QFES COMMUNITY INSIGHTS SURVEY 2019

Final Report

Ipsos

31 October, 2019

GAME CHANGERS

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

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 2019 this survey undertook primary research with 2,458 Queenslanders across seven regions of Queensland, asking 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 and Heatwaves are perceived as the highest risk events and were events that people feel the most prepared for. Earthquakes and Terrorism are considered the least likely, and amongst those who do consider terrorism likely, it is also considered the event people are least prepared for. Northern regions feel significantly more at risk from Cyclones compared to southern regions, and Central, North Coast, and South West Queenslanders perceive a higher risk from Bushfires. Far Northern, Northern, and Central Queenslanders perceive a greater risk from all events in general and feel more prepared for them.

Eight percent of respondents had experienced a local emergency or disaster event in the past year, and over two thirds of these people felt prepared for these events (71%), although 17% felt unprepared. While over half of the respondents who had experienced an event (55%) felt that this experience will improve their preparedness, just under half (45%) indicate that their preparedness for events hasn't changed.

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 97% 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, up from 16% in 2018, and 51% of those who don't are likely to install them in the next 12 months.

Only 73% of Queenslanders have home and/or contents insurance, although 93% of those living in owner-occupied homes are insured, compared to 46% of renters. Older Queenslanders are more likely to have insurance (87%), whereas those who have moved to Queensland within the last year are less likely to have insurance (54%).

The majority of Queenslanders do not have fire plans for their household (55% compared to 35% who do) or an evacuation plan (49% compared to 42% who do). Older Queenslanders have generally completed more property changes to reduce the impact of emergency and disaster events, while those in Brisbane and the South East have generally completed fewer preparedness activities compared to other regions.

EXECUTIVE SUMMARY CONT.

Business owners

Ten percent of respondents were business owners, with most of these owning businesses that matched their home postcode (85%). Only 47% had business insurance, with just 23% having a business continuity plan and 43% undertaking hazard impact mitigation activities.

Perceptions and expectations of QFES

Most Queenslanders consider themselves responsible for preparing their household for emergency and disaster events, with QFES considered the 2nd most responsible. Fire and hazard response is considered the most important service, followed closely by Warnings and alerts. Overall Queenslanders are unsure about which services are provided in their local area, with less awareness in Brisbane, South East, and South West regions.

Queenslanders prefer that QFES be available to respond to events (63%) as compared to providing individuals the skills to improve self-reliance (37%), although more younger Queenslanders are interested in being taught self-reliance (44%). When looking at allocation of resources, Queenslanders would like to move towards a more flexible service (65%) compared to a permanent presence in their local community (35%), although this is reversed in Central Queensland (54% preferring a permanent presence).

In 2018-19, 38% of respondents received a service from QFES, and satisfaction was very high. Experience with a QFES service also increased perceive risk and preparedness, as well as actual preparedness.

The Community Insights Survey included a sample of 2,458 Queenslanders aged 18 years and older who completed a 15 minute online survey between 27th August and 29th September 2019. Several major Queensland fire events occurred in September 2019. A third of the sample was collected before these fire events started occurring (before 8/9/19: n=813), with the remainder collected after (after 8/9/19: n=1,645). Throughout the report where significant differences occur between pre-post fire samples, it has been noted.

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 2018-19, QFES had 3338 FTE and approx. 38,500 volunteers, and responded to approx. 201 incidents *a day**.

The CRC report** found that the total economic cost 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 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 undertake primary research with Queensland households to **measure the level of risk perceptions and preparedness and practices for fire and emergency events.** Specifically the campaign objectives included:

- 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
- Continue to measure indicators related to smoke alarm installation from the 2018 QFES Community Insights Survey

* 2018-19 QFES Annual Report
** National research priorities for natural hazards emergency management, May 2019

RESEARCH APPROACH AND SAMPLING

RESEARCH APPROACH

- Online survey of Queenslanders aged 18+.
- The 15 minute survey was conducted between 27th August and 29th September 2019.
- Several major Queensland fire events occurred in September 2019. A third of the sample was collected before these fire events started occurring (before 8/9/19: n=813), with the remainder collected after (after 8/9/19: n=1,645).

SAMPLE

- In order to provide a representative and robust a picture of the level of household preparedness and practices for emergency and disaster events, the sample was be drawn from the seven QFES regions:
  - Brisbane
  - South Eastern
  - South Western
  - North Coast
  - Central
  - Northern
  - Far Northern
- Total sample size n=2,458

ANALYSIS

- Sample was weighted to reflect the Queensland population proportions in terms of region, age and gender.
- Significance differences between results are conducted at 95% confidence level between the indicated groups on each chart. They are indicated by the following symbols:
  ▲ significantly higher @ 95% CI
  ▼ significantly lower @ 95% CI

DEMOGRAPHICS

The 2019 QFES Community Insights Survey respondents were 2,458 Queenslanders. Of these, significantly more were female (59%) and aged 25-34 (21%) and 35-44 (19%). Seven regions across Queensland were sampled, with the final sample including significantly more respondents from Brisbane (20%) compared to other regions. The majority of respondents lived in homes that were owner occupied (56%) and detached houses (73%). While two-thirds of the sample was collected after the Queensland 2019 September fire events began occurring, they did not appear to significantly affect the findings throughout this report.

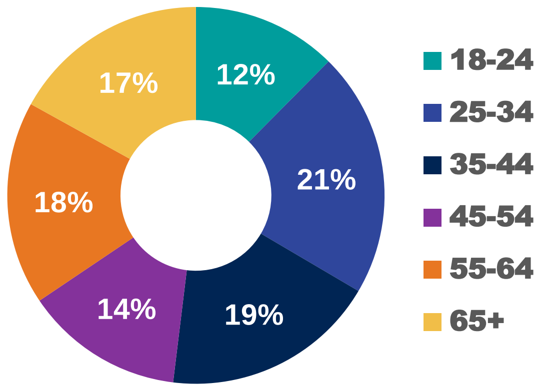
Gender

Male 41%

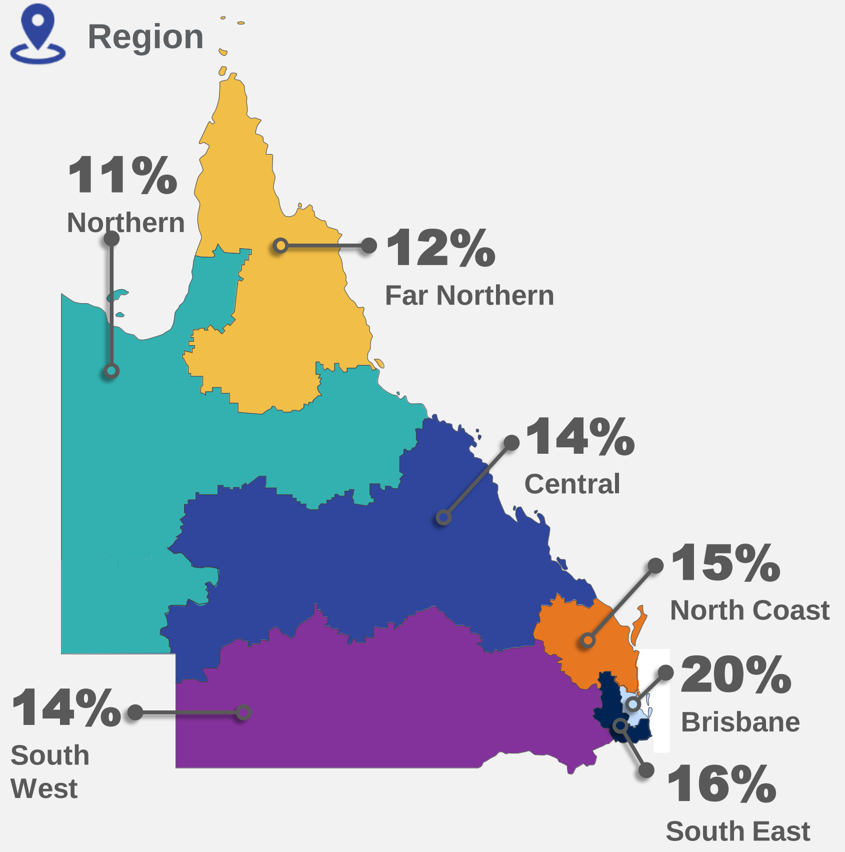
Female 59%

Gender Diverse <1%

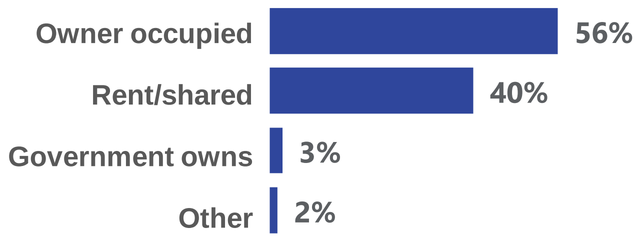
Age



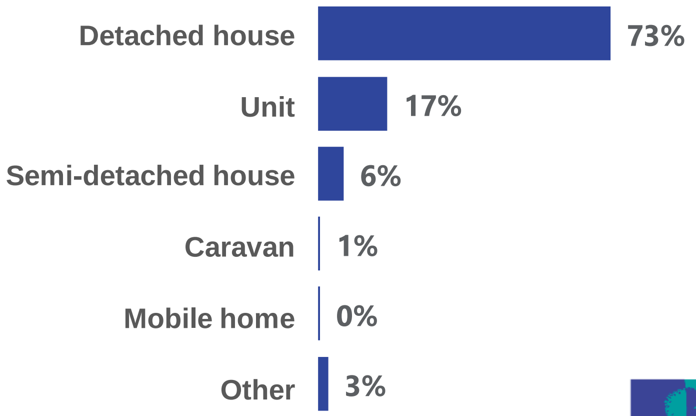
Region



Home ownership



Type of dwelling



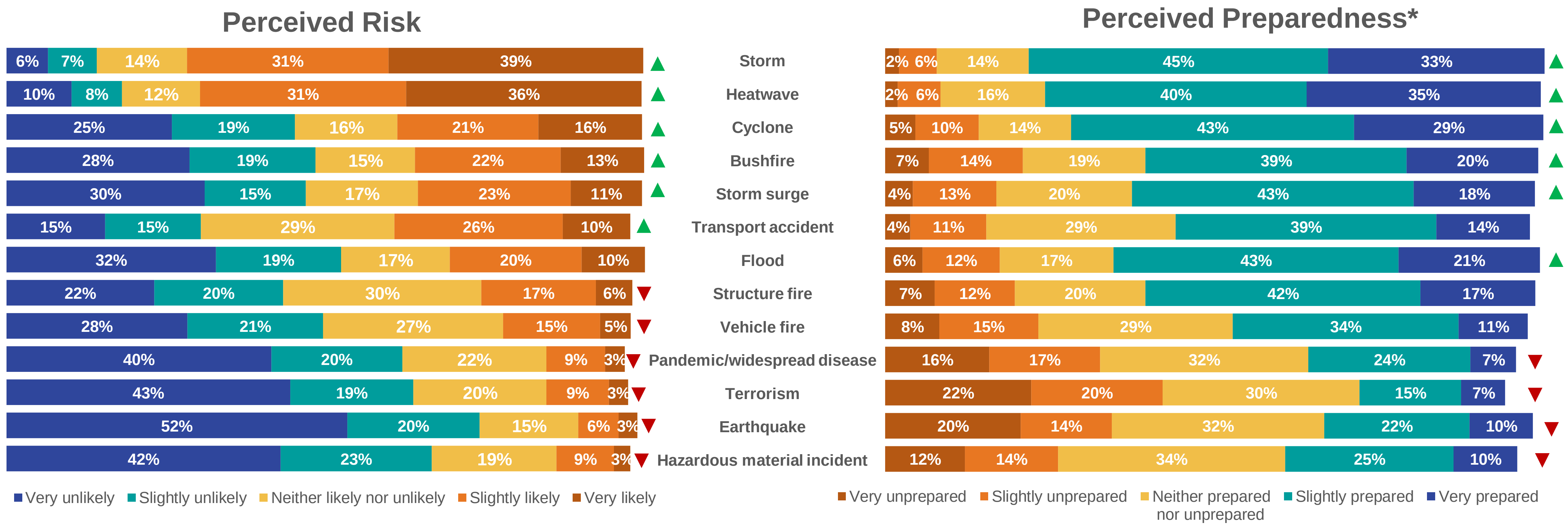
Source: SQ1 Age I SQ2 Gender | SQ5 Region | Q24 Home ownership | Q26 Type of dwelling. Base: *Total sample; Unweighted; n = 2458*

COMMUNITY PERCEPTIONS

PERCEPTION OF RISK & PREPAREDNESS

Overall, Queenslanders perceive storms and heatwaves as the most likely forms of emergency or disaster events. Respondents felt most prepared for storms, heatwaves and cyclones (all >75% prepared),followed by floods (65% prepared). Terrorism (22% prepared) and earthquakes (31% prepared) are the least prepared for events, though few see them as likely. When asked about their perceptions of risk, some "other" event responses included tsunami, water shortage, drought, hailstorm, power outage and human events (such as riots, home invasions and accidental injury).

The 2018-19 QFES Annual Report[1] indicated that there were four times as many landscape fires (10,154) compared to structure fires (2,607), which matches with perceived risk for Bushfires (35% likely) being higher than structure fires (23%). People feel less prepared for bushfires compared to the other high risk events such as storms and cyclones. However, Queenslanders are likely underestimating their risk of transport accidents (36%), with QFES responding to 14,331 Mobile Property Crashes in 2018-19.



