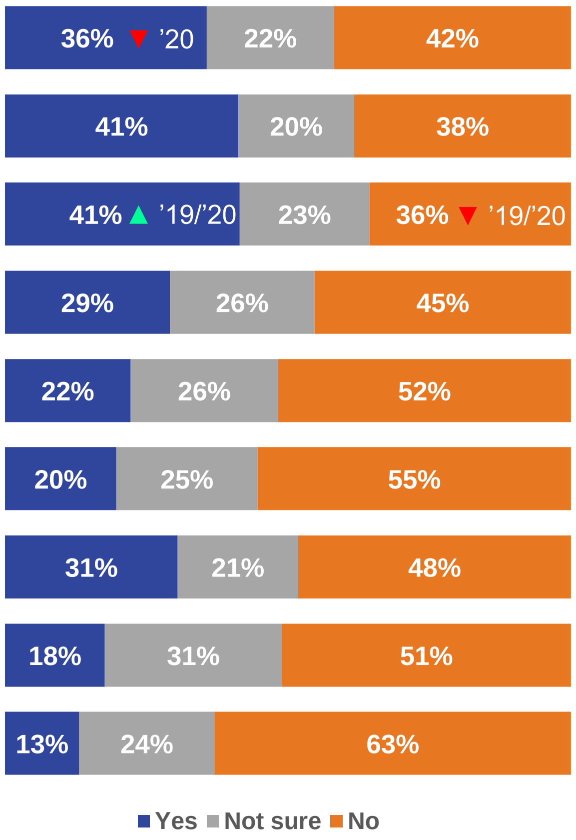
Base: *Total sample 2021 n=2176; 2020 n = 2100; 2019 n=2458. Q7. In your opinion, how important is it to protect the following from an emergency or disaster event. Based on NET importance (Very important + Slightly important)*

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

# QFES

## Service delivery and importance

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




**Importance* of QFES delivering the following services in your local area**

| Service | Importance* |
|---|---|
| Fire and hazard response | 3.0 |
| Warnings and alerts | 3.4 |
| Hazard reduction activities | 3.9 ▲ '19 |
| Search and Rescue | 4.2 |
| Recovery Services | 5.2 |
| Community Safety checks | 5.6 ▼ '19/'20 |
| Education | 5.9 ▼ '19 |
| Temporary repair of property | 6.5 |
| Research | 7.3 |

***1=most important, 9=least important**

Fire and hazard response services were considered the most important QFES service, consistent with previous years. However, there were fewer people indicating fire and hazard responses were provided in their area in 2021. Following this, warnings and alerts and then hazard reduction activities were second and third most important, with an increase in hazard reduction services provided since 2020.

Community safety checks and education were considered less important compared to previous years.

SEQ residents indicated fewer services provided overall compared to those in ROQ regions. Hazard reduction activities were considered more important in ROQ compared to SEQ.

Hazard reduction activities were considered more important by Queenslanders who own their own home and live in houses, whereas renters ranked community safety checks and education as more important.

