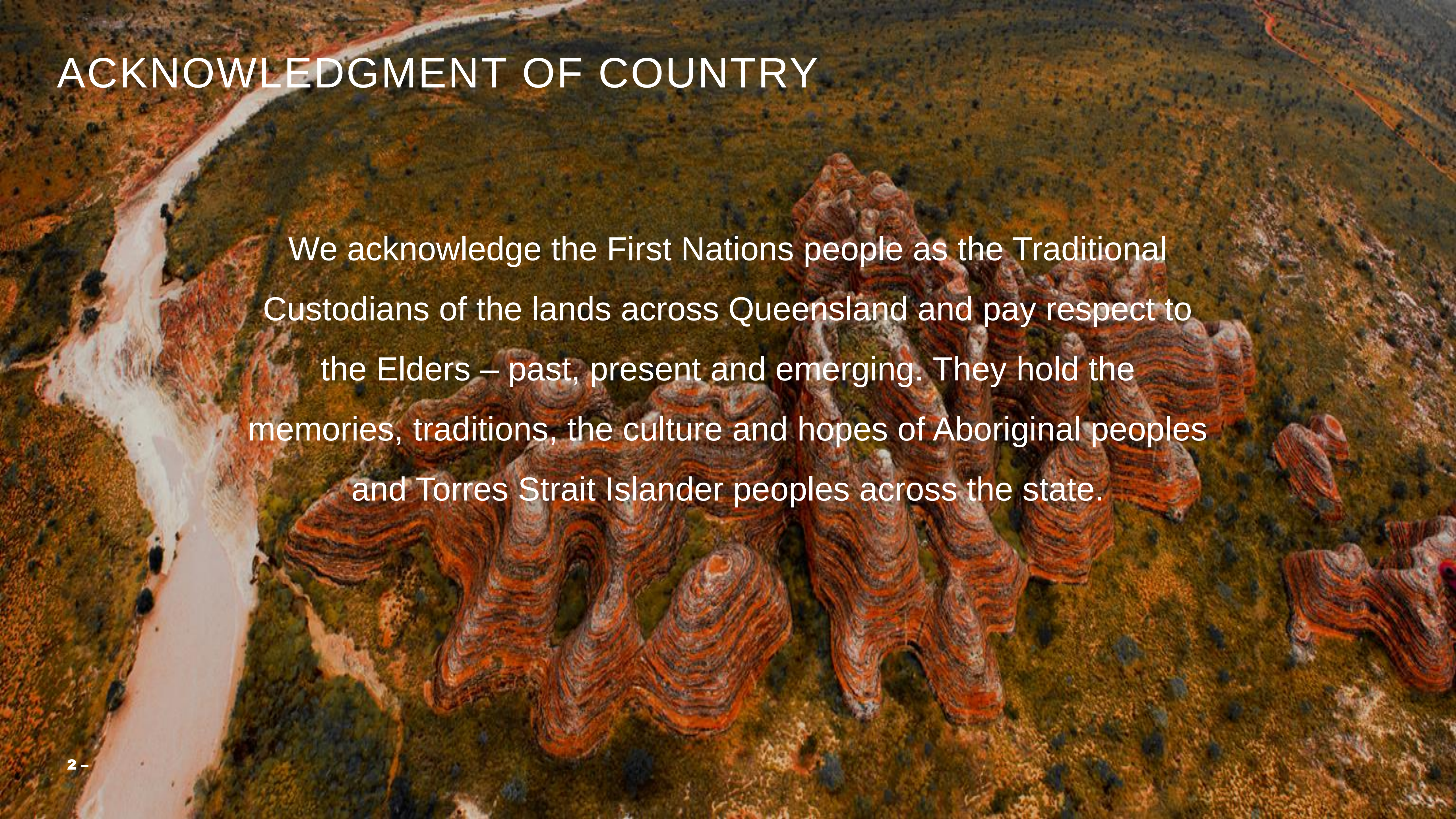
QFES COMMUNITY INSIGHTS SURVEY 2022

Final Report

Prepared by Ipsos

14 December, 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. 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 2022, 2,099 Queenslanders were surveyed across seven regions of Queensland, and were 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** (74%) and **heatwaves** (64%) are perceived as the **highest risk events** (slightly or very likely). They are also the events that people feel the most prepared for (77% feel slightly or very prepared for storms and 75% for heatwaves).
    - In 2022 compared to 2021, **more people felt at risk from floods**, and fewer people felt at risk from storm surges.
    - There was a significantly lower risk perceived from pandemics in 2022 compared to 2021, 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 (30%), although few perceive terrorism as a likely risk (10%).
- Both **perceived risk** (2.7/5 - where 5 is the highest perceived risk) and **perceived preparedness** (3.7/5 – where 5 is the highest perceived preparedness) **decreased compared to 2021**.
    - Northern Region Queenslanders (2.9) perceive emergency or disaster events to be significantly more likely than people in other regions.
    - Northern (2.9) and Central Queenslanders (2.8) perceive a lower risk compared to 2021 (3.0 for both), and South Western Queenslanders (3.5) have lower perceived preparedness compared to 2021 (3.7).
- 15% of respondents had **experienced a local emergency or disaster event in the past year, a significant increase from 2021** (6%), likely due to the South East Queensland flooding in early 2022. Two thirds of these participants (64%) felt prepared for the events.
    - Seven in ten people who had experienced an event (69%) felt that this experience has improved 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.

- **A third of Queenslanders have a home escape plan** (33%), and fewer have checked QFES or local council website for information (31%) or prepared an emergency kit (30%).
- While 98% of Queenslanders have **smoke alarms** installed (consistent with the 5-year average), only 82% of these have been **tested or maintained in the past 12 months**. This has however increased from last year's 76%.
    - In relation to the new Interconnected Smoke Alarm (ISA) legislation, 46% of Queenslanders have ISAs installed (up significantly from 33% in 2021), and 62% of Queenslanders who don't have them installed say they are likely to install them in the next 12 months.
- **Three quarters of Queenslanders (77%) have home and/or contents insurance, an increase from 2021**, and this increases to 94% for those living in owner-occupied homes.
    - There has been an increase in those whose insurance does not cover storm surges (16%), floods (15%) and storms (6%) compared to 2021, possibly shifting from 'don't know' with the increasing storms and flooding in 2022.
    - Queenslanders more likely to have insurance include owner occupiers, those living in detached houses, and high-income earners.
- Overall, there has been a **decrease since 2021 in those who believe climate change will impact emergency and disaster events**, returning to 2020 levels.
    - Perceptions of climate change impact are higher amongst females and young Queenslanders (18-34 years).

EXECUTIVE SUMMARY

Perceptions and expectations of QFES

- As seen in previous years, most **Queenslanders consider themselves** (85% mostly or completely) **responsible for preparing their household for emergency and disaster events**, with QFES considered the second most responsible (62%).
    - Queenslanders were **more likely to say the Federal Government and State Governments were responsible** (53% and 51%, respectively) compared to 2021 (48% and 47%, respectively).
- Medical facilities (94%) were considered the most important to protect in an emergency event, closely followed by water infrastructure (92%) and energy infrastructure (92%).
    - Fewer Queenslanders consider residential homes, schools, the environment, childcare facilities and sites of cultural significance as important compared to 2021. As with climate change impacts, this appeared to spike in 2021 and has now returned to 2020 levels.
- Warnings and alerts are considered the most important service, overtaking fire and hazard response in the top spot compared to 2021. Those receiving warnings and alerts were the most satisfied with a service (89% satisfaction) compared with other services.
    - 'Search and rescue' and 'evacuation from flooding' moved up to 3rd and 4th most important local QFES services, however they had some of the lower satisfaction ratings at 75% satisfied (for those that received those services).
- QFES service delivery preferences remain stable across the last 5 years:
    - Queenslanders prefer that QFES be available to respond to events (66%) as compared to providing individuals the skills to improve self-reliance (34%).
    - When looking at allocation of resources, Queenslanders would like to move towards a more flexible service (60%) compared to a permanent presence in their local community (40%).

EXECUTIVE SUMMARY

Business owners

- Thirteen percent of respondents were business owners:
  - Most businesses are locally owned, with 81% based in the same postcode the respondent lives in.
  - Over half (52%) of those who own a business have business insurance, but just 28% have a business continuity plan
  - Almost three in five business owners (59%) undertook hazard impact mitigation activities, a significant increase compared to 2021 (48%).
- Perceived risks and preparedness follow similar patterns to those seen for personal risk and preparedness, although the overall perceived likelihood of risk is lower.
  - Perceived risk from pandemics has decreased compared to 2021.

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 2021-22, QFES had 3,665 FTE and approximately 34,500 volunteers across the state*.

In 2019, the BNHCRC found that the total economic costs of natural disasters is growing, and include significant and long-term social impacts**. It also 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 approximately 17 years ago as the former ‘Households Survey’, evolving using the BNHCRC criteria index and input from QFES subject matter experts. 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 residents.

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

* 2021-22 QFES Annual Report: https://www.qfes.qld.gov.au/sites/default/files/2022-09/QFES-2021-22%20Annual-Report-Full-Report.pdf
** Bushfire & Natural Hazards CRC (BNHCRC), 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 years and older.
- The 15 minute survey was conducted between 20th September and 24th October 2022.
- This 2022 data is compared to the 2021 data, which used a similar questionnaire.

SAMPLE

- In order to provide a representative and robust picture of the level of 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= 2,099

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 2021 @ 95% CI
▼ significantly lower than 2021 @ 95% CI

- Statistical significance testing was conducted between the demographic categories for 2022 data and are indicated by the following symbols:

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

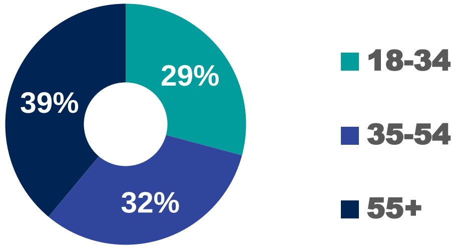
DEMOGRAPHICS

The 2022 QFES Community Insights Survey respondents comprised 2,099 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.

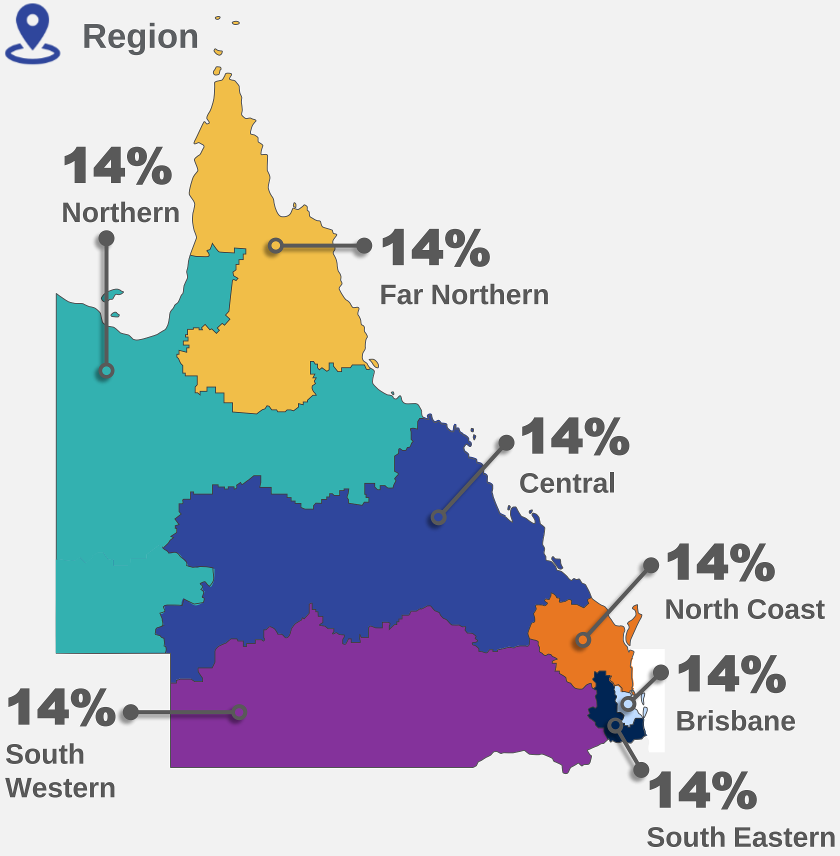
Gender

Male	Female	Gender Diverse
45%	55%	0%

Age



Region



Home ownership

Home ownership	%
Owner occupied	60%
Rent/shared	35%
Government owns	2%
Other	3%

Type of dwelling

Type of dwelling	%
Detached house	73%
Unit	14%
Semi-detached house	9%
Caravan / Mobile Home	1%
Other	2%