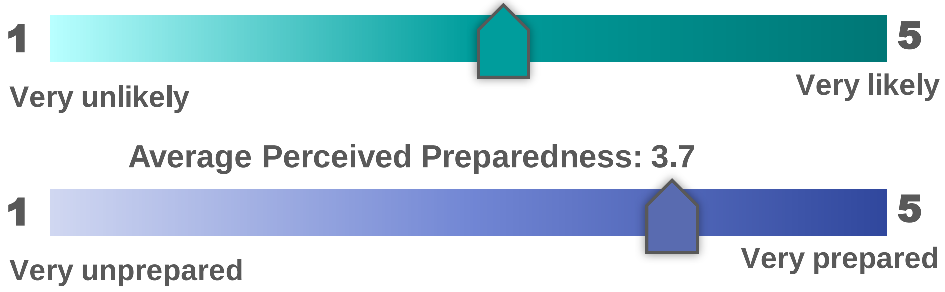
*of those who responded "Slightly likely/Very likely" to event for perceived risk

[1] 2018-19 QFES Annual Report

Source: Q1. Perceived Risk | Q2. Perceived Preparedness. Base: *Total sample; Weight_CELL; base n = 2458* | *Q2 n = from 29 to 178. "Don't know" responses not shown.*
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI - "Very likely/prepared" & "Likely/Prepared" compared to event average

RISK & PREPAREDNESS

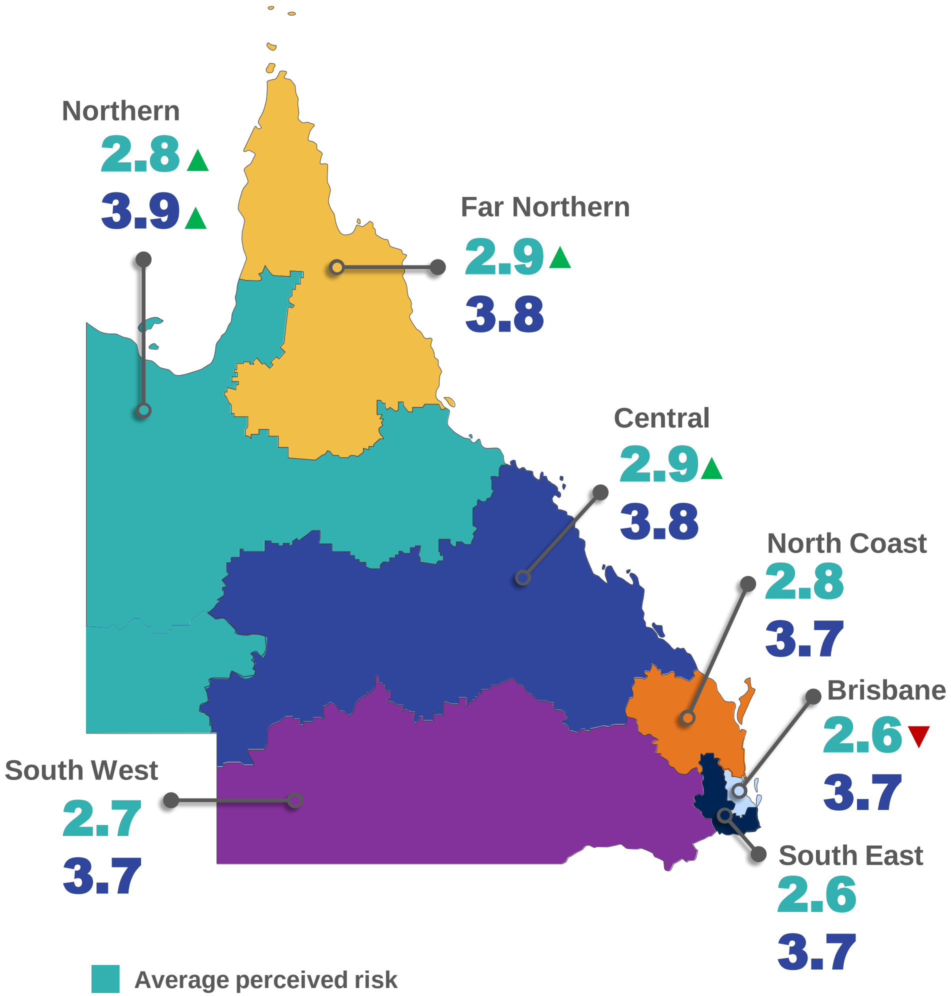
By region



Far North and Central Queensland generally perceive emergency or disaster events as significantly more likely than the Brisbane, South East and South West regions. The Northern region also perceives risks significantly higher than Brisbane and the South East area. The North Coast region perceives risks significantly higher when compared with Brisbane as well.

Generally, the regions don't have major differences in preparedness for the events they perceive as likely. Northern Queenslanders are the only group to have significantly high perceptions of preparedness but this is only in comparison to the South East region. The North coast feels the least prepared for terrorism**.**

Brisbane perceive less risk from most events on average, but are reasonably well prepared for most events. Central, Northern and Far Norther Queensland tend to perceive more risk from many events including Flood and Cyclones, and are more prepared than other regions for Cyclones in particular. The South East is least prepared for Structure fires, and North Coast is least prepared for Terrorism.



Average perceived risk

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

Source: Q1. Perceived Risk | Q2. Perceived Preparedness | SQ5b. Region. Base: *Total sample; Weight_CELL; base n = 2458* | *Q2 n = from 29 to 1748*

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI - compared to event average

RISK & PREPAREDNESS

Top 3 events by region

Event & Region Breakdown

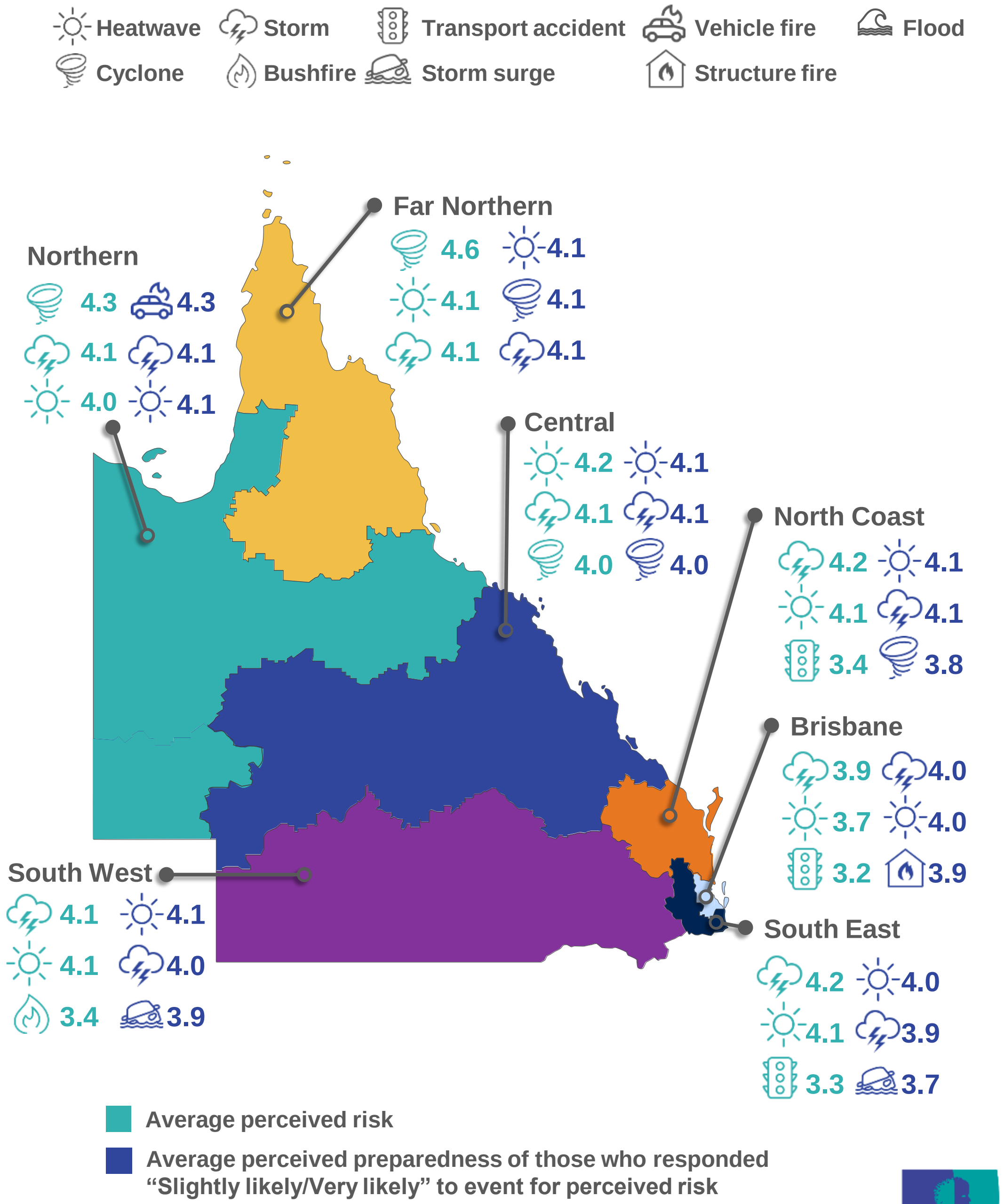
Storms and heatwaves made it to the top 3 events in all regions for both perceived risk and perceived preparedness. Heatwave risk perceptions are significantly higher in Central, Far North, North Coast, South West, South East when compared to Brisbane, with no significant differences in preparedness.

Central, Far North, North Coast and Northern regions feel significantly more at risk of cyclones than the remaining regions. Far North and Northern regions feel significantly more prepared than those that felt at risk of cyclones in the North Coast, South West, South East and Brisbane regions. Central Queensland also feels more prepared than Brisbane.

While there is no significant difference between the regions score for traffic accident risk, this event has made the top three list for Brisbane, South East and North Coast.

Bushfires only appear once in the top three lists (South West) – however Central, North Coast and South West regions had significantly higher perception of bushfire risk than the rest of the state, with no significant differences in preparedness.

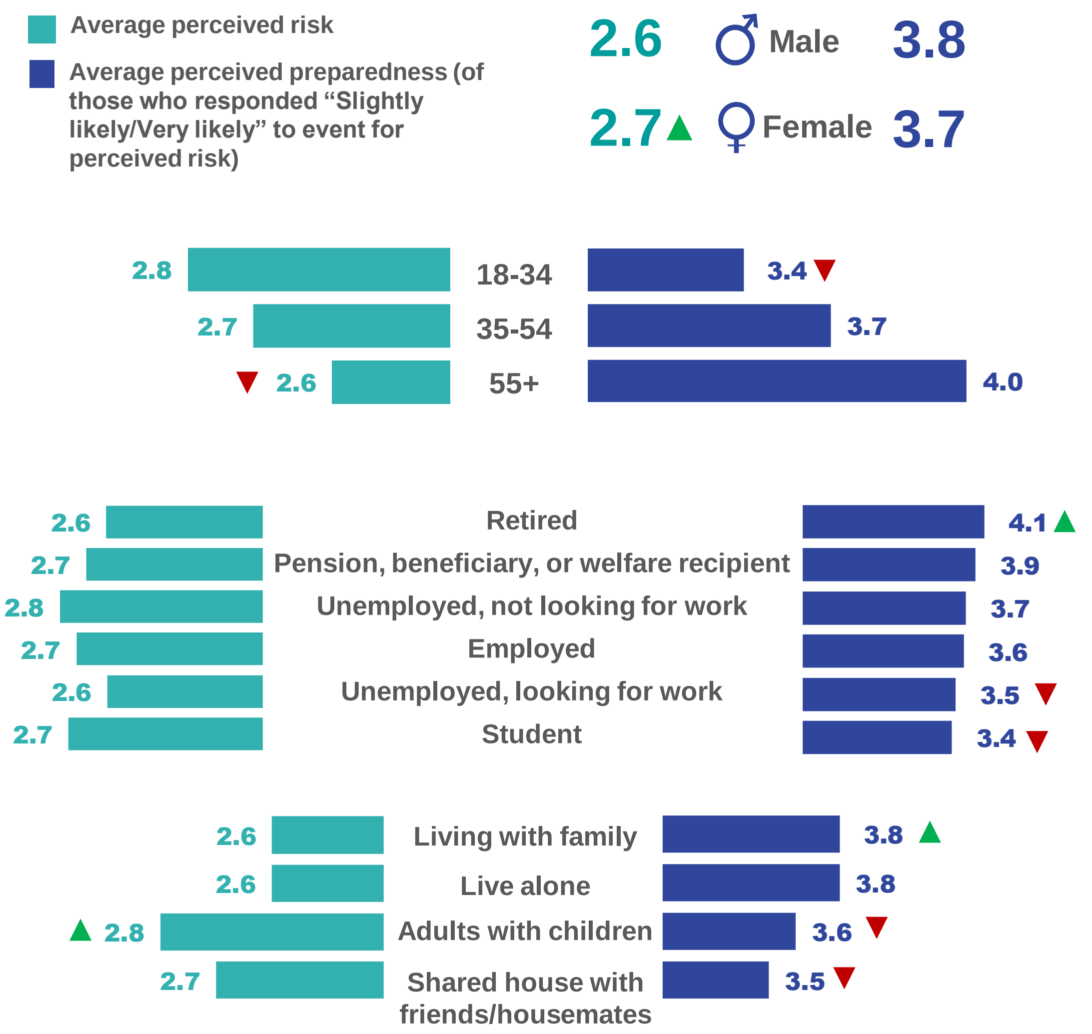
Not making the top three, flood risk is still viewed significantly higher in Central, Far North and Northern regions compared to the rest of Queensland. North Coast region feels significantly more at risk of floods than Brisbane, with no significant differences in preparedness.



Source: Q1. Perceived Risk | Q2. Perceived Preparedness | SQ5b. Region. Base: *Total sample; Weight_CELL; base n = 2458* | *Q2 n = from 29 to 1748*

RISK & PREPAREDNESS

Demographics



Gender

Overall, women have significantly higher perceptions of risk compared to men, with significantly higher perceptions of risk for 9 out of 13 of emergency or disaster events. However, men feel slightly more prepared than women, but this is not significant.

Age

Queenslanders have significant lower perceptions of risks and feel significantly more prepared for emergency or disaster events as they get older. Older Queenslanders (55+) have significantly lower risk perceptions for storm surges, bushfires and floods, while having significantly higher perceptions of risk for cyclones than 18-34 and 35-54 respondents. Older Queenslanders (55+) feel significantly more prepared for heatwaves, storms, cyclones, bushfires and structure fires than younger respondents.

Employment status

Queenslanders who are retired have significantly higher perceptions of preparedness compared to average, with Students and Unemployed looking for work respondents felt significantly less prepared. No differences in risk perception.

Living Situation

Adults with children feel significantly more at risk and significantly less prepared than those living with their family or living alone.

Other

CALD respondents (3.6) felt significantly less prepared than non-CALD respondents (3.8). Those who had moved within the last year (3.5) also felt less prepared than those who hadn’t (3.8), with no difference by where people had moved from.

Respondents who completed the survey before the fire events (before 8/9/19) perceived a significantly greater risk for storms (4.2 vs. 4.0) and felt significantly more prepared for heatwaves (4.2 vs. 4.0) compared to after the fire event.

