QFES COMMUNITY INSIGHTS SURVEY 2023

Final Report

Prepared by Ipsos

15 December, 2023

Queensland Government

GAME CHANGERS

ACKNOWLEDGMENT OF COUNTRY

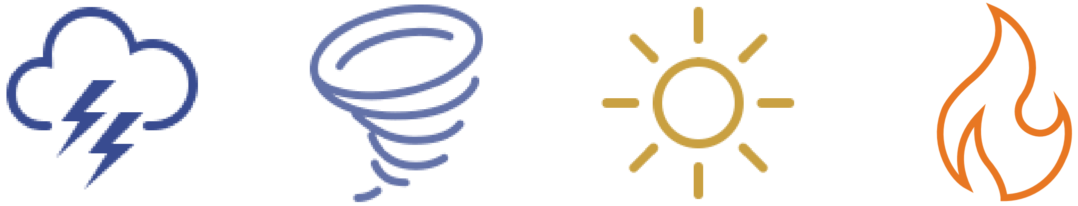
We acknowledge the First Nations people as the Traditional Custodians of the lands across Queensland and pay respect to the Elders – past, present and emerging. They hold the memories, traditions, the culture and hopes of Aboriginal peoples and Torres Strait Islander peoples across the state.

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 2023, 2,100 Queenslanders were surveyed across seven regions of Queensland.

Perceived risk of emergency events

- **Heatwaves are considered more likely this year**, with floods and pandemic down from 2022. Storms remain the top perceived risk.
- Despite these changes, the **average perceived risk** for emergency or disaster events has decreased in 2023 to the lowest point since 2019, after peaking in 2020 and 2021.
- Queenslanders who perceive lower risk of emergency events tend to feel more prepared.



Preparedness for emergencies

- Over two thirds of **Queenslanders feel prepared for storms, heatwaves and cyclones**, and more people feel unprepared for bushfires in 2023.
- While self-reported preparedness for emergency events is similar across all regions, the Preparedness index, which measures **preparedness behaviours, is highest in Northern Queensland and lowest in South Eastern Queensland**.
- **Experience of a local emergency event results in greater preparedness** on average, with 59% of those who had experienced a local emergency event saying they felt more prepared, compared to only 3% who felt less prepared afterwards.

EXECUTIVE SUMMARY

Smoke alarms

- Queenslanders are installing more smoke alarms in their homes over time, however **preparedness behaviours around smoke alarms is down in 2023**, particularly around testing and changing batteries.
- Three quarters of Queenslanders have heard of interconnected smoke alarms (ISAs), the highest level since 2019. However, **only half of Queenslanders have ISAs installed**.
    - This is higher for renters (60%), where this was legislated by 2022, than homeowners (42%), who need to have ISAs installed by 2027.

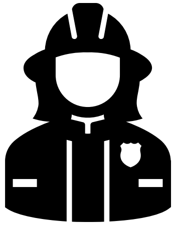
Insurance

- **Three quarters of Queenslanders have home and/or contents insurance**, a significant decrease to 2021 level after a peak in 2022.
- **Structure fires and storm** remain the most commonly insured-for incidents, followed by **flood**. There are no changes in event coverage or confidence (moderate to high) compared to 2022.
- Homeowners and those living in detached houses are more likely to be insured.

EXECUTIVE SUMMARY

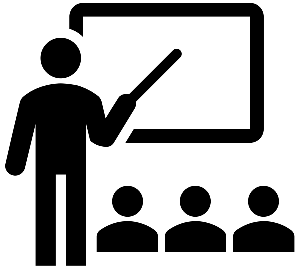
Perceptions of QFES services

- **'Fire and hazard response' has reclaimed top position as the most important service in 2023**, with 'warnings and alerts' back in second place, and 'road crash rescue' third most important.
- For Queenslanders who have received a QFES service, satisfaction is high, and the **majority of Queenslanders take actions suggested in warnings and alerts** when they receive them.
- **Medical facilities continue to be considered the most important infrastructure to protect in an emergency event**, closely followed by water infrastructure, residential homes, energy infrastructure, and aged care facilities.



QFES Responsibility and engagement

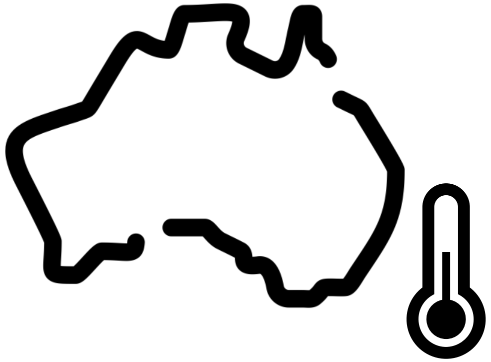
- **Queenslanders consider themselves most responsible for household preparedness** (84%), followed by QFES (64%) and local councils (62%).
- Community activities considered most important tend to be around **engagement with school students**.
- **QFES community engagement awareness is higher in regional Queensland**.
- Preference for a permanent QFES presence is higher in regional communities compared to SEQ.



EXECUTIVE SUMMARY

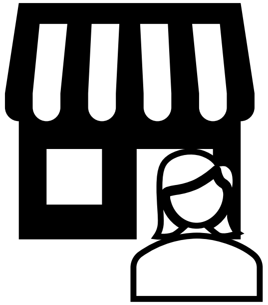
Climate change

- The perceived impact of climate change on emergency events has **decreased for natural emergencies** (storms, floods, cyclones and earthquakes) and **increased for human-caused disasters** (structure fire, transport accident, vehicle fire and hazardous material incident).



Business owners

- **Business owner demographics found equivalent portions of males and females in 2023**, whereas 2022 had significantly more males.
- Most business owners live in the same postcode as their business, and this remains stable over time.
- Business owners still consider pandemics a risk, and feel **less prepared for pandemics, floods and transport accidents** than they did in 2022.
- Levels of business insurance coverage (58%) are their highest since 2019.



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BACKGROUND AND OBJECTIVES OF SURVEY

BACKGROUND

The Queensland Fire and Emergency Services (QFES) was established in 2013 and encompasses the Fire and Rescue Service (FRS), disaster management services, Rural Fire Service (RFS), and State Emergency Service (SES).

In 2019 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 18 years ago as the former 'Households Survey', evolving using 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.

** 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 17-minute survey was conducted between 20th September and 13th October 2023.
- We present tracking data since 2019, with significant testing of 2023 compared to 2022 data.

SAMPLE

- 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= 2,100

ANALYSIS

- Sample was weighted to reflect the Queensland population proportions in terms of region, age and gender.
- Statistical significance testing was conducted at a 95% confidence level (CI). Differences are indicated by the following symbols:

▲ significantly higher than 2022 @ 95% CI
▼ significantly lower than 2022 @ 95% CI

- Statistical significance testing was conducted between the demographic categories for 2023 data and are indicated by the following symbols:

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

DEMOGRAPHICS

The 2023 QFES Community Insights Survey respondents comprised 2,100 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.

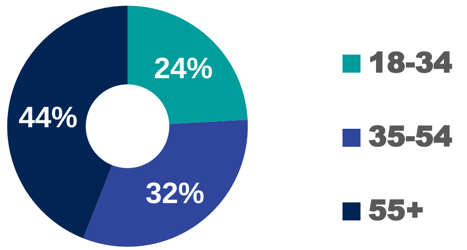
Gender

Male **46%**

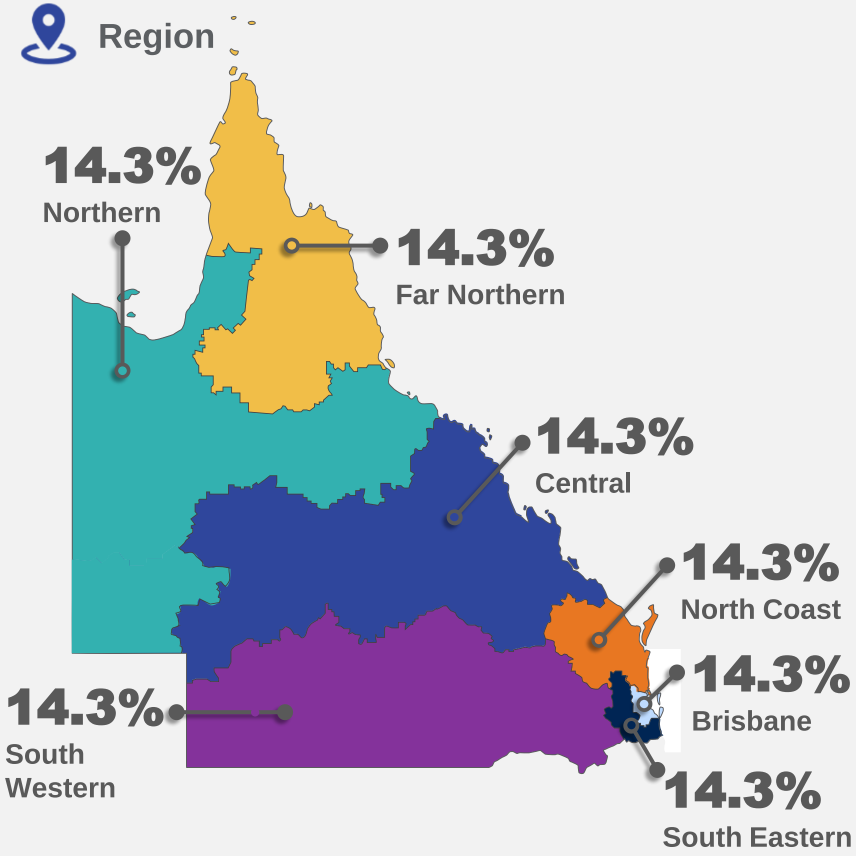
Female **54%**

Gender Diverse **<1%**

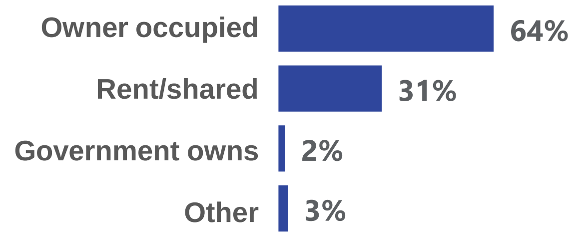
Age



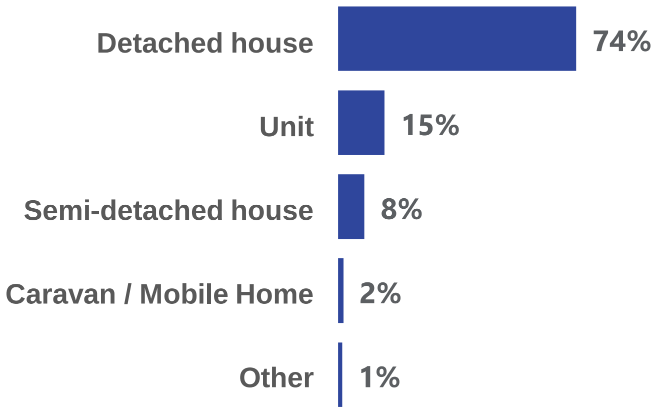
Region



Home ownership



Type of dwelling



Base: *Total sample; Unweighted; n = 2100*

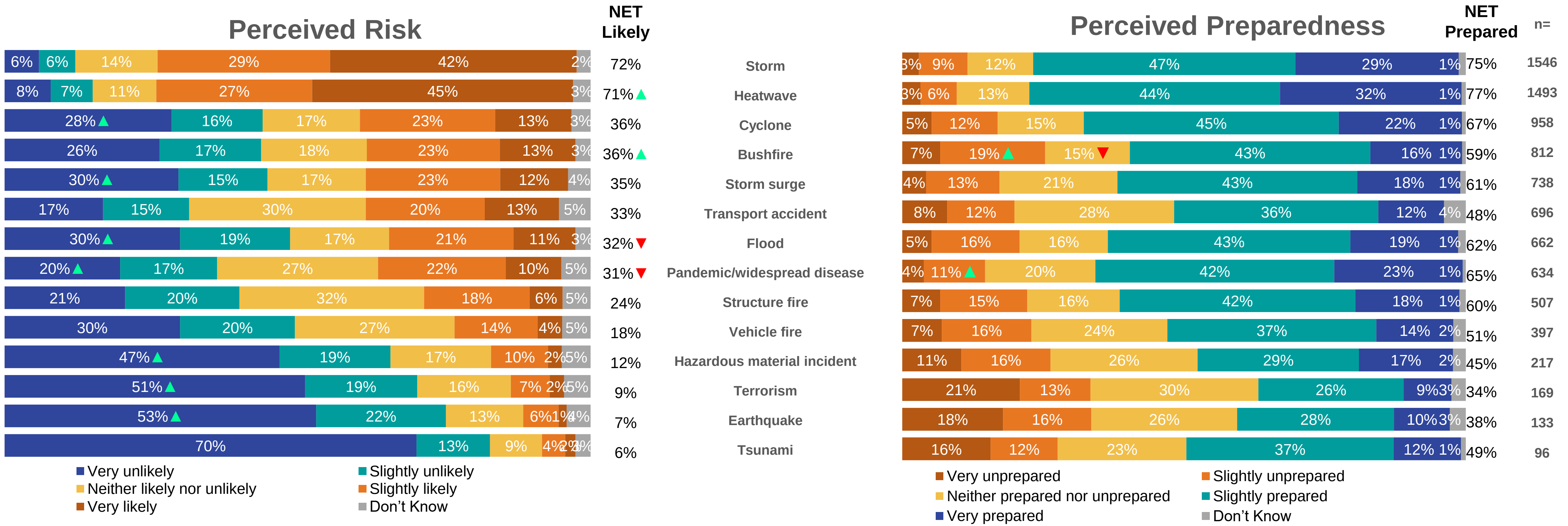
Source: SQ1 What is your age l SQ2 What is your gender? | SQ5 Which suburb do you live in? | Q24 Do you or your family own or rent your home? | Q26 How would you best describe the type of dwelling you live in?

COMMUNITY PERCEPTIONS

PERCEPTION OF RISK & PREPAREDNESS

More Queenslanders feel at risk from heatwaves and bushfires this year compared to 2022, and a significant decrease in those concerned about floods and pandemics. Storms and heatwaves are the top two perceived emergency or disaster events, followed by cyclones and bushfires. Pandemic has dropped from the top three list.

Among those who perceived a risk from events, people feel most prepared for heatwaves, storms, and cyclones, while terrorism remained the event people felt least prepared for. This consistency is maintained compared to 2022.