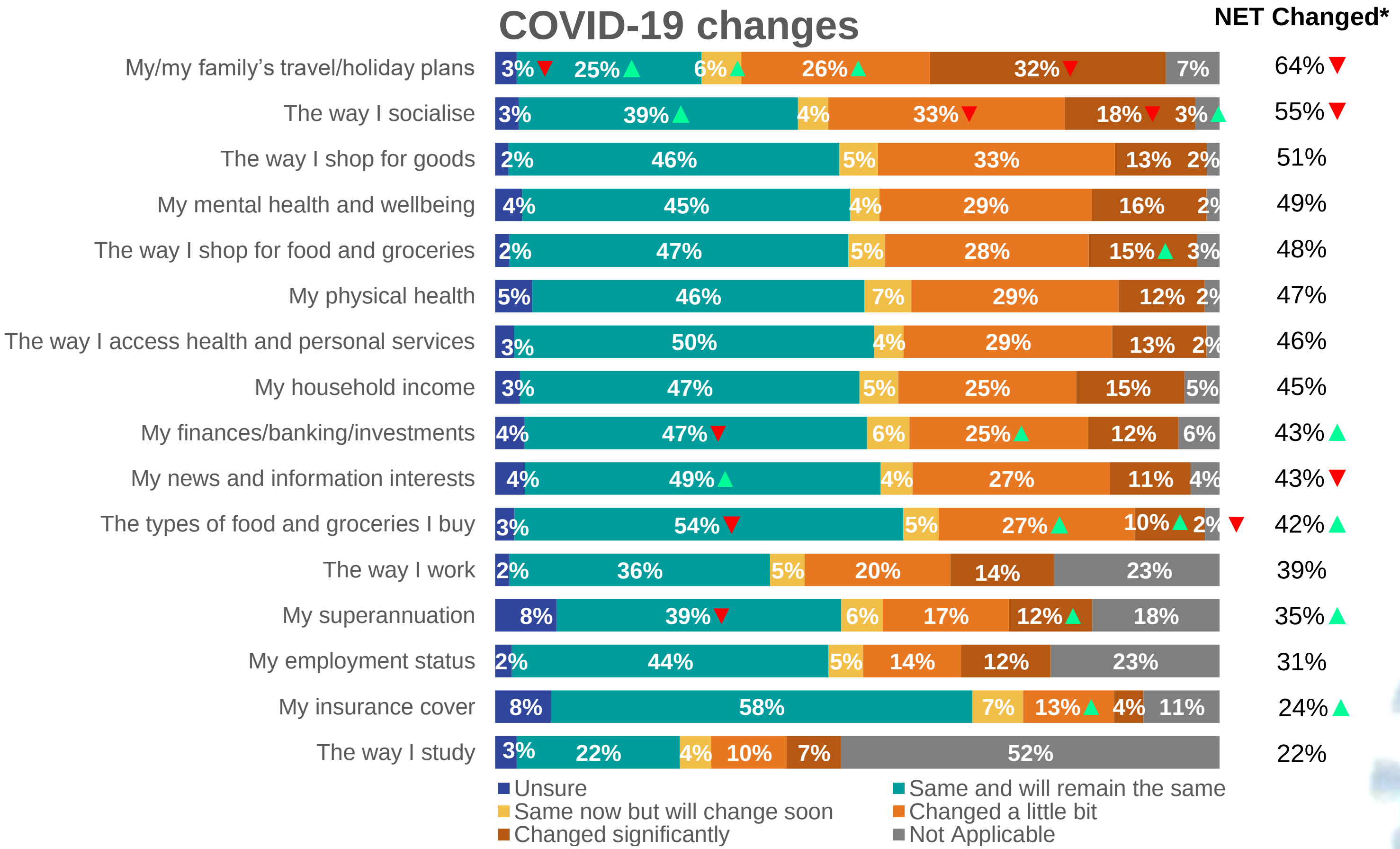
Base: *Total sample; Unweighted; n=2099*

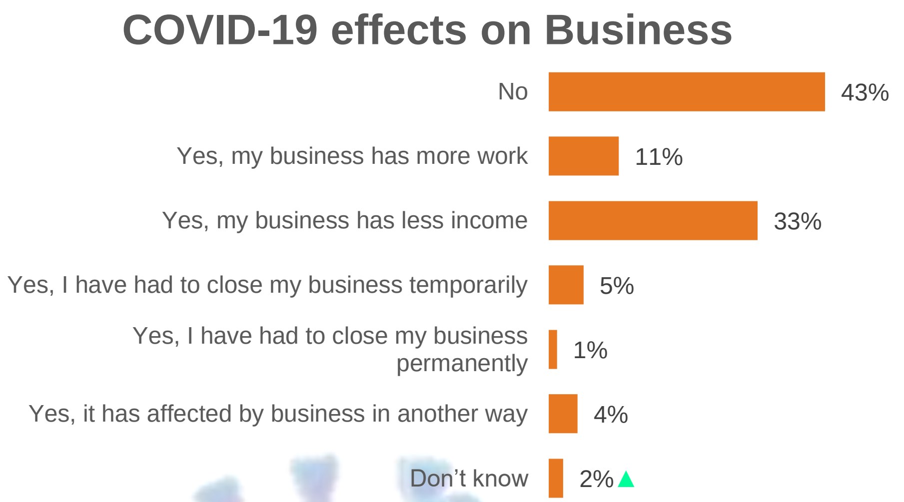
Source: SQ1 What is your age? I SQ2 What is your gender? | SQ5 Which suburb do you live in? | Q25 Do you or your family own or rent your home? | Q26 How would you best describe the type of dwelling you live in?

COVID CONTEXT

Queenslanders’ living arrangements and working environments have changed since the start of COVID-19 in 2020. Holiday plans remain the top of the list in 2022, with 64% of Queenslanders indicating changes but has decreased from 2021 (70%). Declines in changes are also seen in socialising (down from 63% to 55%) and news and information interests (48% to 43%), compared to 2021. On the other hand, changes in finances/banking/investments, purchase of groceries, superannuation and insurance cover have increased slightly in 2022 compared to 2021.

More than half (55%) of 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=2099.* 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.

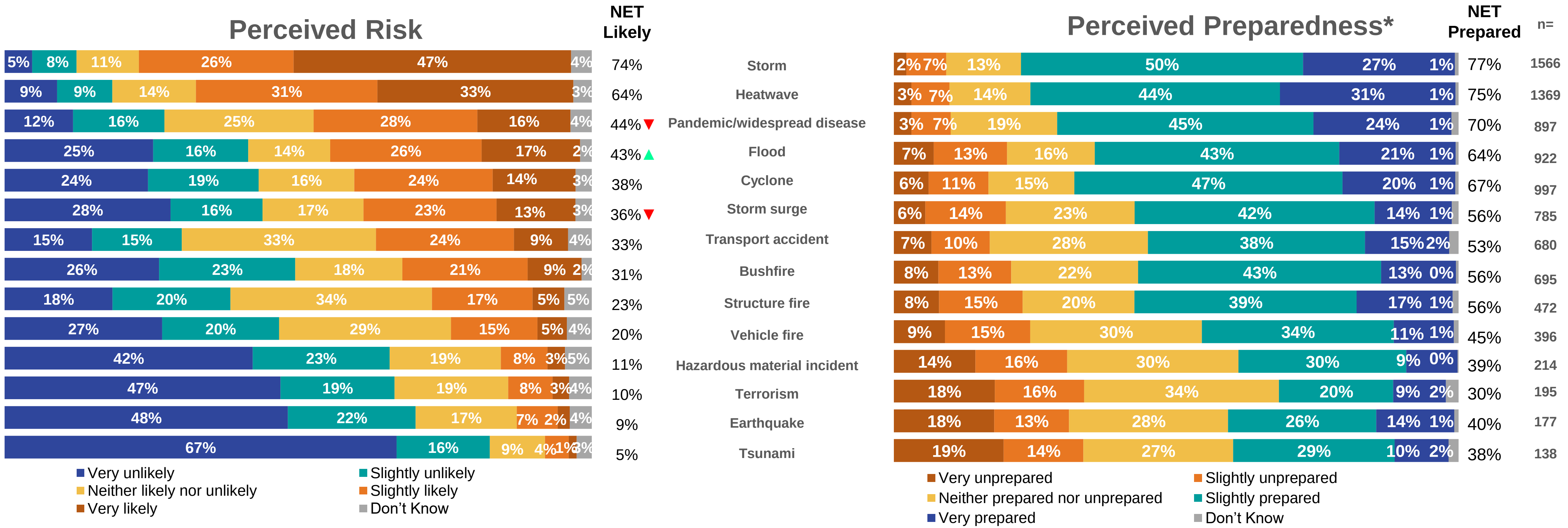
▲/▼ Significantly higher/lower than 2021 @ 95% CI

COMMUNITY PERCEPTIONS

PERCEPTION OF RISK & PREPAREDNESS

Storms, heatwaves and pandemics remain the top three most likely forms of emergency or disaster events perceived by Queenslanders. Compared to 2021, fewer people felt at risk from pandemics and storm surges. There were also more people who felt at risk from flooding compared to 2021, possibly due to extensive flooding across Queensland and Australia more broadly in 2022.

Of those who perceived a risk from events, people felt most prepared for storms, heatwaves and pandemic, consistent with 2021. Terrorism is the event people feel least prepared for, although few perceive terrorism as a likely risk.



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

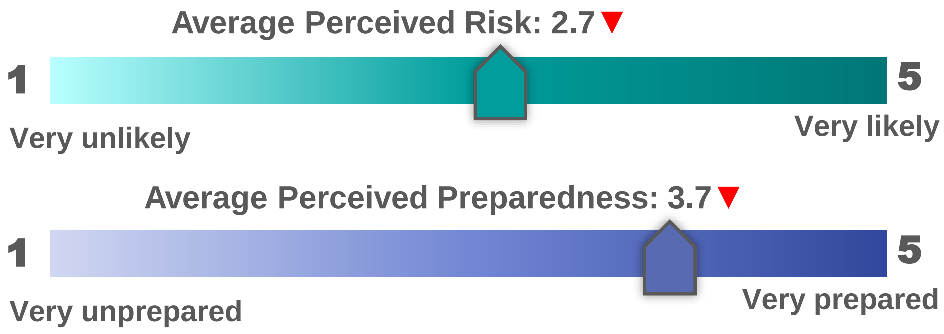
▲/▼ Significantly higher/lower than 2021 @ 95% CI

Base: *Total sample base n=2099* | Q2 n=from 138 to 1566

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.

RISK & PREPAREDNESS

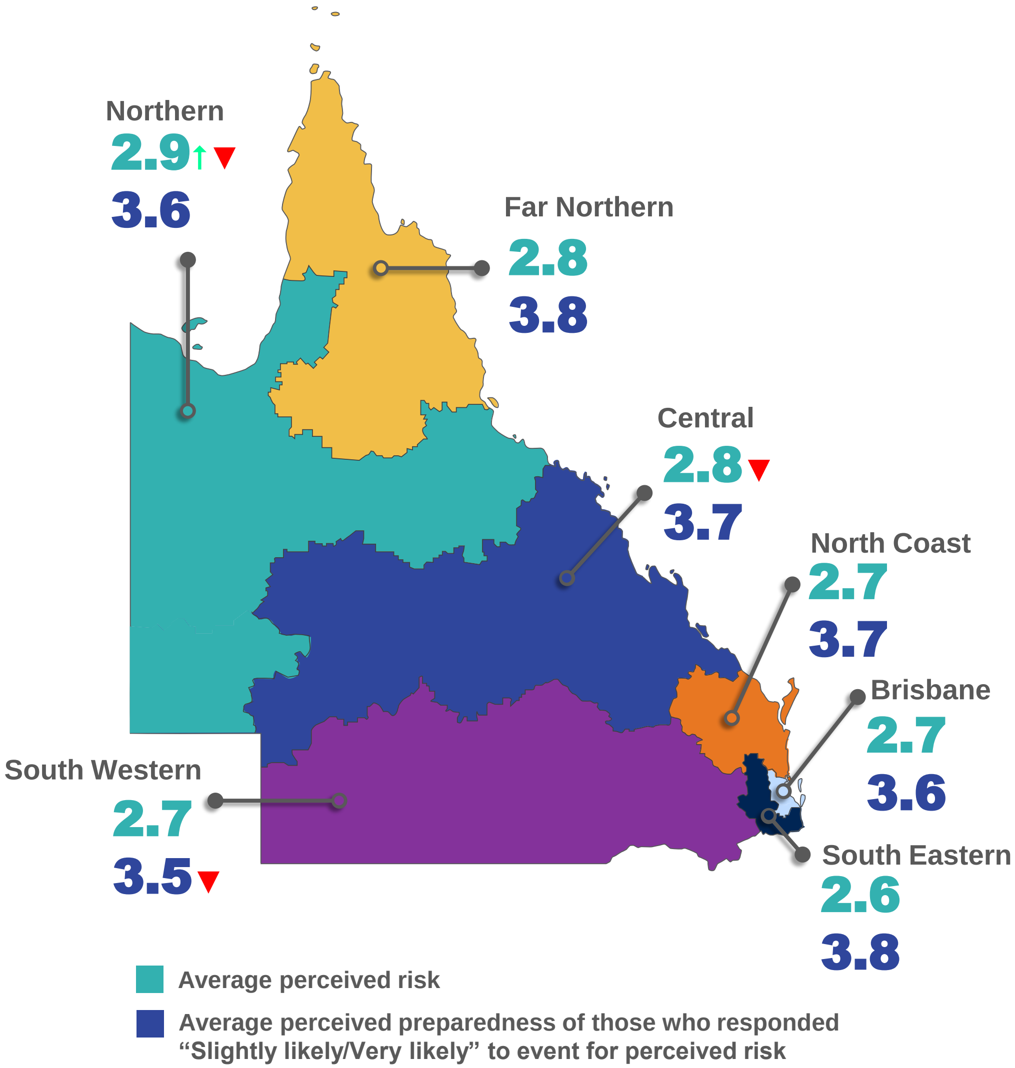
By region



The average perceived risk and preparedness for emergency or disaster events have both decreased in 2022 compared to 2021, and are comparable to 2019 levels.

Queenslanders residing in the Northern Region generally perceive emergency or disaster events to be significantly more likely than people in other regions. However, this perceived risk is lower compared to 2021, both for Northern and Central Queenslanders.

Residents of South Western feel they are less prepared on average for events they perceive as likely, compared to 2021. This is driven by lower perceived preparedness for heatwaves, storms, and pandemics.