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

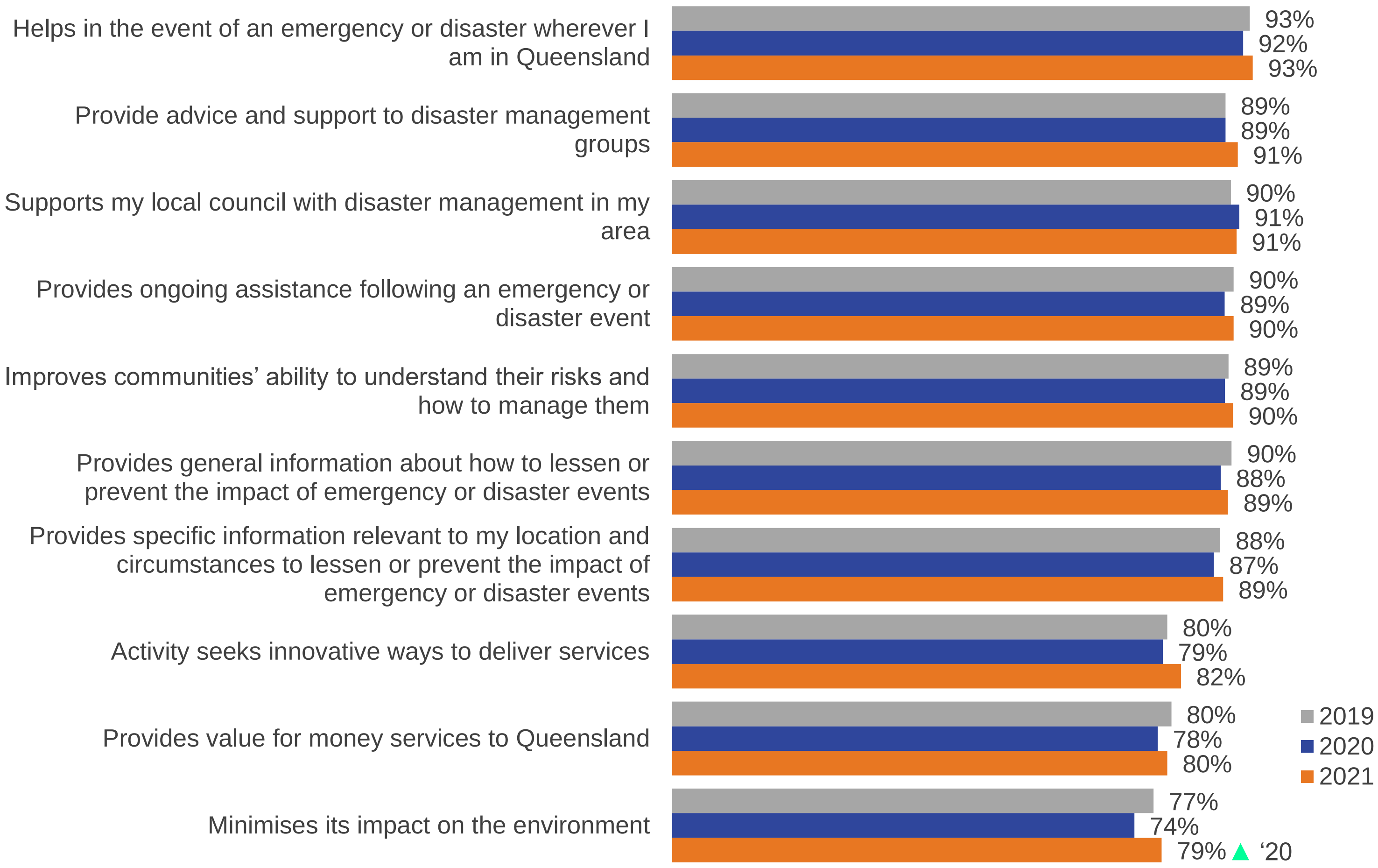


Base: *Total sample 2021 n = 2176. Q4. Which of the following QFES services were provided in your local area in the past 12 months | Q5. Please rank the importance of QFES delivering the following services in your local area? Please rank from 1-9*

# QFES

## QFES activities importance

**How important to you is it that QFES performs the following activities in your local area? (NET 'Slightly important' + 'Very important')**




Four in five Queenslanders consider all the listed QFES items important, with the most important activity being to help in the event of emergency or disaster event (wherever they are in Queensland).

Older Queenslanders (55+ years) considered all services more important compared to younger Queenslanders (18-34 years). Females consider minimising the impact on the environment as more important compared to males. There were no significant differences by region.

