

KANTAR PUBLIC

Brisbane 2032 Olympic and Paralympic Games Community Research

**Combined Qualitative and
Quantitative Research Report**
for The Department of Premier
and Cabinet

FINAL

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August 2022

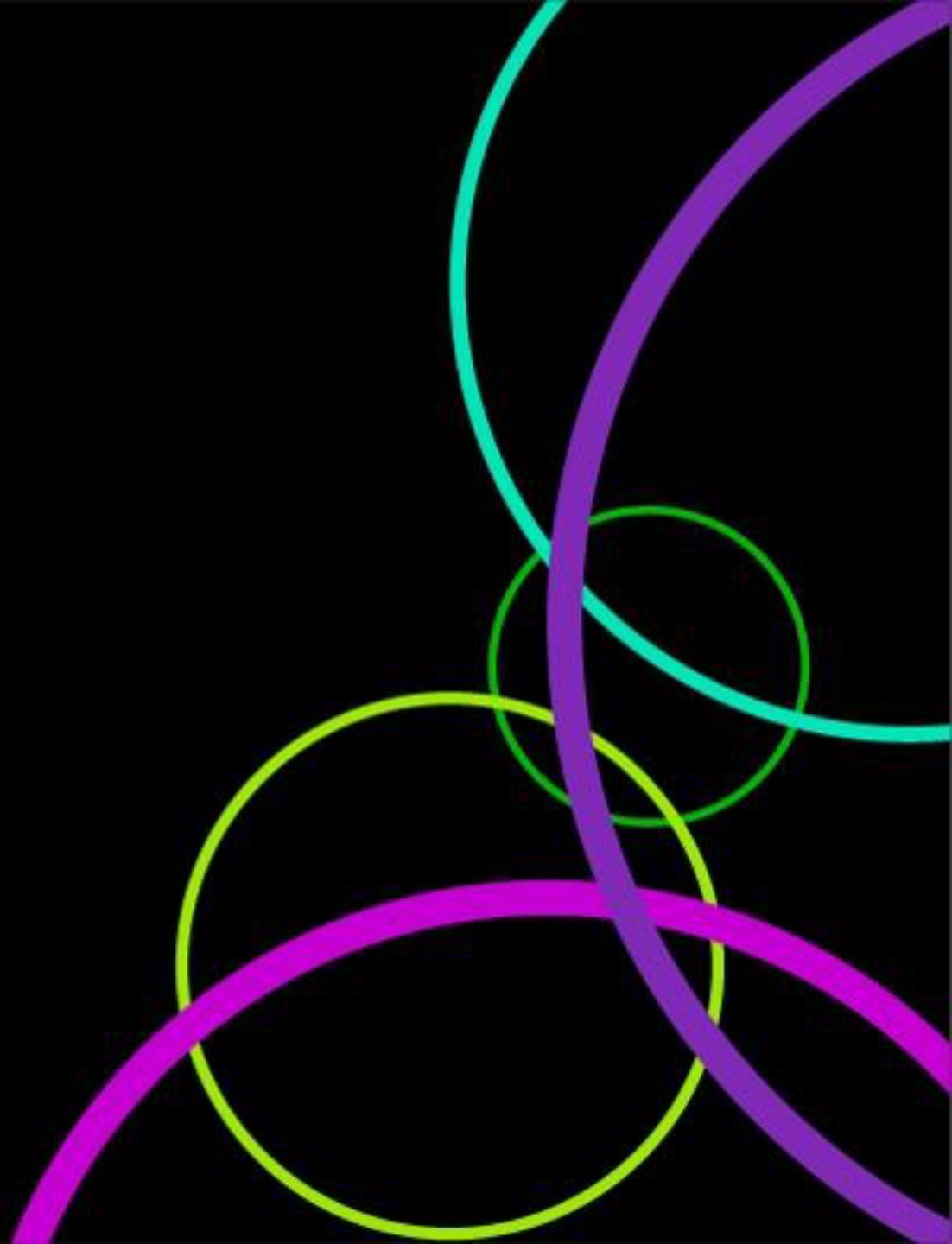




CONTENTS

	Page
1. Executive summary	3
2. Research background, objectives and approach	10
3. Summary findings – Queensland community	15
3.1 Community sentiment	16
3.2 Level of involvement	30
3.3 Information needs	36
4. Summary findings – Queensland stakeholders	44

1. Executive summary



STATEWIDE OVERVIEW

AWARENESS

Unprompted recall of **major sporting events** in Australia in next 10 years

56% OLYMPIC GAMES

1% PARALYMPIC GAMES

Prompted recall that **Australia has been selected** for a future Olympic and Paralympic Games



81% IN AUSTRALIA



73% IN BRISBANE



54% IN 2032

INTEREST IN INFORMATION



42% Towns / locations where events will be held



38% Ticket costs



35% Infrastructure and facilities being planned / built

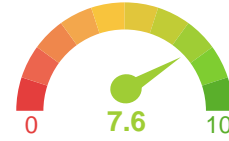
The **community engagement** concept received most support for being delivered **online**



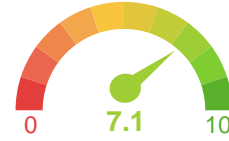
36%

SENTIMENT

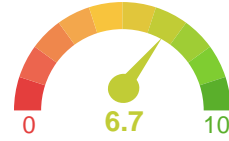
MEAN LEVEL OF **SUPPORT FOR THE GAMES**



MEAN LEVEL OF **INTEREST IN THE GAMES**



MEAN LEVEL OF **EXCITEMENT FOR THE GAMES**



INVOLVEMENT



74% Likely to watch the Games on TV or catch-up TV



48% Likely to watch from live sites / events



45% Likely to purchase tickets to attend and watch live events



34% Likely to host friends or family in their home or property as visitors



34% Likely to attend a regional event outside of Greater Brisbane.