▲▼ Significantly higher/lower than 2021 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

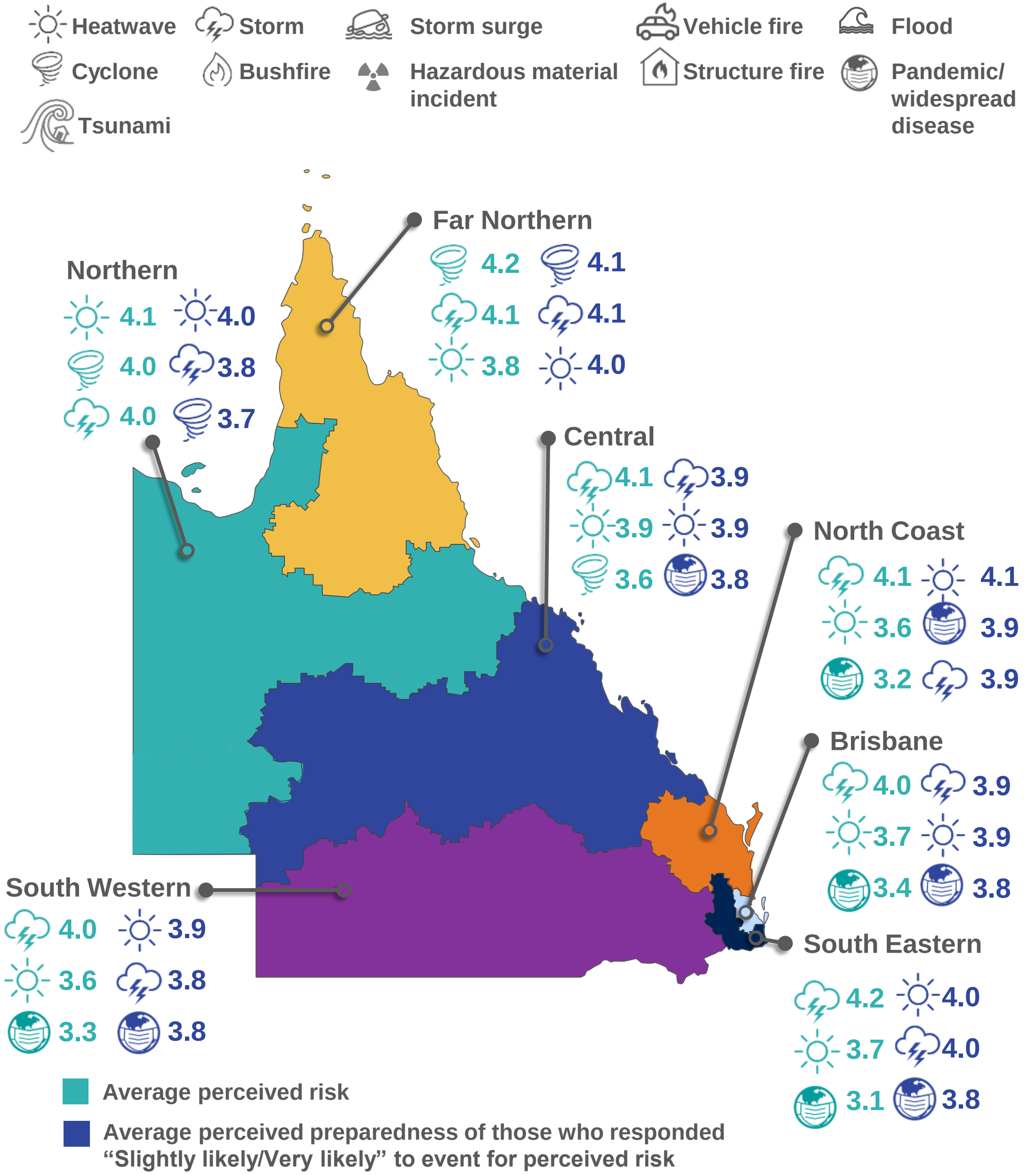
Base: *Total sample 2022 n=2099 | Q2 n=from 138 to 1566.* Q1. How do you rate the likelihood that the following emergency or disaster event could impact your home or family in the next year? | Q2. (those who responded "Slightly likely/Very likely" to event for perceived risk) Overall, how prepared do 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

Top 3 events by region

Event & Region Breakdown

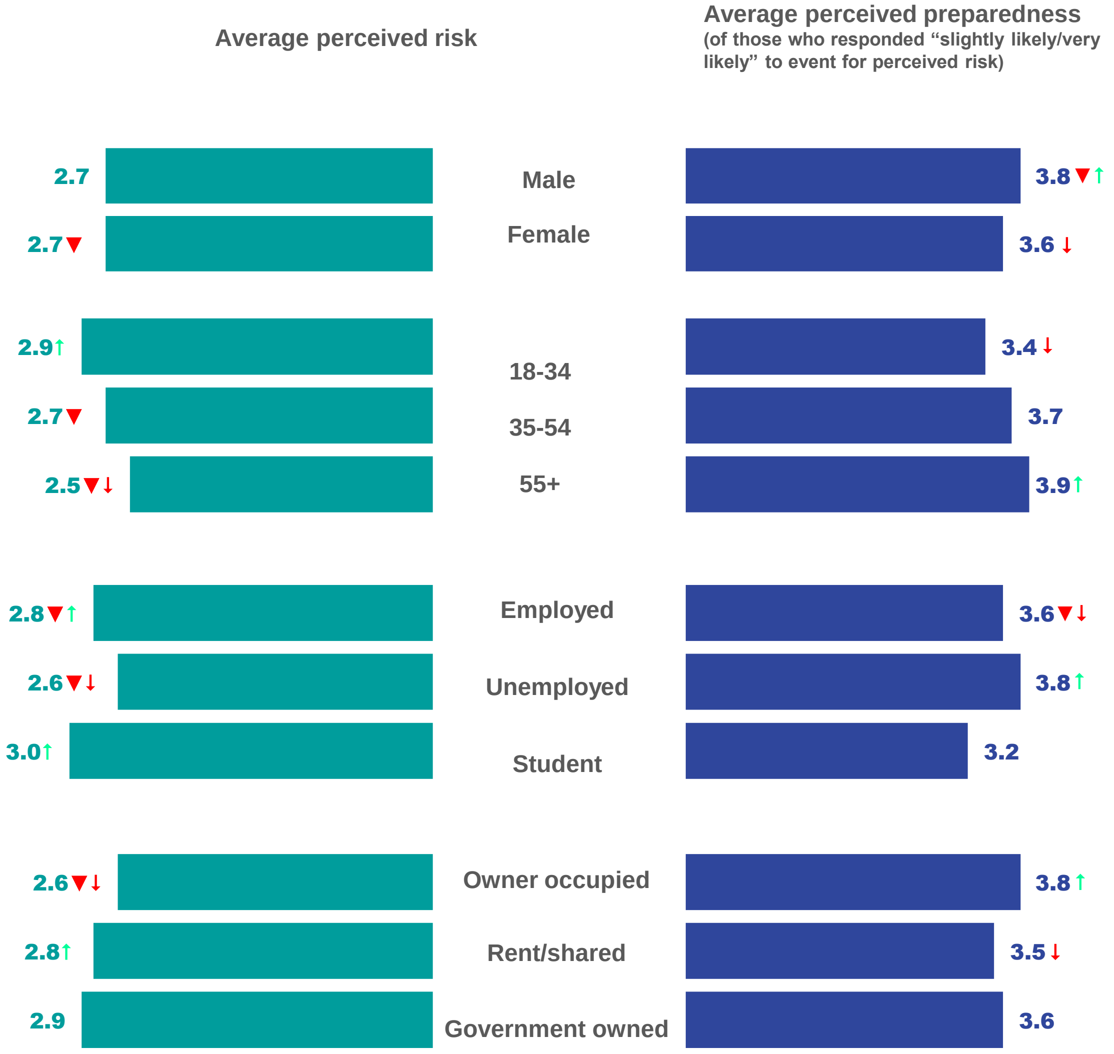
- Storms remain within the top 3 events in all regions for both perceived risk and perceived preparedness. Slight changes since 2021 include decreased risk in South Western, Central and Northern, and decreased preparedness in South Western and Central.
- Heatwaves are within the top 3 events for perceived risk across all regions, with both risk and preparedness perceived to be lower in South Western and Central in 2022.
- Cyclones are perceived to be a greater risk in Far Northern, Northern and Central and lower in South Eastern, South Western and Brisbane, with a decrease in perceived risk in Far Northern, Northern and South Western in 2022 compared to 2021.
- Queenslanders in Northern and South Western are more concerned about the risk of floods than other regions. Higher perceived risk is noted in the South Western and South Eastern in 2022 compared to 2021.
- Queenslanders in North Coast and Central perceive a greater risk from bushfires, with a lower risk perceived in Brisbane. The perceived risk is lower in 2022 compared to 2021 for Central while preparedness is lower for North Coast.
- Perceived risk of pandemics has significantly decreased across all regions since 2021, and perceived preparedness has decreased in South Western and Far Northern in 2022, compared to 2021.



Base: *Total sample 2022 n=2099 | 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



▲▼ Significantly higher/lower than 2021 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

Gender

Perceptions of risk among women have decreased in 2022, compared to 2021, and is now at a similar level with men. However, men feel more *prepared* than women, despite a decrease compared to 2021.

Age

Younger Queenslanders (18-34 years) perceive higher risk on average compared to other ages, with older Queenslanders (55+) perceiving the lowest risk. Those 35-54 years and 55+ years have seen a decrease in risk perception, compared to 2021. Older Queenslanders feel more prepared, whereas younger Queenslanders (18-34 years) feel less prepared.

Employment status

Queenslanders who are employed and students perceive a greater risk on average, but a decline in risk perception compared to 2021. Those employed feel less prepared than those unemployed.

Owner/Renter

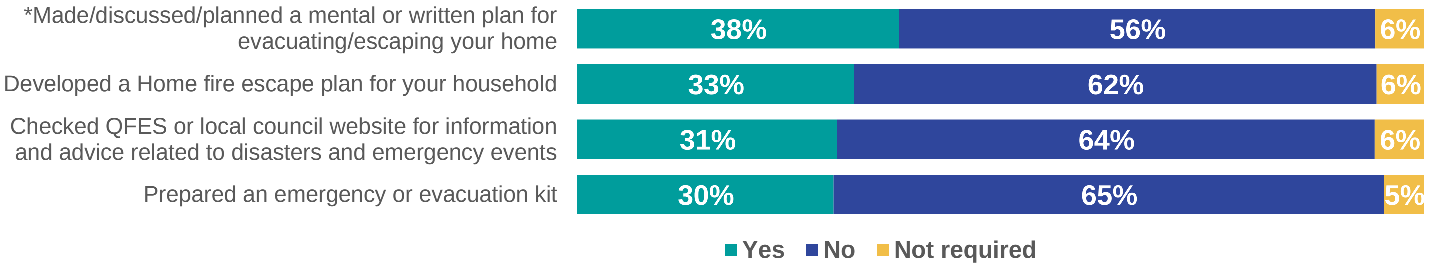
Home owners in Queensland perceive a lower risk, and a decline compared to 2021, while those who rent perceive higher risk. Home owners generally feel more prepared on average than those who rent.

Base: *Total sample 2022 n=2099; 2021 n=2176.* 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?

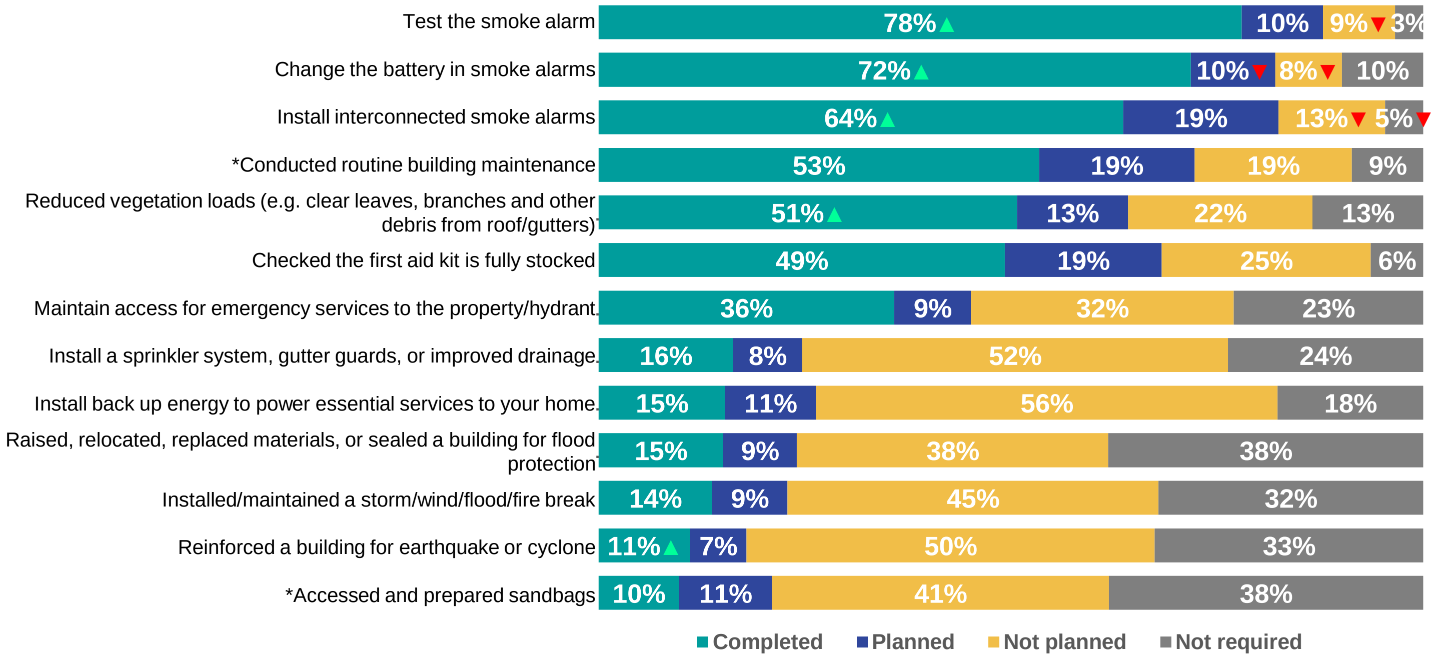
PREPAREDNESS BEHAVIOUR

Actions taken

Research and planning for local emergencies or disaster events



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



About a third of Queenslanders have researched or planned for emergencies, consistent with 2021.

Note that 'made/discussed/planned a mental or written plan for evacuating/escaping your home' is newly added in 2022 survey.

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

There was an increase in completed preparedness behaviours compared to 2021 for testing, maintaining and installing (hard-wired) smoke alarms, reducing vegetation loads and reinforcing buildings for earthquakes or cyclones.