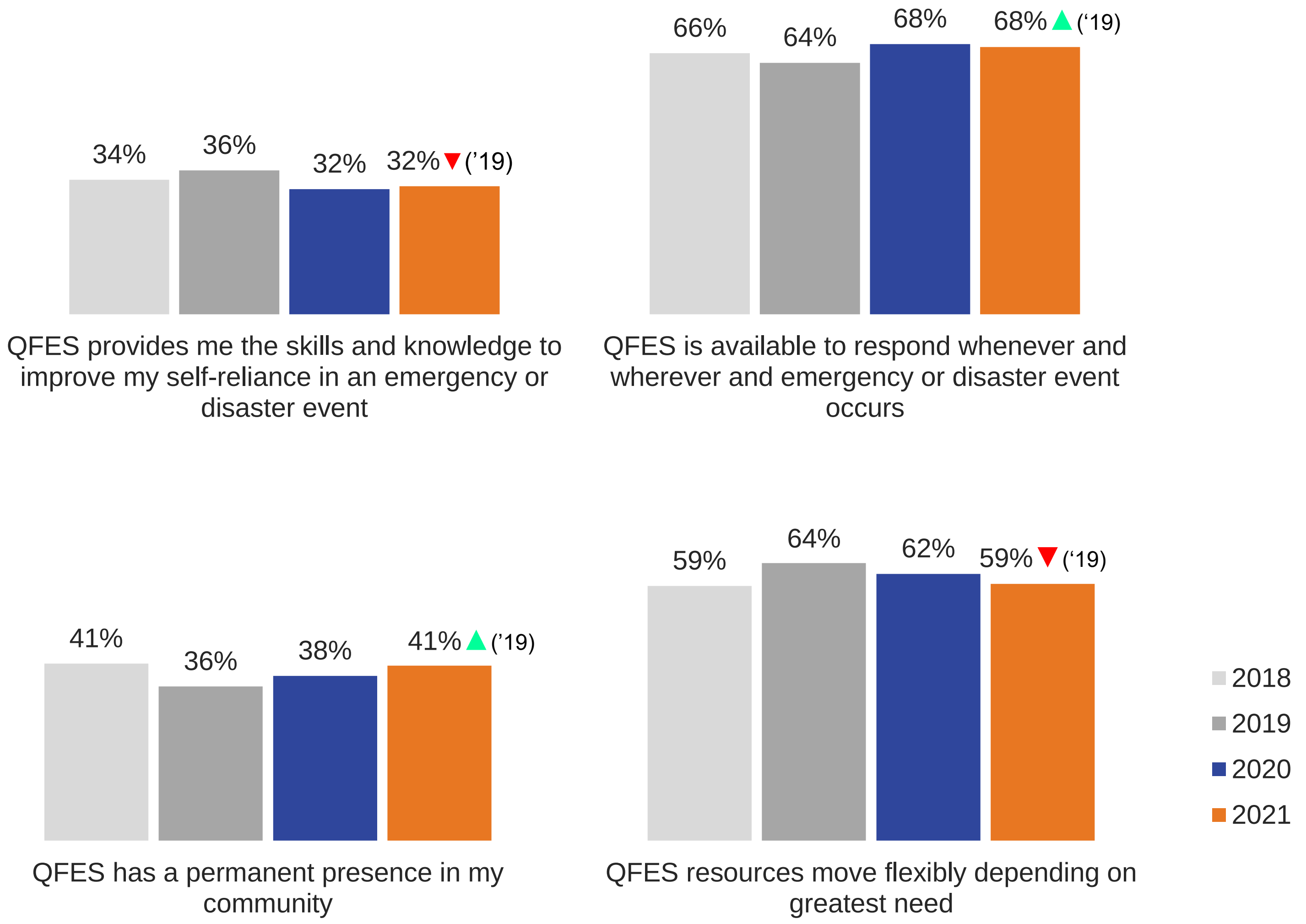


Base: *Total sample 2021 n = 2176. Q6. How important to you is it that QFES performs the following activities in your local area.*

▲▼ Significantly higher/lower than 2019/20 @ 95% CI

# QFES

## Service delivery preference




**Reliance on QFES to respond to emergency and disaster events has increased compared to 2019.**

Older respondents (55+ years) are more likely to rely on QFES than other age groups and have a lower preference of being taught self-reliance skills.