PERCEIVED BENEFITS OF GAMES



64% Increased tourism / tourism dollars



50% Being part of history



49% New / improved infrastructure and facilities



49% Creation of more jobs for residents



47% Stronger economy



47% Showcase / raise the profile of Brisbane / Queensland to the world

MEAN LEVEL OF **CONCERN ABOUT GAMES**



AREAS OF CONCERN ABOUT GAMES



49% Cost concerns (any type)



41% Increased traffic congestion during the Games



30% Tickets will be too expensive



29% Public transport during the Games



27% Environmental impact / waste (negative)



27% Rising house prices or rents

COMMUNITY SENTIMENT – Segment differences

Queenslanders who are generally more positive about 'Brisbane 2032'

- ✓ Residents living in South East Queensland (SEQ) – defined in this study as Greater Brisbane plus the Sunshine and Gold Coasts (excluding Toowoomba)
- ✓ Higher general support is evident within Brisbane Inner City and the Sunshine Coast regions
- ✓ Younger Queenslanders (aged < 40 years in this research)
- ✓ Working Queenslanders (especially those working in the education sector) and tertiary students;
- ✓ Families (children <18 years are in the household)
- ✓ Sport and fitness enthusiasts (themselves, and/or have children who regularly engage in organised sport)
- ✓ *CALD residents (speak a language other than English at home)
- ✓ First Nations Australians

As supportive segments of the Queensland population, these groups may be easiest to engage with about 'Brisbane 2032'.

Queenslanders who are generally less positive about 'Brisbane 2032'

- Regional Queenslanders who live outside of SEQ
- Lower levels of sentiment is evident within the specific regions of Toowoomba, Townsville and within Brisbane-West/Ipswich
- Older Queenslanders
- Unemployed residents
- Those without children in the household
- Queenslanders not interested/engaged in sport, fitness or organised sport themselves; and/or whose children do not regularly engage in organised sport
- Residents who identify as living with disability

As less supportive segments these groups may be more difficult to engage with about 'Brisbane 2032'.

FACTORS DRIVING POSITIVE COMMUNITY SENTIMENT

Factors driving positive sentiment about 'Brisbane 2032'

The following attitudes trigger positive sentiment about 'Brisbane 2032':

- *The Brisbane 2032 Games will benefit me personally*
 - **Personal benefit** means the opportunity to be involved during the Games and being 'a part of history' – the most engaged Queenslanders position the Games as a world-class major event and unique experience that they don't want to miss – these residents show enthusiasm for buying tickets/attending events and/or volunteering.
 - Residents in Greater Brisbane, *CALD and First Nations Australians are more likely than other groups to want to be actively involved in Brisbane 2032.
- *The Games will leave a **positive legacy for Queensland*** – one of the most valued lasting legacies of 'Brisbane 2032' is the new/improved infrastructure and facilities (this benefit is particularly acknowledged by Sunshine Coast residents – who as a region are much more likely to have a personal interest in sport, fitness and organised sport)
- In the minds of Queenslanders, new/improved infrastructure and facilities equates to new roads, better public transport connectivity and upgraded sports facilities
- *The Brisbane 2032 Games will benefit **Australia's, Brisbane's and regional Queensland's economies*** – overall, increased tourism and tourism dollars was the most recognised (economic benefit) of the 2032 Games, followed by more jobs.

Interesting differences driving sentiment among minority groups

Of note, ***CALD residents** are more likely (than average) to:

- Agree that 'The Brisbane 2032 Games make me feel proud'
- The benefit of 'attracting foreign investment/trade'
- Feel more informed about the Games, and say what they have heard/seen has been mostly positive.

In addition, **First Nations Australians** are more likely (than average) to agree:

- The organisers of the Games are doing a great job so far
- The Brisbane 2032 Games will benefit me personally.

Queenslanders who are most positive about 'Brisbane 2032' can visualise the personal benefits they will experience in 10 years time. These residents can articulate the ways that they will personally be involved during the Games. In tandem with personal benefit, is the legacy of new/improved infrastructure and facilities that will enhance residents' lifestyles well before the year 2032.

FACTORS DRIVING LESS POSITIVE SENTIMENT – REGIONAL QUEENSLAND

Regional Queenslanders (outside of SEQ) are less positive about 'Brisbane 2032'

Two powerful and emotionally-charged perceptions are damaging the Games' reputation among the regions (outside of SEQ):

1. The (oft-used narrative) about the disparity in funding between SEQ and non-SEQ being reinforced in terms of the funds that will now be needed to run the Games – some feel at the direct expense of funding their local essential services such as health and infrastructure.
2. They are worried that there won't be any benefits outside of Brisbane/SEQ – for their residents or their local economies.

Specific towns showing more strongly embedded negativity include:

- **Toowoomba** residents are less positive in general about all the various economic, environmental and legacy benefits; and more likely to suggest that there aren't any benefits at all.
- **Townsville** residents are more sceptical about any 'activity and health community benefits' and whether their economy will benefit; they worry that there won't be any benefits for their residents or communities.
- Although **Cairns** residents are hopeful of more jobs, along with **Central Queenslanders**, they are also more likely to worry there won't be any benefits for their residents or communities.

Communicating with the regions will need to be handled with particular care and sensitivity for their residents and economies. So as to not inflame the 'perceptual gap' (between SEQ and non-SEQ), it will be important that the Government is 100% transparent around budgets committed to funding 'Brisbane 2032'; and that all possible opportunities to improve infrastructure, services and host events in regional Queensland are offered (with optimal fanfare and media attention) over the coming years.

The key to communicating with residents outside of SEQ will be attempting to identify any areas of personal relevance and involvement opportunities that 'Brisbane 2032' may represent to engender some type of connection with the Games – in spite of the geographic barriers to SEQ.

To encourage early engagement with 'Brisbane 2032', leverage existing networks where positivity is more likely and entrust halo influences:

- Use Queensland schools (and university campuses) to reach young people (and their families). The educators included in the qualitative research (Phase 1) were highly supportive of the cross-curricular opportunities of teaching through 'Brisbane 2032', and would value teaching support materials;
- Use sporting clubs to reach sports enthusiasts and tap into local regional events to build awareness and interest levels.

FACTORS DRIVING LESS POSITIVE SENTIMENT – OLDER PEOPLE AND THOSE LIVING WITH DISABILITY

Older Queenslanders are less positive

- Queenslanders aged 50+ years are generally not as positive about the Games as younger Queenslanders – and the oldest residents in the research, aged 60-69 years, are less so.

Characterising a typical, less positive older Queenslanders:

- They typically feel less positive about the (general) legacy left for Queensland and are less likely to acknowledge the ‘soft areas of legacy’, such as feeling pride, and being inspired about the activity and health benefits for the community – in addition, they are less complimentary about the organisers doing a great job and being on track and are more concerned about the general cost of the Games, and ‘security during the Games’.
- **They are more likely however**, to acknowledge the more tangible, economic benefits, such as the new/improved infrastructure and facilities, more jobs, raising the region’s profile and attracting more foreign investment and trade.

When attempting to connect with older Queenslanders about the Games, a focus on the more measurable and tangible ‘harder’ legacy benefits such as boosting the economy (and managing costs) may resonate more strongly.