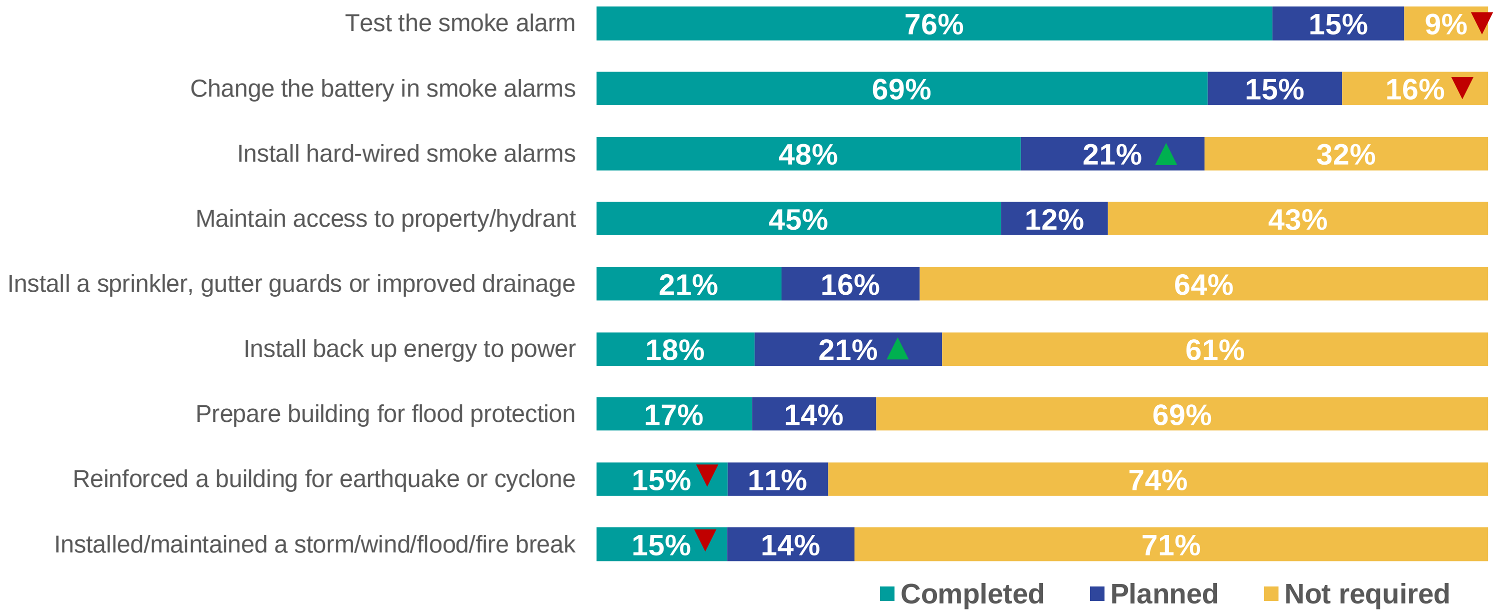
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other categories

Source: Q1. Perceived Risk | Q2. Perceived Preparedness | SQ1 Age I SQ2 Gender | Q33. Employment Status | Q35. Living Situation. Base: *Total sample; Weight_CELL; base n = 2458* | *Q2 n = from 29 to 1748*

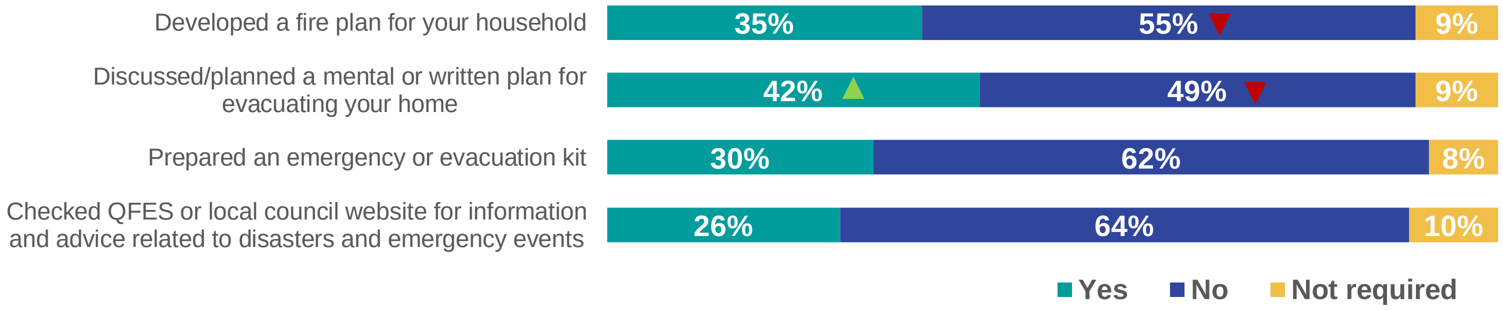
PREPAREDNESS BEHAVIOUR

Actions taken

Property changes to reduce impact of local emergencies or disaster events



Research and planning for local emergencies or disaster events



When looking at actual behaviours Queenslanders undertake to prepare their homes and families, the most common actions are testing and maintaining smoke alarms.

In many instances respondents considered property changes not required. Significantly more respondents had Completed tasks than Planned in all instances except for Installing back-up energy, where significantly more had it Planned, and Maintaining storm/wind//flood/fire breaks, which were even.

For research and planning activities, significantly fewer respondents had done the activities than not, with discussing an evacuation plan being the most likely activity people engaged in compared to others.

The CRC Report* indicated that investment in physical and community resilience measures significantly lessen the increase in costs of natural disasters, and the findings from this 2019 Community Insights survey indicates plenty of room for targeting events to improve the preparedness of Queenslanders.

Of those who selected "other", some stated that they completed practice emergency evacuation drills, yard clearing and kept materials at their home such as sand bags in case of emergency.

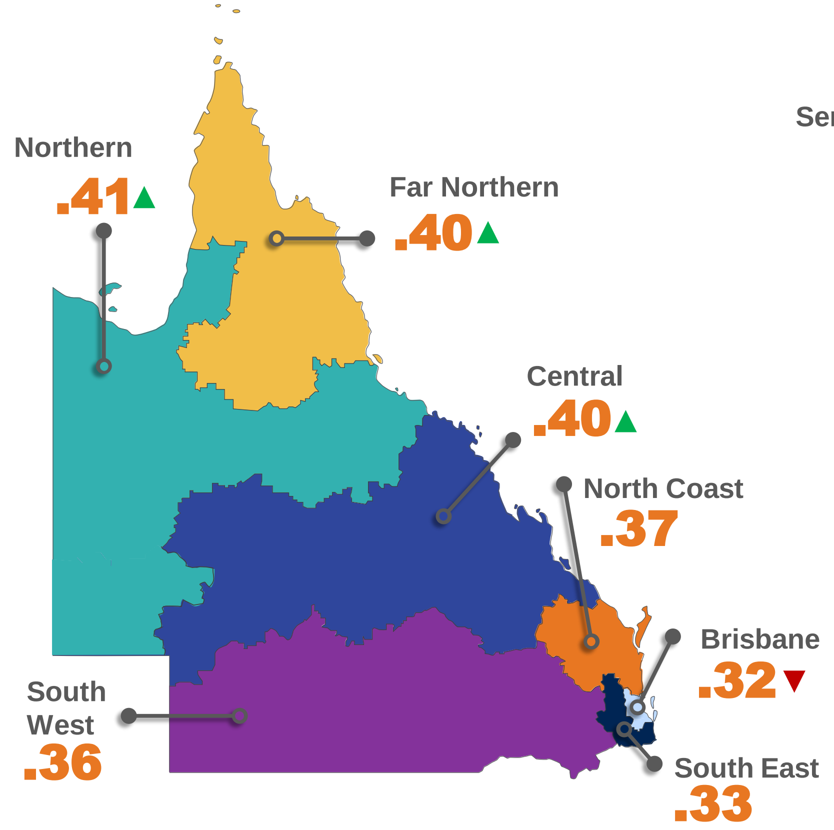
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other activities

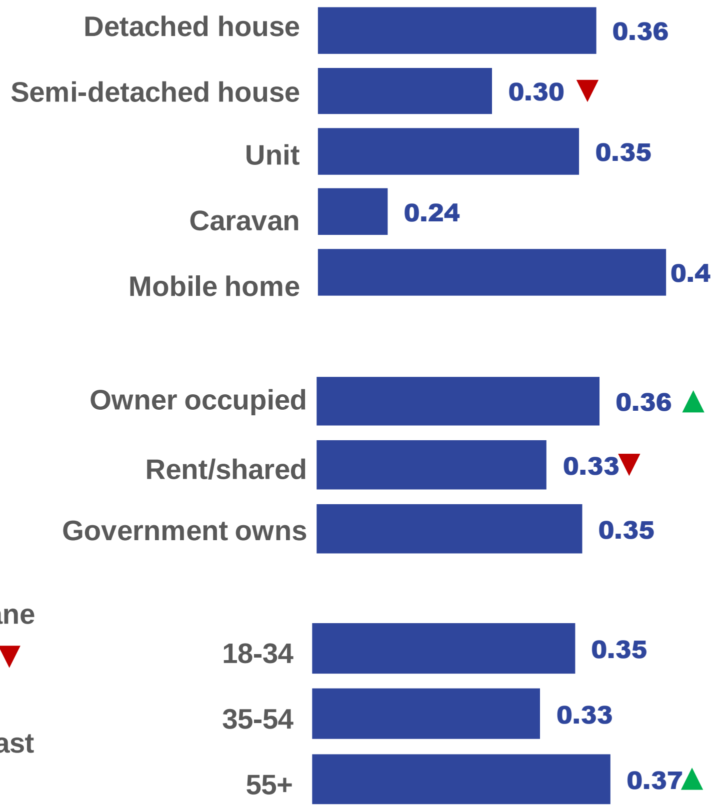
** National research priorities for natural hazards emergency management, May 2019

Source: 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. Base: *Total sample; Weight_CELL; base n = 2458*

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, divided by the total number of activities, resulting in a value between 0 (unprepared) and 1 (prepared).





Region

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

Age

Older Queenslanders have completed significantly more activities to prepare their household.

Type of dwelling

Those who own their own home had completed significantly more activities to prepare to events than renters.

Owner or renter

Those living in semi-detached houses and Caravans had completed fewer activities to prepare, although only the former was significant.

Other

There was no difference in the Preparedness Index between genders, those with or without family with limitations, or those living with or without children. In many instances, it's likely that some activities aren't required, resulting in a lower preparedness index.

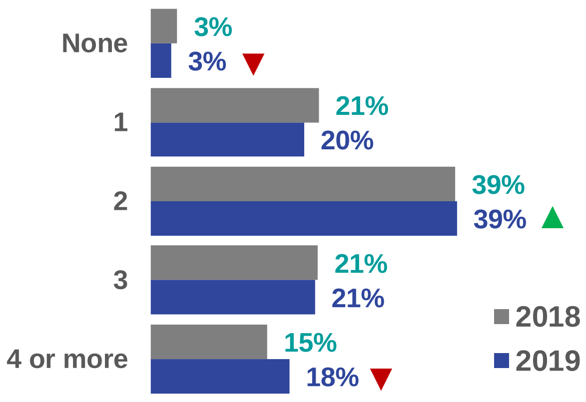
Respondents who completed the survey before the fire events had a significantly higher preparedness index (.37) compared to those who completed the survey after 8/9/19 (.34).

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to average of categories

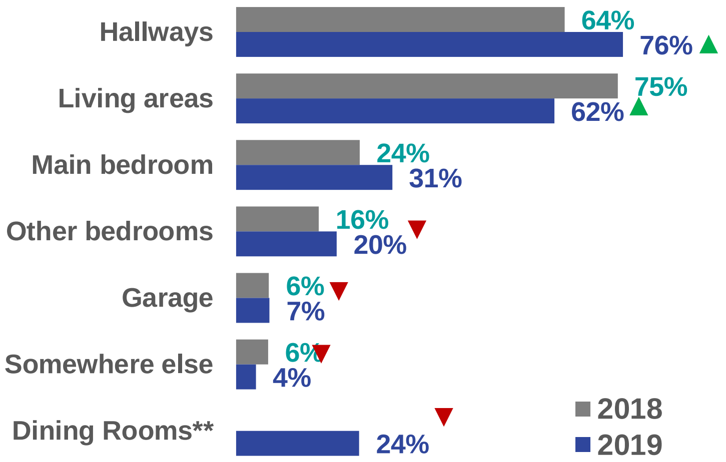
Source: Q17. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event | Q18. In the last year, have you undertaken any of the following .activities. Base: *Total sample; Weight_CELL; base n = 2458*

SMOKE ALARMS

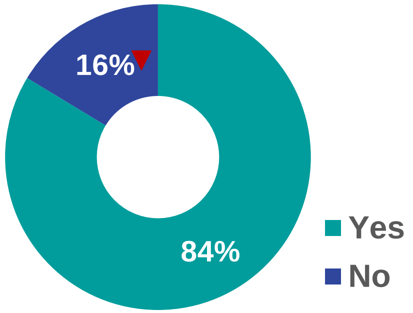
Number of smoke alarms installed



Smoke alarm location

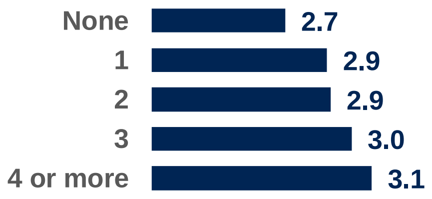


Households with operational smoke alarms*



Average perceived preparedness for structure fire

Number of smoke alarms



Operational smoke alarms

Not operational
3.1

Operational
2.9

Source: 2019: Q20. Number of smoke alarms | Q20B Smoke alarm location | Q17. Preparedness Behaviours | 2018: Q6 Number of smoke alarms installed | Q7 Smoke alarm location | Q2. Perceived Preparedness (Structural fire). Base: *Total sample 2019; Weight_CELL; n = 2458* | Q2 Perceived Preparedness (Structure fire) n= 592 | *Q20B n = 2392. 2018; weighted; base n=2257* | *Q7 Smoke alarm location n=2181*

Average number of smoke alarms **2.4**

Most Queenslanders (97%) have one or more smoke alarms and of those 84% are operational*. The most common number of smoke alarms to have in the home is two. While there are slightly more non-operational smoke alarms for people who have moved in the last 12 months this is not significant.

Those aged 55+ are significantly more likely to only have one smoke alarm than the two younger age brackets. While 35-54 year-olds are significantly more likely to have two smoke alarms than the other two age groups. There are no major differences between 2019 and 2018 data on number of smoke alarms or their location.