Queenslanders who are employed and those who earn over $100,000 have a greater preference for being taught self-reliance skills.

Service delivery preference does not change across regions or gender.

**The majority of Queenslanders would prefer QFES resources move flexibly rather than having a permanent presence, although more people want a permanent presence compared to 2019.**

Preference for flexibility of QFES resource distribution is significantly higher in Brisbane (68%), with most other regions preferring a permanent presence: Central (57%), South West (50%), Norther (49%) and Far Northern (49%).

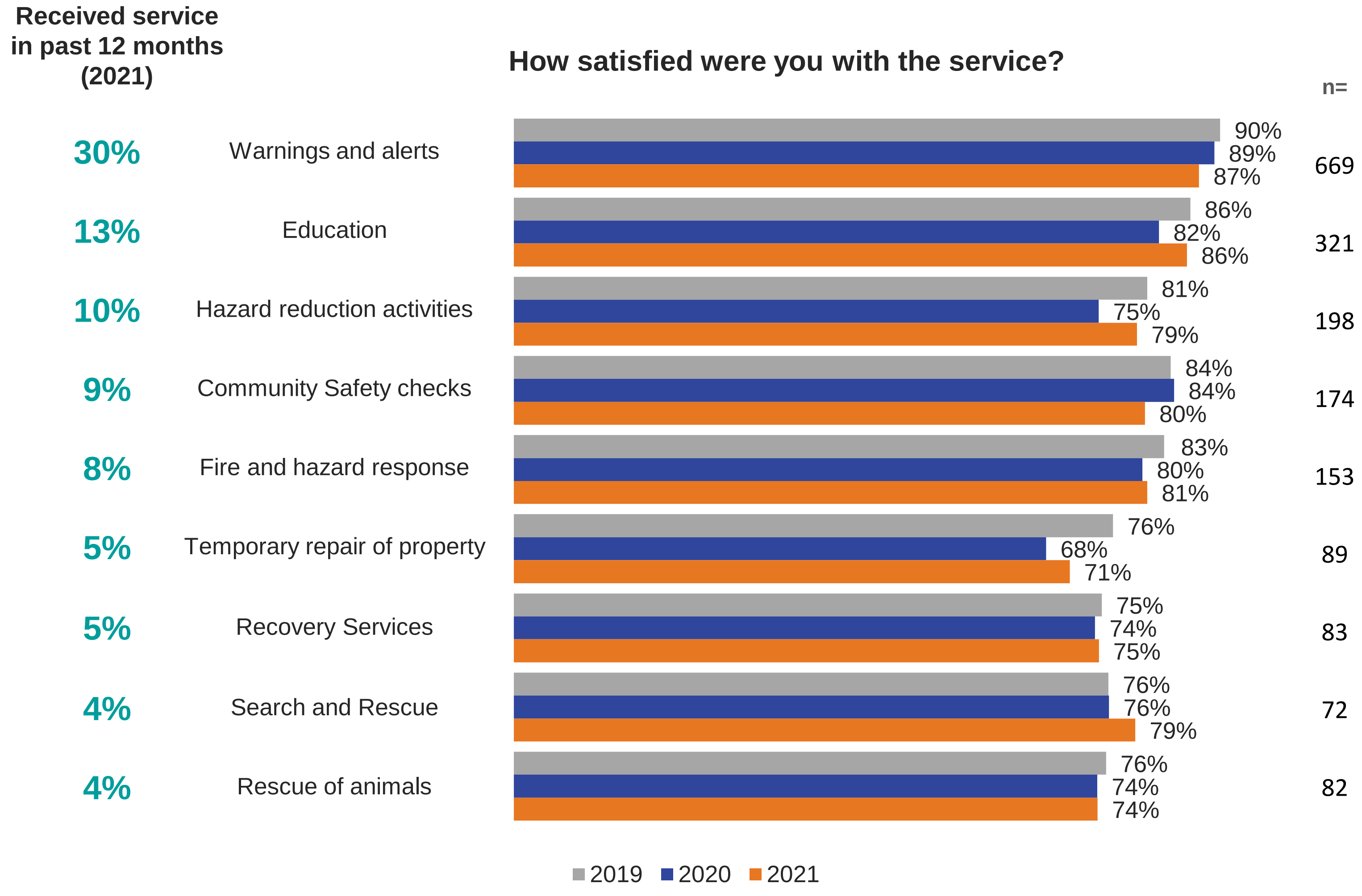
▲▼ Significantly higher/lower than 2019/20 @ 95% CI