Queenslanders living with disability are less positive

- Queenslanders living with disability are generally not as positive as Queenslanders (without disability)
 - A key driver of less positive sentiment is that they tend to feel the Games won’t benefit them personally.
 - Of some note, residents who identify as living with disability are more concerned about ‘security during the Games’, compared to those living without disability.
 - Residents who identify as living with disability are less likely to want to be involved in ‘Brisbane 2032’ showing less intent to:
 - Attend the Opening Ceremony, Purchase tickets, Watch from live sites, Watch via TV, Host friends/family, Attend a regional event.

Other than the insights highlighted above, the disability sector was not specifically consulted in detail via this research project. Given the lower levels of sentiment arising in the research, further exploration is warranted to understand the barriers (re: personal benefit, involvement) in greater depth.

COMMUNICATION PRIORITIES – SEGMENTS AND CONTENT

Segments who generally feel less informed and/or describe what they've heard as less positive

- Residents living outside of Greater Brisbane, particularly Townsville:
 - These residents are most concerned that non-SEQ residents and economies won't benefit from 'Brisbane 2032'.
- Brisbane–West residents and those in the neighbouring region of Ipswich (who of note, are less interested in sport and fitness):
 - Residents in the west of Brisbane are most concerned about traffic congestion during the Games; and show interest in knowing more about how negative impacts will be managed.
- Females feel less informed in general, and are less positive (than males) about what they have heard so far:
 - Females are keen to know more about the environmental impacts of the Games and how other negative impacts will be managed such as details about cost implications, traffic congestion, housing costs etc.
- Older Queenslanders 50+ years are more concerned (than younger residents) about the general cost of the Games.

Consider prioritising the above segments as initial targets for information delivery about 'Brisbane 2032' to raise their levels of knowledge and improve perceptions. To resonate, the messaging must be tailored to their specific concerns and information needs.

Broader information needs by the Queensland community

In terms of the general Games information that Queenslanders want to know about, the most popular topics of content are:

- The towns/locations where events will be held, ticket costs, and what infrastructure and facilities are being planned/built to cater for the Games. Brisbane Inner City dwellers in particular also want construction updates.

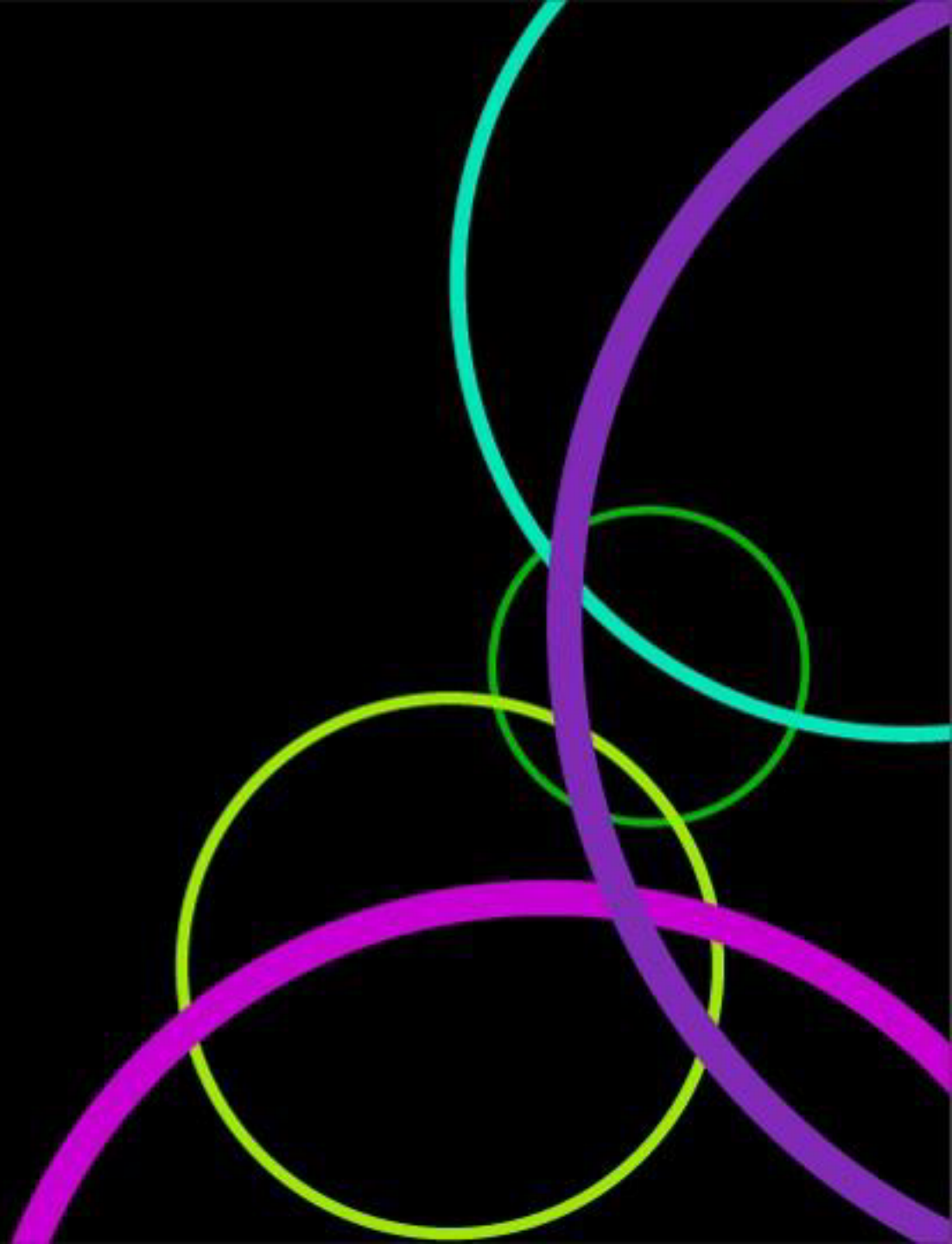
The 'climate positive Games' message

The qualitative research (Phase 1) suggested that promoting a 'climate positive games' may be an effective opportunity to ignite community awareness and interest, and secure support for 'Brisbane 2032' (the Phase 2 survey research suggests this may work better for males who were more likely to acknowledge the "climate positive" commitment as being a 'Brisbane 2032' benefit).

Focus group and stakeholder research participants viewed the commitment as significant and important for Brisbane, Queensland and Australia – and suggested that Brisbane could be a leading catalyst for worldwide change in sustainability and renewable energy.

2.

Research background,
objectives and approach



RESEARCH PROJECT BACKGROUND AND OBJECTIVES

Queensland was successful in securing the Brisbane 2032 Olympic and Paralympic Games ('Brisbane 2032').