When looking at residents' average perceived risk of structure fires, scores do increase with higher numbers of smoke alarms installed. However this is not by significant amounts. There is no significant difference between perceptions of structure fires risk for operational and non-operational smoke alarm households.

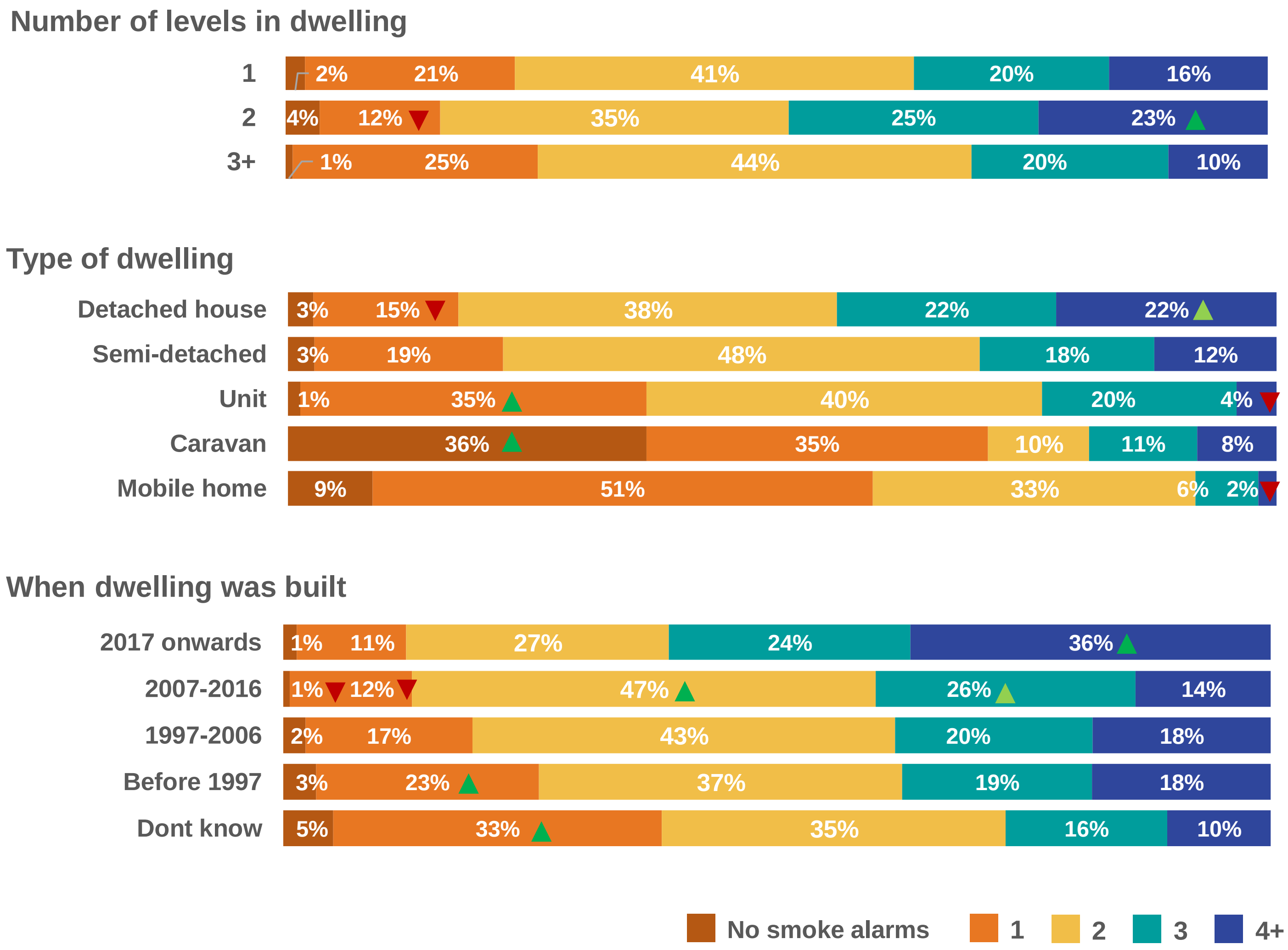
The kitchen was a common location stated from those that selected "other" for smoke alarm location. Respondents who completed the survey before the fire events were less likely to have 3 smoke alarms (18%) compared to after 8/9/19 (23%).

*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 @ 95% CI; ▼ significantly lower @ 95% CI – compared to average of other categories

SMOKE ALARMS

Dwelling demographics by smoke alarms



Regardless of the number of levels in a home, two smoke alarms are the most common. Houses with two floors are significantly less likely to have one smoke alarm and significantly more likely to have four or more than one level and three plus level houses.

As expected, detached and semi-detached houses are significantly more likely to have 4 or more smoke alarms and significantly less likely to have only one smoke alarm compared to units. The same can be seen for detached houses compared to mobile homes.

Caravans are significantly more likely to have no smoke alarms than detached houses, semi-detached houses and units.

Homes built from 2017 onwards are significantly more likely to have four or more smoke alarms than those built before 2017 following the legislation changes, with a general trend of newer houses having more smoke alarms.

Homes built before 1997 are significantly more likely to only have one or no smoke alarms compared to those built from 2007 onwards. Homes built between 1997-2006 and 2007-2016 are significantly more likely to have two smoke alarms than homes built from 2017 onwards.

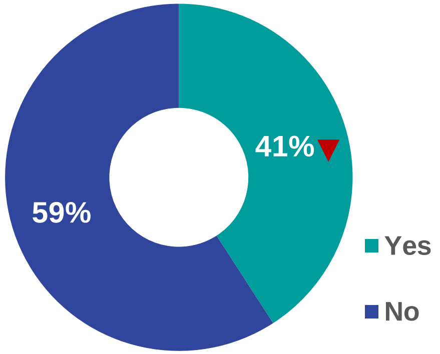
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to average of other categories

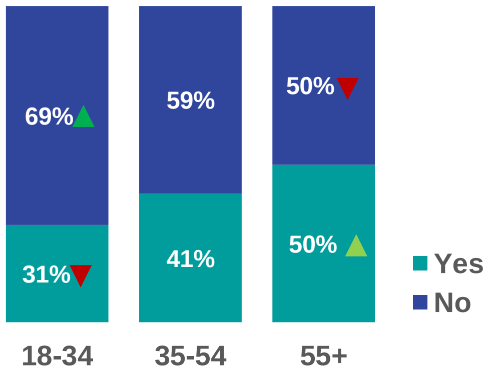
Source: Q20. Number of smoke alarms | Q25. When house was built | Q26. Type of house | Q27. Number of levels in house. Base: *Total sample; Weight_CELL; base n = 2458*

SMOKE ALARMS

Interconnected

Awareness of new legislation





Installation of Interconnected Smoke Alarms (ISA)

20%

Already have Interconnected Smoke Alarms

Source: Q21. Awareness of new Interconnected Smoke Alarm legislation | Q22. Likeliness to install Interconnected Smoke Alarm over the next 12 months. 2018: Q6 Number of smoke alarms installed | Q7 Smoke alarm location. Base: *Total sample; Weight_CELL; base n = 2458* | Q22. Likeliness to install Interconnected Smoke Alarm over the next 12 months n=1,979

Over a third of Queenslanders have heard of interconnected smoke alarms with awareness of the new legislation significantly increasing with age.

Following this, retirees (54%) and those on a pension, beneficiary or welfare (49%) are more aware than most other employment statuses. Queenslanders living in a shared house (25%) are significantly less likely to have heard of the legislation than other living situations. Awareness is however not significantly different across gender or location.

Queenslanders who have received a QFES service in the last 12 months are slightly more aware of the new legislation than those who haven't but there is not a significant difference. Those who are aware of the legislation feel significantly more prepared (but no more at risk) than those who aren't aware. They are also more likely to have operational smoke alarms than those unaware of the new legislation.

One fifth of Queenslanders already have interconnected smoke alarms, which is up from 16% in 2018. Of those who don't, just over half are likely to install them in the next 12 months.

Men (55%) were significantly more likely to say they would install ISAs in the next 12 months compared to women (47%). Younger respondents (18-34) were significantly more likely to indicate they would install ISAs in the next 12 months compared to respondents aged 35+. ISA installation does not differ across regions.

Those who have received a QFES service in the last 12 months (57%) 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 but show no difference in already having them installed. Those with them installed also don't feel any more prepared than those who don't.

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to average of other categories

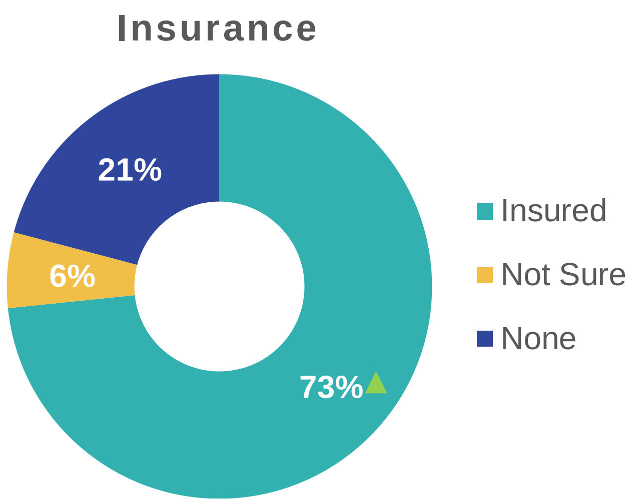
INSURANCE BEHAVIOURS

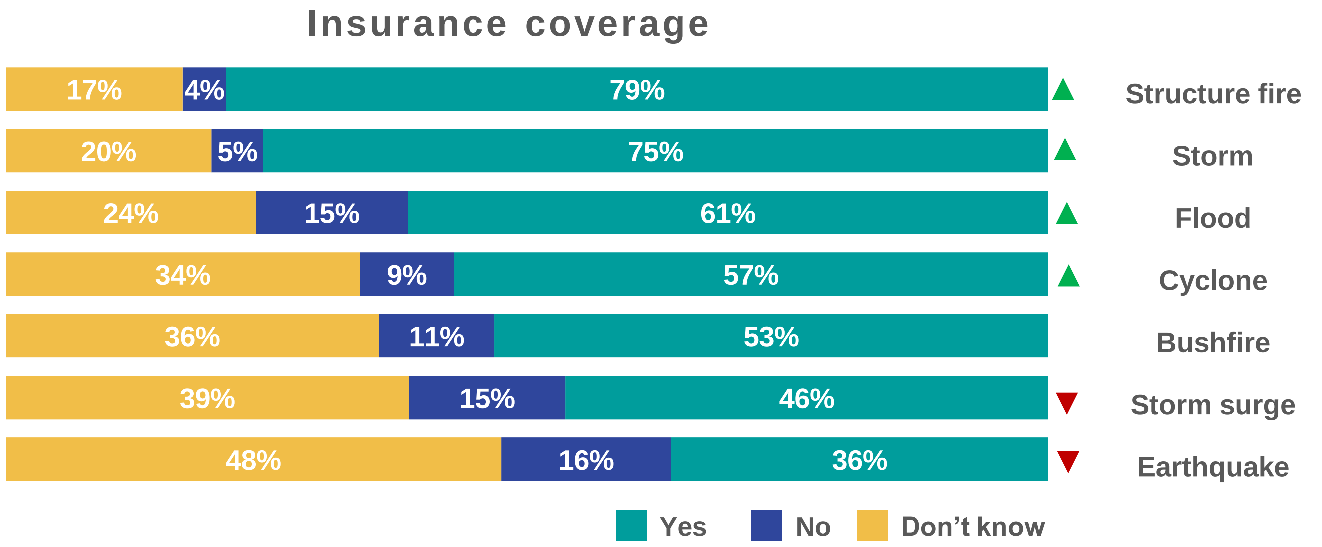
Home Insurance

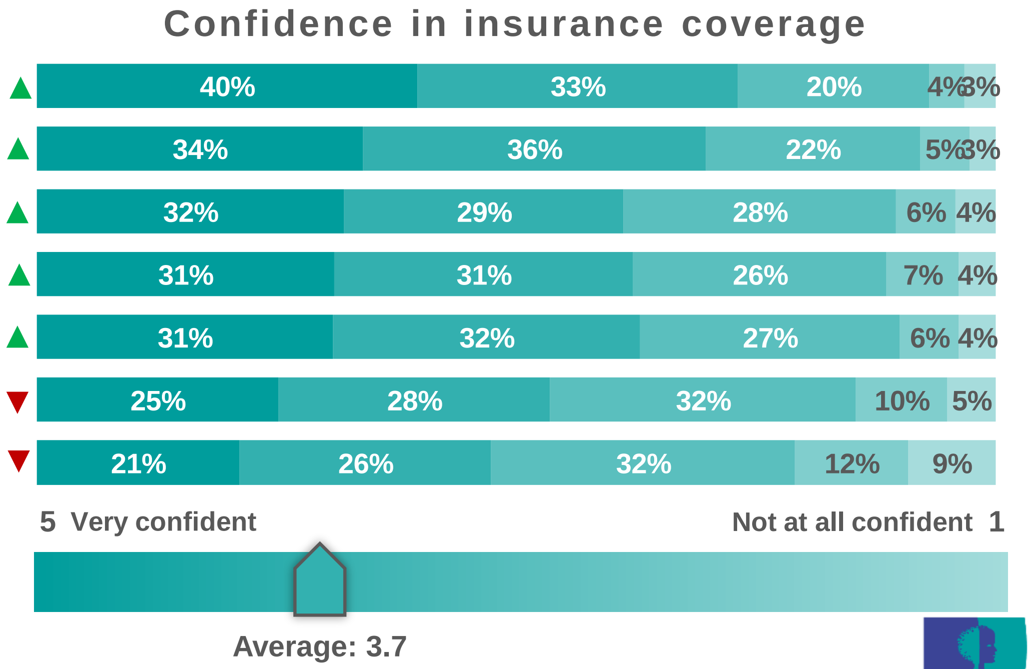
Three quarters of respondents have home and/or contents insurance, with 6% of respondents unsure if they have insurance. However, 93% of respondents in owner occupied homes have insurance, significantly more compared to Renters (46%). Of those that selected "other" type of insurance, they stated car, liability, health and personal/life insurance.

Of those who do have insurance, on average Queenslanders are confident their insurance covers emergency and disaster events (3.7/5). Looking at specific events, the majority of people know that their insurance covers Structure fires and Storms, and also Floods and Cyclones, although Floods are less likely to be covered. Overall people are confident in their insurance. However, many people are unsure if their insurance covers Storm surges and Earthquakes.