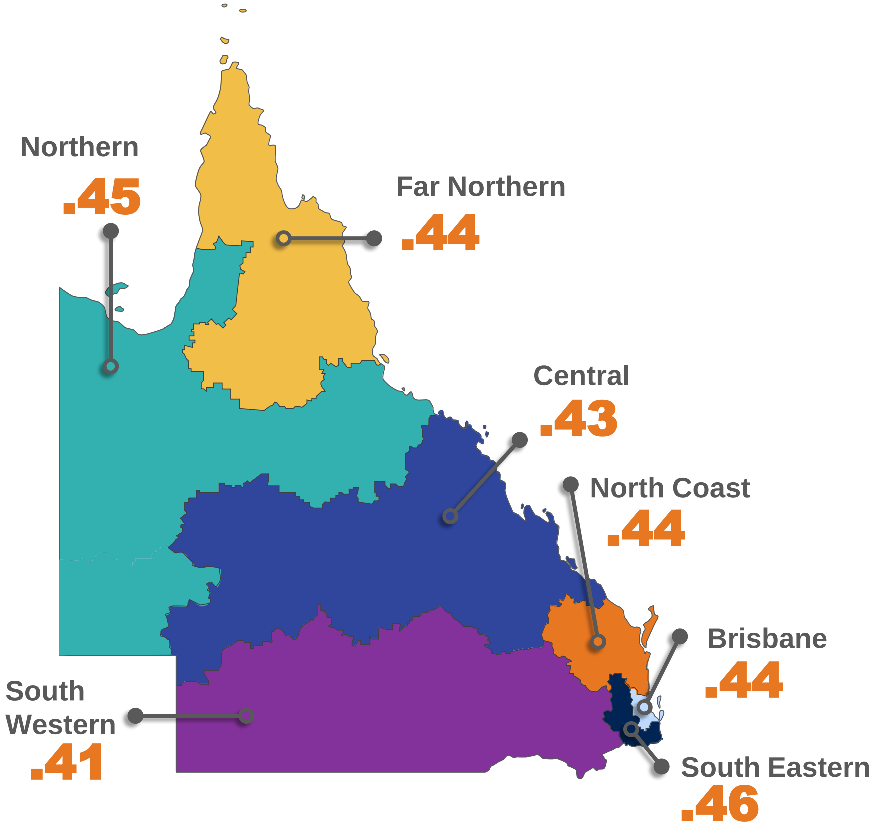
▲▼ Significantly higher/lower than 2021 @ 95% CI

*Response codes added in 2022

Base: *Total sample* 2022 *n=2099*. 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. The regions across Queensland show similar levels of preparedness, with increases in Brisbane and South Eastern and lower preparedness in Far Northern compared to 2021.



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 that additional items have been added to this question in 2021 and 2022, meaning any direct comparison to previous years is not possible.

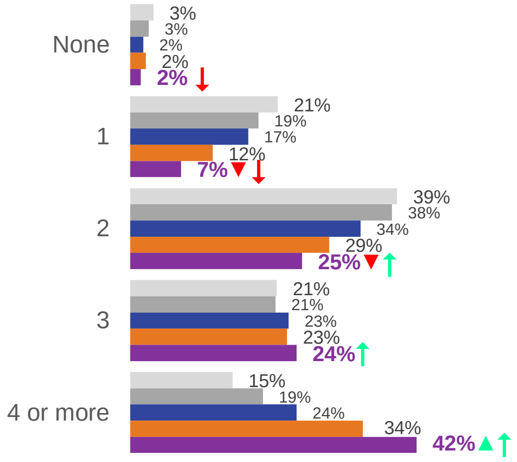
Base: *Total sample* 2022 *n=2099*. Q17. In the last year, have you undertaken any of the following emergency or disaster planning? | Q18. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event?

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

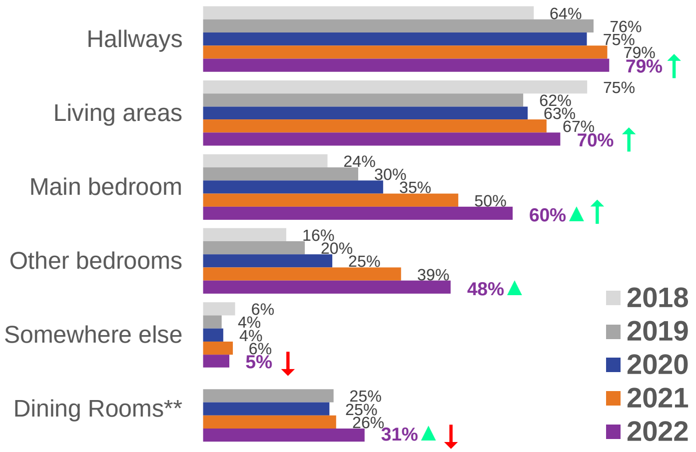
SMOKE ALARMS

Average number of smoke alarms **3.1**

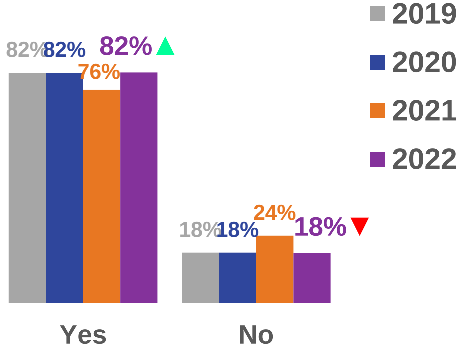
Number of smoke alarms installed



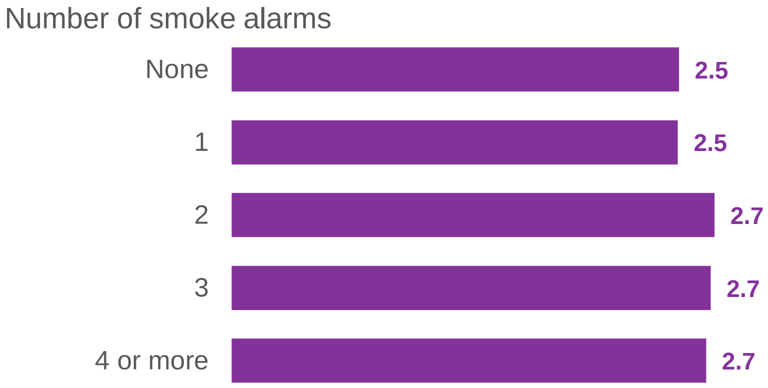
Smoke alarm location



Households with operational smoke alarms*



Average perceived risk for structure fire



Base: *Total sample 2022 n=2099; 2021 n=2176; 2020 n=2100; 2019 n=2458; 2018 n=2257.* 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).

Most Queenslanders (98%) have one or more smoke alarms in their homes. Of these, 82% are considered operational*, which bounced back to 2020 levels after a dip in 2021. The most common number of smoke alarms to have in the home is four, which has increased since the start of survey.

The most common areas for smoke alarms are hallways and living areas. The proportion of households with alarms in bedrooms and dining rooms have increased compared to 2021.

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.

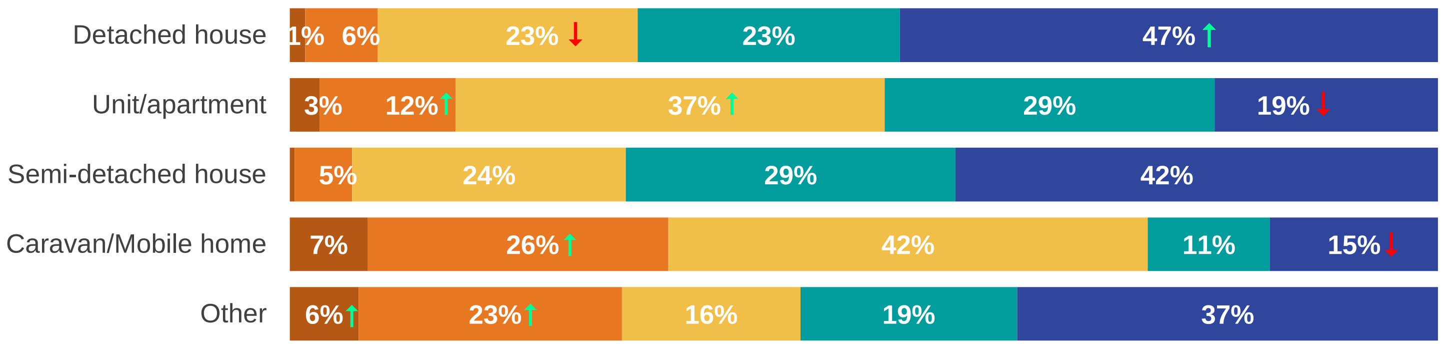
*Operational smoke alarms are those the owner has taken action to test or maintain in last 12 months.
** 'Dining Rooms' was not a selection option in 2018

▲▼ Significantly higher/lower than 2021 @ 95% CI
↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

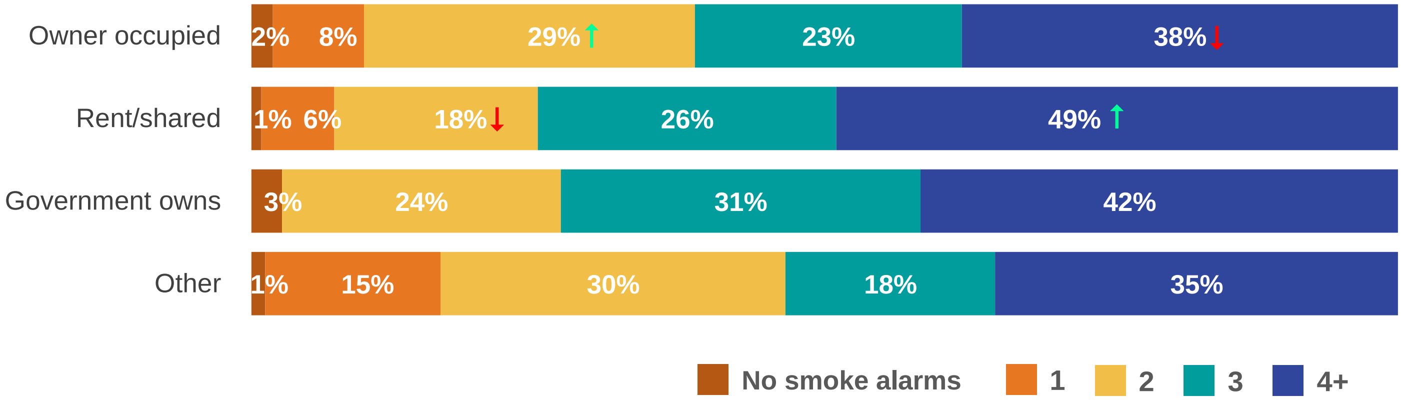
SMOKE ALARMS

Dwelling demographics by smoke alarms

Type of dwelling



Dwelling ownership



Detached homes are more likely to have 4+ smoke alarms, with units and caravans 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 one alarm, noting this response group is low in number (n=28).

Queenslanders who are renting are more likely to have 4+ smoke alarms than those who own their own home. While homeowners are more likely than those who rent to have 2 smoke alarms. There is no difference in operational smoke alarms between owners or renters.

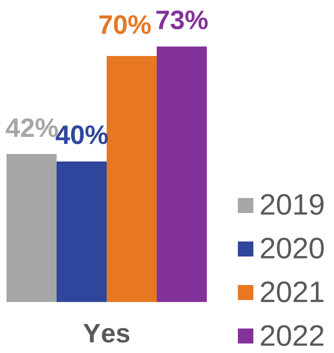
↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

Base: *Total sample 2022 n=2099.* 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?

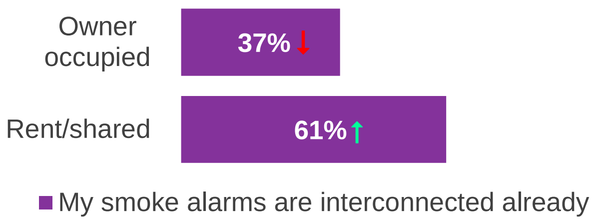
SMOKE ALARMS

Interconnected Smoke Alarms (ISAs)

Awareness of new legislation



ISAs by Dwelling ownership

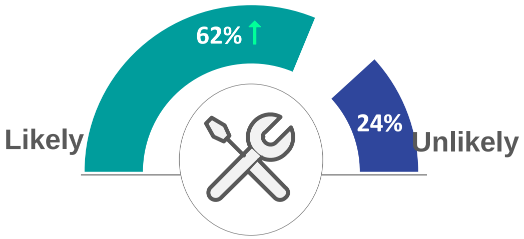


Installation of ISAs

46%▲

Already have Interconnected Smoke Alarms

Likeliness to install in the next 12 months*



Base: *Total sample 2022 n=2099; 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? | Q6. Number of smoke alarms installed? | Q7. Smoke alarm location.

*Excluding those who already have interconnected smoke alarms installed.

More than seven in ten Queenslanders have heard of interconnected smoke alarms (ISAs), similar to 2021.

Awareness of the new legislation increases with age, and those living in South Western Queensland are more likely to be aware of the new legislation. Significant higher awareness is also seen among those that are English speaking only than culturally diverse.

Queenslanders aware of the new legislation are more likely to have operational smoke alarms (85%) than those unaware of the new legislation (74%).

Nearly half of Queenslanders (46%) already have interconnected smoke alarms installed, an increase compared to 2021. Of those who don't have interconnected smoke alarms, 62% say they are likely to install them in the next 12 months, again this has increased from 2021.

Queenslanders who rent are significantly more likely to already have interconnected smoke alarms, and more home owners (67%) indicate they are 'likely' to install interconnected alarms in the next 12 months (51% renters).

ISA installation intention does not differ across regions. No significant differences found for those 'unlikely' to install in the next 12 months.