In May 2022, the State of Queensland, acting through the Department of the Premier and Cabinet (DPC) commissioned Kantar Public to undertake research to measure broad community and stakeholder sentiment in the lead up to 'Brisbane 2032', including expectations, perceived benefits and legacy opportunities. This initial research project provides the baseline KPIs at 10 years out from Brisbane 2032 and further waves of quantitative surveys may be repeated annually to track key measures over time, and inform strategy development. Broadly, the research project will:

- **Inform the Queensland Government about Queenslanders' views about the benefits and opportunities that Brisbane 2032 will bring to Queensland and their own regions;**
- **Seek to identify any issues or concerns around the staging of the event;**
- **Shape the government's 10-year road map; and**
- **Inform further engagement and communications across Queensland and in region specific communities.**

The target audience for this research was all Queenslanders aged 13 years and over. Kantar Public undertook a multi-modal approach (qualitative and quantitative research phases) to meet the aims of the project.

Phase 1. Qualitative Research	<ul style="list-style-type: none">• 8 online focus groups with Queensland residents• 10 in-depth interviews (IDIs) with community stakeholders
Phase 2. Quantitative Research	<ul style="list-style-type: none">• A robust and detailed survey with a representative sample of Queenslanders (total n=2,245)

This report combines the key findings from Phase 1 (Qualitative) and Phase 2 (Quantitative) of the research project.

There are two additional more detailed reports available, focusing on each research phase.

Although using different methods of research, the qualitative and quantitative research phases found similar findings among Queensland residents.

QUALITATIVE RESEARCH PHASE 1

HOW

- **Community:**
8 online focus groups
(each group was 90 minutes in length)
- Total of 47 participants
- **Stakeholders:**
10 in-depth interviews with key community stakeholders
(each interview was 45-60 minutes in length)

WHO

- **Community representatives**
(including participants from SEQ and regional Queensland, a mix of genders, First Nations Australians, Culturally & Linguistically Diverse (CALD) and those living with a disability)

Group	Age	Gender	Region
1	13-17 years	Male	Greater Brisbane
2	13-17 years	Female	Gold Coast/Sunshine Coast
3	18-34 years	Mix	Greater Brisbane
4	35+ years	Mix	Greater Brisbane
5	18-34 years	Mix	Gold Coast/Sunshine Coast
6	35+ years	Mix	Gold Coast/Sunshine Coast
7	18-34 years	Mix	North Qld/Far North/RoQ
8	35+ years	Mix	North Qld/Far North/RoQ

- **Stakeholder representatives**
Advance Cairns, Outback Queensland Tourism Organisation, Townsville Enterprise Limited, Capricorn Enterprise, Queensland Council of Social Service, ATSI Committee, University of Southern Queensland (USQ), The University of Queensland (UQ), Queensland University of Technology (QUT), Queensland Chamber of Commerce

WHEN

- Fieldwork took place on 2 to 23 June 2022

QUANTITATIVE RESEARCH PHASE 2



Data collection method

Online using research panels



Survey length

15 minutes



Target respondent

Queensland general population aged 13-69 years. Consent from parents was sought for youth aged 13-15 years.



Data collection dates

Mon 27 June – Mon 11 July



Weighting

The data was post-weighted by age, gender and location using ABS 2021 Census data.



Sample size

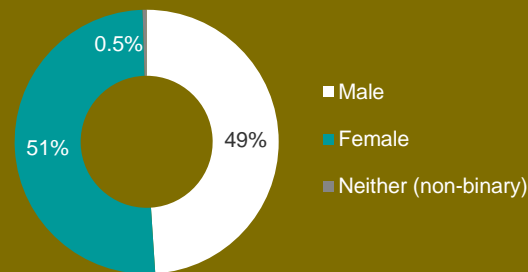
n=2,245 surveys achieved; estimated margin of error is very low at 2.07%**

** A margin of error less than +/-5% is considered ideal in market research.

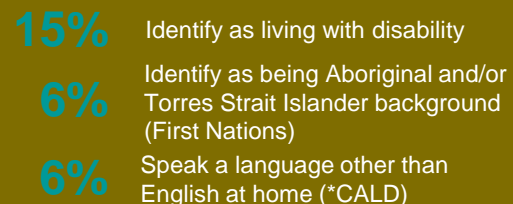
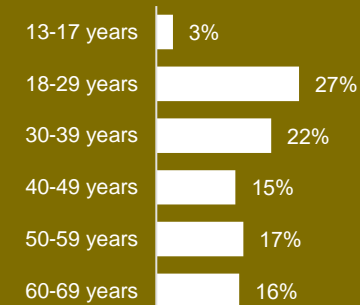
RESPONDENT PROFILE