Respondents who completed the survey after the fire events (after 8/9/19) were significantly more likely to say they had no insurance coverage for structure fires (5%), bushfires (14%) and storms (6%) compared to those who completed the survey before 8/9/19 (2%, 7% and 3% respectively).





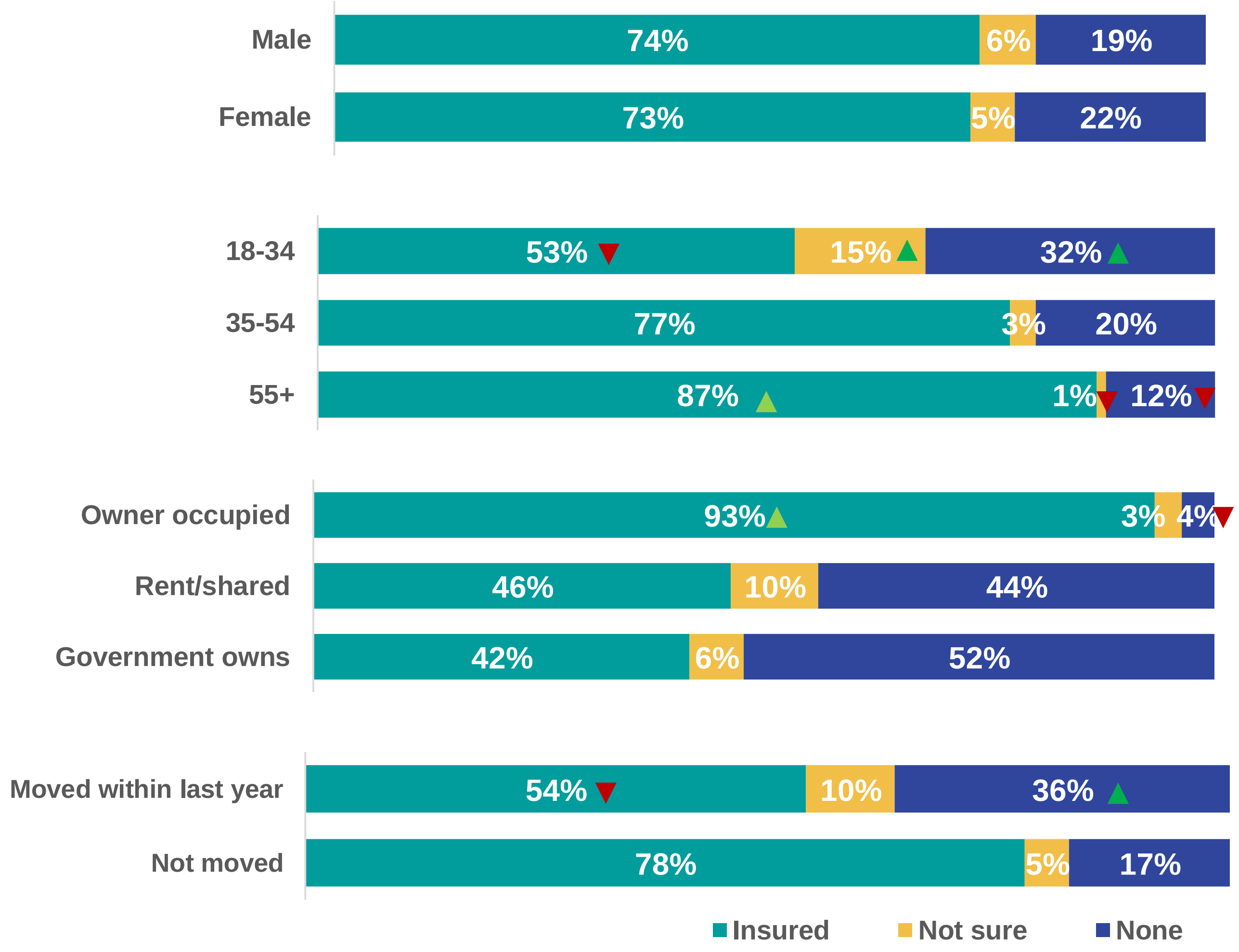


Source: Q12 Type of insurance for home | Q13 Type of events insurance covers | Q13B Confidence in insurance coverage.
Base: *Total sample; Weight_CELL; base n = 2458 | Q20B n = 2392 | Q13 n = from 33 to 1757 | Q13Bn = from 27 to 1691*

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to average of events (For confidence, combining top two boxes).

INSURANCE BEHAVIOURS

Demographics



Gender

There were no significant differences between genders for insurance coverage, although males were more confident that their insurance covered Cyclones, Bushfires and Earthquakes.

Age

Younger respondents were significantly less likely to have insurance, and significantly more likely to be unsure about whether they had insurance. This was the same for confidence, with older respondents significantly more confident in their insurance cover across the board.

Owner or renter

Almost all Queenslanders who own their homes have home and/or contents insurance, and were more confident than Renters that their insurance covers Structural fires, Storms, Cyclones and Bushfires.

Moved house within the last year

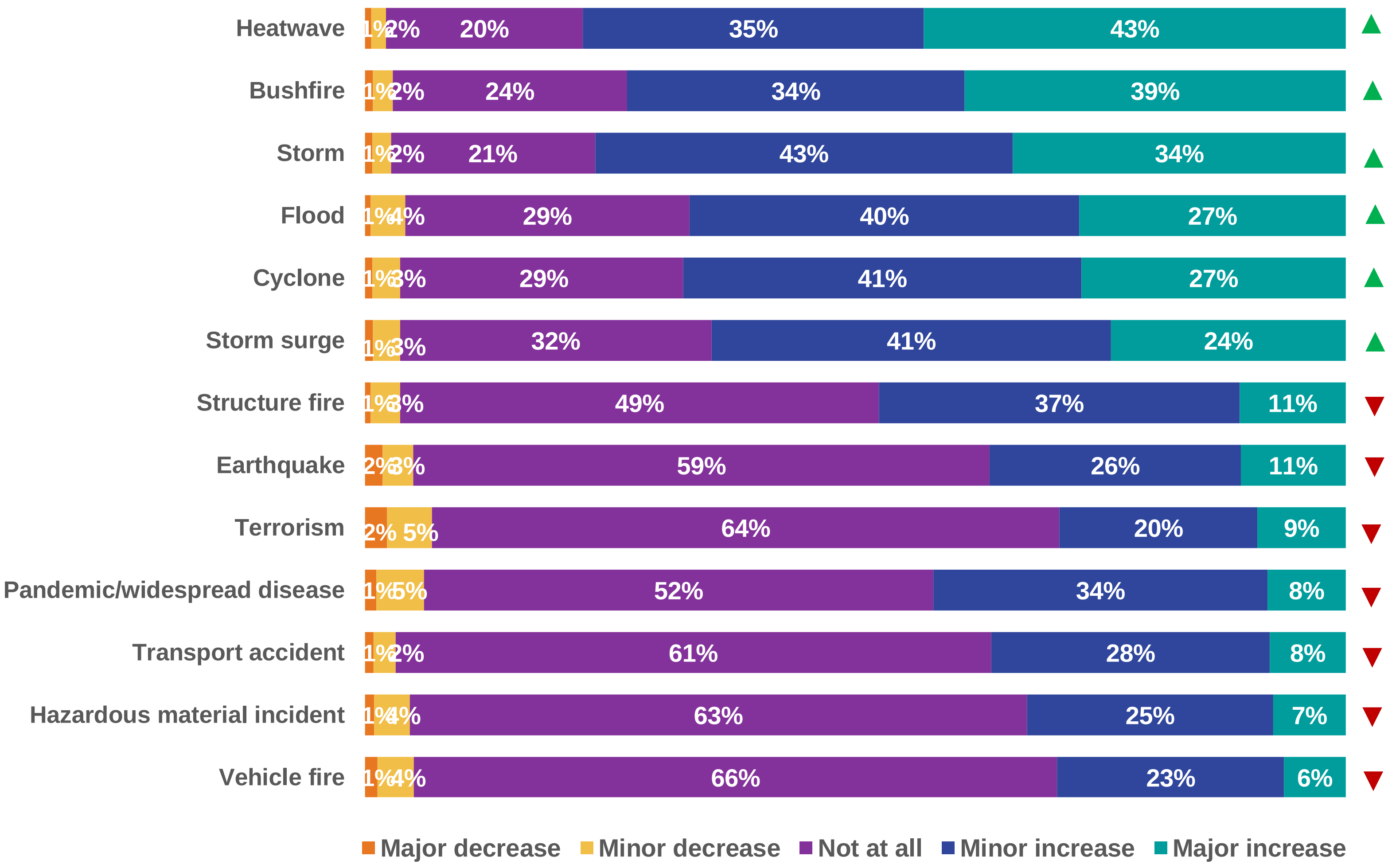
Respondents who had moved recently were significantly less likely to have home insurance, and although not significantly, those who had moved from overseas were more Unsure about their insurance (28% compared to 9% within Australia).

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other categories

Source: Q20. Number of smoke alarms | Q25. When house was built | Q26. Type of house | Q27. Number of levels in house. Base: *Total sample; Weight_CELL; base n = 2458*

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?



More than half of respondents believe that climate change will increase the impact of Heatwaves, Bushfires, Storms, Floods, Cyclones, and Storm surges, and these findings are in line with those seen in 2018.

These perceptions match the data*, which shows that the summer of 2018-19 was the hottest on record for Australia, with extreme heatwaves and bushfires across Queensland.

By region, respondents from the Northern, Far Northern, North Coast, and Central regions believe climate change will increase the impact of Cyclones, significantly more than other regions. North Coast respondents feel there will be an increased effect of Bushfires, significantly more so than respondents from Brisbane.

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.

Respondents who completed the survey before the fire events (before 8/9/19) were significantly more likely to say heatwave would be impacted by climate change (81% vs. 76% after 8/9/19).

* 2018-19 QFES Annual Report

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other categories (top two box)

Source: Q10. Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following.
Base: *Total sample; Weight_CELL; base n = 2458*

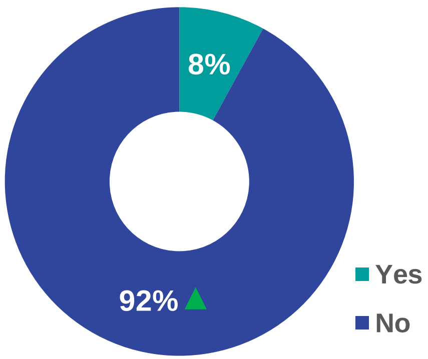
EXPERIENCE OF A LOCAL EVENT

Change in preparedness

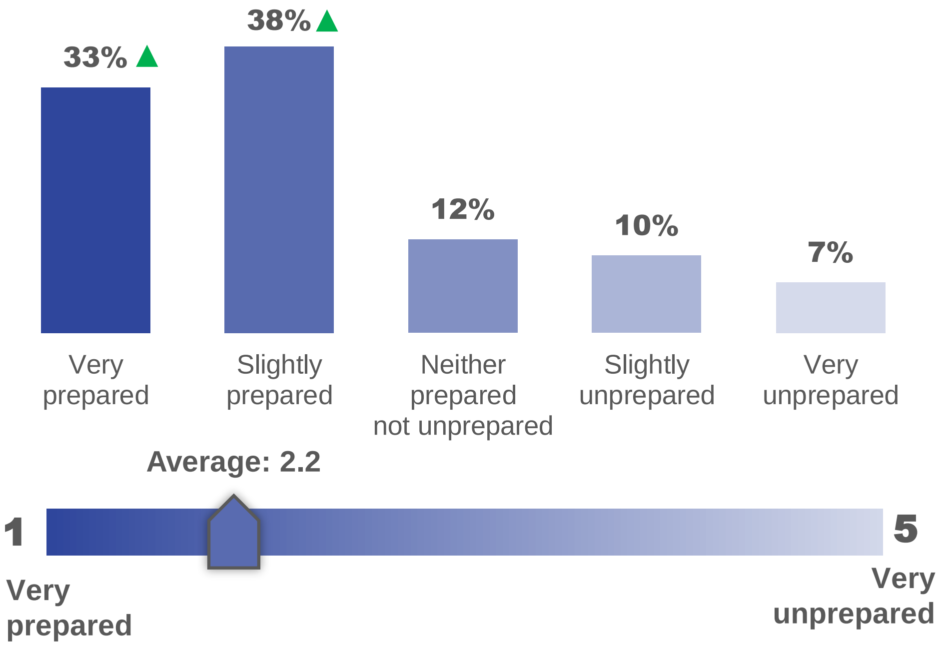
Eight percent of respondents had experienced a local emergency or disaster event in the last year. The majority (71%) of those who had experienced an event said they were prepared, and feel they are now more prepared for future events (55%). These respondents had a significantly higher Preparedness Index* (.45) compared to those who hadn't experienced a recent event (.34).

There was a trend for those who had experienced an event but responded after the fire events (8/9/19) to feel the event would make them more prepared for future events (58%) compared to those who responded before the fire events (47%), but this was not significant.

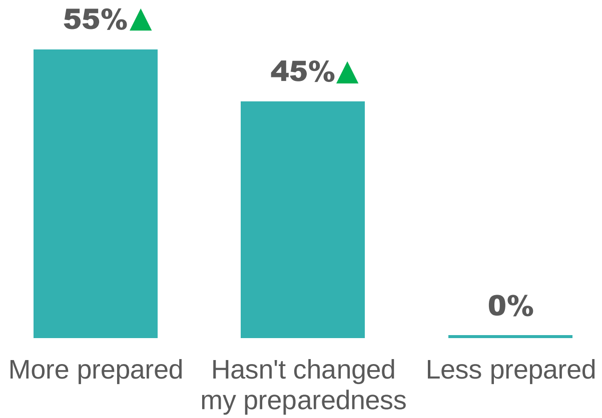
Experienced a local emergency or disaster event in the last 12 months



Preparedness for the emergency or disaster event



Impact of event on preparedness



Source: 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? Base: Total sample; Weight: Weight_CELL; base n = 2458 | Q19B & Q19C n=311

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

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other categories.

BUSINESS OWNER PERCEPTIONS

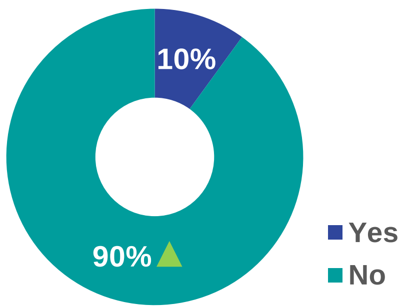
BUSINESS OWNERS

Demographics

10%

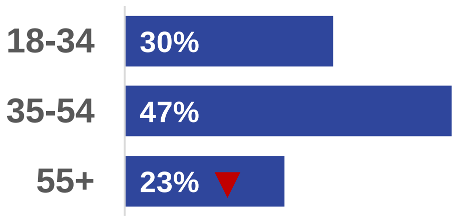
of respondents own a business

compared to 8% in 2018.