*Base: Total sample 2021 n= 2176;  2020 n = 2100; 2019 n=2458.Q8. What is more important to you | Q9 What is more important to you*

# QFES

## Service satisfaction




**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 rescue of animals, and search and rescue tied for the least utilised. Fewer people received community safety checks, search and rescue, and rescue of animals compared to 2019.

Those receiving warnings and alerts were the most satisfied with their service compared to other services.

Northern Queenslanders were more likely to have received warnings and alerts, and education services, those in South West were more likely to have receive education services, and those on the North Coast were less likely to receive education services.

Respondents who had received a QFES service have higher perceived risk levels for emergency and disaster events compared to those who hadn't received a service. Those who receive a service also had a higher preparedness Index compared to those who didn't receive a service.



Base: *Total sample 2021 n=2176; 2020 n = 2100; 2019 n=2458. Q11. Have you received/used a service delivered by QFES in the last year? | Q11B.* (those who responded "Yes" to received service*) How satisfied were you with the X?*

*Based on NET satisfied (Very satisfied + Fairly satisfied)*

# 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**. Thinking of preparing your household for disasters and emergency events, 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 the 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**. In the last year, have you undertaken any of the following emergency or disaster planning?
**Q18**. 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?
**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**. Coronavirus (COVID-19) has affected people from many countries around the world. What has changed for you?
**Q23B**. Has the Coronavirus (COVID-19) affected your business?
**Q24**. Have you moved house within the past 12 months?
**Q24B.** Where have you moved from?
**Q25**. Do you or your family own or rent your home?
**Q26**. To the best of your knowledge, when was your house built?
**Q27**. How would you best describe the type of dwelling you live in?
**Q28**. How many levels does your home have? (if you live in a unit only count the levels of your unit, not the entire building.)
**Q29**. What is the main language other than English that you speak at home?
**Q29B**. What is the main language other than English that you speak at home?
**Q30**. Does anyone in your household have any limitations that would affect response to an emergency or disaster situation?
**Q31**. What is your country of birth?
**Q32**. Do you identify as Aboriginal and/or Torres Strait Islander?
**Q33**. What is the highest level of education you have received?
**Q34**. Which of the following best describes your employment status?
**Q35**. Which of the following best describes your living situation (Include dependant children if in shared care arrangements with another partner)
**Q36**. What is your estimated household income?
**Q37.** Do you have any other questions/comments about the services provided by QFES?

# DEMOGRAPHICS
## General

### Highest level of education

| Level of education | % |
|---|---|
| Year 10 | 15% |
| Year 12 | 19% |
| Trade Qualification | 17% |
| Diploma | 16% |
| Bachelor | 20% |
| Post-graduate | 10% |
| Doctorate | 1% |
| None of the above | 2% |

### Household income

| Household Income | % |
|---|---|
| Less than $50,001 | 33% |
| $50,001 - $100,000 | 31% |
| Over $100,001 | 27% |
| Prefer not to say | 9% |

### Household members' limitations or impairment

| Limitations | % |
|---|---|
| Unable to communicate well in English | 1% |
| Vision impairment | 2% |
| Mobility impairment | 10% |
| Hearing impairment | 7% |
| Mental Health impairment | 6% |
| Cognitive disorder/intellectual disability | 2% |
| Other | 2% |
| Prefer not to say | 2% |
| None of the above | 77% |