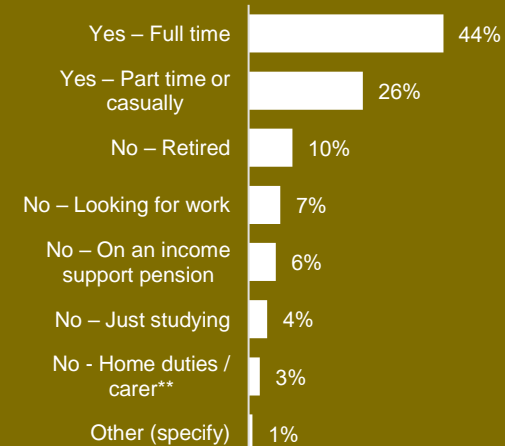
GENDER



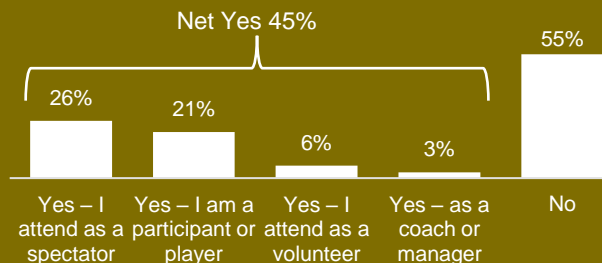
AGE



EMPLOYMENT STATUS



REGULAR PARTICIPATION IN ORGANISED SPORT



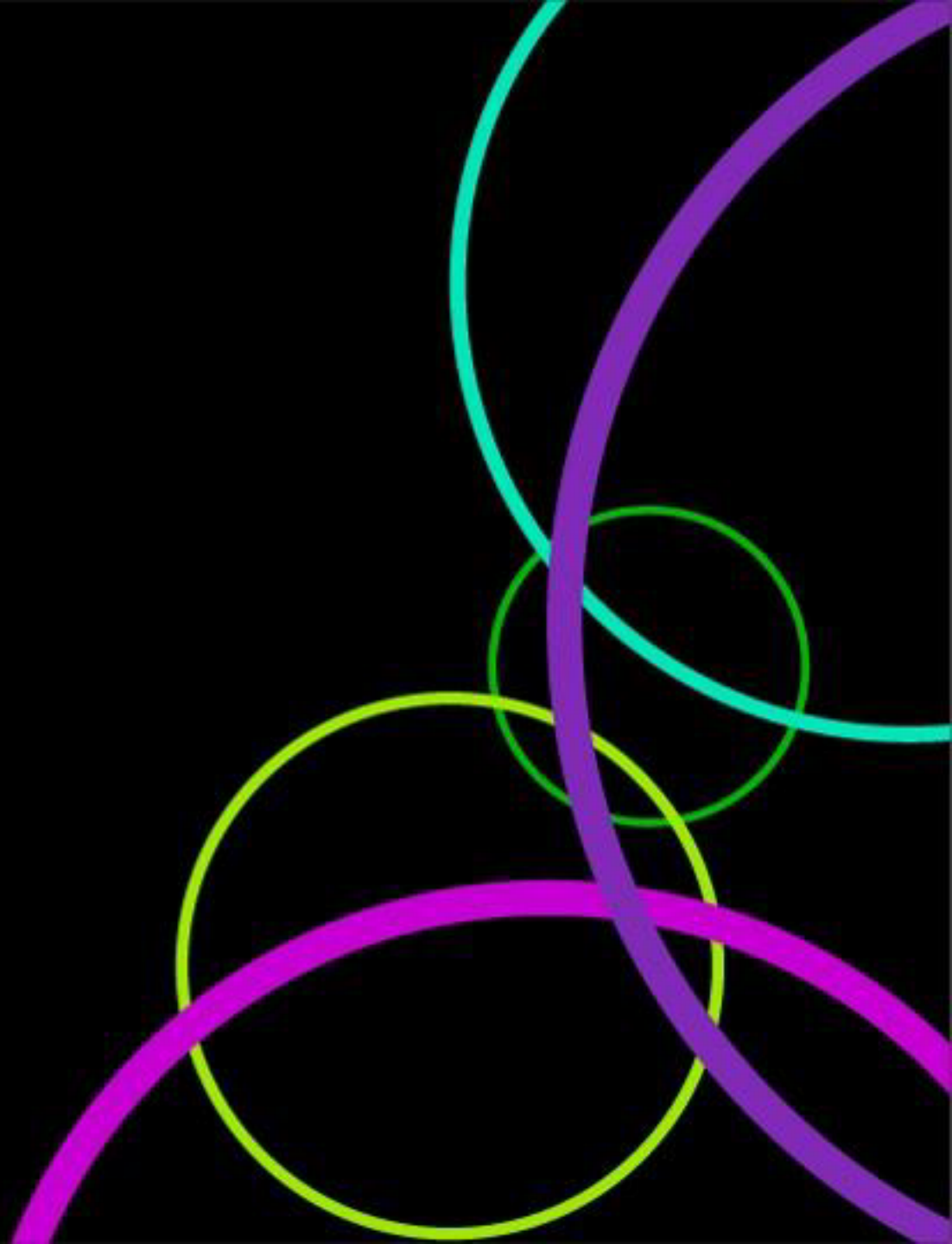
*CALD = Culturally and Linguistically Diverse (speak a language other than English at home)

GEOGRAPHICAL BREAKDOWN OF SURVEYS

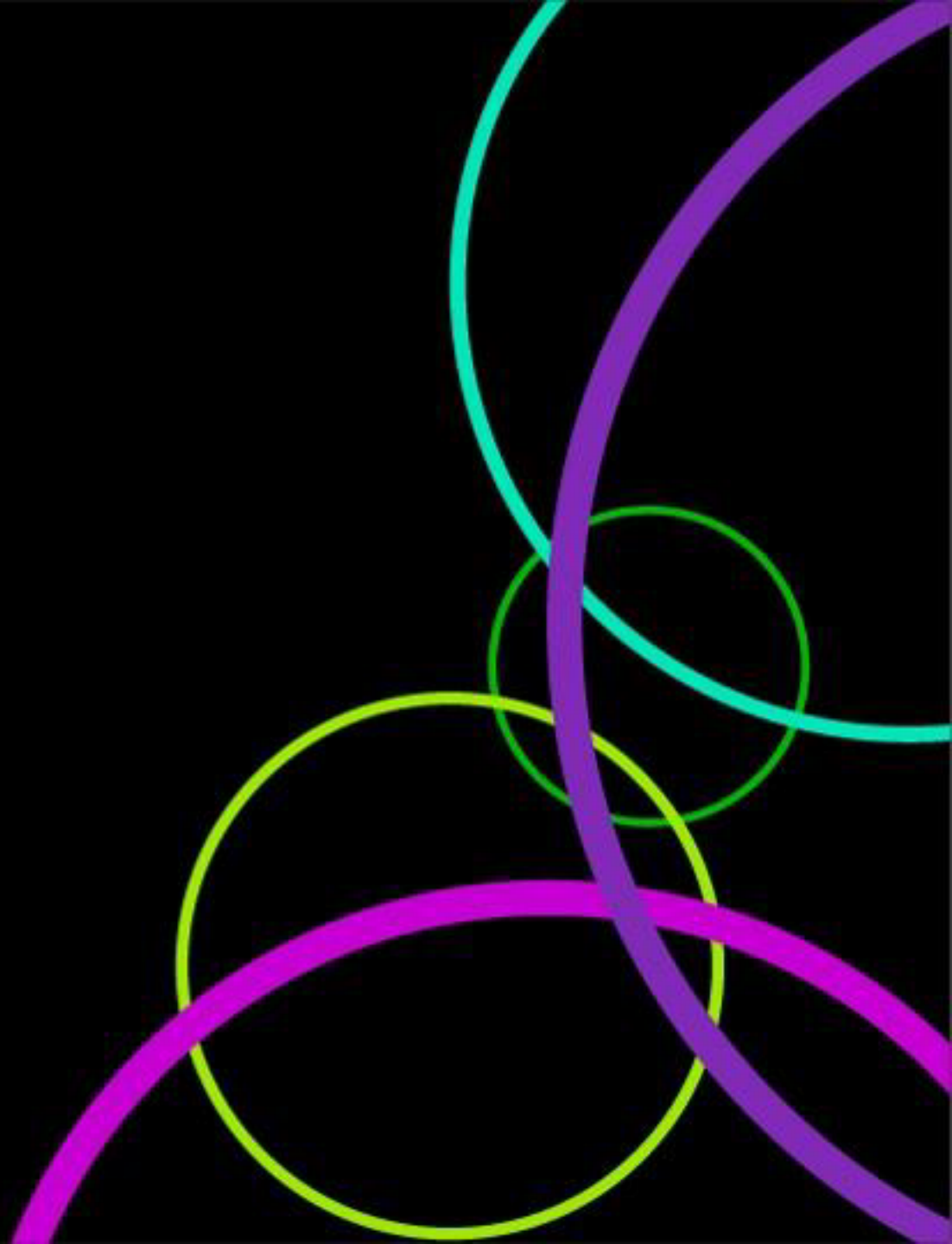
A total of n=2,245 surveys were completed across the geographical breakdowns below, which allowed coverage of the 19 SA4s (ABS Statistical Area Level 4) in Queensland, with priority focus given to those locations hosting Brisbane 2032 events.