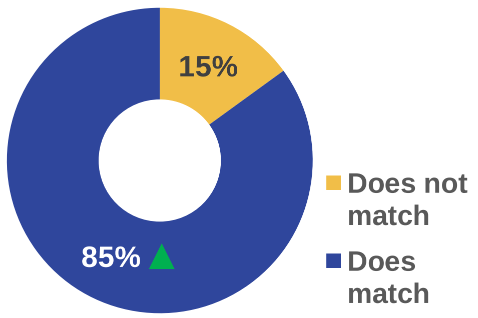


Male **62%** ▲

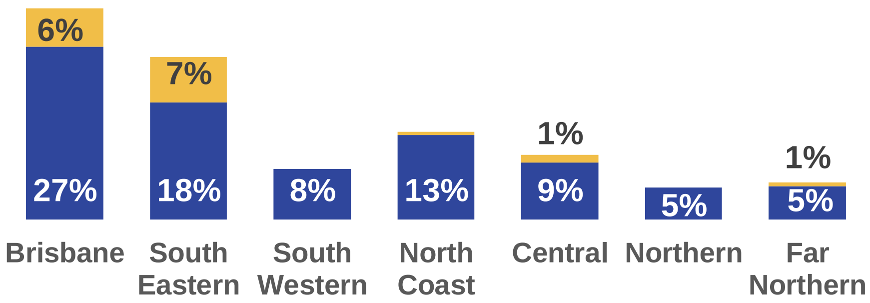
Female **37%**



Most business postcodes matched home postcodes



Business owners by region (using home postcode)



Gender

Two-thirds of business owners were male, significantly more than females, with one Gender diverse (<1%).

Age

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

Region

Business owners were spread across the seven regions, with a trend towards more business owners in Brisbane and the South East. For those businesses that didn't match the respondents' home postcode, this was more likely to occur in Brisbane and the South East.

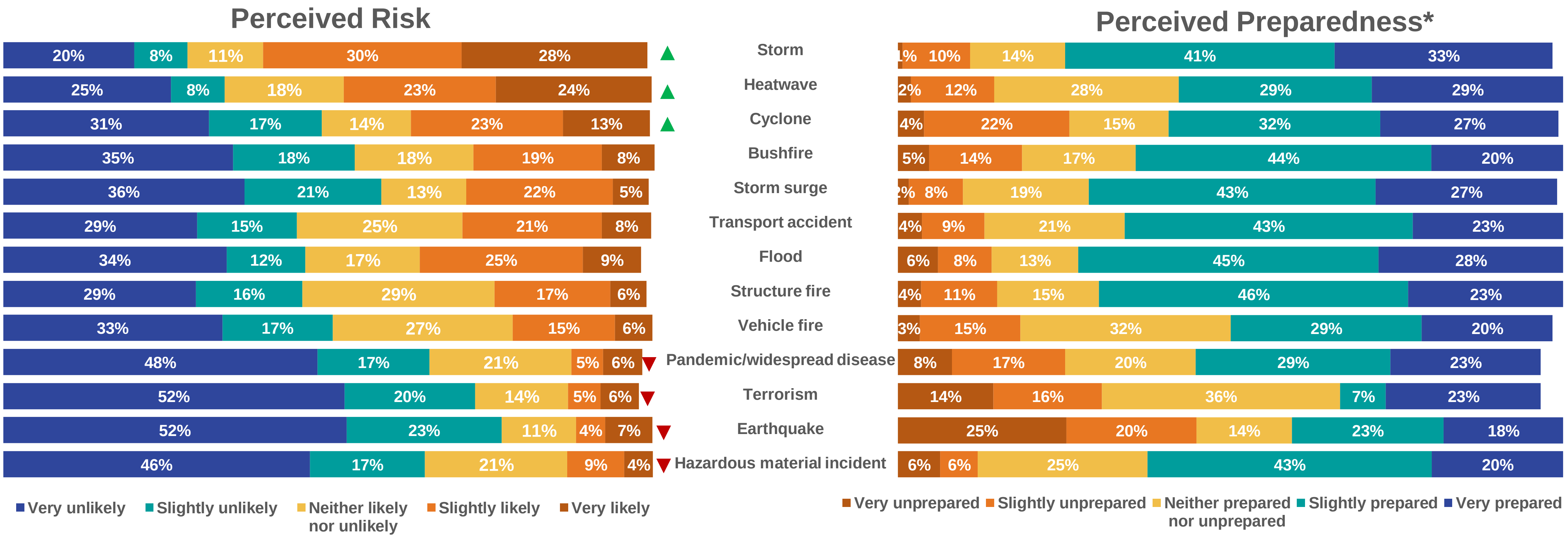
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI

Source: SQ6 Own a business | SQ6B Business post code | SQ4 Home post code. Base: *Total sample; Weight_CELL; n = 2458* | SQ6B.Business post code; *Weight_CELL; n = 263*

BUSINESS OWNERS

Perceived Risks & Preparedness

Business owners perceive similar risks to their business as to their home, with Storms and Heatwaves the highest perceived risk, although this was lower than the perceived risk to homes. They perceived a greater risk from Structure fires and lower risk from Cyclones to their businesses compared to homes. Perceived preparedness was highest for Storms, matching preparedness for homes for Storms, but then Transport accidents and Structure fires were second and third highest in preparedness, higher than home preparedness. Similar to the general population, business owners who selected "other", stated tsunami, water shortage, drought, and human events (such as riots, home invasions and personal illness) as risks.



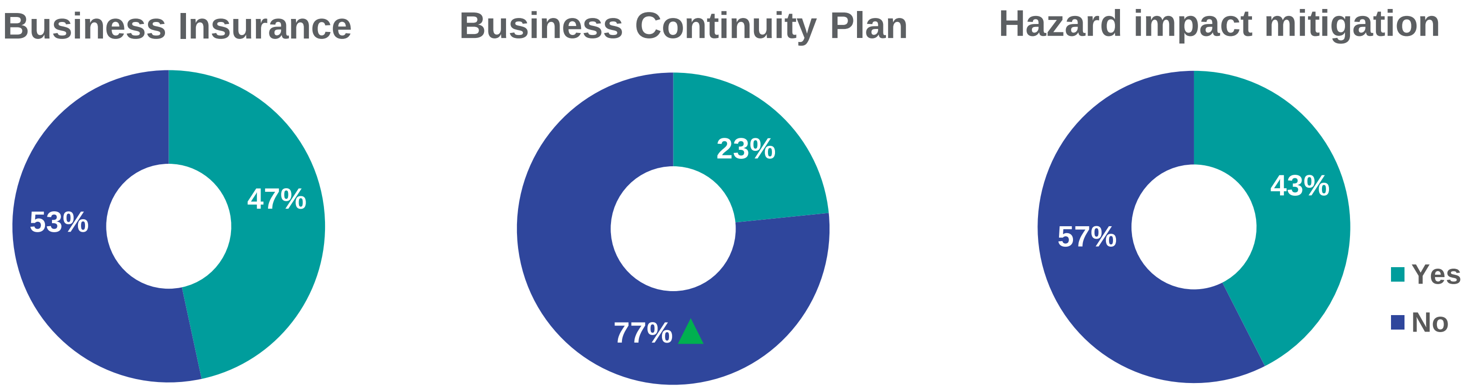
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI - "Very likely/prepared" & "Likely/Prepared" compared to event average

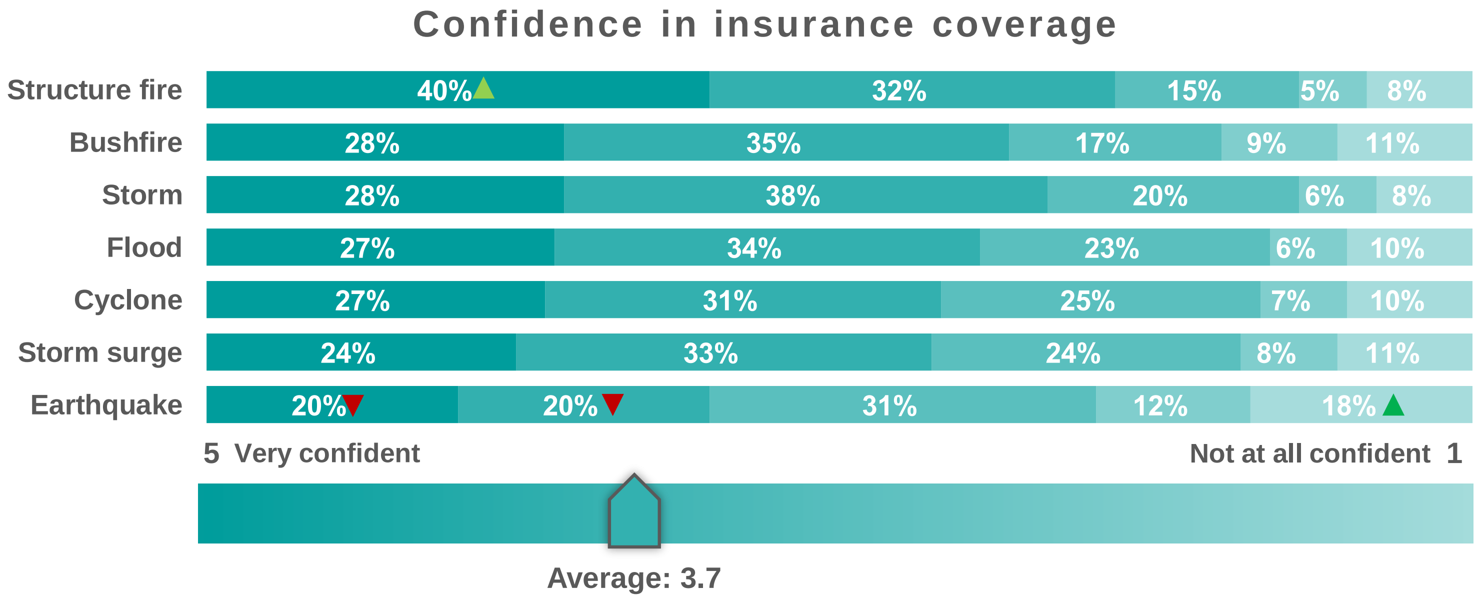
*of those who responded "Slightly likely/Very likely" to event for perceived risk

Source: Q1B. Business Perceived Risk | Q2B. Business Perceived Preparedness. Base: Q1B Business Perceived Risk; *Weight_CELL; n = 263* | Q2B. Business Perceived Preparedness*; Weight_CELL; base n = from 28 to 155*

BUSINESS OWNERS

Insurance





Less than half (**47%**) of business owners have insurance for their business.

Those who do have insurance are reasonably confident that their insurance will cover their business. Business owners are significantly more confident that their insurance will cover Structure fires, and not at all confident that their insurance will cover Earthquakes.

Only **23%** of business owners have a Business Continuity Plan, the same as in 2018.

Less than half (**43%**) have identified ways to mitigate the impact of hazards on their business, which is lower than in 2018 (55%).

Business owners who completed the survey after the fire events (after 8/9/19) were significantly less confident that their insurance would cover bushfires (22% Not confident vs. 6% Not confident before fire events).

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI

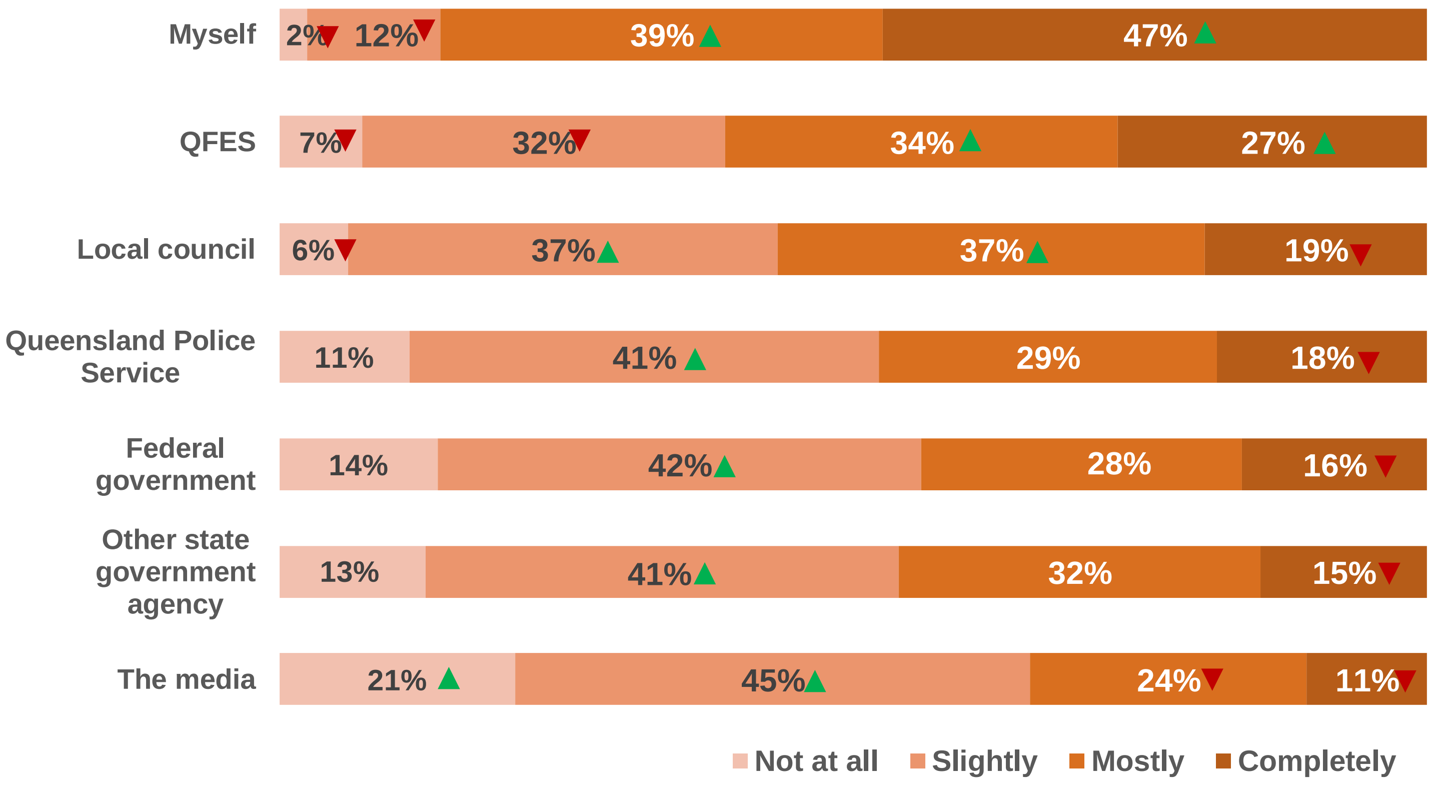
Source: Q14 Do you have insurance for your business? | Q14B Confidence in insurance coverage | Q15 Business Continuity Plan | Q16 Hazard impact mitigation. Base: *Weight_CELL; base n = 263* | *Q14B n = 131* | *Q15 & Q16 n = 263*

PERCEPTIONS ABOUT 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, **86%** said "myself" as being mostly or completely responsible.