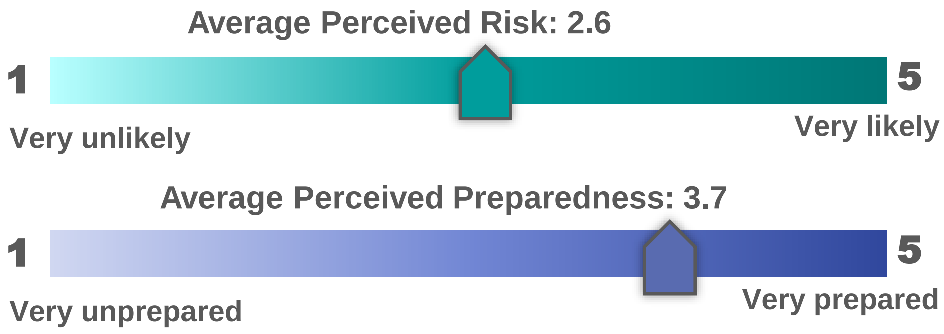
**of those who responded 'Slightly likely/Very likely' to event for perceived risk*

▲/▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample base 2023 n=2100; 2022 n=2099* | Q2 2023 n= from 96 to 1546; 2022 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? No significant differences found between waves for Q2.

RISK & PREPAREDNESS

By region

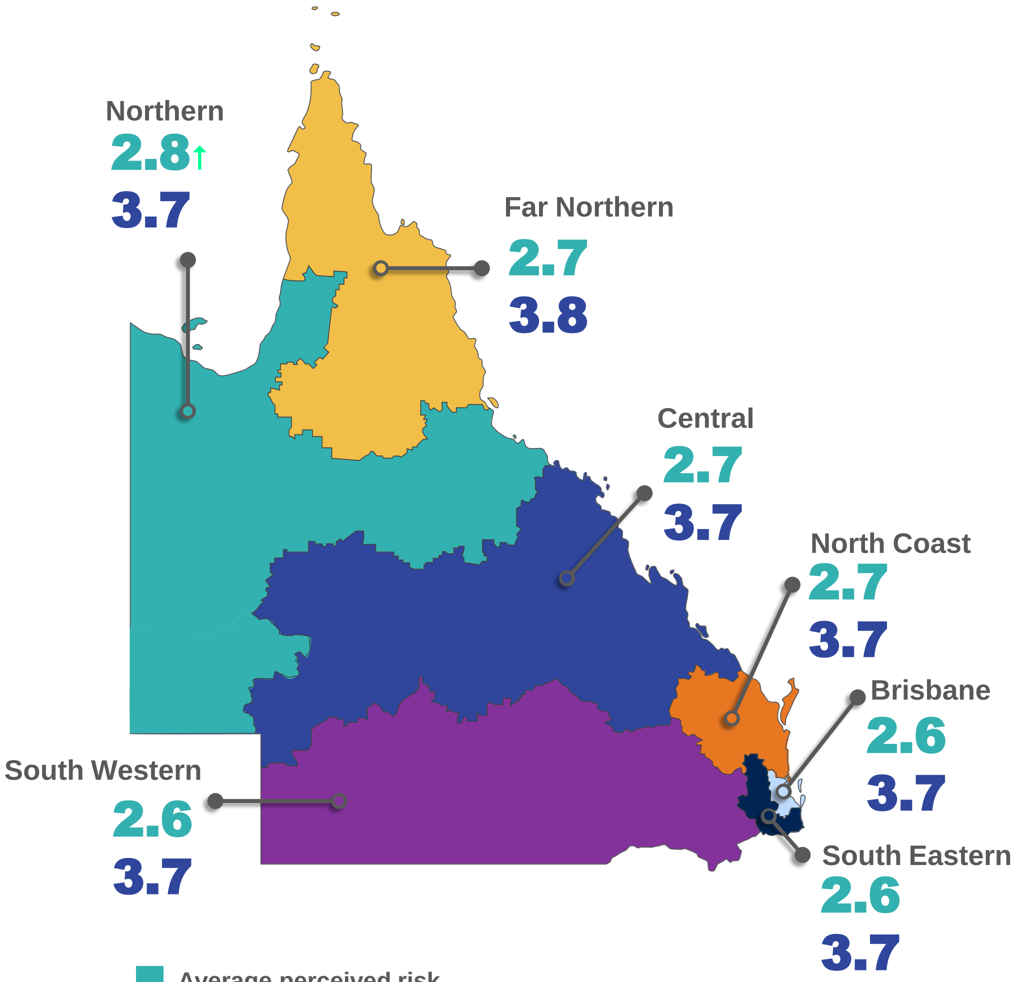


The **average perceived risk** from emergency or disaster events (2.6) decreased in 2023 to its lowest point since 2019, after a high of 2.8 in 2020 and 2021.

- Residents in the Northern region of Queensland tend to perceive emergency or disaster events as more likely compared to people in other regions.

The **average perceived preparedness** has remained steady.

- Perceived preparedness remains consistent across regions, with no significant changes since 2022.



Average perceived risk

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

▲▼ Significantly higher/lower than 2022 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

Base: *Total sample 2023 n=2100; 2022 n=2099* | *Q2 2023 n = from 96 to 1546; 2022 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** continue to rank in the top three events for both perceived risk and preparedness in all regions. A significant decrease in risk perception in 2023 is observed in South Eastern and Far Northern Queensland, while increased preparedness is noted in South Western Queensland.

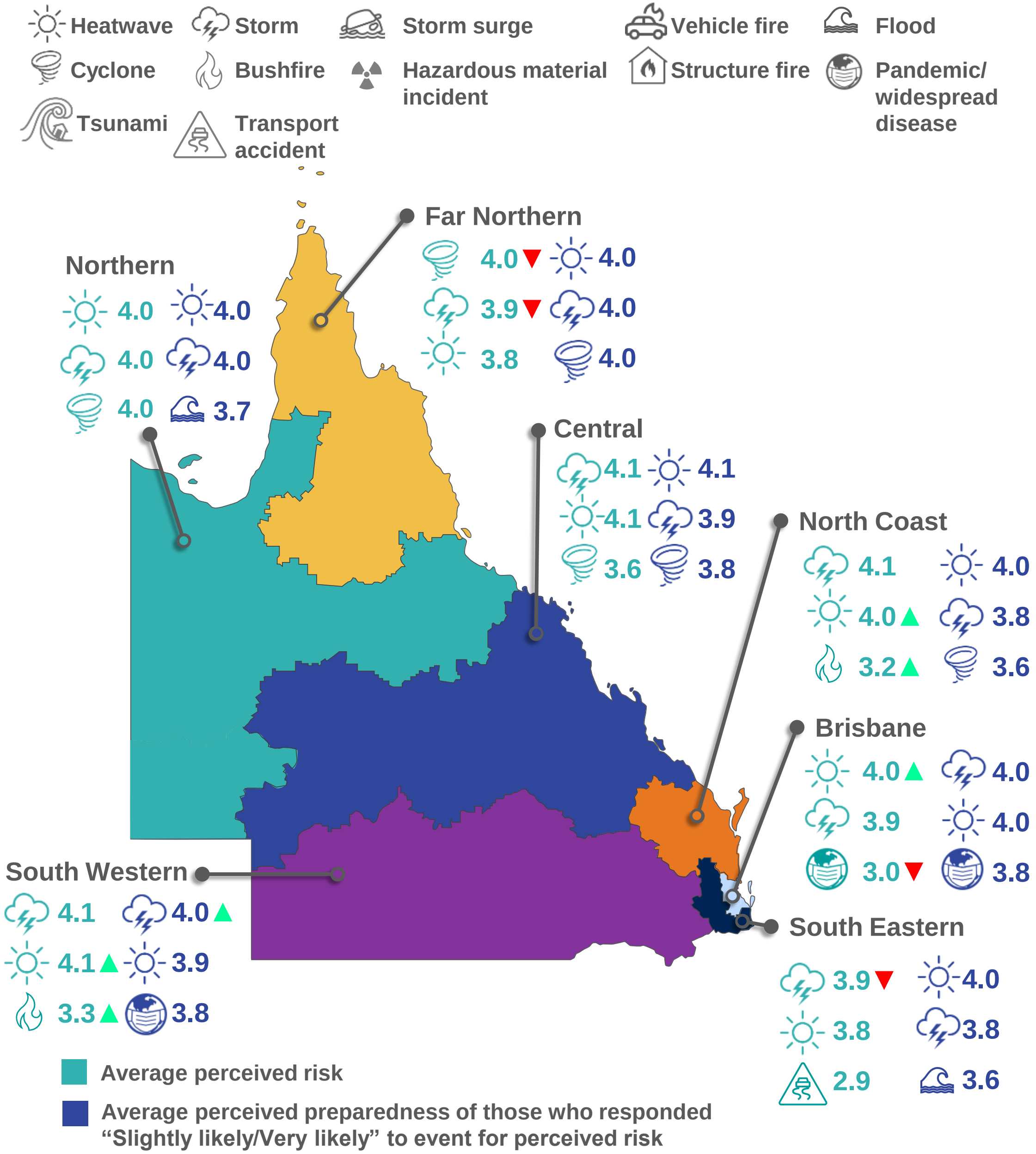
- **Heatwaves** are within the top three events for perceived risk and preparedness across all regions, with risk perceived to be higher in Brisbane, South Western and Central Queensland in 2023.

- **Cyclones** are perceived to be a significant lower risk in Far Northern and South Western Queensland in 2023, compared to 2022. Perceived preparedness remains steady.

- Concern about the risk of **floods** have seen significant decreases in Brisbane, South Eastern, South Western, North Coast and Far Northern Queensland. Preparedness is perceived lower in North Coast Queensland only.

- Queenslanders in South Western and North Coast perceive a greater risk from **bushfires**. No changes in the perception of preparedness across regions.

- Significant decrease in perceived risk of **pandemics** across all regions continues in 2023, and perceived preparedness has decreased in North Coast Queensland only.

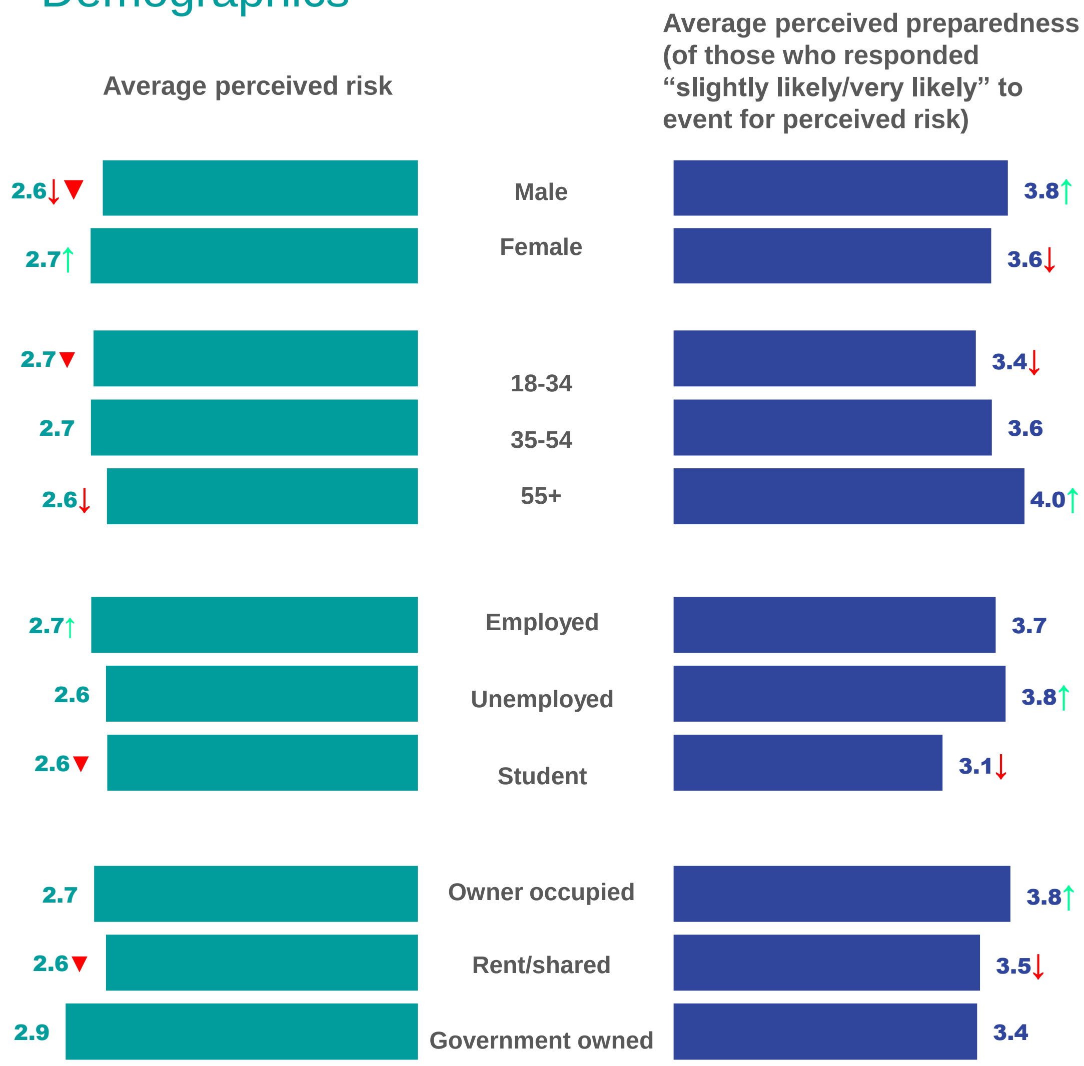


▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample 2023 n = 2100* | *Q2 n = from 96 to 1546.* 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 2022 @ 95% CI

↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

Gender

Females tend to perceive more risks on average than men, with men's perceptions of risk showing a significant decrease in 2023. Additionally, men tend to feel more prepared than women.

Age

Older Queenslanders (55+), on average, perceive lower risk compared to other age groups, and tend to feel more prepared. In contrast, younger Queenslanders (18-34 years) have seen a significant decrease in perceived risk, but they still tend to feel less prepared.

Employment status

Employed Queenslanders, on average, perceive a greater risk. Students, in comparison to 2022, have seen a decline in risk perception, and they tend to feel less prepared, while the unemployed tend to feel more prepared.

Owner/Renter

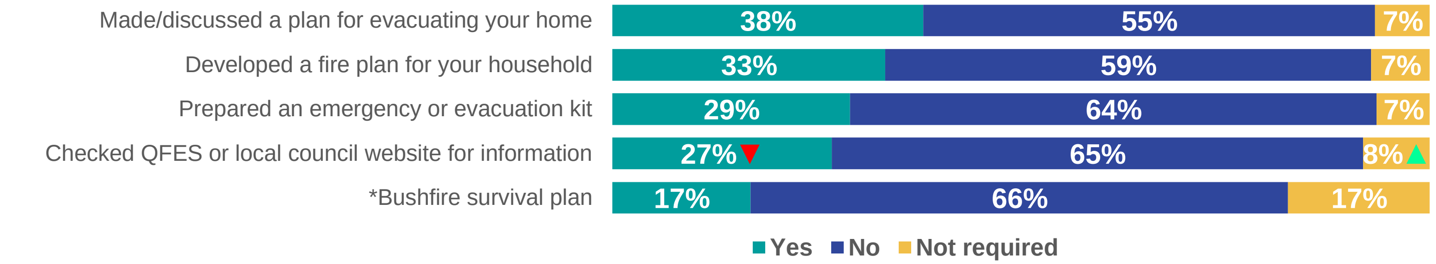
Those who rent have seen a decline in the average perceived risk this year, and they tend to feel less prepared, while homeowners feel more prepared.