▲▼ Significantly higher/lower than 2021 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

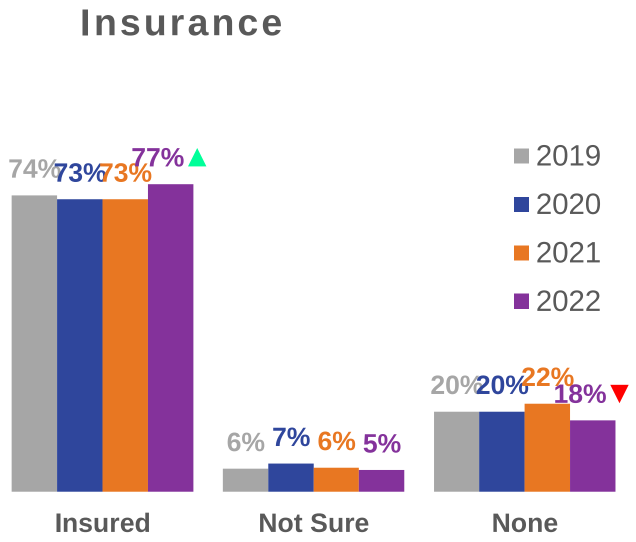
INSURANCE BEHAVIOURS

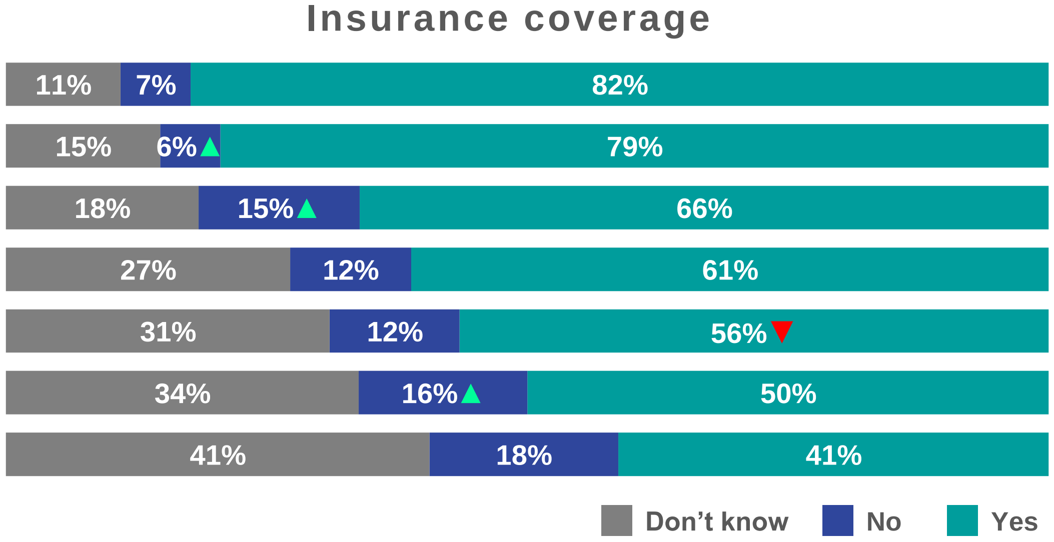
Home Insurance

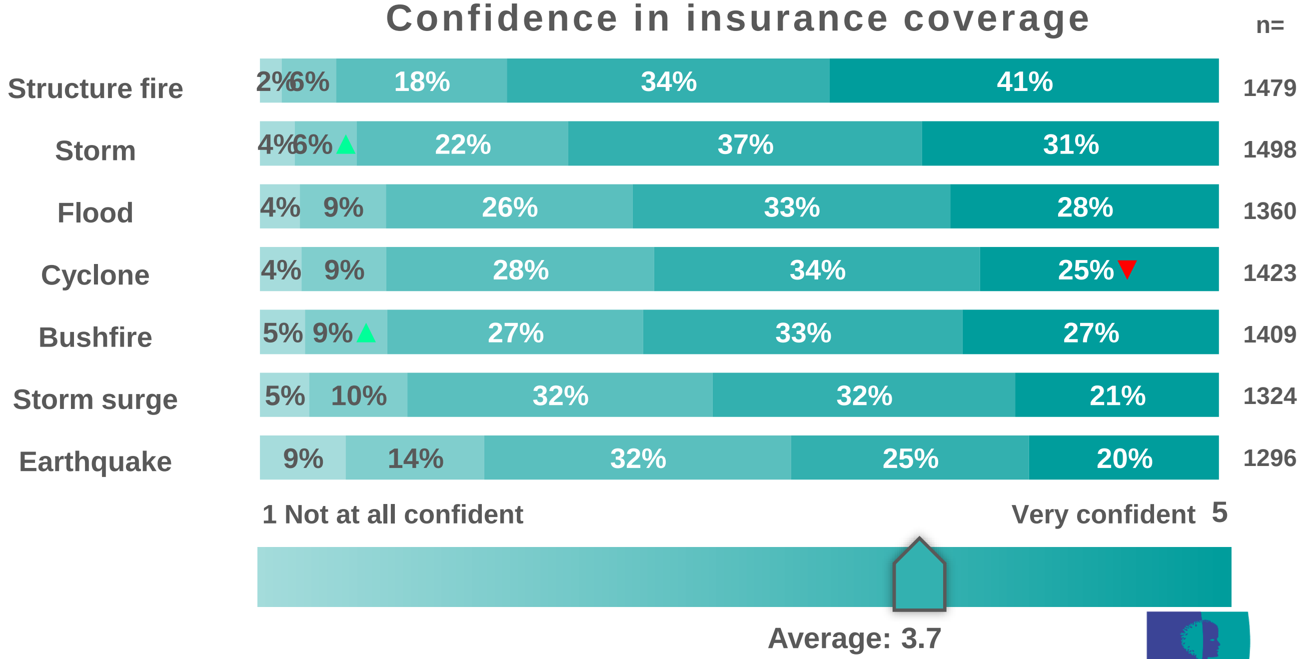
More than three quarters (77%) of respondents have home and/or contents insurance, a significant increase compared to 2021.

Structure fires and storm remain the top most commonly insured-for incidents, but there is a decrease in insurance coverage for bushfires compared to 2021. Higher rates of “no coverage” are seen for storms, floods, and storm surges, compared to 2021 .

On average, Queenslanders who have insurance are confident it covers emergency and disaster events (3.7/5), consistent with 2021 levels.







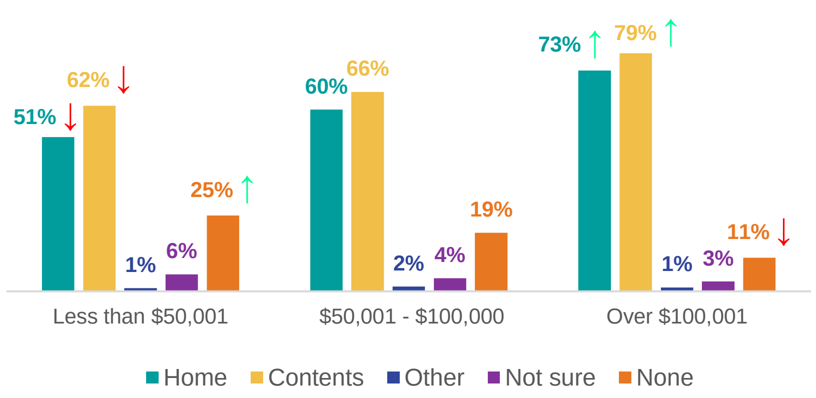
▲▼ Significantly higher/lower than 2021 @ 95% CI

Base: *Total sample 2022 n=2099; 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?

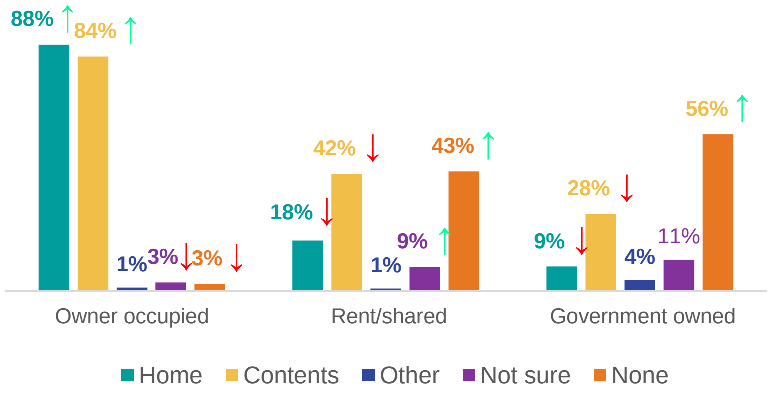
INSURANCE BEHAVIOURS

Demographics

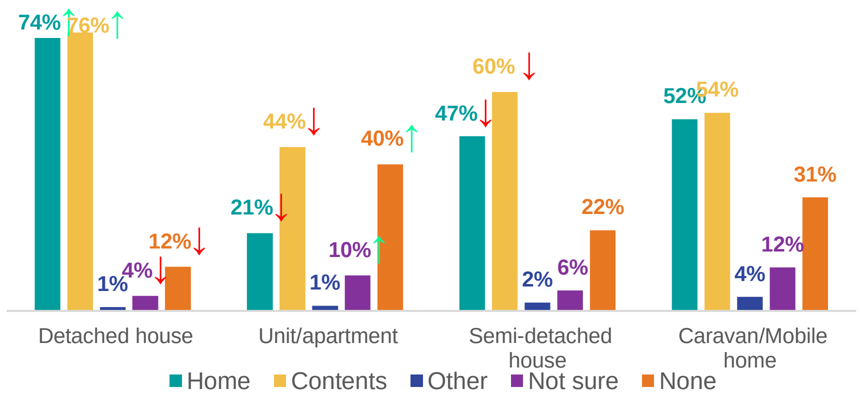
Household income



Owner/renter



Dwelling type



Those with a household income over $100,001 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 and living in government owned homes.

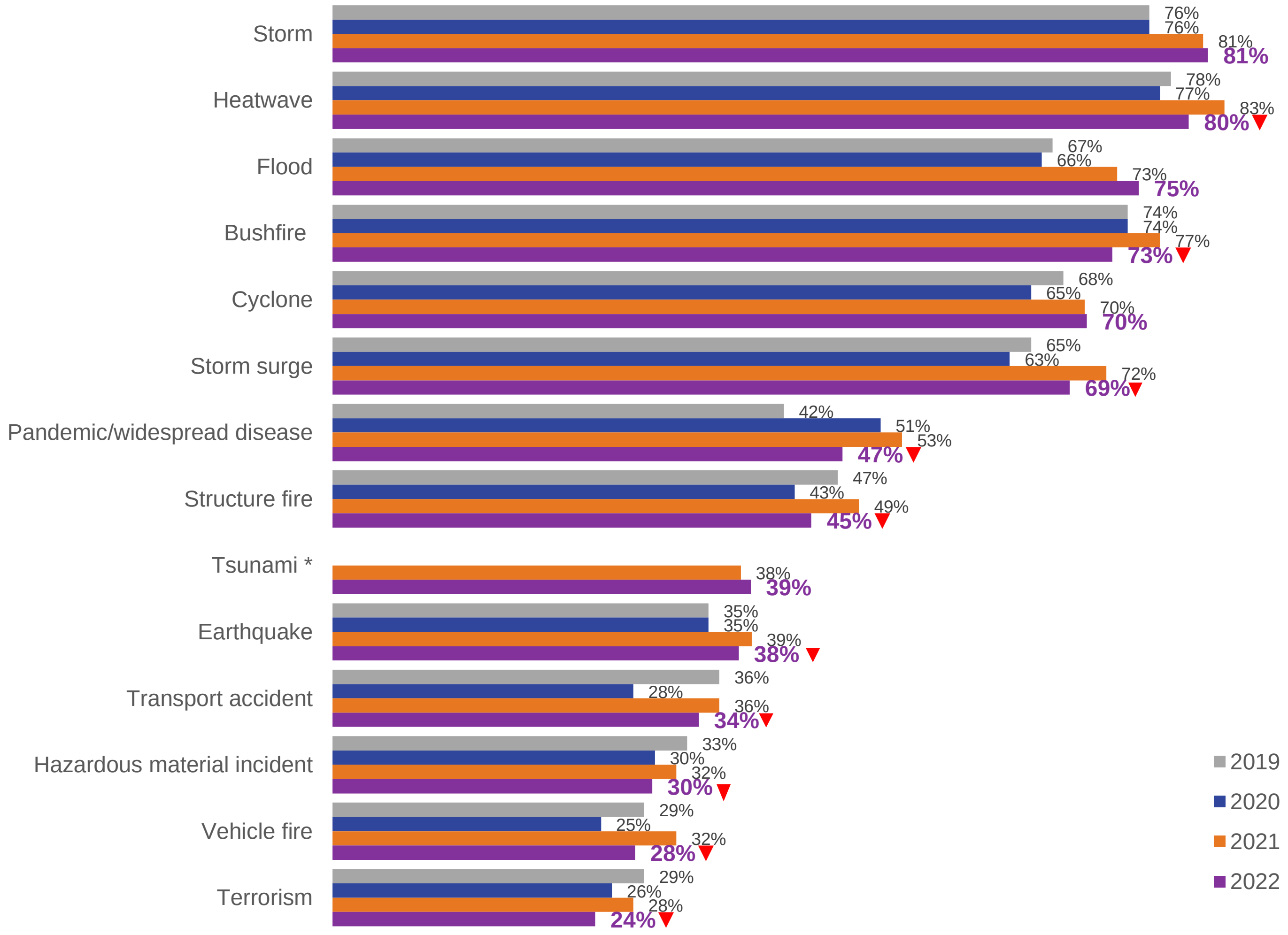
Queenslanders living in detached houses are more likely to have home and contents insurance compared to those living in apartments and semi-detached houses.

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

Base: *Total sample 2022 n=2099; 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? (NET: Mostly + Completely)



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

Overall, fewer people in 2022 (compared to 2021) believe that climate change will increase the impact of heatwaves, bushfires, pandemics, structure fires, vehicle fires and terrorism. In most cases, these findings are reverting to 2020 levels.

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.

▲▼ Significantly higher/lower than 2021 @ 95% CI

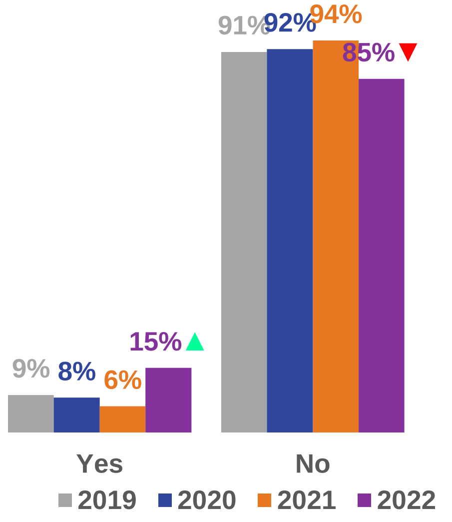
Base: *Total sample 2022 n=2099.* Q10. Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following? * Code added in 2021.