Location (SA4 definitions)	Sample size (n=)	
Greater Brisbane (Consisting of the SA4s: Brisbane Inner City, Brisbane – North, Brisbane – South, Brisbane – East, Brisbane – West, Moreton Bay – North, Moreton Bay – South, Ipswich, Logan - Beaudesert)	820	Referred to throughout the report as Greater Brisbane
Sunshine Coast	291	Referred to throughout the report as Other SEQ (n=582)
Gold Coast	291	
Toowoomba	92	Referred to throughout the report as Outside of SEQ or Non-SEQ (n=843)
Darling Downs - Maranoa	46	
Cairns	169	
Townsville	165	
Mackay-Isaac-Whitsunday	126	
Central Queensland	133	
Rest of Queensland (ROQ) (Wide Bay, Queensland – Outback)	112	
Total	2,245	

3.
Summary findings –
Queensland community



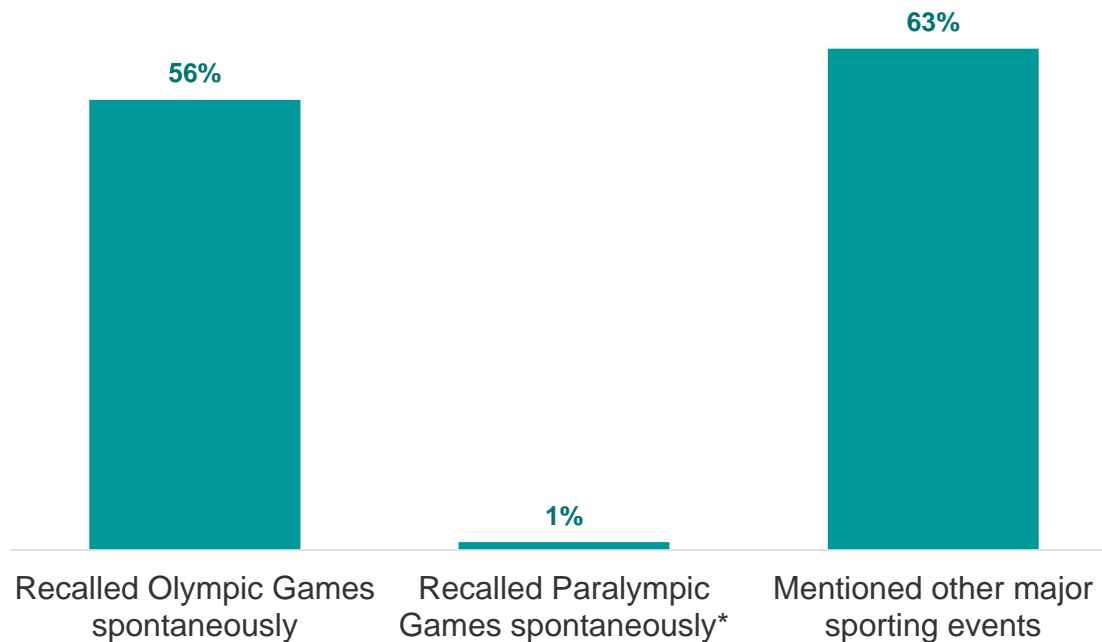
3.1 Community sentiment



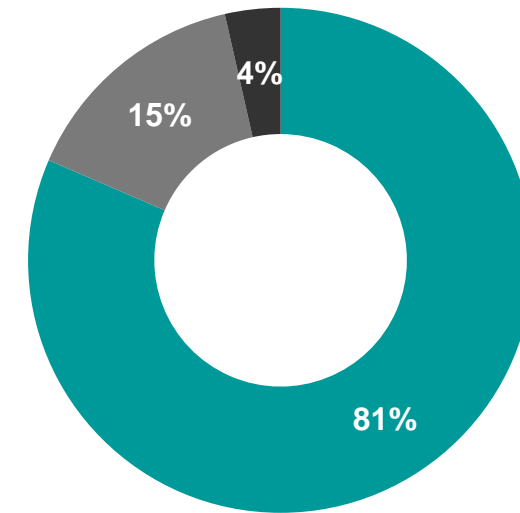
AWARENESS OF THE 2032 GAMES

Without being prompted, 56% of all Queenslanders recalled the Olympic Games as a major sporting event being held in Australia in the next five to 10 years. Only 1% recalled the Paralympic Games without being prompted.