Base: *Total sample 2023 n = 2100; 2022 n= 2099.* 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, 2023 n=1826; 2022 n = 1844) 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?

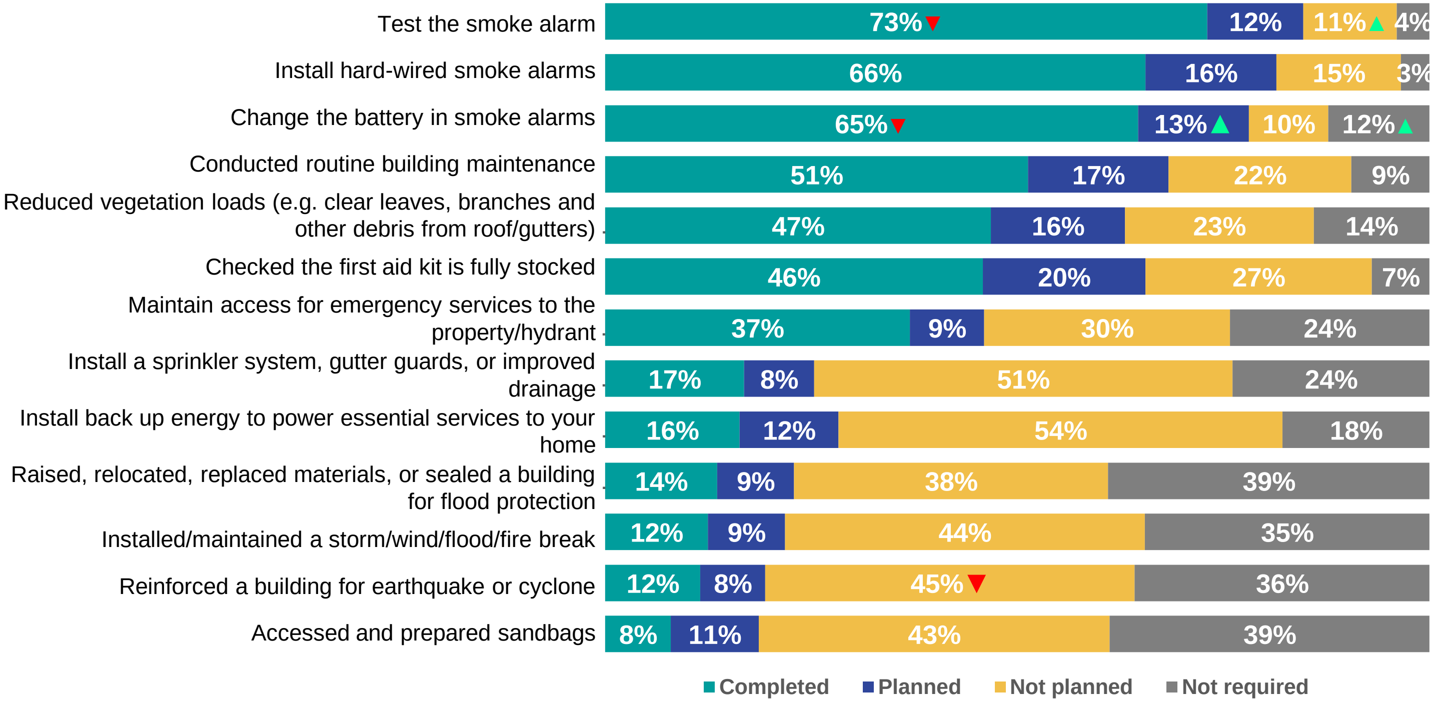
PREPAREDNESS BEHAVIOUR

Actions taken

Research and planning for local emergencies or disaster events



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



Only 38% of Queenslanders have made or discussed an evacuation plan for emergencies, with 7% indicating this isn't required, consistent with previous years. Fewer Queenslanders have visited the QFES or local council websites for information in 2023 compared to 2022.

Note that 'bushfire survival plan' is newly added in 2023 survey.

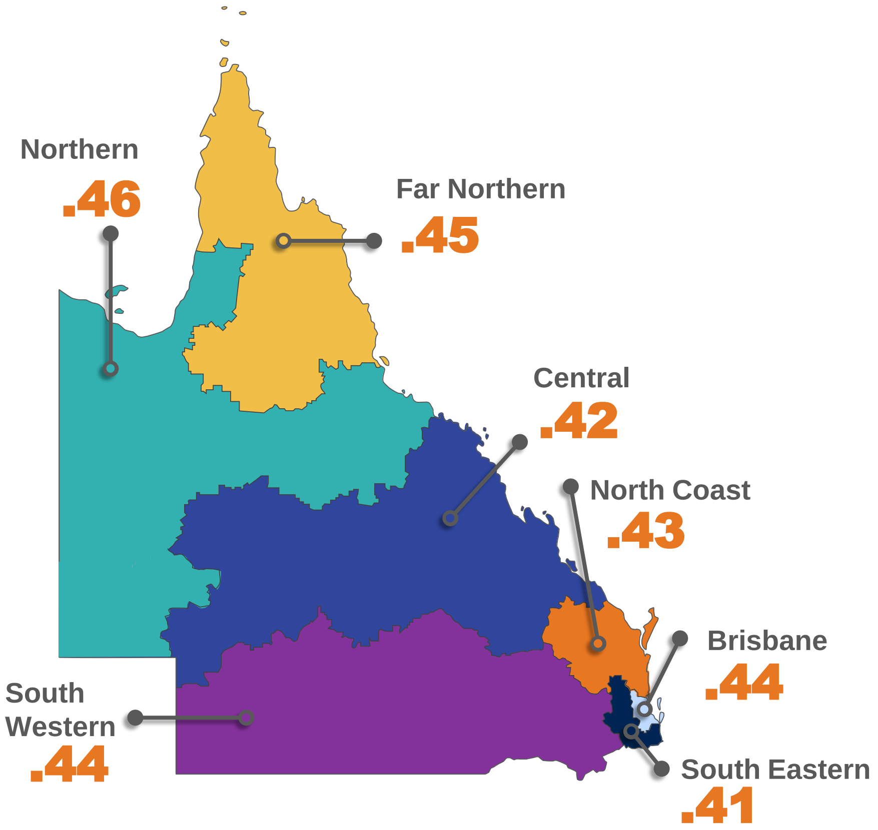
The most common behaviours that Queenslanders undertake to prepare their homes and families include testing, installing, and changing batteries in smoke alarms, as well as maintaining smoke alarms.

However, there is a decrease in completed behaviours related to testing and changing batteries in smoke alarms since 2022.

▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample* 2023 *n = 2100; 2022 n = 2099*. Q17. In the last year, have you undertaken any of the following emergency or disaster planning? | Q17_PAGE. 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? *response option added in 2023

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.

Northern and Far Northern have slightly higher levels of preparedness, with the lowest preparedness seen in South Eastern Queensland. By comparison, self-reported preparedness is similar across all regions.

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, 2022 and 2023, meaning any direct comparison to previous years is not possible.

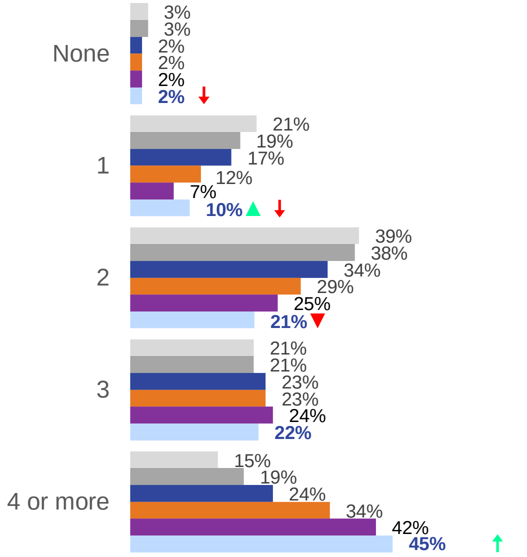
Base: *Total sample* 2023 *n = 2100*. Q17. In the last year, have you undertaken any of the following emergency or disaster planning? | Q18. What has been done/planned to be done to your property by you or your landlord to reduce or prevent the impact of an emergency or disaster event?

↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

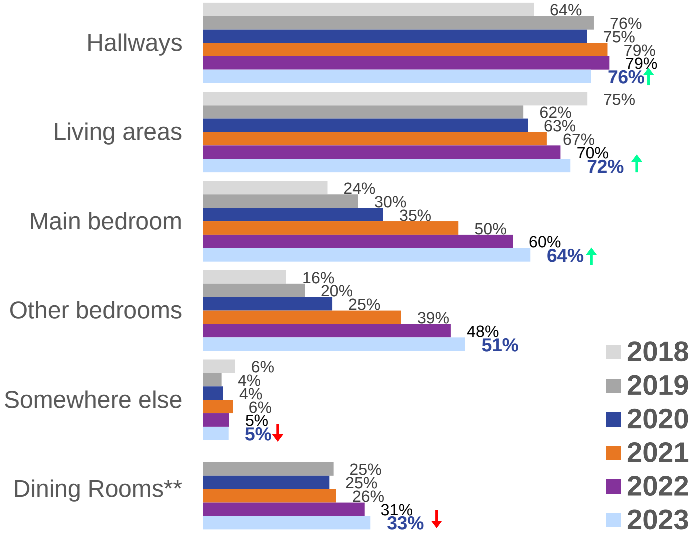
SMOKE ALARMS

Average number of smoke alarms **3.2**

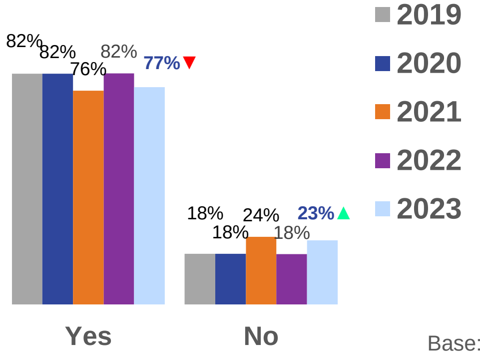
Number of smoke alarms installed



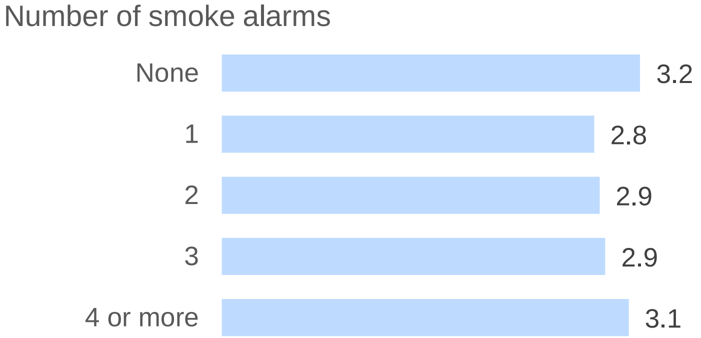
Smoke alarm location



Households with operational smoke alarms*



Average perceived risk for structure fire



Base: *2023 n = 2100; 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).

Consistent with previous years, most Queenslanders (98%) have one or more smoke alarms in their homes. Of these, 77% are considered operational, and this percentage has decreased in 2023, returning to near the 2021 level. The most common number of smoke alarms to have in a home is four or more, and this number has continued to increase since 2019.

In line with previous years, hallways and living areas remain the most common locations for smoke alarms. Additionally, the proportion of households with alarms in bedrooms and dining rooms has continued to increase in 2023.

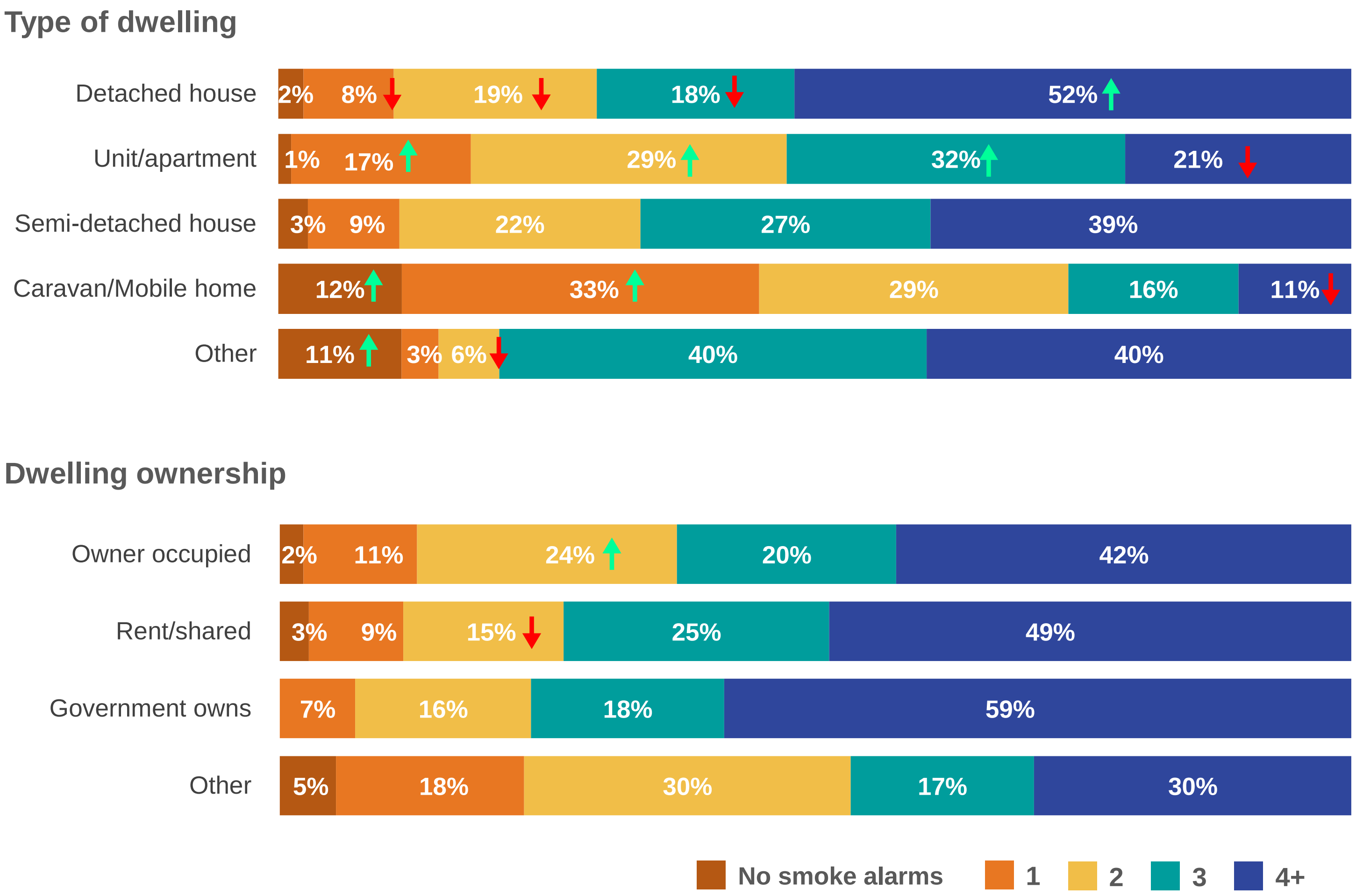
The perceived risk of structure fires is highest for homes without smoke alarms, followed by homes with 4+ alarms. This suggests residents are aware that homes without smoke alarms are at risk, and that residents more concerned about fire risk are taking preventative measures.