EXPERIENCE OF A LOCAL EVENT

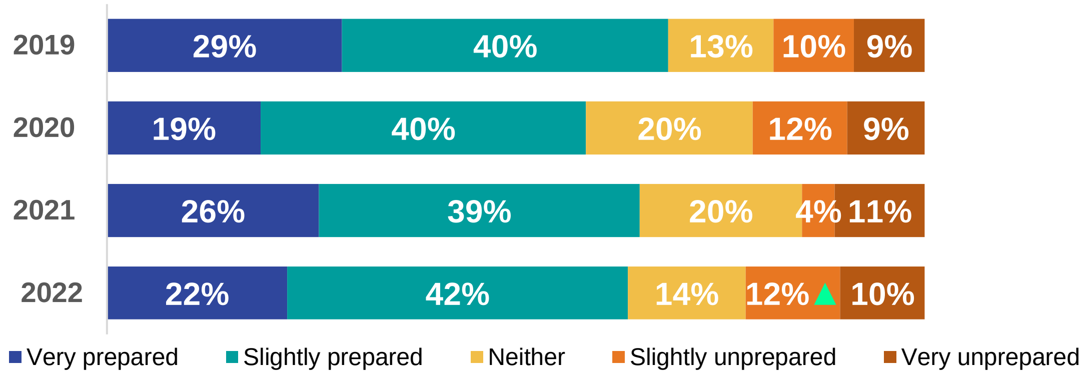
Change in preparedness

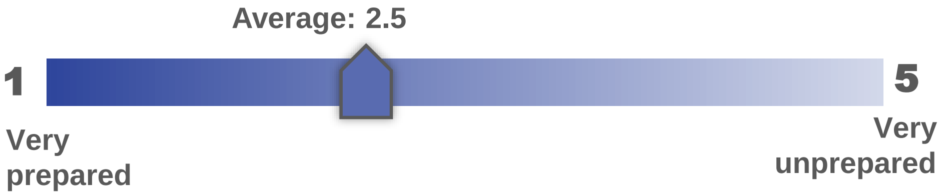
One in six (15%) Queenslanders had experienced a local emergency or disaster event in the last year, an increase compared to 2021. This may be due to the February 2022 floods in South East Queensland. Of those who had experienced an event, 64% said they were prepared and 69% feel they are now more prepared for future events.

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

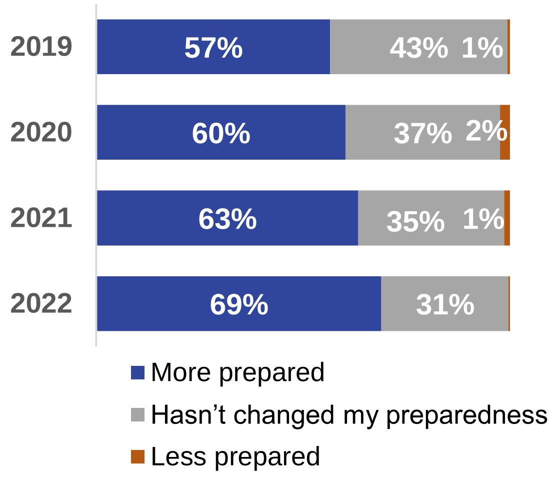


Preparedness for the emergency or disaster event





Impact of event on preparedness



Base: *Total sample 2022 n=2099; 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? 2022 n=273; 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 2021 @ 95% CI

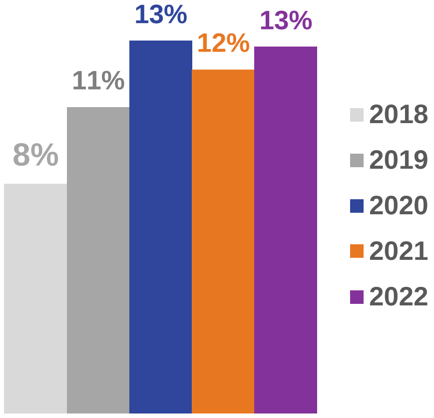
BUSINESS OWNER PERCEPTIONS

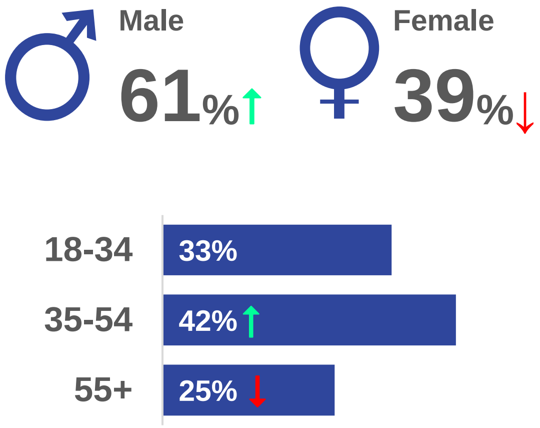
BUSINESS OWNERS

Demographics

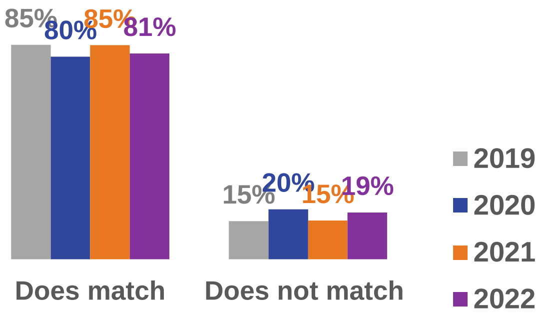
13%

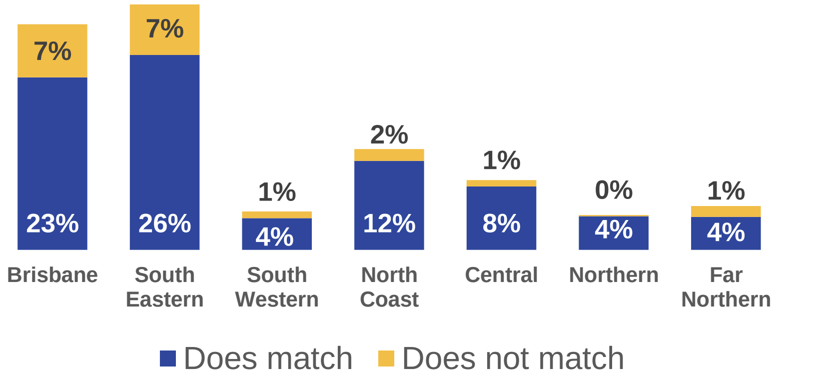
of respondents own a business





Most business postcodes matched home postcodes





Gender

Three fifths of business owner respondents were male, significantly more than females.

Age

Significantly fewer business owners were 55+ years, with two in five business owners aged 35-54.

Region

Business owners were spread across the seven regions, with the most in South Eastern and then Brisbane.

The majority of businesses outside of the residents home postcode were owned by people living in Brisbane and South Eastern.

↑↓ Significantly higher/lower than other categories @ 95% CI (2022 data)

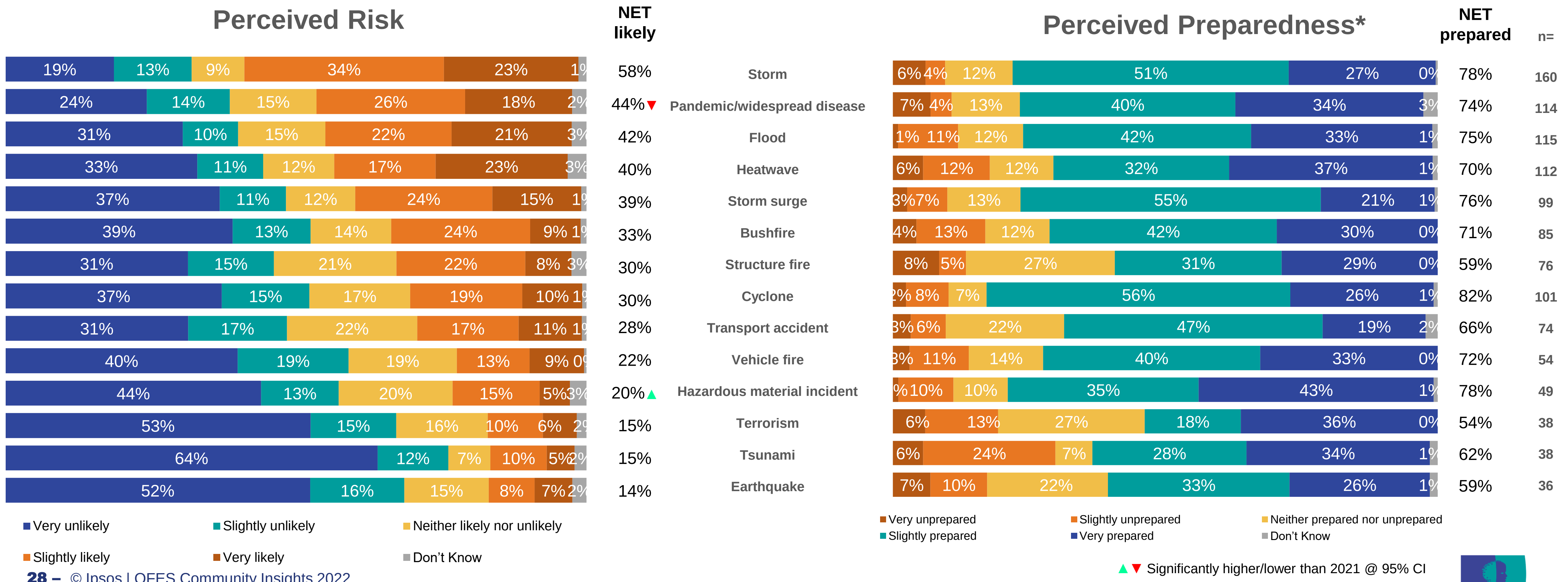
Base: *Total sample 2022 n=2099; 2021 n=2176; 2020 n=2100; 2019 n=2458. Total own a business 2022 n=266; 2021 n=231; 2020 n=245; 2019 n=263.*
SQ6. Own a business | SQ6B. Business post code | SQ4. Home post code. | SQ6B. Business post code

BUSINESS OWNERS

Perceived Risks & Preparedness

Business owners perceive similar risks to their business as to their home, with storms, pandemics, floods and heatwaves the highest perceived risk. Similarly to 2021, the perceived likelihood of these risks is overall lower for businesses compared to homes. As with their homes, business owners felt less at risk from pandemics compared to 2021, as Queenslanders gradually returning to business as usual from COVID-19.

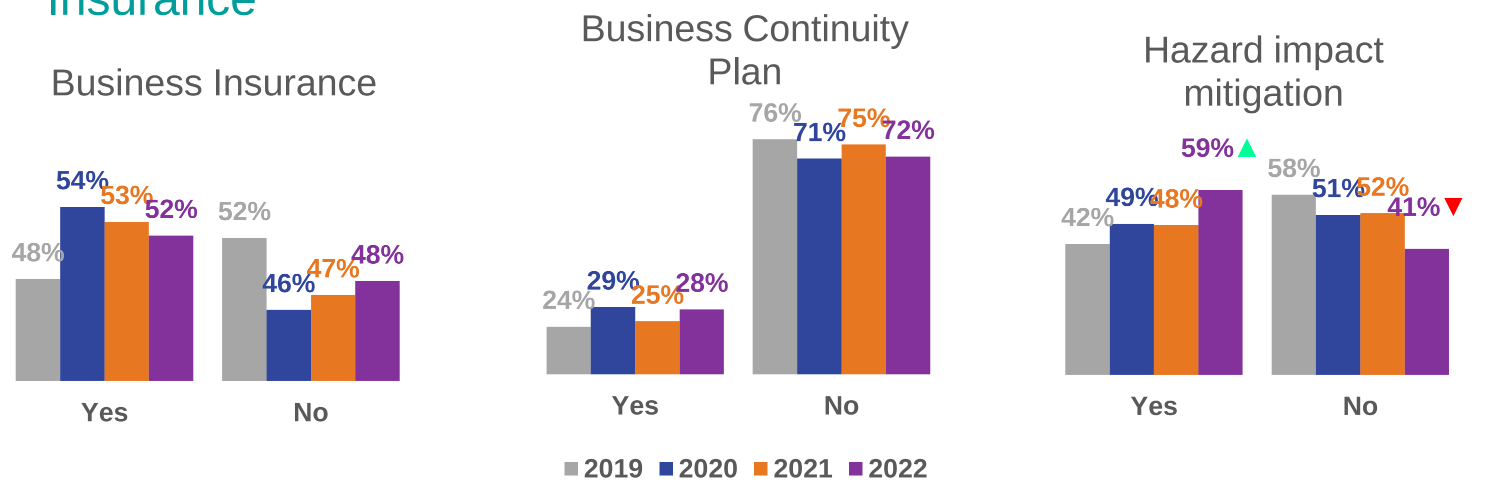
Perceived preparedness was highest for cyclones, hazardous material incident, storms, storm surges and floods.

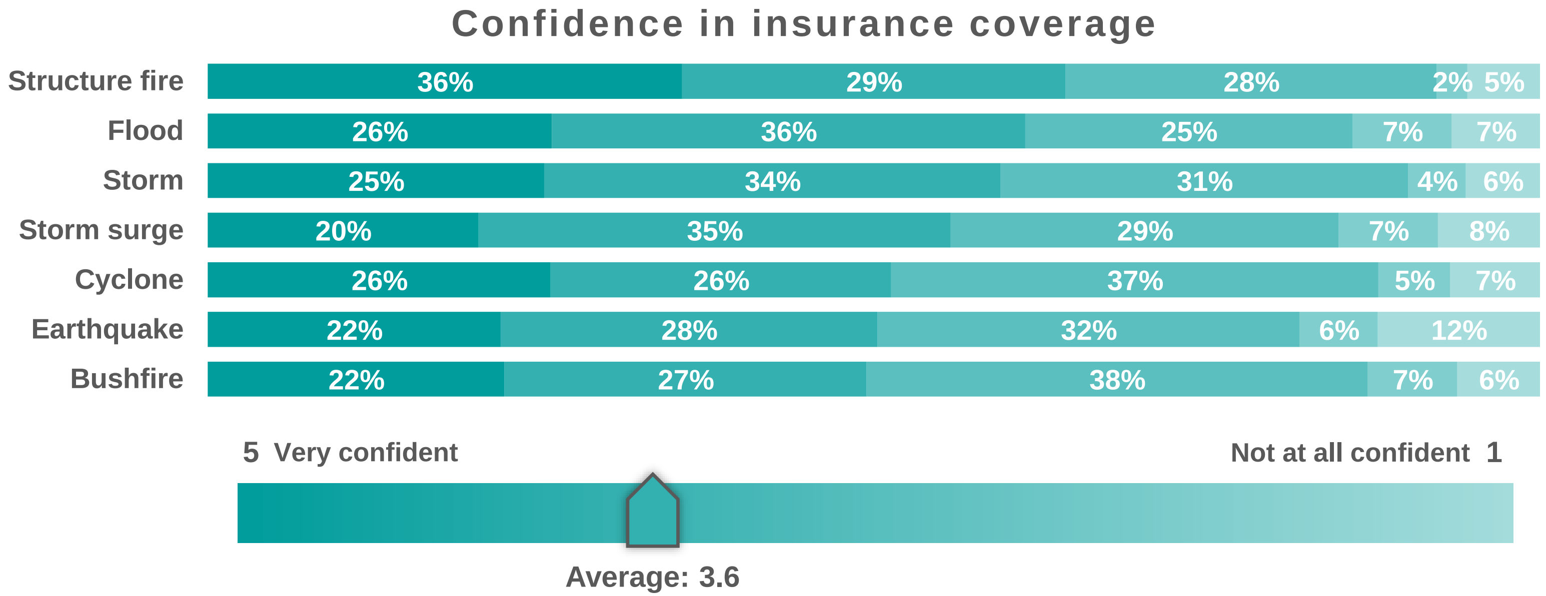


Base: *Total own a business 2022 n=266; 2021 n=231; 2020 n=245; 2019 n=263.* Q1B. How do you rate the likelihood that the following emergency or disaster event could impact your business in the next year? | Q2B. (those who responded "Slightly likely/very likely" to event for perceived risk) Overall, 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





Half (52%) of Queensland business owners have business insurance, not significantly different from previous years.