The Far Northern and Northern respondents considered local council significantly more responsible than other regions (71% and 70% respectively), and Far Northern respondents also considered Federal Government as responsible, the highest region at 54%.

Younger respondents were less likely to consider themselves responsible, with 80% of 18-34 compared to 85% of 35-54 and 92% of over 55s.

CALD respondents held the Federal government (63% versus 43% non-CALD) and the media (53% vs 34% non-CALD) more 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.

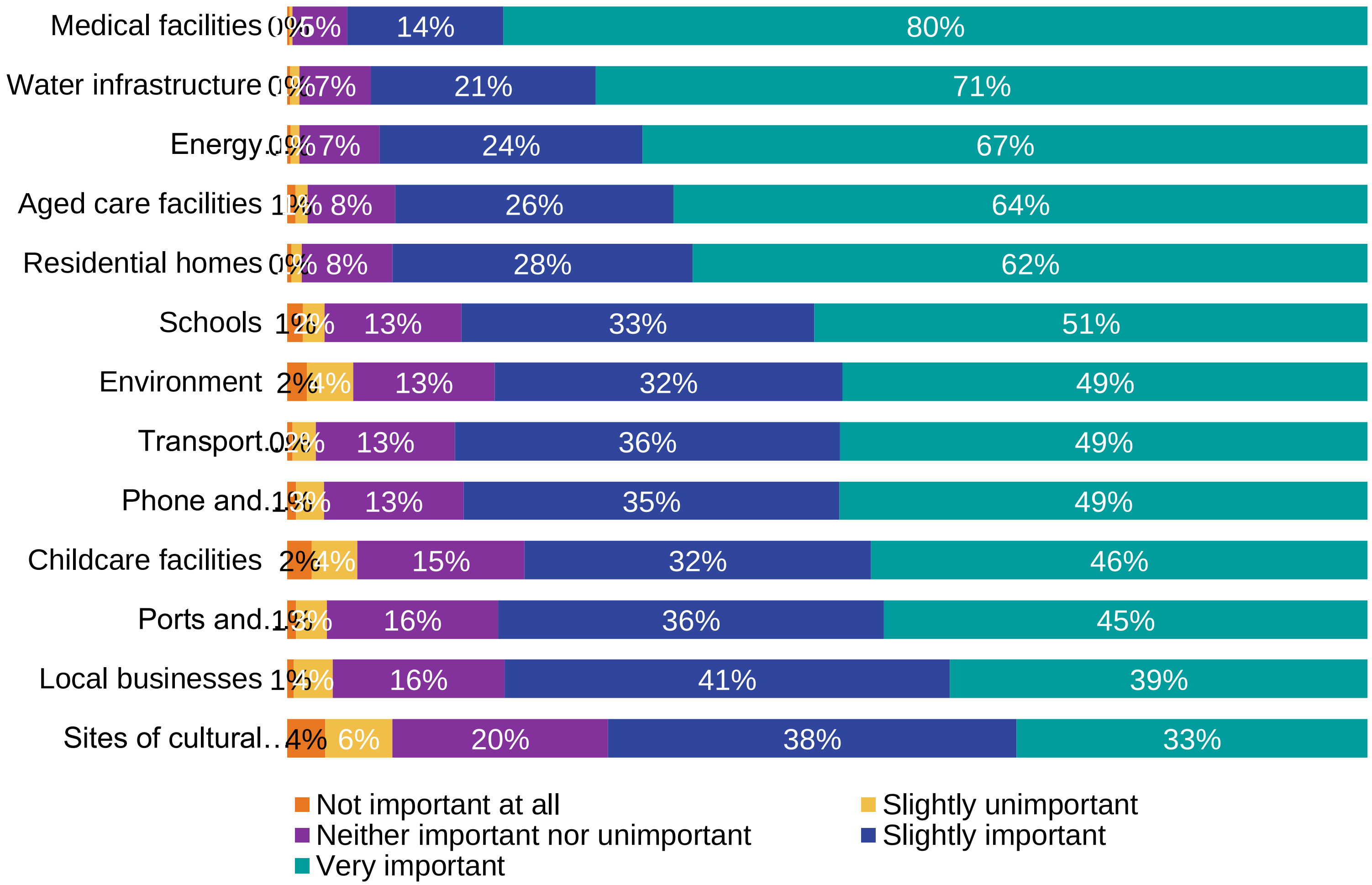
▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – Compared to the average of other categories.

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

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, with **80%** of respondents indicating they would consider this 'Very important'.

These responses were consistent across regions, with the exception of Sites of cultural significance, which Northern respondents considered significantly less important compared to other regions.

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

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

In 2018, Medical facilities was also top of the list, followed by residential homes, aged care facilities, then water and energy infrastructure, all at similar levels. Environment moved from 10th on the list in 2018, to 6th in 2019.

Q7. In your opinion, how important is it to protect the following from an emergency or disaster event Base: *Total sample; Weight_CELL; base n = 2458*

QFES

Service delivery and importance

Fire and hazard response are considered the most important service provided by QFES. Warnings and alerts was ranked second, and this service was also the most well known.

Importance ranked	Service	Which QFES services were provided in your local area in the past 12 months? Yes	Not sure	No
3.1*	Fire and hazard response	30% ▲	44% ▼	26%
3.3	Warnings and alerts	33% ▲	42% ▼	25%
4.4	Search and Rescue	16%	55%	29%
4.4	Hazard reduction activities	20%	52%	27%
5.3	Recovery Services	11% ▼	61%	28%
5.3	Community Safety checks	17%	56%	27%
5.4	Education	24% ▲	52%	23%
6.6	Temporary repair of property	12% ▼	54%	34% ▲
7.2	Research	11% ▼	63% ▲	27%

Yes Not sure No

*1=most important, 9=least important

4.6**	Helps in the event of an emergency or disaster wherever I am in Queensland
4.5	Provides ongoing assistance following an emergency or disaster event
4.5	Supports my local council with disaster management in my area
4.4	Provide advice and support to disaster management groups
4.4	Improves communities' ability to understand their risks and how to manage them
4.4	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
4.1	Minimises its impact on the environment

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

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
Base: *Total sample; Weight_CELL; base n = 2458*

Overall Fire and hazard response was considered the most important service, followed closely by Warnings and alerts, similar to that seen in 2018. To match this, in 2018-19, 2,308 bushfire community warnings[1] were issued, along with 153 emergency alert campaigns[1] targeting both Warnings and Education.

Brisbane, South East and South West regions indicated less awareness of services within their local area generally.

As for importance, Brisbane considered Warnings and alerts to be the most important service (3.3 compared to 3.4 for Fire and hazard response), and Brisbane, Central and South East considered Hazard reduction activities to be more important than Search and rescue.

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.

As for specific activities, older respondents (55+) considered all services as significantly more important compared to younger (18-34) respondents, as did females compared to males. However, they did not differ significantly by region.

Respondents who completed the survey after the fire events ranked Community safety checks (5.2) higher than Recovery services (5.3).

[1] 2018-19 QFES Annual Report

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – Compared to the average of other categories.

QFES

Service delivery preference

For emergency and disaster response, the majority of respondents would prefer QFES respond, compared to teaching self-reliance. For allocation of resources, the majority of respondents would prefer QFES resources move flexibly rather than having a permanent presence. This is the same pattern of results seen in 2018, with no differences before or after the September 2019 fire events.

A preference for QFES event response doesn't change across regions or with gender; however, younger respondents (18-34) indicate higher preference for being taught self-reliance skills (44%).

Preference for flexibility is significantly higher in Brisbane (74%), South East (67%), and Far North Region (66%) compared to other regions, with Central the lowest at only 46% preferring flexibility, and 54% preferring a permanent QFES presence.

CALD differed from non-CALD respondents, indicating a 50/50 split between these choices.

▲ significantly higher @ 95% CI; ▼ significantly lower @ 95% CI – compared to other category

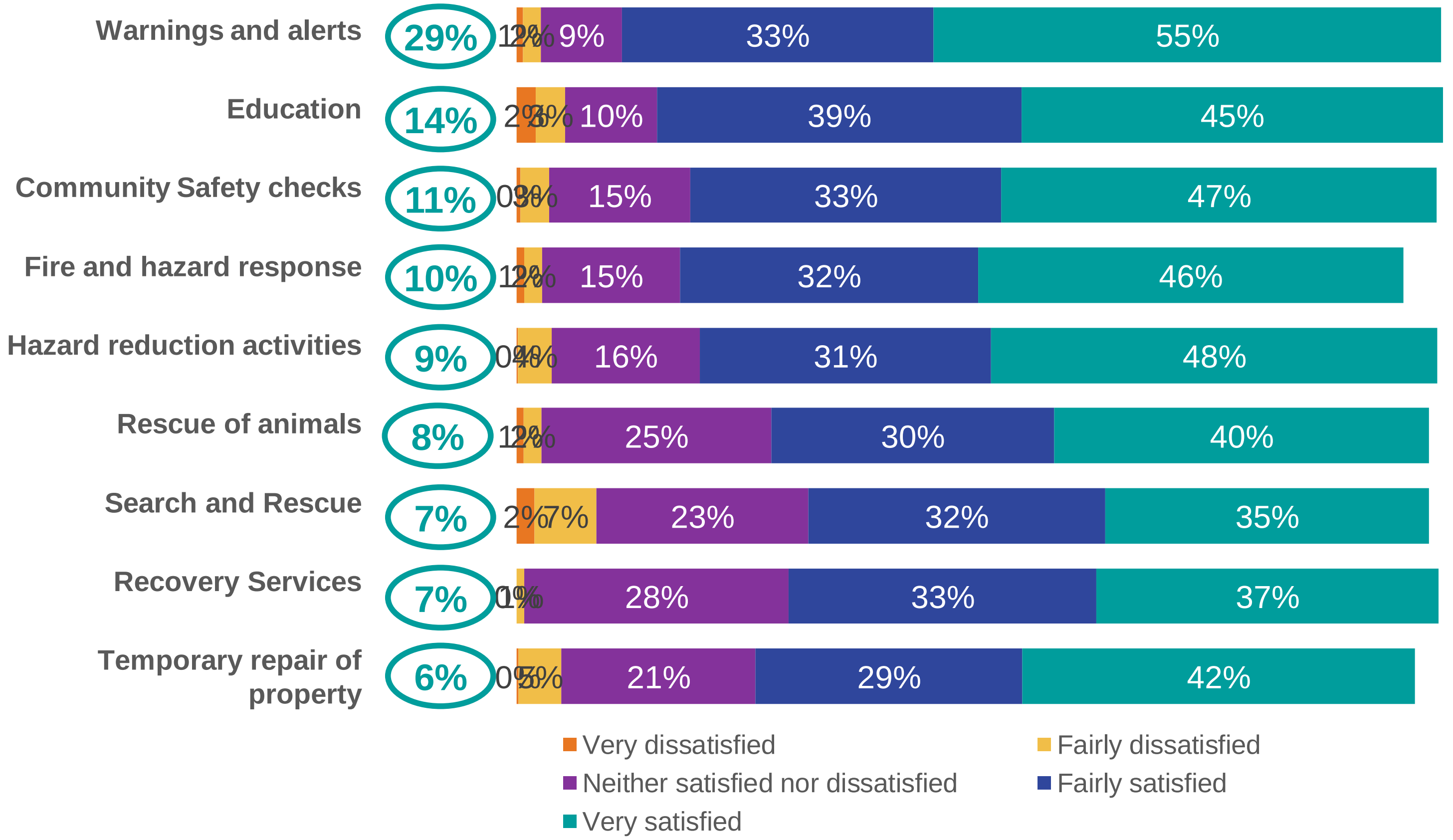
Q8. What is more important to you? Q9. What is more important to you? Base: *Total sample; Weight_CELL; base n = 2458*

QFES

Service satisfaction

In total, 38% of respondents had received a QFES service in the last year, and overall respondents were satisfied with the services.

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



Warnings and alerts were the most commonly received service, with Temporary repair of property the least. Respondents receiving Search and rescue services had the highest dissatisfaction, but this was not significantly different from other services.

By region, Northern respondents received significantly more Warnings and alerts (52%), Community safety checks (17%), and Recovery services (13%) compared to other regions, with no differences in satisfaction. Older respondents received significantly fewer services overall, with no differences in satisfaction.

Respondents who received a QFES service indicated higher perceived risk for emergency and disaster events compared to those who hadn't received a service. They also indicated greater perceived preparedness, and scored higher on the Preparedness Index: .42 compared to .31 for those who didn't receive a service.

More respondents had received a QFES service after the fire events (after 8/9/19), and more were dissatisfied with the Search and Rescue service they received (10% vs. 3% dissatisfied before 8/9/19), although this was not significant.

Q11. Have you received/used a service delivered by QFES in the last year? | Q11B. How satisfied were you with the X? Base: Total sample; Weight_CELL; base n = 2458 | Q11B. n=145 to 821.

** 2018-19 QFES Annual Report

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?

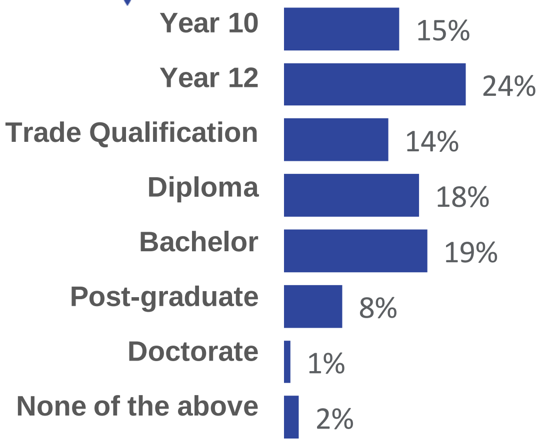
QUESTIONNAIRE CONT.