* 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 2022 @ 95% CI
↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

SMOKE ALARMS

Dwelling demographics by smoke alarms



Detached homes are more likely to have 4 or more 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 are more likely to have only 1 alarm.

On average, 49% of renters and 59% of government housing residents tend to have 4+ smoke alarms. There is no difference in operational smoke alarms between owners or renters.

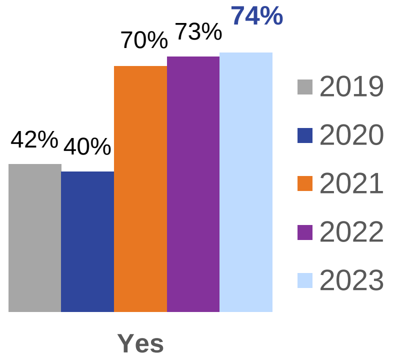
↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

Base: *Total sample 2023 n = 2100.* 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?

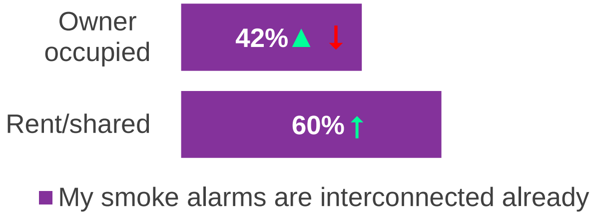
SMOKE ALARMS

Interconnected Smoke Alarms (ISAs)

Awareness of new legislation



ISAs by Dwelling ownership

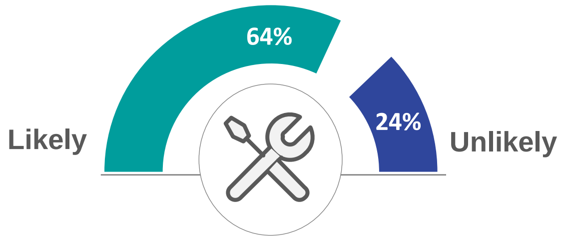


Installation of ISAs

49%

Already have Interconnected Smoke Alarms

Likeliness to install in the next 12 months*



Base: *Total sample 2023 n = 2100; 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.

Three quarters of Queenslanders (74%) have heard of interconnected smoke alarms (ISAs), the highest level since 2019.

Queenslanders aware of the new legislation are more likely to have operational smoke alarms (82%) than those unaware of the new legislation (64%).

Awareness of the new legislation increases with age, and males are more likely than females to be aware of it. Significantly higher awareness is also observed among homeowners living in detached houses and among those who are English-speaking only compared to culturally diverse individuals.

Nearly half of Queenslanders (49%) already have interconnected smoke alarms installed, a slight increase compared to 2022 (46%). Of those who don't have interconnected smoke alarms, 64% say they are likely to install them in the next 12 months. Sixty-seven percent of homeowners indicated they are 'likely' to install them in the next 12 months while only 21% of government housing residents indicated the same.

While it is required that rental properties have ISAs since 2022, only 60% indicate their rental has ISAs. 42% of owner-occupied homes have ISAs installed, leaving three in five homes needing to install them by 2027.

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 2022 @ 95% CI
↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

INSURANCE BEHAVIOURS

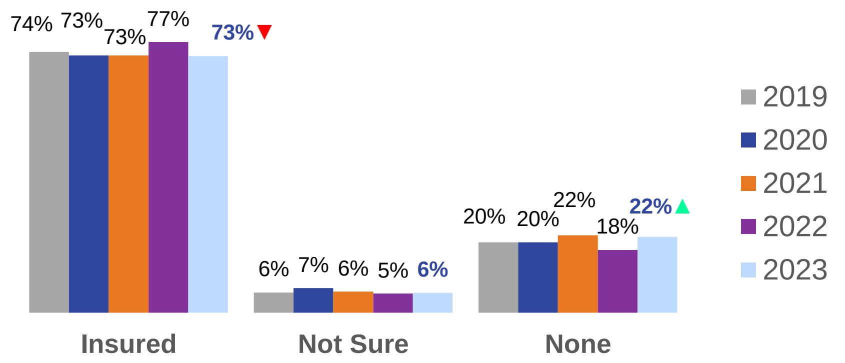
Home Insurance

Three quarters of Queenslanders (73%) have home and/or contents insurance, back to the 2021 level after an increase in 2022.

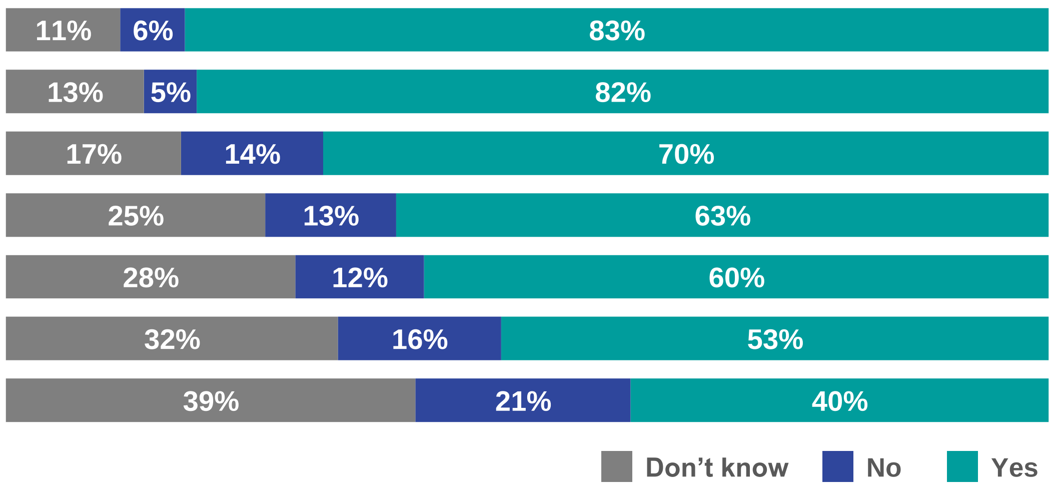
Structure fires and storm remain the most commonly insured-for incidents, followed by flood. No differences were observed compared to 2022.

On average, Queenslanders who have insurance are confident it covers emergency and disaster events (3.7/5), and this confidence has remained steady.

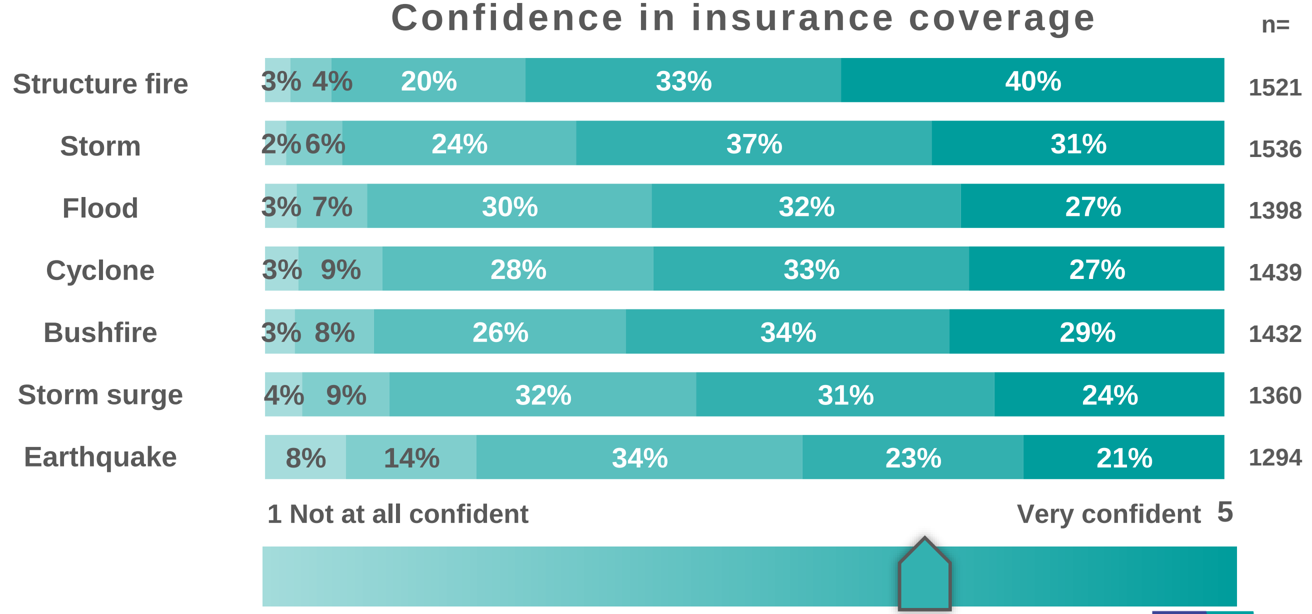
Insurance



Insurance coverage



Confidence in insurance coverage



Average: 3.7

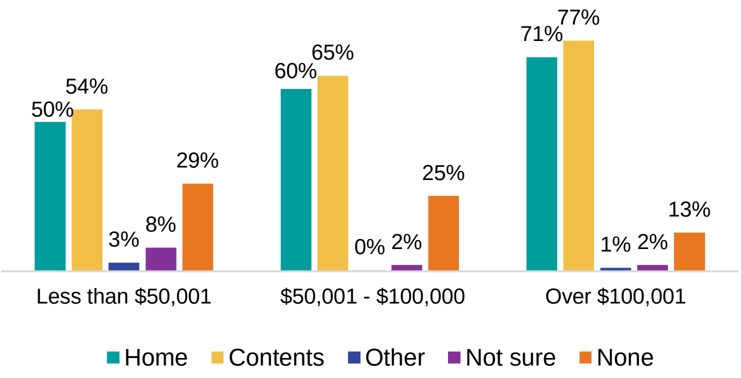
▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample 2023 n = 2100; 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?

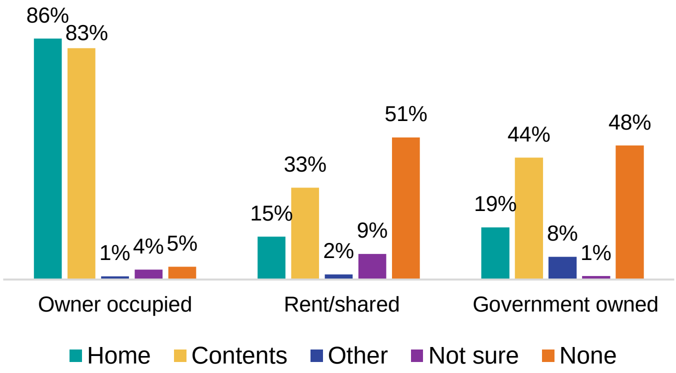
INSURANCE BEHAVIOURS

Demographics

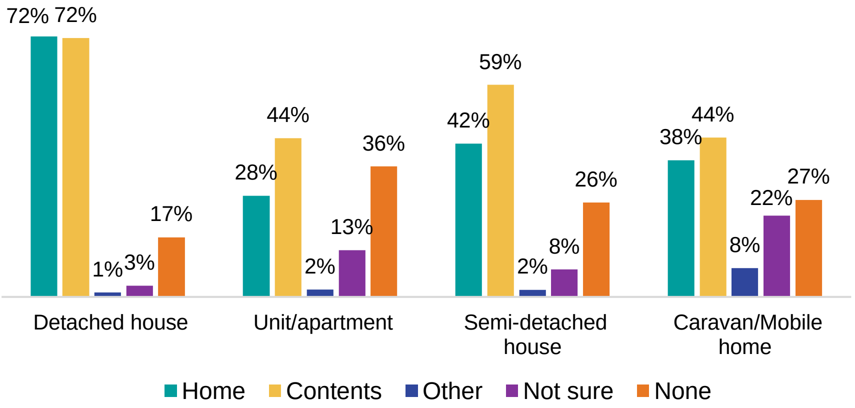
Household income



Owner/renter



Dwelling type



Those with a household income above $100,001 are more likely to be insured for home and contents.

Home and contents insurance is more common among Queenslanders living in owner-occupied homes, as opposed to those who rent or reside in government-owned properties.

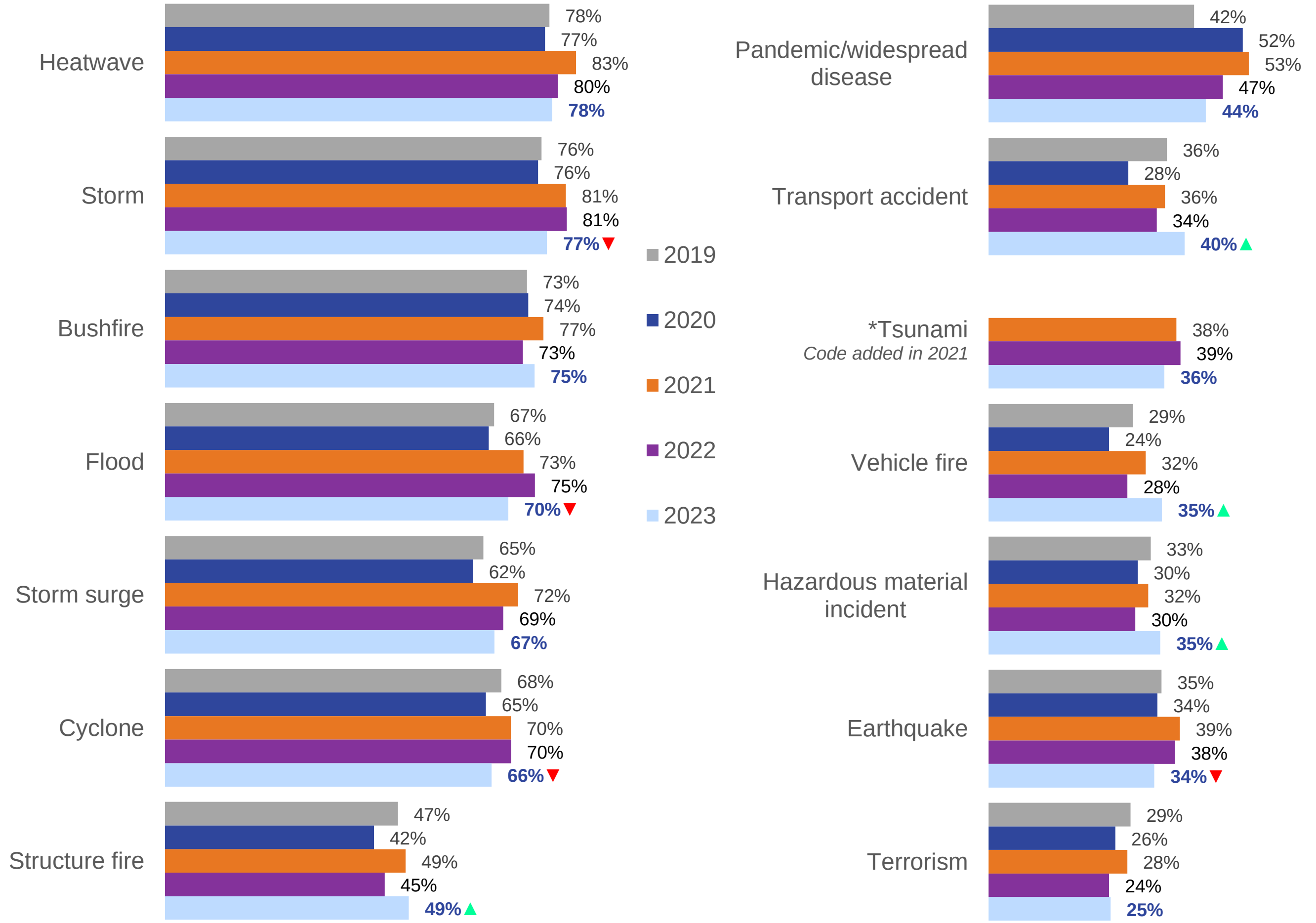
Queensland residents living in detached houses have a higher likelihood of having home and contents insurance compared to those residing in apartments and semi-detached houses.