UNPROMPTED RECALL OF MAJOR SPORTING EVENTS HAPPENING IN AUSTRALIA IN NEXT 10 YEARS



PROMPTED RECALL THAT AUSTRALIA HAD BEEN SELECTED FOR A FUTURE OLYMPIC AND PARALYMPIC GAMES

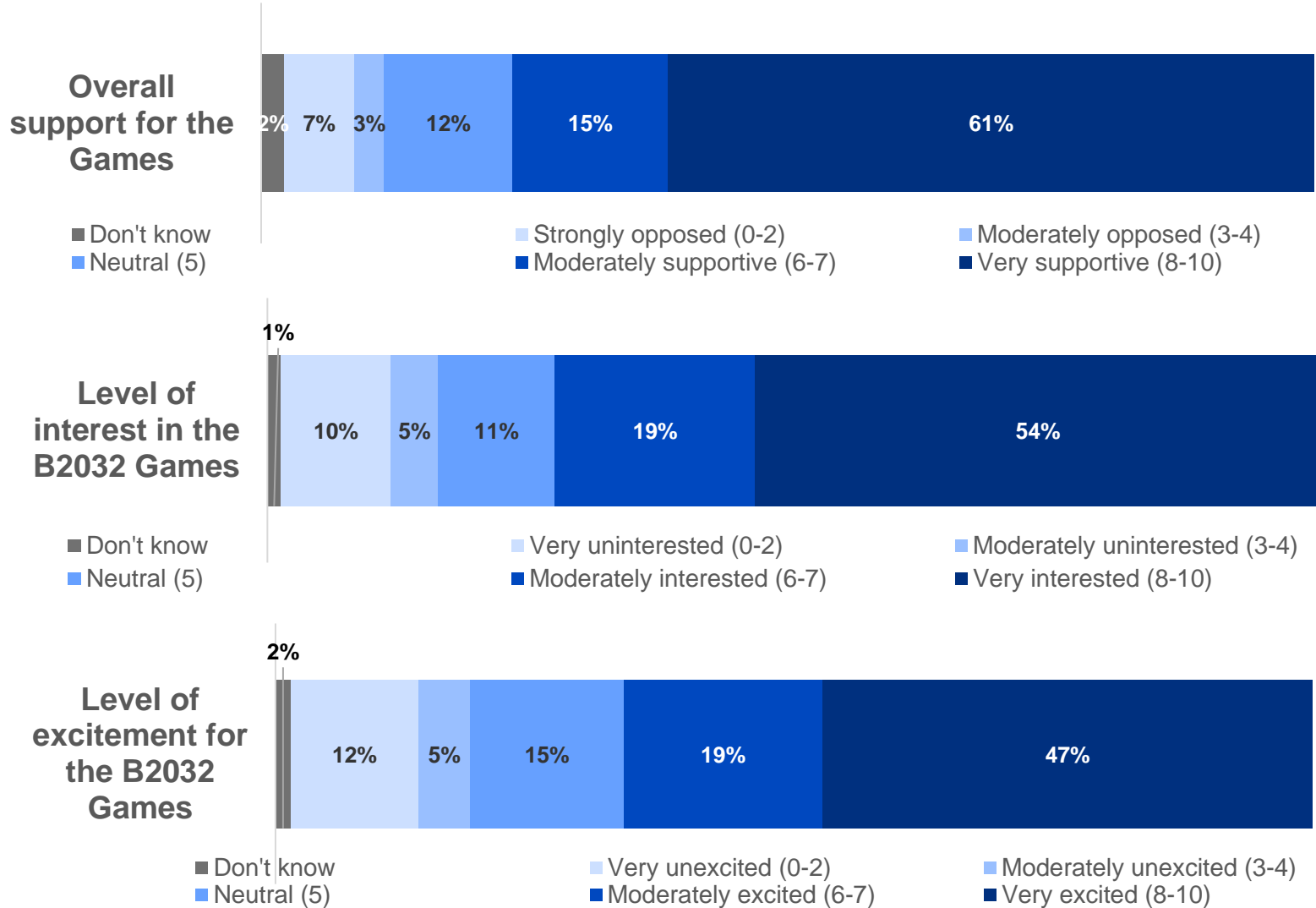


■ Yes (aware) ■ No (not aware) ■ Not sure

When prompted, four in five (81%) Queenslanders were aware that Australia has recently been selected to hold the Games.

Three in four (73%) correctly recalled Brisbane as the host. Just over one half (54%) were able to correctly recall 2032 as the year the Olympic Games will next be held in Australia.

SENTIMENT TOWARDS 2032 GAMES



SUPPORT

There is a moderately high level of support for the 2032 Games. Three in four (76%) Queenslanders are supportive, including 61% who are very supportive. One in ten (10%) are opposed, including 7% who are strongly opposed.

INTEREST

There is also a moderately high level of interest in the Games, with three in four (73%) interested.

EXCITEMENT

In comparison, levels of excitement about the 2032 Games are a little lower. Two in three (66%) are excited to some extent, including nearly one half (47%) who are very excited.

SENTIMENT TOWARDS 2032 GAMES – Segment differences

Generally more supportive, interested and/or excited

- Residents living in South East Queensland (SEQ) – defined by this study as Greater Brisbane plus the Sunshine and Gold Coasts (excluding Toowoomba)
- *CALD residents (speak a language other than English at home)
- Employed residents and current university or tertiary education students
- Younger Queenslanders aged 13-29 years
- Families (i.e. have children <18 years in the household)
- Those who regularly engage in organised sport themselves, and/or have children who regularly engage in organised sport
- Queenslanders who are interested in sport and fitness
- Those who work in a business likely to be impacted by the Brisbane 2032 Games in some way

Generally less supportive, interested and/or excited

- Residents who live outside of SEQ
- Residents who identify as living with disability
- Older residents aged 50-69 years
- Unemployed residents
- Those without children (aged <18 years) in the household
- Those who are not interested in sport and fitness in general; who do not regularly engage in organised sport themselves; and/or whose children who do not regularly engage in organised sport

BASE: Total sample (n=2,245)

B1. To what extent do you support the Brisbane 2032 Olympics and Paralympic Games?

B2. Overall, how interested are you in the Brisbane 2032 Olympics and Paralympics? (Single response)

B3. Overall, how excited are you about the Brisbane 2032 Olympics and Paralympics? (Single response)

*CALD = Culturally and Linguistically Diverse (speak a language other than English at home)

SENTIMENT TOWARDS 2032 GAMES

– verbatim comments (qualitative research)