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

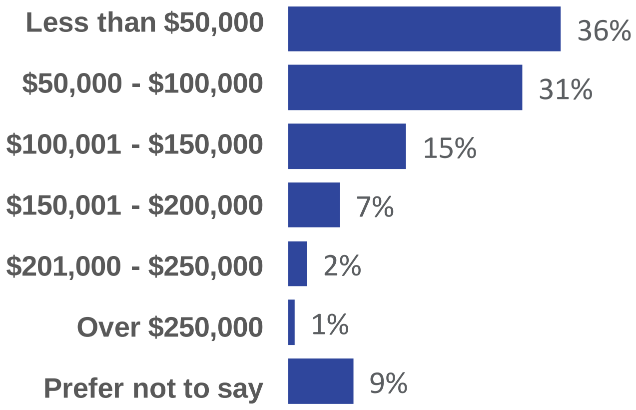
DEMOGRAPHICS

General

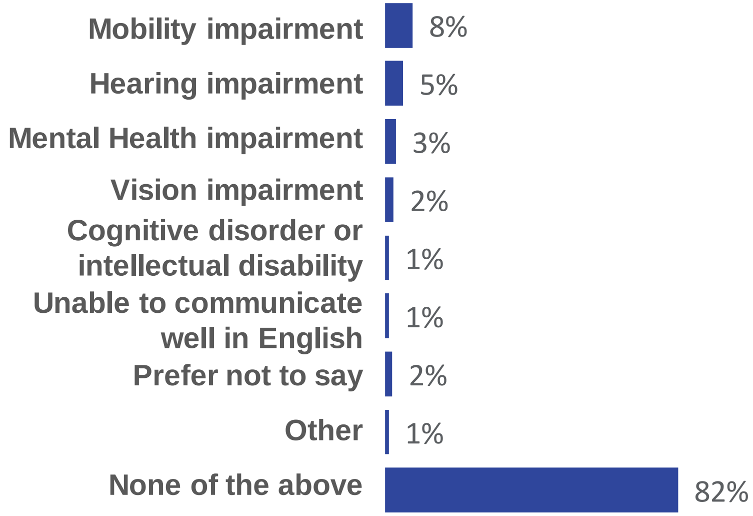
Highest level of education



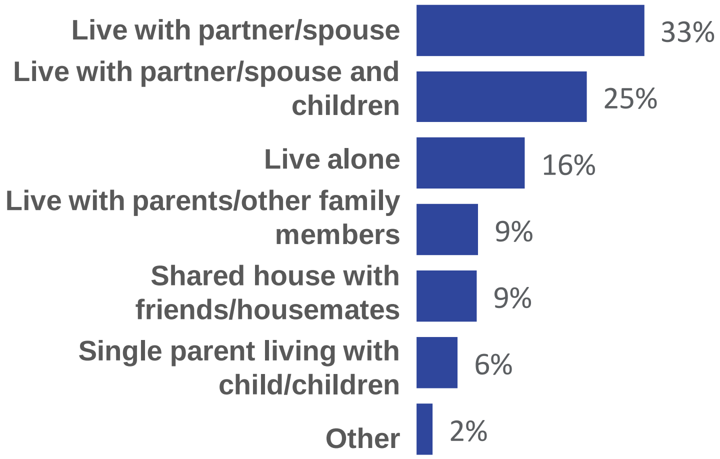
Household income



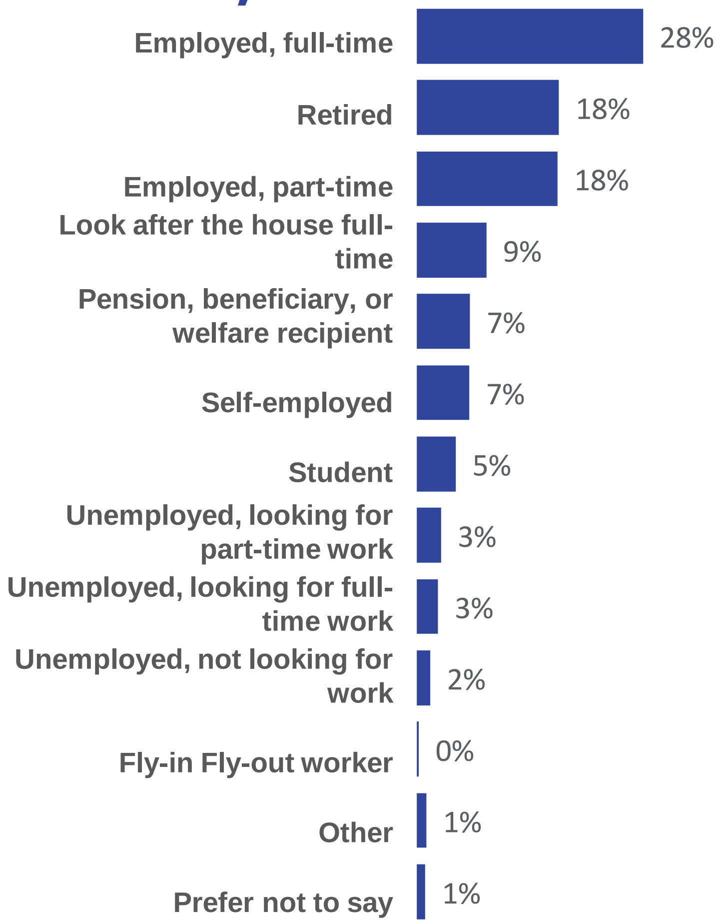
Household members' limitations or impairment



Living Situation



Employment status

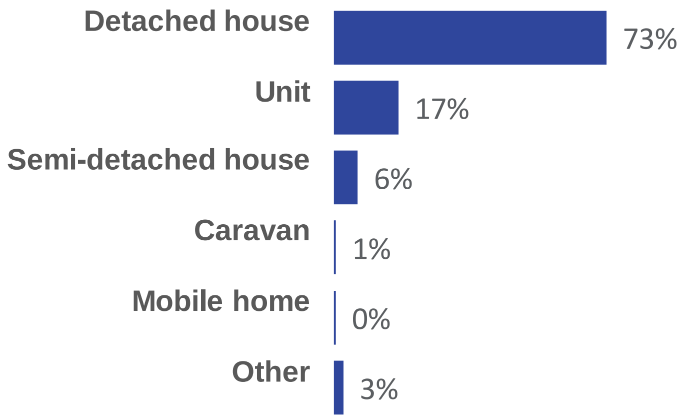


Source: Q32 Highest level of education | Q33 Employment Status | Q34 Living Situation | Q29 Household members' limitations or impairment | Q35 Household Income
Base: *Total sample; Unweighted; n = 2458*

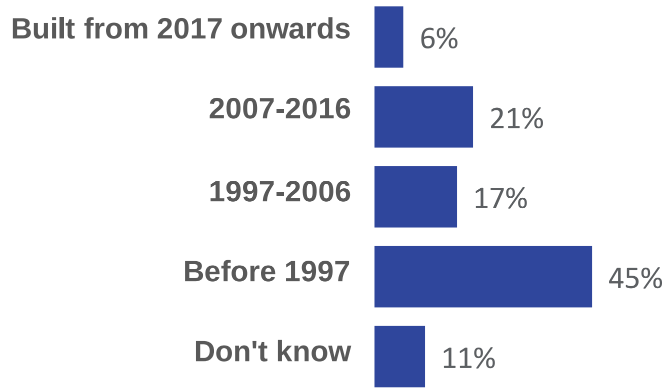
DEMOGRAPHICS

Dwelling details

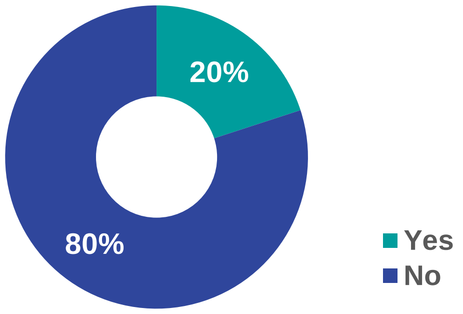
Type of dwelling



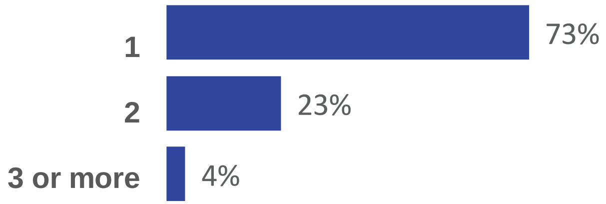
Year of house construction



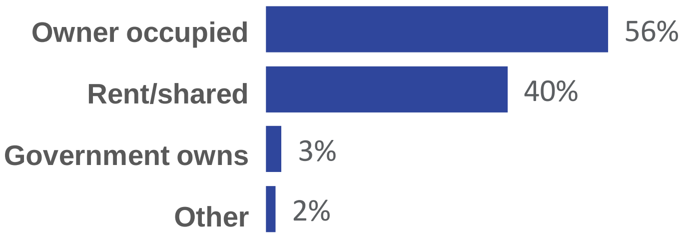
Moved house in the last 12 months



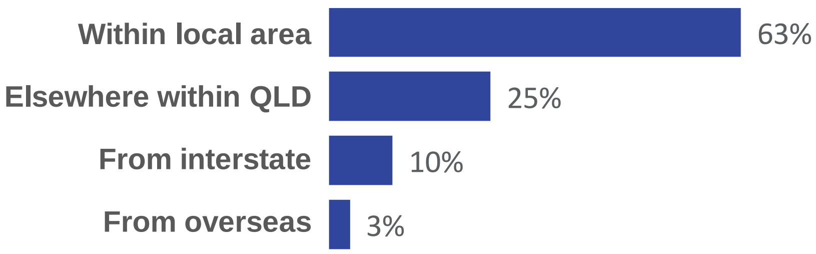
Number of levels in home



Home ownership



Relocated from

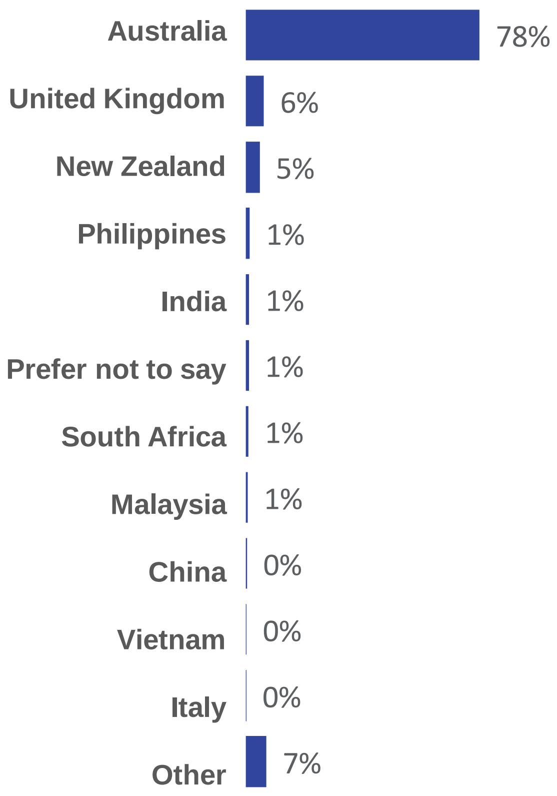


Source: Q26 Type of dwelling | Q27 Number of levels in home | Q25 Year of house construction | Q24 Home ownership | Q23 Moved house in the last 12 months | Q23B Relocated from
Base: *Total sample; Unweighted; n = 2458* | Q23B Relocated from; *Unweighted; n = 497*

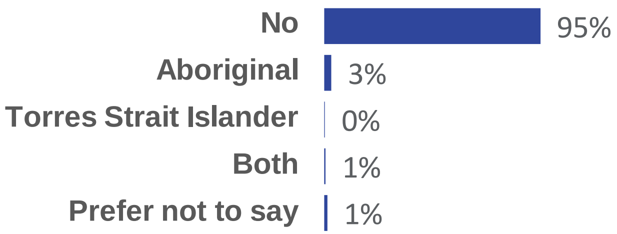
DEMOGRAPHICS

Cultural and Linguistics

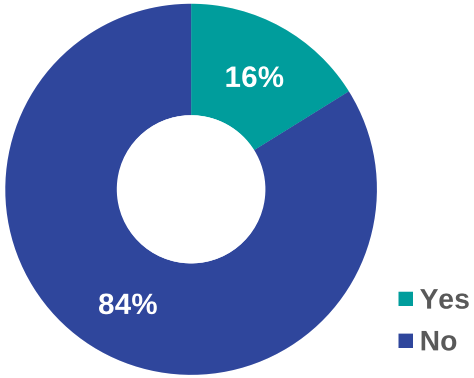
Country of birth



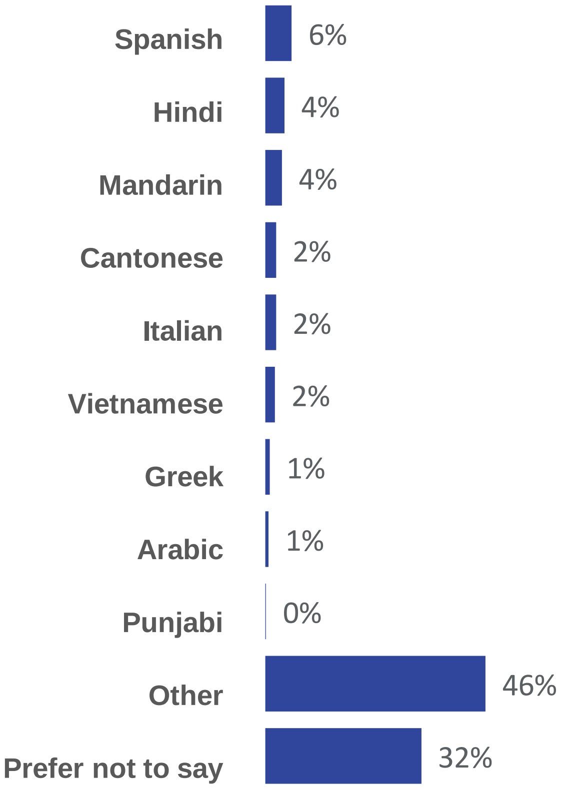
Indigenous Status



Language other than English at home



Main language other than English at home



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 = 2458* | Q28B Main language other than English at home*; Unweighted; n = 397*

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