Base: *Total sample 2023 n=2100* 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?

↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

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)



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

Overall, fewer people in 2023 (compared to 2022) believe that climate change will increase the likelihood of impact of storms, floods, cyclones and earthquakes, with more people believing it will increase the likelihood of impact of structure fire, transport accident, vehicle fire and hazardous material incident.

Females are more likely to believe climate change will cause an increase in events across the board compared to males.

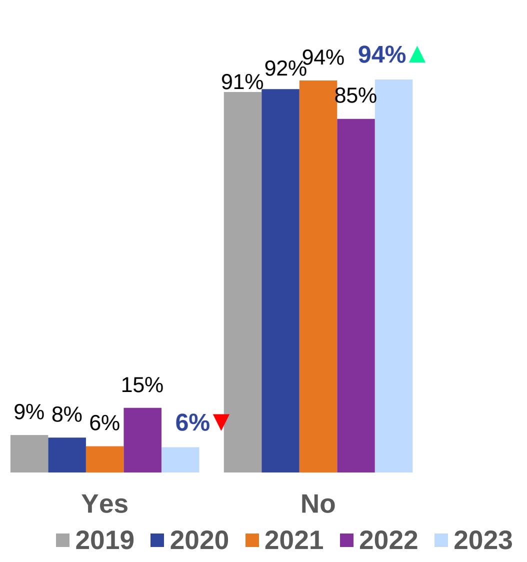
▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample 2023 n = 2100; 2022 n = 2099; 2021 n = 2176; 2020 n = 2100; 2019 n = 2458.* 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.

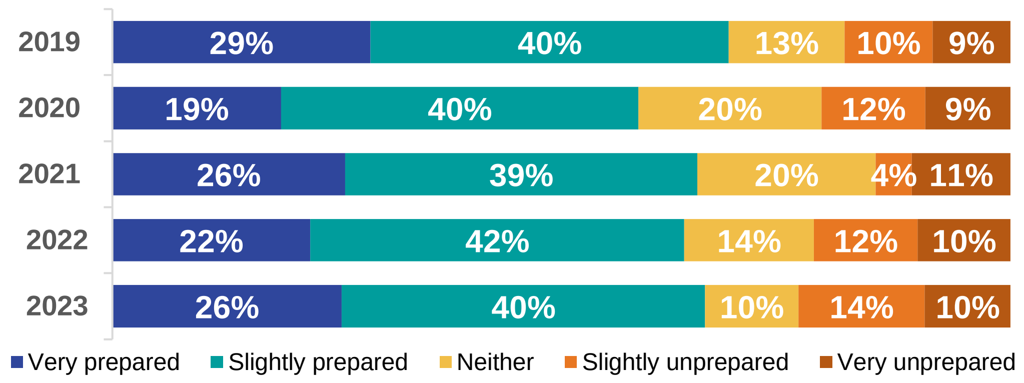
EXPERIENCE OF A LOCAL EVENT

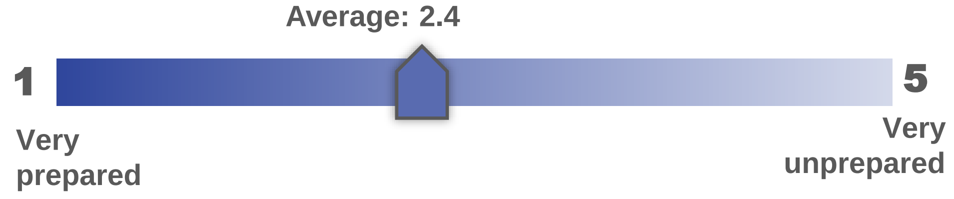
In the past year, 6% of Queenslanders have experienced a local emergency or disaster event, marking a significant decline from 2022 and a return to the levels seen in 2021. Two-thirds (66%) of those who had experienced an event said they were prepared, and 59% feel more prepared for future events now.

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

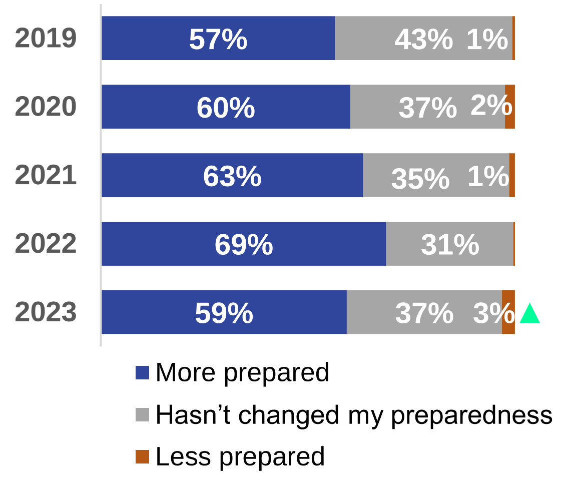


Preparedness for the emergency or disaster event





Impact of event on preparedness



Base: *Total sample 2023 n = 2100; 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? 2023 n = 94; 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 2022 @ 95% CI

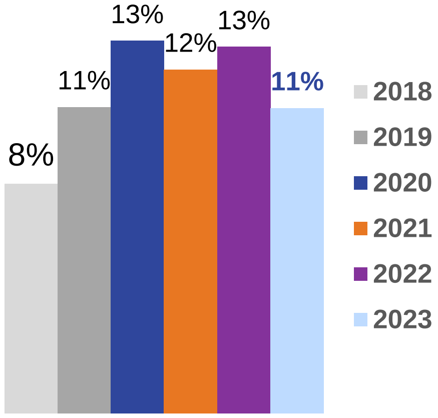
BUSINESS OWNER PERCEPTIONS

BUSINESS OWNERS

Demographics

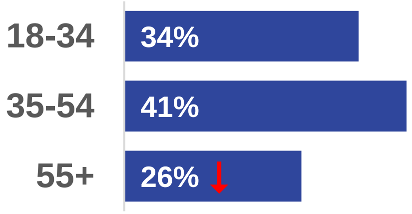
11%

of respondents own a business

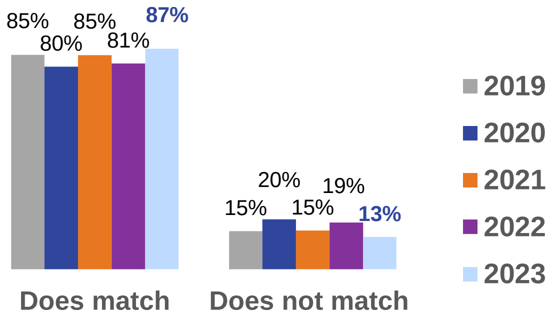


Male 53%

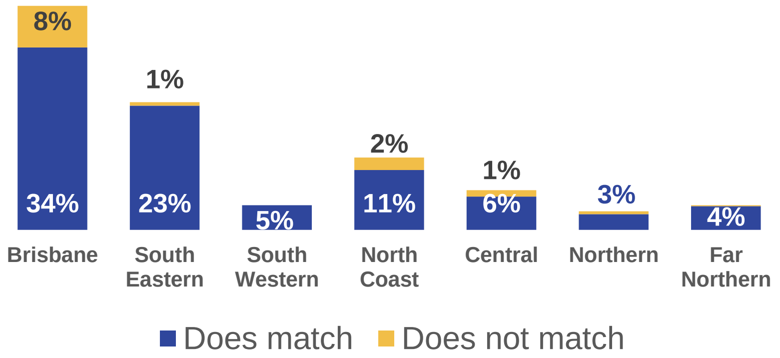
Female 46%



Most business postcodes matched home postcodes



Business owners by region (using home postcode)



Gender

No significant differences found in 2023, whereas there were significantly more male business owners in 2022 (61% male vs. 39% female).

Age

One in four (26%) business owners were aged 55+, significantly fewer than other age groups.

Region

Business owners were spread across the seven regions, with the most in Brisbane, then followed by South Eastern Queensland.
Most businesses outside of the resident's home postcode were owned by people living in Brisbane.

↑↓ Significantly higher/lower than other categories @ 95% CI (2023 data)

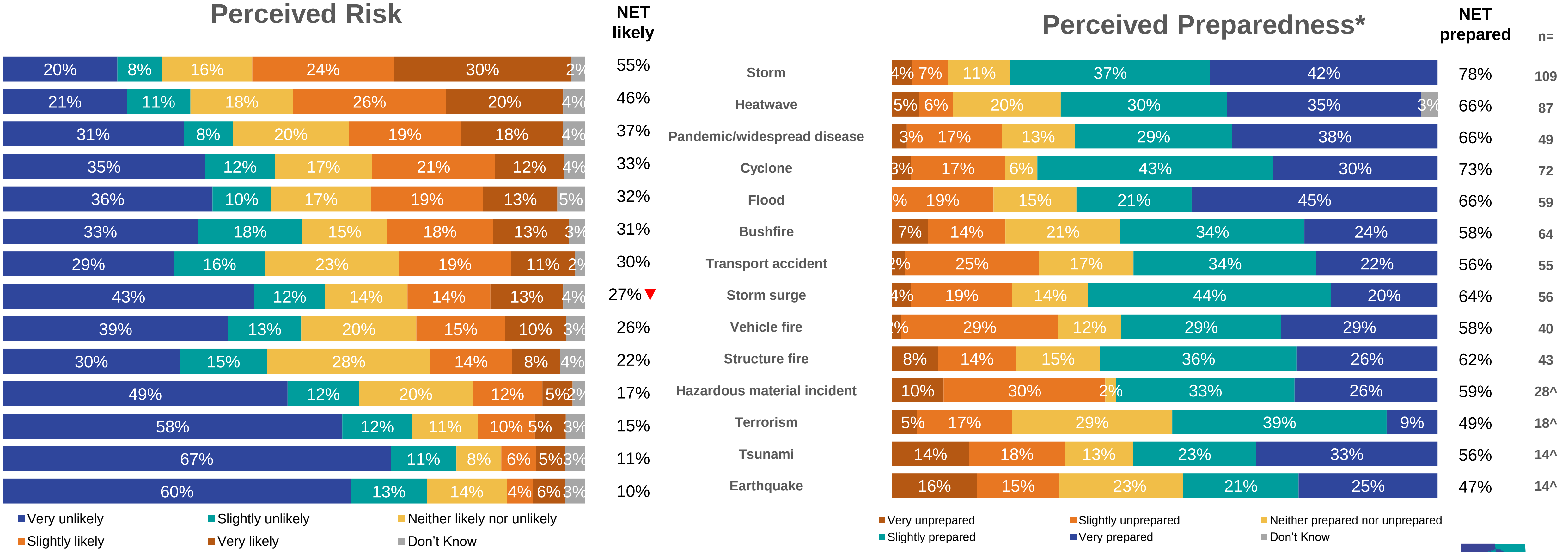
Base: *Total sample 2023 n = 2100; 2022 n= 2099; 2021 n= 2176; 2020 n = 2100; 2019 n=2458. Total own a business 2023 n = 199 2022 n=266; 2021 n=231; 2020 n=245; 2019 n=263.* SQ6 Own a business | SQ6B Business post code | SQ4 Home post code. | SQ6B.Business post code

BUSINESS OWNERS

Perceived Risks & Preparedness

Business owners perceived similar risks to their business as to their home, with storms and heatwaves being the highest perceived risks. However, pandemics are considered the 3rd highest risk to businesses (down from 2nd in 2022), whereas this dropped from 3rd to 8th for individuals. There is also a reduced perceived risk from storm surge this year.

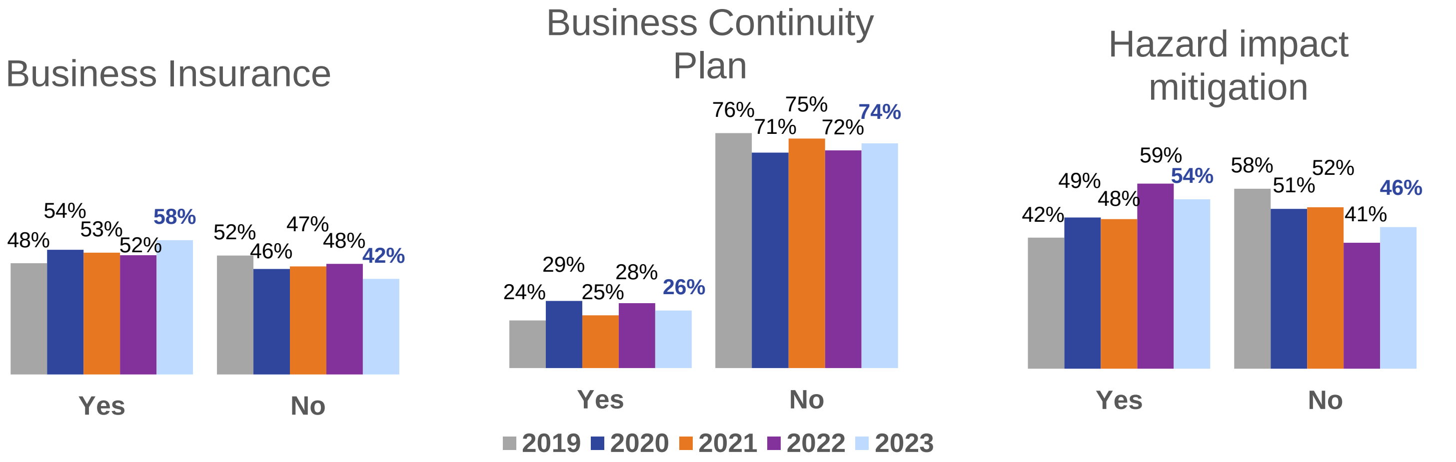
Perceived preparedness was highest for storms, cyclones, heatwaves, pandemics and floods. Business owners feel less prepared for pandemics, floods and transport accidents than they did in 2022.