Just under one in three (28%) of business owners have a Business Continuity Plan and three in five (59%) have identified ways to mitigate the impact of hazards on their business, which is a significant increase from 2021.

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 2022 n=266; 2021 n=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?

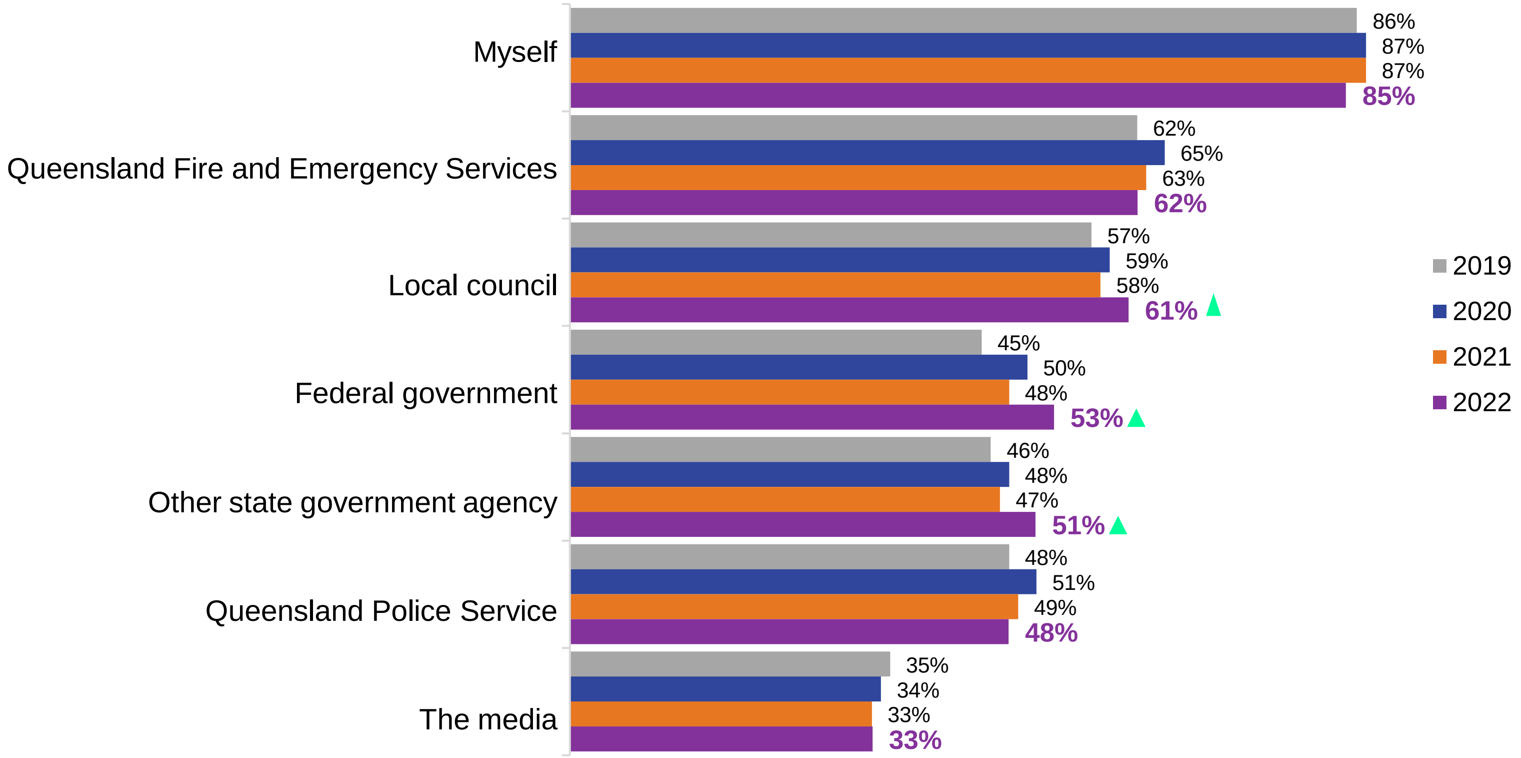
▲▼ Significantly higher/lower than 2021 @ 95% CI

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 identified themselves (as being 'Mostly' or 'Completely' responsible). Younger Queenslanders (18-34 years) were less likely to consider themselves responsible.

Increased perception for being responsible was seen for Federal Governments and State Governments in 2022 compared to 2021.

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, partners, neighbours, friends, family and hospitals.

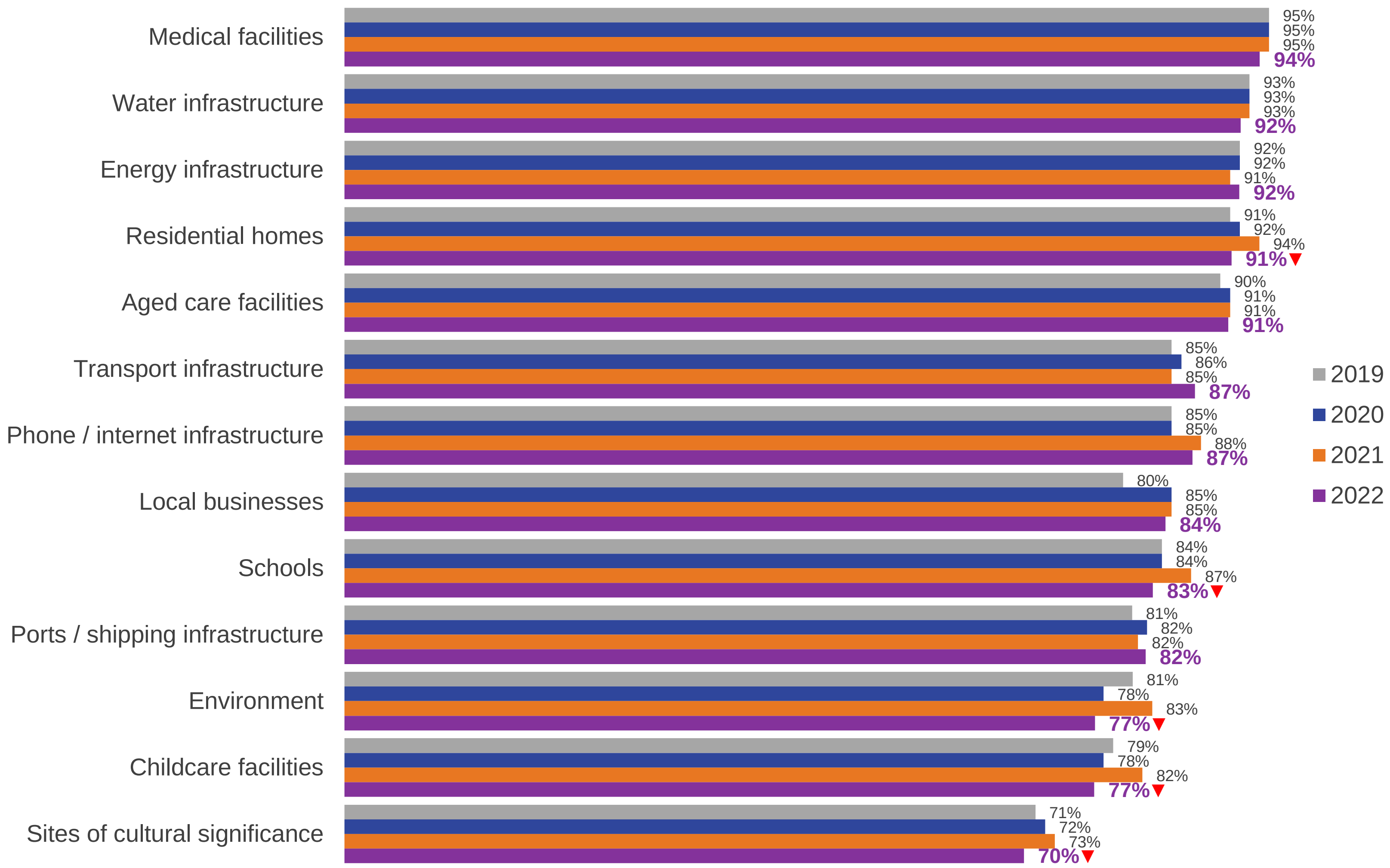
Base: *Total sample 2022 n=2099; 2021 n= 2176; 2020 n = 2100; 2019 n=2458.* Q3. Thinking of preparing your household for disasters and emergency events, how responsible do you believe each of the following should be?
*NET of 'mostly' and 'completely'

▲▼ Significantly higher/lower than 2021 @ 95% CI

QFES

Infrastructure protection

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



Medical facilities remain the most important to protect in an emergency event, closely followed by water infrastructure and energy infrastructure.

In 2022, fewer people consider residential homes, schools, environment and cultural sites as important to protect compared to 2021.

By region, Central considers phone and internet infrastructure as well as ports and shipping infrastructure less important, and Northern considers transport infrastructure as less important compared to other regions.

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

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

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

▲▼ Significantly higher/lower than 2021 @ 95% CI

Base: *Total sample 2022 n=2099; 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)

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

	Yes	Not sure	No	Importance
Warnings and alerts	55%▲	26%▼	19%	4.0
Fire and hazard response	39%	35%▼	26%	4.4
Search and Rescue	33%▲	38%▼	29%	5.2
Evacuation from flooding*	31%	31%	38%	5.6
Hazard reduction activities	31%▼	42%▲	28%▲	6.2
Recovery Services	30%▲	41%▼	29%	6.3
Community safety checks	23%▲	49%▼	28%	6.7
Education	33%	43%▼	25%▲	7.3
Provision of sandbags*	37%	32%	32%	7.4
Provide access to flooded property*	23%	43%	34%	8.0
Temporary repair of property	23%▲	44%▼	33%	8.1
Research	16%▲	59%▼	25%	8.8

■ Yes ■ Not sure ■ No

1=most important, 12=least important

More people were definitive of service provision this year ('yes' or 'no' instead of 'not sure') compared to 2021, except for hazard reduction activities.

Warnings and alerts overtook fire and hazard response services as the most important QFES service, compared to 2021. This may be due to the increased provision of warnings and alerts in the area in 2022.

Search and Rescue moved from 4th to 3rd most important, and the new code 'Evacuation from flooding' ranked as 4th most important service.

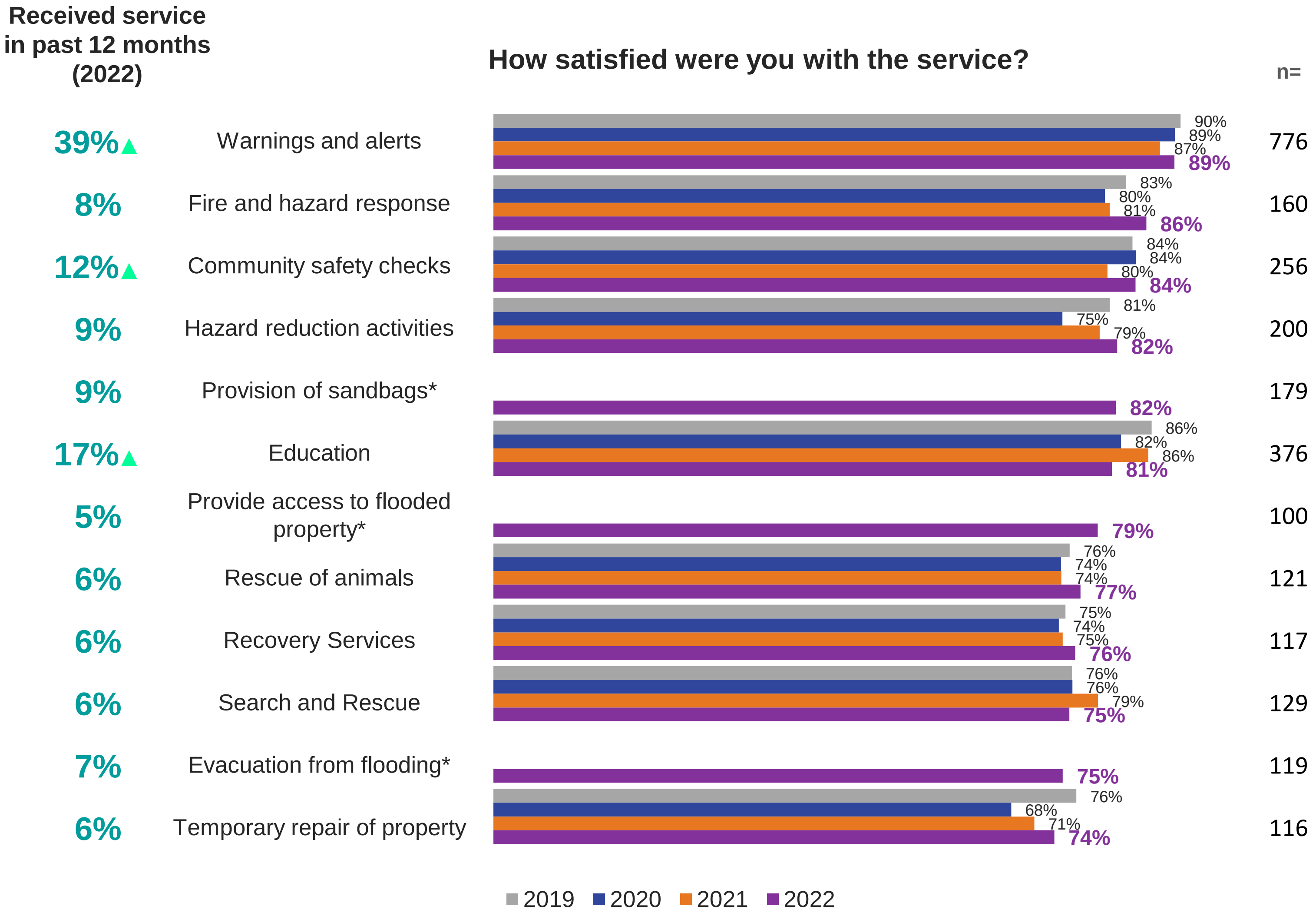
Note that provision of sandbags, evacuation from flooding and provide access to flooded property are newly added in the 2022 survey. Due to these additional codes, no direct comparison to 2021 data is possible in the importance ranking metric.