### Living Situation

| Living situation | % |
|---|---|
| Live alone | 18% |
| Shared house with friends/housemates | 5% |
| Live with parents/other family members | 6% |
| Live with partner/spouse | 36% |
| Live with partner/spouse and children aged <18 | 22% |
| Live with partner/spouse and children aged >18 | 6% |
| Single parent living with child/children | 6% |
| Other | 1% |

### Employment status

| Employment status | % |
|---|---|
| Employed, working full-time (35+ hrs per week) | 29% |
| Employed, working part-time (<35 hrs per week) | 18% |
| Self-employed | 6% |
| Fly-in Fly-out worker (working away from home regularly, hours per week vary according to roster) | 0% |
| Unemployed, looking for full-time work (35+ hrs per week) | 2% |
| Unemployed, looking for part-time work (<35 hrs per week) | 3% |
| Unemployed, not looking for work | 2% |
| Student | 2% |
| Pension, beneficiary, or welfare recipient | 7% |
| Retired | 24% |
| Look after the house full-time | 6% |
| Other | 1% |
| Prefer not to say | 1% |



Source: Q32 Highest level of education | Q33 Employment Status | Q34 Living Situation | Q29 Household members' limitations or impairment | Q35 Household Income
Base: *Total sample; Unweighted; n =2176*

# DEMOGRAPHICS

## Dwelling details

### Type of dwelling

| Dwelling | % |
|---|---|
| Detached house | 75% |
| Unit/apartment | 14% |
| Semi-detached house | 9% |
| Caravan/Mobile home | 1% |
| Other | 1% |

### Year of house construction

| House construction | % |
|---|---|
| Built from 2017 onwards | 9% |
| 2007-2016 | 19% |
| 1997-2006 | 17% |
| Before 1997 | 45% |
| Don't know | 10% |

### Moved house in the last 12 months

| Moved | % |
|---|---|
| Yes | 19% |
| No | 81% |

### Number of levels in home

| Levels | % |
|---|---|
| 1 | 72% |
| 2 | 24% |
| 3 or more | 4% |

### Home ownership

| Home ownership | % |
|---|---|
| Owner occupied | 64% |
| Rent/shared | 33% |
| Government owns | 2% |
| Other | 2% |

### Relocated from

| Relocated | % |
|---|---|
| Within local area | 61% |
| Elsewhere within Queensland | 27% |
| From interstate | 10% |
| From overseas | 2% |



Source: Q26 Type of dwelling | Q27 Number of levels in home | Q25 Year of house construction | Q24 Home ownership | Q23 Moved house in the last 12 months | Q23B Relocated from
Base: *Total sample; Unweighted; n = 2100* | Q23B Relocated from; *Unweighted; n = 497*

# DEMOGRAPHICS
## Cultural and Linguistics

### Country of birth

| Country of birth | % |
|---|---|
| Australia | 79% |
| United Kingdom | 7% |
| New Zealand | 4% |
| China | 0% |
| India | 1% |
| Philippines | 1% |
| Vietnam | 0% |
| Italy | 0% |
| South Africa | 1% |
| Malaysia | 0% |
| Other | 5% |
| Prefer not to say | 1% |

### Indigenous Status

| Indigenous | % |
|---|---|
| No | 95% |
| Aboriginal | 3% |
| Torres Strait Islander | 0% |
| Both | 0% |
| Prefer not to say | 1% |

### Language other than English at home

| LOTE | % |
|---|---|
| Yes | 12% |
| No | 88% |

### Main language other than English at home

| Main language other than English | % |
|---|---|
| Mandarin | 4% |
| Arabic | 2% |
| Cantonese | 3% |
| Vietnamese | 2% |
| Italian | 5% |
| Greek | 1% |
| Hindi | 4% |
| Spanish | 3% |
| Punjabi | 0% |
| Other | 28% |
| Prefer not to say | 48% |



Source: Q31 Indigenous Status | Q28 Language other than English at home | Q30 Country of birth | Q28B Main language other than English at home
Base: *Total sample; Unweighted; n = 2100* | *Q28B* Main language other than English at home*; Unweighted; n = 298*

# ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

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