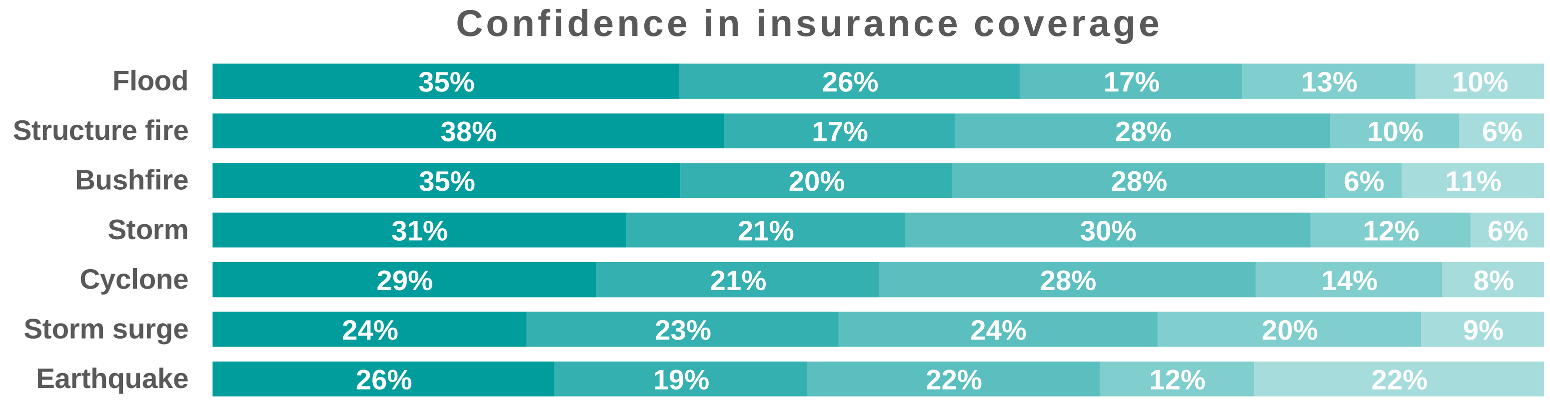


Base: *Total own a business 2023 n = 199; 2022 n= 266.* Q1B How do you rate the likelihood that the following emergency or disaster event could impact your business in the next year? | Q2B. (those who responded “Slightly likely/very likely” to event for perceived risk) Overall, how prepared do you feel 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. ^Note: Caution low base, n<30.

BUSINESS OWNERS

Insurance





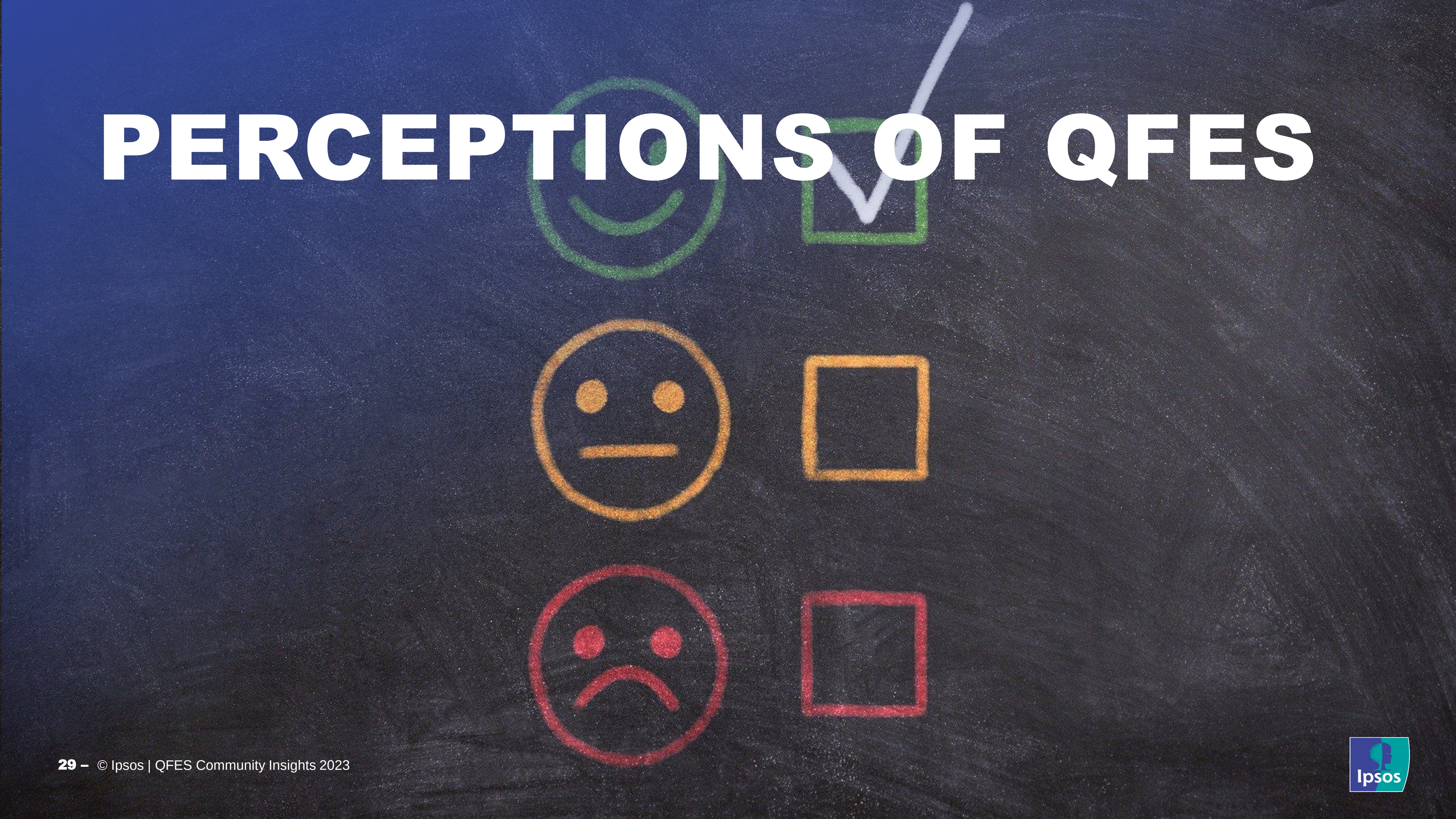
Three in five Queensland business owners (58%) have business insurance, which is at the highest level since 2019.

One quarter of business owners (26%) have a Business Continuity Plan and just over half (54%) have identified ways to mitigate the impact of hazards on their business, consistent with 2022 levels.

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 2023 n = 199; 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 2022 @ 95% CI

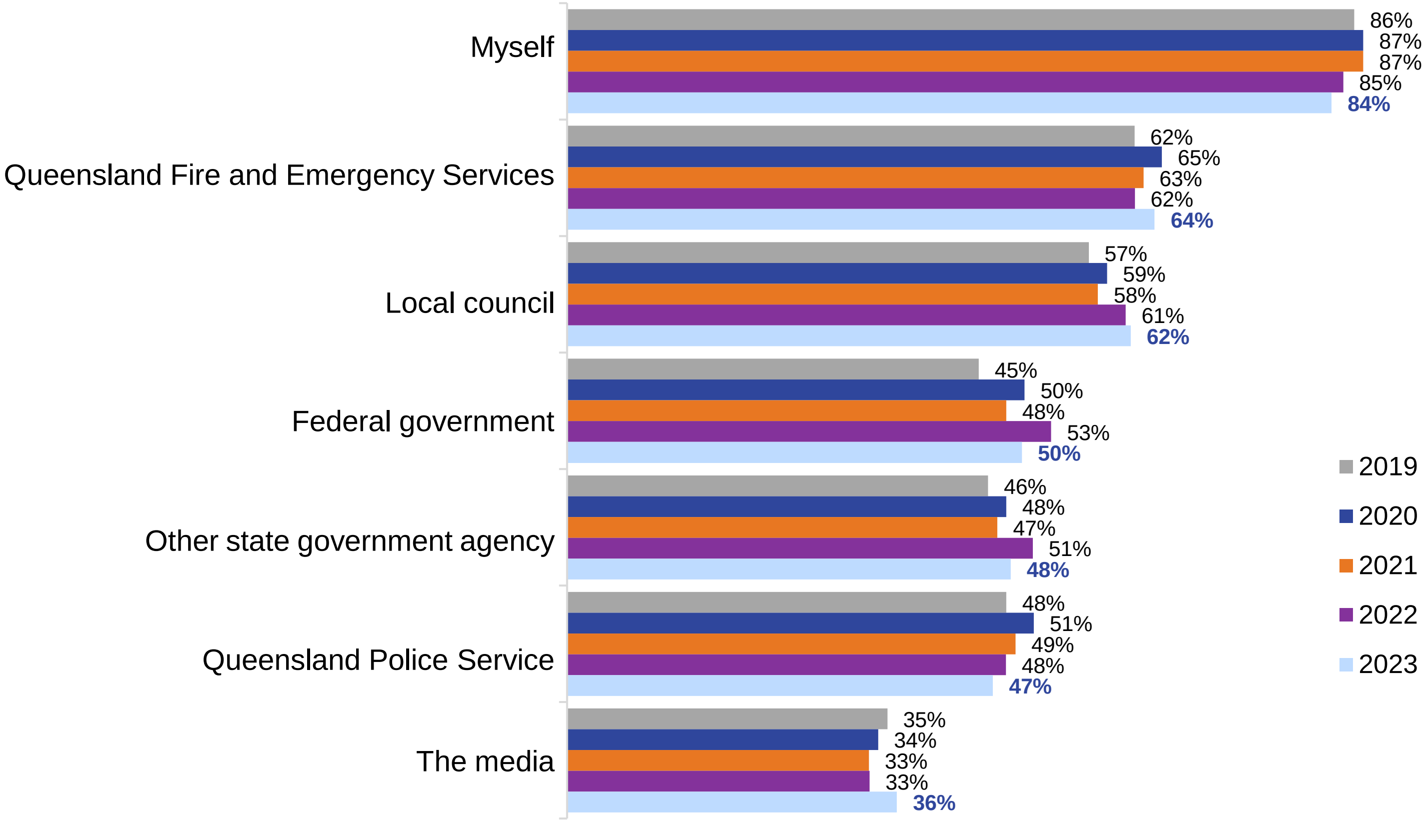


PERCEPTIONS OF QFES

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?



In line with previous years, when respondents were asked who they perceived to be responsible for preparing their household for disaster and emergency events, most (84%) identified themselves (as being 'Mostly' or 'Completely' responsible).

Older Queenslanders (55+ years) were more likely (90%) and the 18-34 year olds were less likely (75%) to consider themselves responsible. No significant differences when compared to 2022.

Among those who selected 'other', the majority expressed that there should be a shared responsibility within their household and the local community. This included responses such as the community, neighbours and landlords.

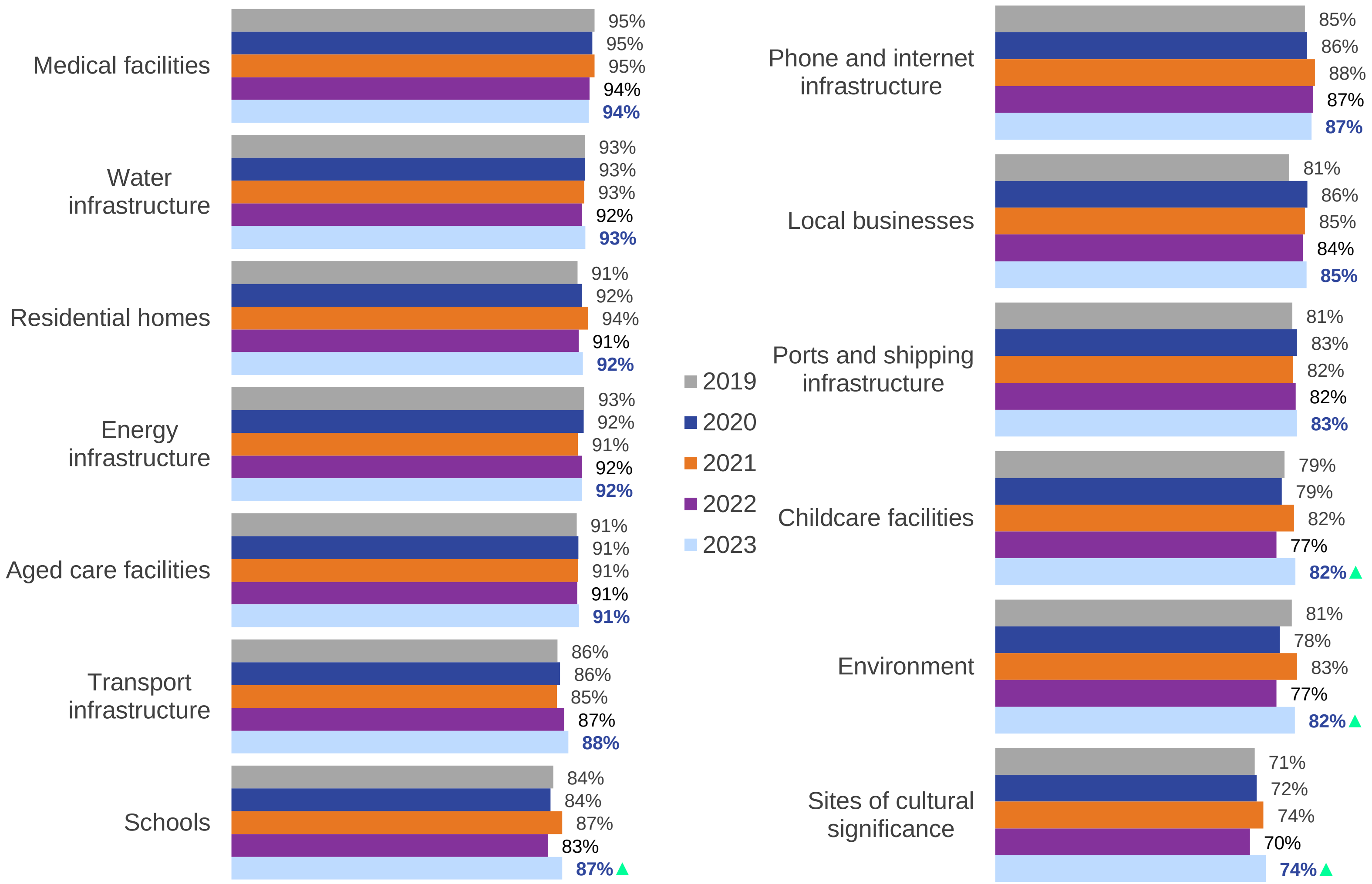
Base: *Total sample 2023 n = 2100; 2022 n=2099; 2021 n= 2176; 2020 n = 2100; 2019 n=2458.* Q3. Thinking of preparing your household for disasters and emergency events, how responsible do you believe each of the following should be?
*NET of 'mostly' and 'completely'

▲▼ Significantly higher/lower than 2022 @ 95% CI

QFES

Infrastructure protection

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



Medical facilities continue to be the most important to protect in an emergency event, closely followed by water infrastructure, residential homes, energy infrastructure, and aged care facilities.