▲▼ Significantly higher/lower than 2021 @ 95% CI

Base: *Total sample 2022 n=2099.* 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 1-12. * Code added in 2022.

QFES

Service satisfaction



In total, nearly half (48%) of respondents had received a QFES service in the last year, an increase in 2022 compared to 2021.

Warnings and alerts continue to be the most commonly received service, with more people receiving warnings and alerts, and also education and community safety checks compared to 2021.

More respondents from Northern Region had received education services, provision of sandbags, hazard reduction activities, recovery services and search and rescue services, and more Brisbane respondents had received provision of sandbags. Fewer respondents from the North Coast had received access to flooded property and fewer from Central had received warnings and alerts services.

Overall, respondents were satisfied with the services, with at least three quarters indicating 'very satisfied' or 'fairly satisfied' for their received services.

Those receiving warnings and alerts were the most satisfied with their service compared to other services. Search and rescue, and evacuation from flooding were considered 3rd and 4th most important local QFES services (see previous slide), however they had some of the lower satisfaction ratings at 75% satisfied.

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

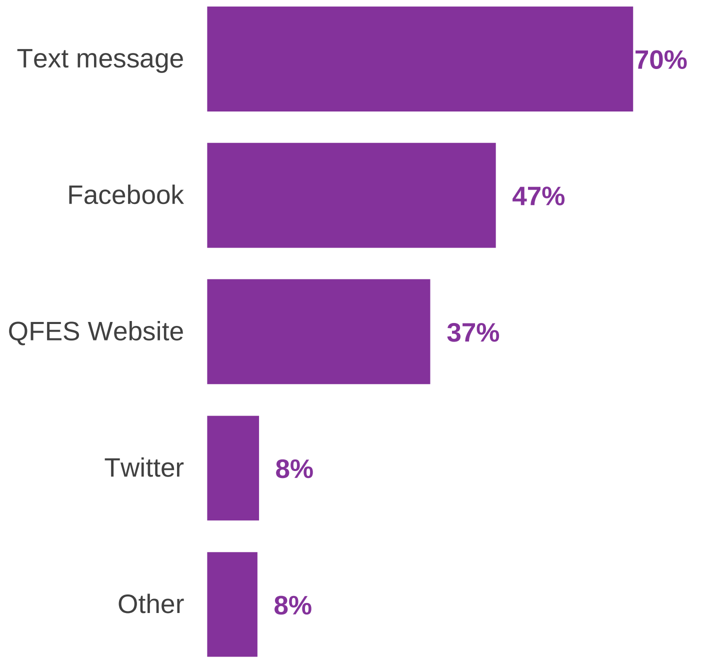
▲▼ Significantly higher/lower than 2021 @ 95% CI

Base: *Total sample 2022 n=2099; 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) * Code added in 2022.

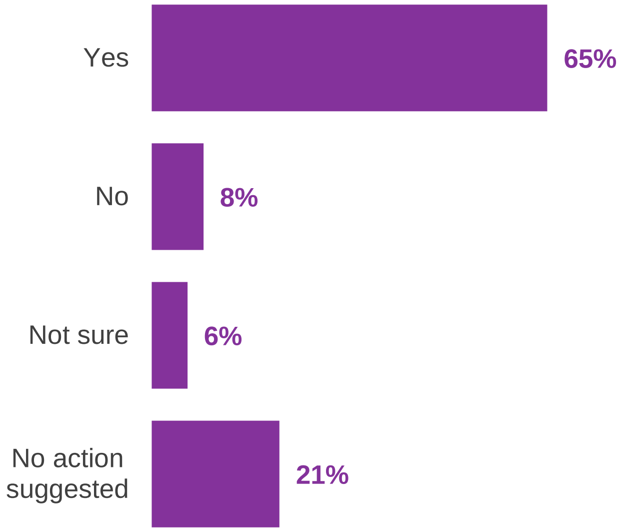
QFES

Receipt of warnings and alerts services

How did you receive the 'warning and alert'?



Did you take the action suggested?



Among those that have received warning and alert services in the past year (39%), seven in ten indicated they received them via text messages, and nearly half mentioned Facebook. Among those that mentioned 'other', most frequently cited channels were TV and radio.

Nearly two in three respondents indicated they took the action suggested following the receipt of warning and alert. One in five said no action was suggested in the warning and alert services received.

Base: *Total received warnings and alerts 2022 n=776.* Q11C. How did you receive the 'warning and alert'? | Q11D. Did you take the action suggested in the warning and alert?

* New questions added in 2022.

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’)

Three quarters (73%) of 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), except for actively seeks innovative ways to deliver services and provides value for money services for Queensland.

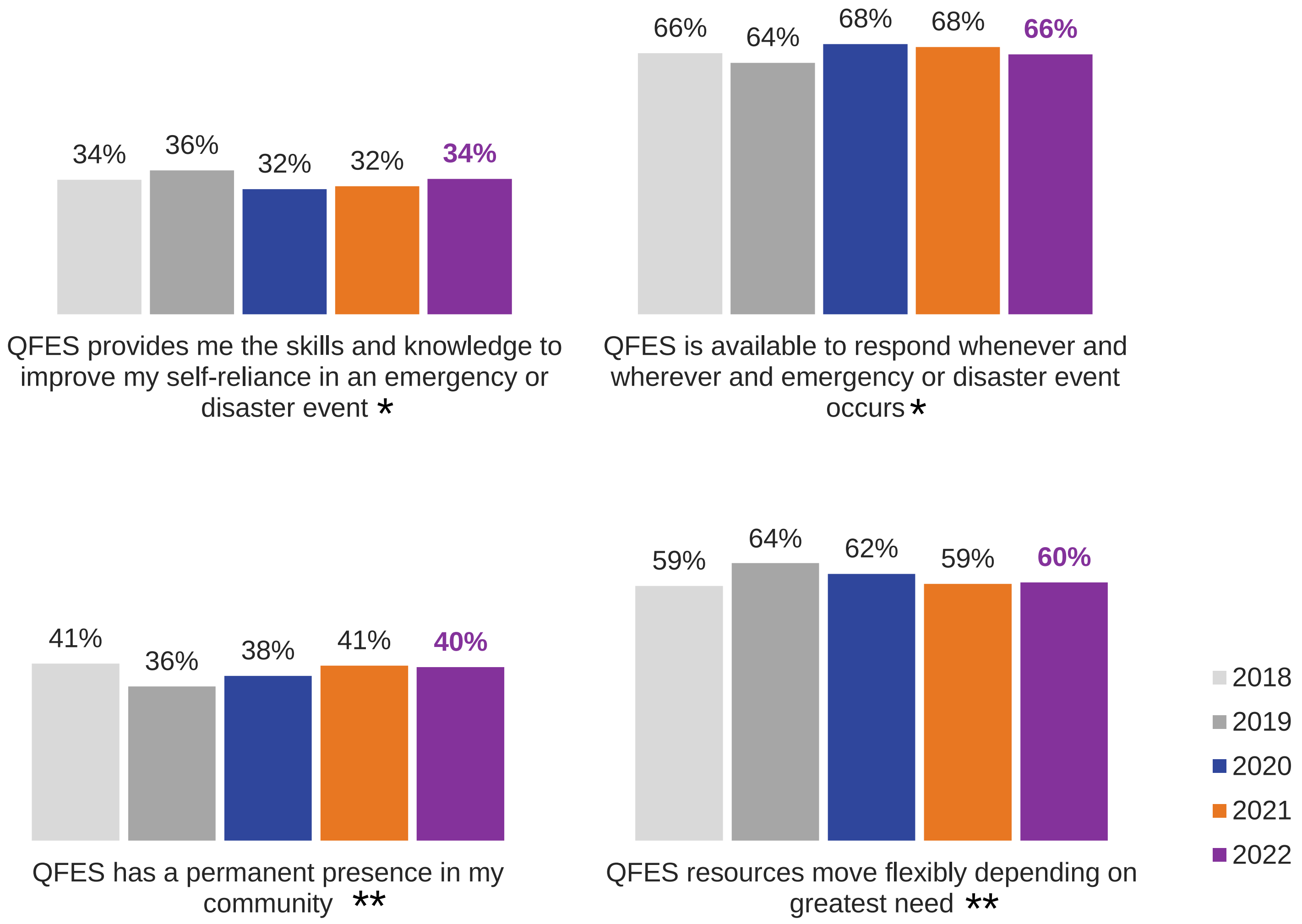
By gender, females consider supporting local council with disaster management, providing assistance after emergency events, innovative ways to deliver services, providing value for money services for Queensland and minimising impacts on the environment as more important compared to males.

Northern Region considered providing value for money services as less important compared to other regions.

Base: *Total sample 2022 n=2099.* Q6. How important to you is it that QFES performs the following activities in your local area?

▲▼ Significantly higher/lower than 2021 @ 95% CI

QFES
Service delivery preference



Two thirds of Queenslanders (66%) prefer QFES be available to respond when events occur, compared to providing knowledge for self-reliance, and this remains steady compared to 2021.

The majority of Queenslanders would prefer QFES resources move flexibly rather than having a permanent presence, consistent with 2021.

Preference for flexibility of QFES resource distribution is significantly higher in South Eastern (63%), with the rest of Queensland preferring a permanent presence (46%). This is particularly driven by Central (50% permanent presence).

▲▼ Significantly higher/lower than 2021 @ 95% CI

Base: Total sample 2022 n=2099; 2021 n=2176; 2020 n=2100; 2019 n=2458. * Q8. What is more important to you? | ** Q9. What is more important to you?

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 1-12
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? (see page 37)
Q9. What is more important to you? (see page 37)
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 service you received?
Q11C. How did you receive the ‘warning and alert’?
Q11D. Did you take the action suggested in the warning and alert?
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. 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?
Q23C. Coronavirus (COVID-19) has affected people from many countries around the world. What has changed for you?
Q23D. Has the Coronavirus (COVID-19) affected your business?
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

Level of education	%
Year 10	16%
Year 12	21%
Trade Qualification	15%
Diploma	17%
Bachelor	20%
Post-graduate	9%
Doctorate	1%
None of the above	2%

Household income

Household Income	%
Less than $50,001	30%
$50,001 - $100,000	30%
Over $100,001	32%
Prefer not to say	8%

Household members' limitations or impairment

Limitations	%
Unable to communicate well in English	1%
Vision impairment	2%
Mobility impairment	9%
Hearing impairment	5%
Mental Health impairment	5%
Cognitive disorder/intellectual disability	2%
Other	2%
Prefer not to say	2%
None of the above	79%

Living Situation

Living situation	%
Live alone	18%
Shared house with friends/housemates	5%
Live with parents/other family members	7%
Live with partner/spouse	34%
Live with partner/spouse and children aged <18	22%
Live with partner/spouse and children aged >18	6%
Single parent living with child/children	7%
Other	1%

Employment status

Employment status	%
Employed, working full-time (35+ hrs per week)	34%
Employed, working part-time (<35 hrs per week)	16%
Self-employed	7%
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)	1%
Unemployed, looking for part-time work (<35 hrs per week)	3%
Unemployed, not looking for work	1%
Student	2%
Pension, beneficiary, or welfare recipient	5%
Retired	21%
Look after the house full-time	6%
Other	1%
Prefer not to say	1%

Base: *Total sample; Unweighted; n=2099*
Source: Q32. Highest level of education | Q33. Employment Status | Q34. Living Situation | Q29. Household members' limitations or impairment | Q35. Household Income

DEMOGRAPHICS

Dwelling details

Type of dwelling

Dwelling	%
Detached house	73%
Unit/apartment	14%
Semi-detached house	9%
Caravan/Mobile home	1%
Other	2%

Year of house construction

House construction	%
Built from 2017 onwards	11%
2007-2016	20%
1997-2006	17%
Before 1997	41%
Don't know	11%

Moved house in the last 12 months

Moved	%
Yes	22%
No	78%

Number of levels in home

Levels	%
1	74%
2	23%
3 or more	4%

Home ownership

Home ownership	%
Owner occupied	60%
Rent/shared	35%
Government owns	2%
Other	3%

Relocated from

Relocated	%
Within local area	60%
Elsewhere within Queensland	24%
From interstate	14%
From overseas	2%

Base: *Total sample; Unweighted; n=2099* | Q23B. Relocated from*; Unweighted; n=453*
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

DEMOGRAPHICS

Cultural and Linguistics

Country of birth

Country of birth	%
Australia	81%
United Kingdom	6%
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	93%
Aboriginal	5%
Torres Strait Islander	0%
Both	1%
Prefer not to say	2%

Language other than English at home

LOTE	%
Yes	13%
No	87%

Main language other than English at home

Main language other than English	%
Mandarin	4%
Arabic	1%
Cantonese	1%
Vietnamese	2%
Italian	6%
Greek	1%
Hindi	4%
Spanish	4%
Punjabi	0%
Other	37%
Prefer not to say	39%

Base: *Total sample; Unweighted; n=2099* | Q28B. Main language other than English at home*; Unweighted; n=268*
Source: Q31. Indigenous Status | Q28. Language other than English at home | Q30. Country of birth | Q28B. Main language other than English at home

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.