Schools, childcare facilities, the environment, and cultural sites have returned to 2021 levels of importance after dips in 2022.

By region, South Eastern Queenslanders consider water infrastructure less important.

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 environment more important than males.

Queenslanders living in owner-occupied homes considered residential homes and phone and internet infrastructure as more important compared to those renting.

▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample 2023 n = 2100; 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	Service	Importance
38%	34%	28%	Fire and hazard response	4.2
46%▼	29%	24%▲	Warnings and alerts	4.5
			*Road crash rescue	5.6
27%▼	40%	33%▲	Search and Rescue	5.8
32%	37%▼	30%▲	Hazard reduction activities	6.0
17%▼	33%	50%▲	Evacuation from flooding	6.7
22%▼	43%	35%▲	Recovery Services	7.0
22%	46%	32%▲	Community Safety checks	7.4
34%	41%	25%	Education	7.8
22%▼	36%▲	42%▲	Provision of sandbags	8.7
13%▼	41%	46%▲	Provide access to flooded property	9.0
18%▼	45%	37%▲	Temporary repair of property	9.0
16%	56%	28%	Research	9.5

■Yes ■Not sure ■No

1=most important, 12=least important

Fire and hazard response has reclaimed the most important service in 2023, after warnings and alerts overtook in 2022. The new code 'Road crash rescue' overtook search and rescue and ranked 3rd.

Overall awareness of provision of services to respondents' local areas is 66% for any service in 2023, compared to 63% in 2022. However, awareness of individual services provided is lower across most services this year compared to 2022.

Note that road crash rescue is newly added in the 2023 survey. Due to these additional codes, no direct comparison to 2022 data is possible in the importance ranking metric.

Base: *Total sample 2023 n = 2100; 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. *response option added in 2023, only asked for Q5.

▲▼ Significantly higher/lower than 2022 @ 95% CI

QFES

Service satisfaction

Received service in past 12 months	Service	How satisfied were you with the service? 2019	2020	2021	2022	2023	n=
9%	Fire and hazard response	79%	80%	81%	86%	**82%**	172
32%▼	Warnings and alerts	89%	90%	87%	89%	**87%**	651
6%	Search and Rescue	74%	76%	79%	75%	**68%**	99
9%	Hazard reduction activities	80%	75%	79%	82%	**78%**	172
7%	*Evacuation from flooding				75%	**67%**	107
6%	Recovery Services	74%	74%	75%	76%	**75%**	90
9%▼	Community Safety checks	82%	84%	80%	84%	**77%**	172
14%▼	Education	86%	82%	86%	81%	**78%**	289
8%	*Provision of sandbags				82%	**71%**	122
5%	*Provide access to flooded property				79%	**69%**	86
6%	Temporary repair of property	73%	68%	71%	74%	**69%**	89
7%	Rescue of animals	73%	75%	74%	77%	**73%**	107

Two in five respondents (42%) received a QFES service in the last year, a decrease compared to 2022 (48%).

Warnings and alerts continue to be the most received service, although fewer people indicated they received warnings and alerts, or education and community safety checks compared to 2022.

More respondents from Brisbane had received flood evacuation services.

Overall, respondents were satisfied with the services. Satisfaction was generally higher for the more commonly received services.

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

Respondents who had received a QFES service have higher perceived risk levels and perceived preparedness for emergency and disaster events. No difference observed for preparedness index.

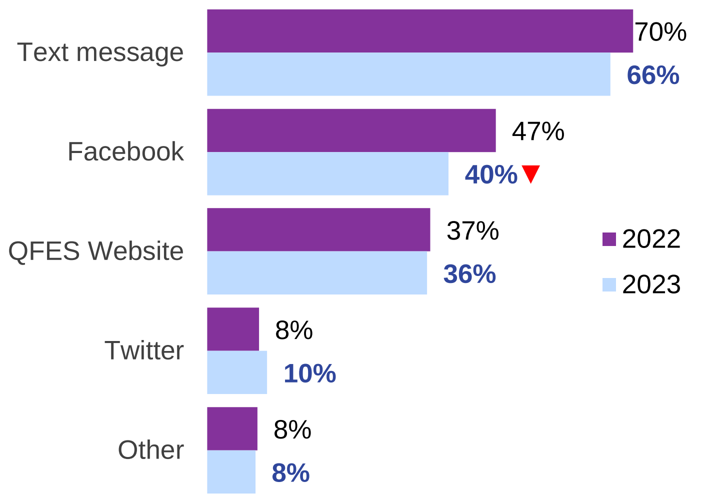
▲▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample 2023 n=2100; 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.

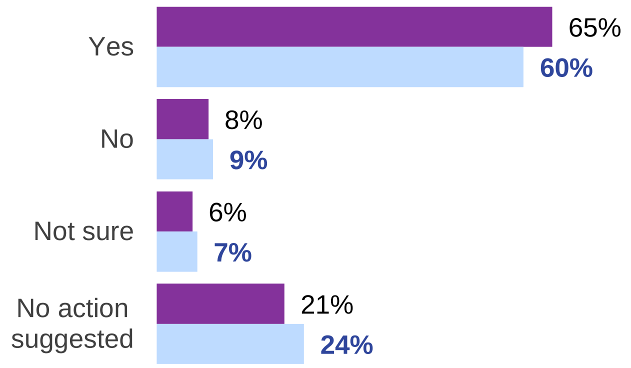
QFES

Receipt of warnings, alerts services and messaging

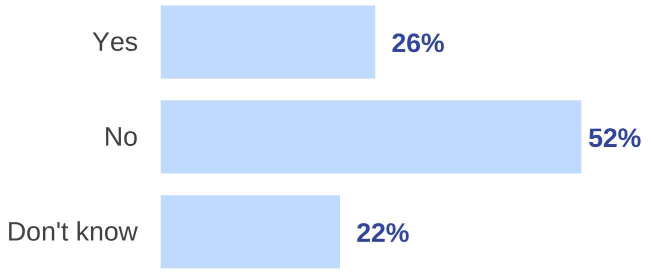
How did you receive the 'warning and alert'?



Did you take the action suggested?



*Have you seen or heard any QFES advertising or messaging?



Among those that have received warning and alert services in the past year (32%), two thirds (66%) indicated they received them via text messages, and two in five (40%) mentioned Facebook, which has declined from 2022. Among those that mentioned 'other', most frequently cited channels were TV and radio.

Of those who received a warning or alert that had an action suggested, four in five (79%) took the action suggested (*calculated after removal of 'no action suggested' responses*).

Claimed advertising recall for QFES communications is 26%.

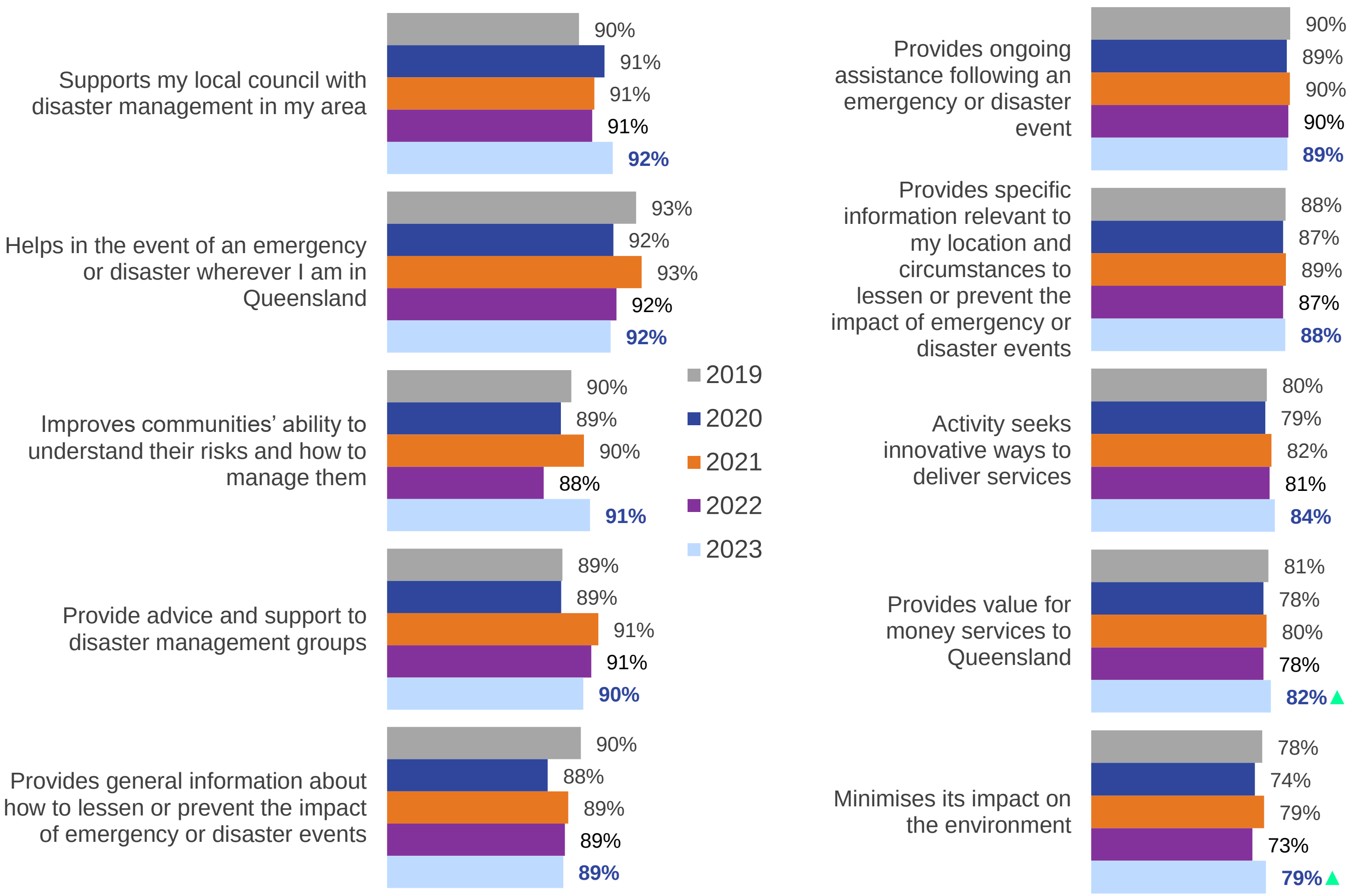
Base: *Total received warnings and alerts 2023 n=651; 2022 n=776.* Q11C. How did you receive the 'warning and alert'? | Q11D. Did you take the action suggested in the warning and alert? Q40. Have you seen or heard any QFES advertising or messaging in the past twelve (12) months?
*New question added in 2023.

▲▼ Significantly higher/lower than 2022 @ 95% CI

QFES

QFES activities importance

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



Four in five Queenslanders (79%) consider all the listed QFES items important, with the most important activity being to support local council with disaster management and to help in the event of emergency or disaster event. More people considered providing value for money services and minimising impact on the environment to be important compared to 2022.

Older Queenslanders (55+ years) considered all services more important compared to younger Queenslanders (18-34 years), except for providing ongoing assistance following an emergency and minimising impact on environment.

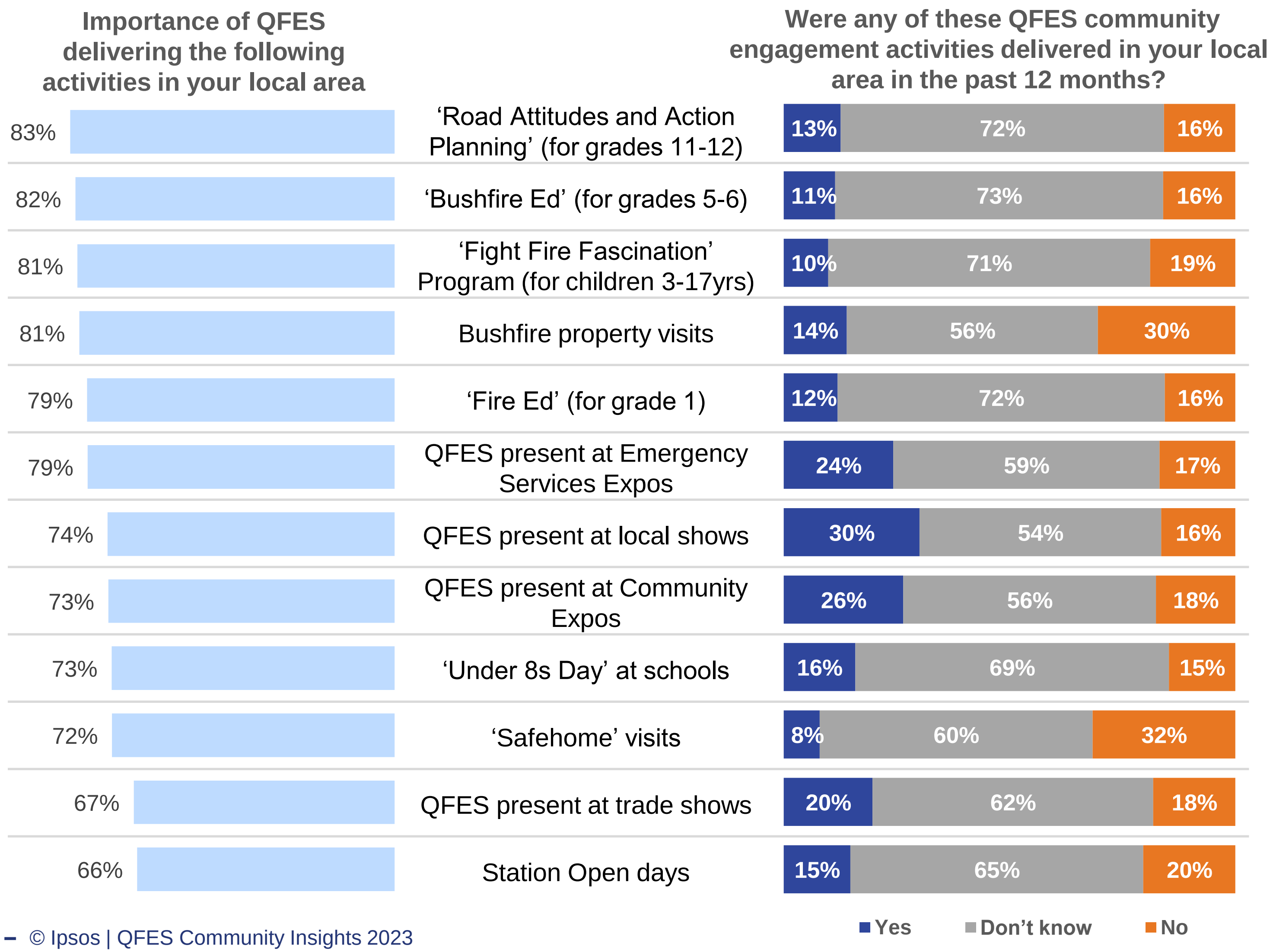
Females consider providing ongoing assistance following an emergency, providing specific information and minimising impact on environment as more important compared to males.

Base: *Total sample 2023 n=2100; 2022 n = 2099; 2021 n=2176; 2020 n = 2100; 2019 n=2458.* Q6. How important to you is it that QFES performs the following activities in your local area?

▲▼ Significantly higher/lower than 2022 @ 95% CI

QFES

Community engagement



Community activities considered most important are engagement with school students.

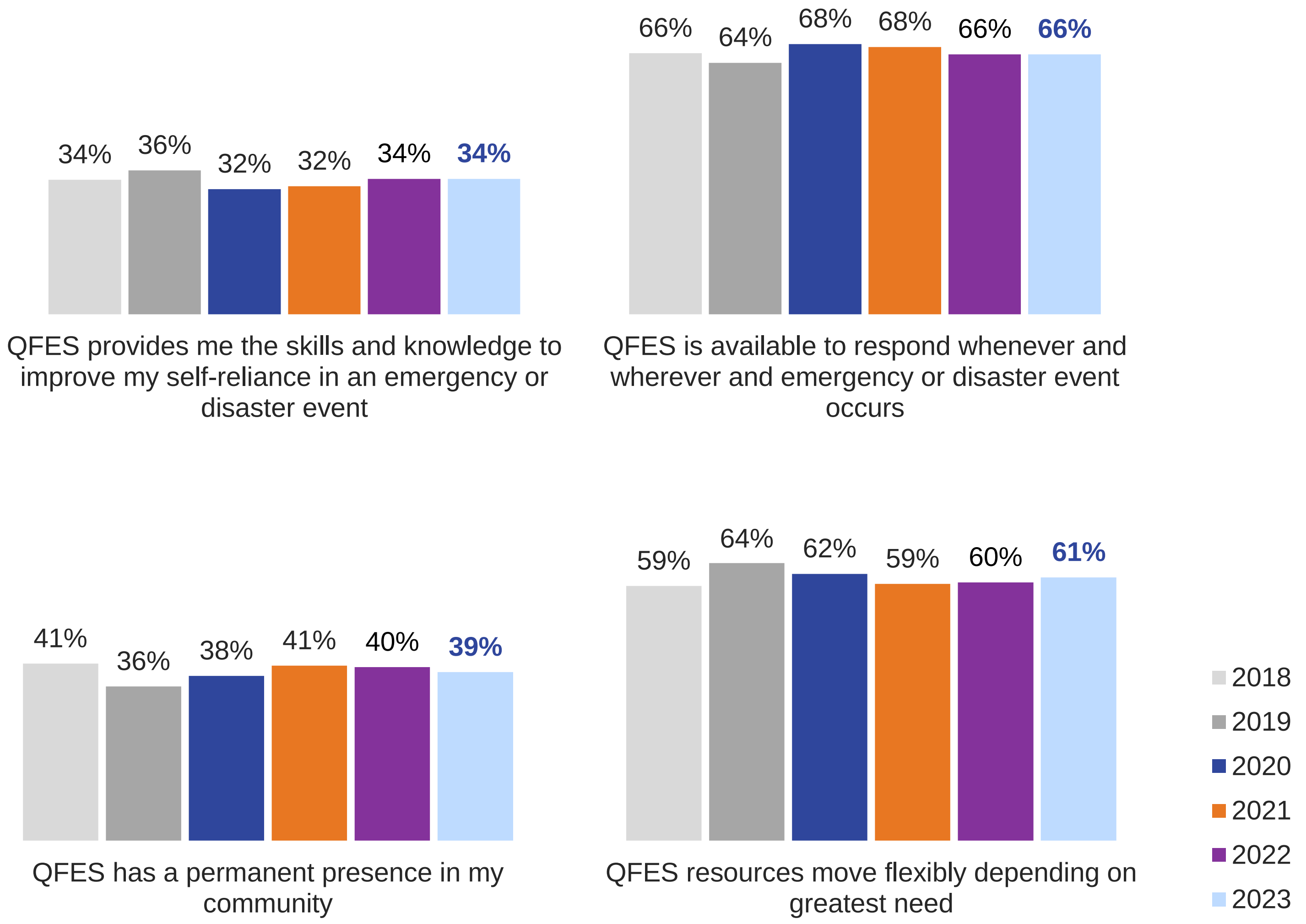
Older Queenslanders (55+ years) are more likely to consider all QFES presentations and bushfire property visits important.

QFES presenting at local shows, community expos and emergency services expos were the activities with most awareness. Engagement awareness was higher across the board for regional Queensland compared to South East Queensland.

Base: *Total sample 2023 n = 2100* Q38. Were any of these QFES community engagement activities delivered in your local area in the past 12 months? | Q39. How important to you is it that QFES performs the following activities in your local area? Questions added in 2023. Based on NET importance (Very important + Slightly important)

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, which remained consistent with 2022.

Most Queenslanders would prefer QFES resources move flexibly (61%) rather than having a permanent presence, in line with 2022.

Preference for flexibility of QFES resource distribution is significantly higher in SEQ (66%) compared to rest of Queensland (53%). This is driven by South Western, Central and Northern Queenslanders (48%, 53% and 48% permanent presence, respectively).

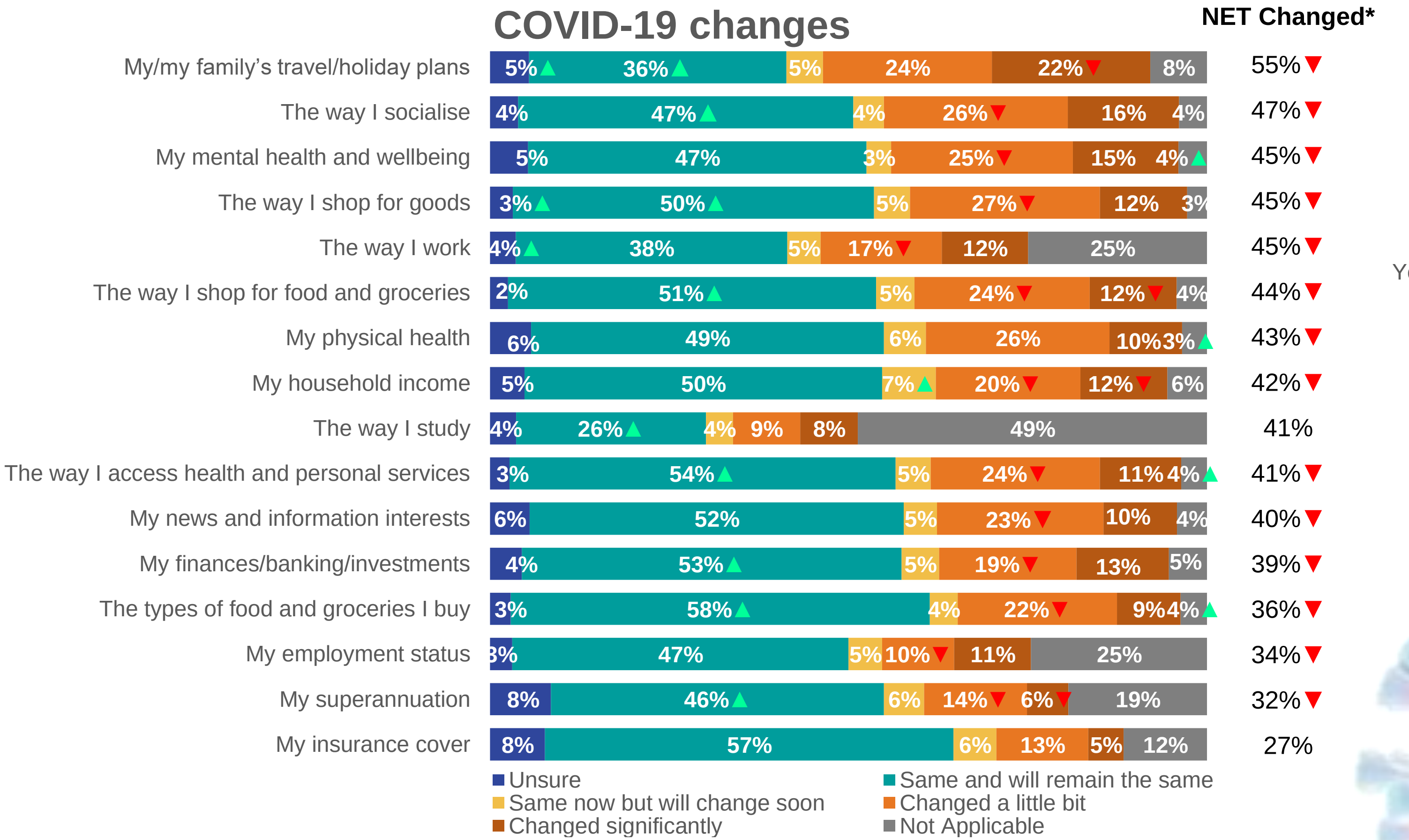
▲▼ Significantly higher/lower than 2022 @ 95% CI

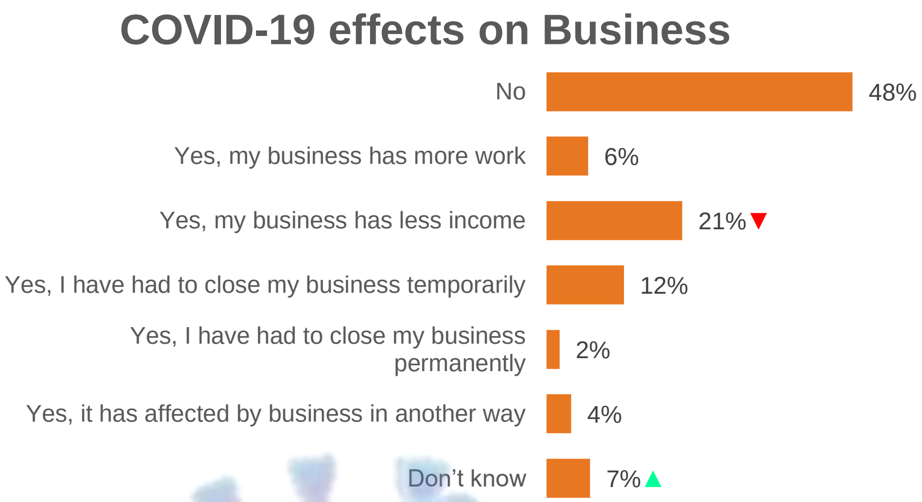
Base: Total sample 2023 n = 2100; 2022 n= 2099; 2021 n= 2176; 2020 n = 2100; 2019 n=2458. Q8. What is more important to you? | Q9 What is more important to you?

COVID CONTEXT

Since the start of the COVID-19 pandemic, living situations and working environments have changed for residents in Queensland. There are significant decreases in almost all changes this year. However, there are still many Queenslanders saying they are impacted by COVID-19.

Forty-five percent of business owners indicated that COVID-19 has affected their businesses, with one in five (21%) reporting reduced income, a significant decline since 2022.





▲/▼ Significantly higher/lower than 2022 @ 95% CI

Base: *Total sample; 2023 n = 2100, 2022 n=1099.* Q23C COVID-19 Changes | Q23D 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.

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
Q38. Where any of these QFES community engagement activities delivered in your local area in the past 12 months?
Q39. How important to you is it that QFES performs the following activities in your local area?
Q6. How important to you is it that QFES performs the following activities in your local area?
Q7. In your opinion, how important is it to protect the following from an emergency or disaster event?
Q8. What is more important to you?
Q9. What is more important to you?
Q10. Over the next 10 years, how much do you believe climate change will alter the likelihood that you are impacted by the following?
Q11. Have you received/used a service delivered by QFES in the last year?
Q11B. How satisfied were you with the X service you received?
Q11C. How did you receive the ‘warning and alert’?
Q11D. Did you take the action suggested in the warning and alert?
Q40. Have you seen or heard any QFES advertising or messaging in the past twelve (12) months?
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?

QUESTIONNAIRE CONT.

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?
Q17. In the last year, have you undertaken any of the following emergency or disaster planning?
Q17_PAGE. 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 home 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 home 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 home 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	12%
Year 12	19%
Trade Qualification	16%
Diploma	16%
Bachelor	23%
Post-graduate	12%
Doctorate	1%
None of the above	2%

Household income

Household Income	%
Less than $50,001	28%
$50,001 - $100,000	29%
Over $100,001	34%
Prefer not to say	9%

Household members' limitations or impairment

Limitations	%
Mobility impairment	11%
Mental Health impairment	7%
Hearing impairment	6%
Cognitive disorder/intellectual disability	4%
Vision impairment	3%
Unable to communicate well in English	1%
Other	1%
Prefer not to say	2%
None of the above	75%

Living Situation

Living situation	%
Live alone	17%
Shared house with friends/housemates	8%
Live with parents/other family members	10%
Live with partner/spouse	30%
Live with partner/spouse and children aged <18	21%
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	6%
Fly-in Fly-out worker (working away from home regularly, hours per week vary according to roster)	0%
Unemployed, looking for full-time work (35+ hrs per week)	2%
Unemployed, looking for part-time work (<35 hrs per week)	3%
Unemployed, not looking for work	3%
Student	4%
Pension, beneficiary, or welfare recipient	5%
Retired	21%
Look after the house full-time	4%
Other	1%
Prefer not to say	1%

Base: *Total sample; Unweighted; n =2100*
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	70%
Unit/apartment	17%
Semi-detached house	10%
Caravan/Mobile home	1%
Other	1%

Year of house construction

House construction	%
Built from 2017 onwards	13%
2007-2016	20%
1997-2006	17%
Before 1997	38%
Don't know	12%

Moved house in the last 12 months

Moved	%
Yes	16%
No	84%

Number of levels in home

Levels	%
1	68%
2	26%
3 or more	6%

Home ownership

Home ownership	%
Owner occupied	62%
Rent/shared	34%
Government owns	2%
Other	2%

Relocated from

Relocated	%
Within local area	55%
Elsewhere within Queensland	29%
From interstate	10%
From overseas	6%

Base: *Total sample; Unweighted; n = 2100* | Q23B Relocated from; *Unweighted; n = 344*
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	78%
United Kingdom	5%
New Zealand	4%
Philippines	1%
South Africa	1%
India	1%
Malaysia	1%
China	1%
Italy	0%
Vietnam	0%
Other	7%
Prefer not to say	1%

Indigenous Status

Indigenous	%
No	95%
Aboriginal	2%
Torres Strait Islander	0%
Both	0%
Prefer not to say	2%

Language other than English at home

LOTE	%
Yes	14%
No	86%

Main language other than English at home

Main language other than English	%
Mandarin	7%
Arabic	3%
Cantonese	8%
Vietnamese	1%
Italian	2%
Greek	2%
Hindi	10%
Spanish	4%
Punjabi	0%
Other	41%
Prefer not to say	22%

Base: *Total sample; Unweighted; n = 2100* | *Q28B* Main language other than English at home*; Unweighted; n = 237*
Source: Q31 Indigenous Status | Q28 Language other than English at home | Q30 Country of birth | Q28B Main language other than English at home

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