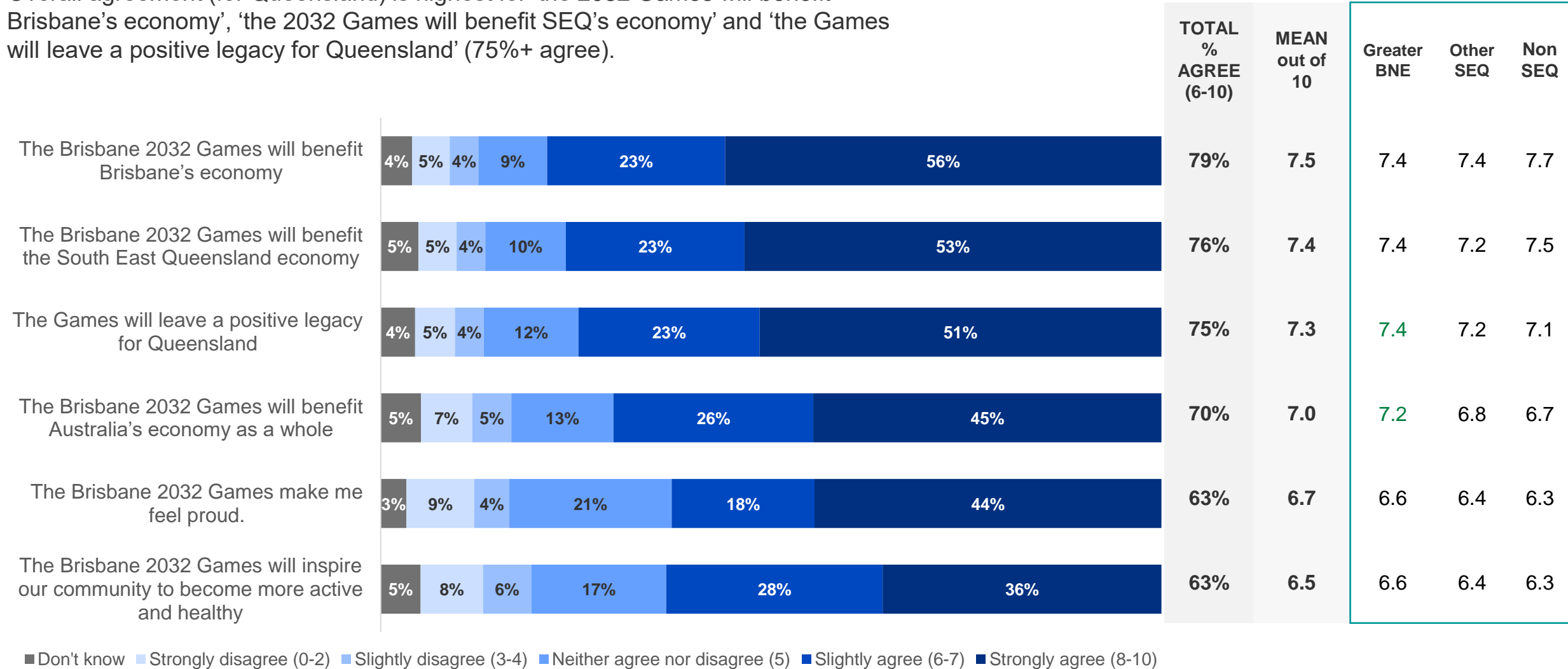
“It’s **exciting** to have such a **massive event in our own backyard**... everyone at the club (netball) is very excited, **especially the kids.**”
(Sunshine/Gold Coasts, 36-70 years)

“Hopefully there’ll be **lots of infrastructure upgrades** that last long into the future if everything is planned with that **long-term mindset.**”
(Sunshine/Gold Coasts, 18-35 years)

“I think it’s **unreasonable to expect it to be fully equal** when the event is in Brisbane but if we can try to have those **pre-Games events** etc, and maybe spend a little money on that, **it would soften the blow if we felt involved.**”
(Non-SEQ, 36-70 years)

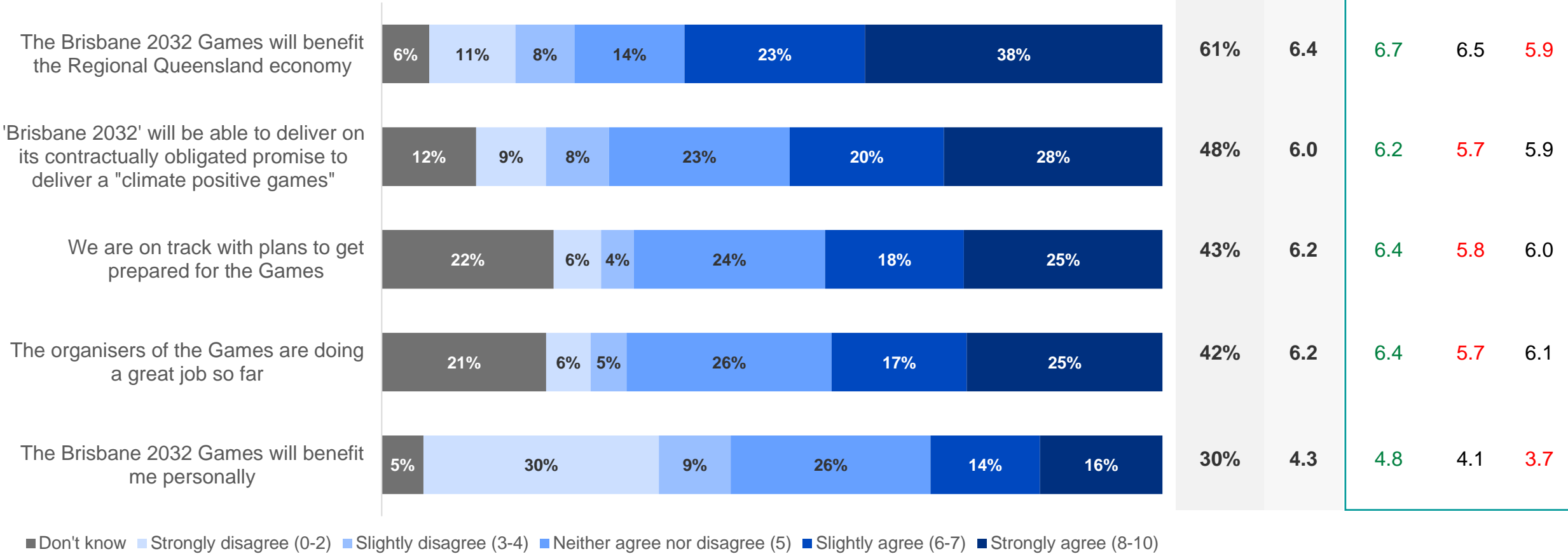
AGREEMENT WITH SENTIMENT STATEMENTS

Overall agreement (for Queensland) is highest for ‘the 2032 Games will benefit Brisbane’s economy’, ‘the 2032 Games will benefit SEQ’s economy’ and ‘the Games will leave a positive legacy for Queensland’ (75%+ agree).



AGREEMENT WITH SENTIMENT STATEMENTS (cont'd)

Overall agreement (for Queensland) is lowest for 'The Brisbane 2032 Games will benefit me personally'. Awareness issues are present for 'The organisers of the Games are doing a great job so far' and 'We are on track with plans to get prepared for the Games'. These statements have a high proportion of residents (one in five) who indicated they didn't know.



AGREEMENT WITH SENTIMENT STATEMENTS – Regional differences

Regional Queenslanders

- Residents living in Greater Brisbane are typically more positive about the likely benefits of Brisbane 2032, compared to other Queensland residents.

More positive regional sentiment (by specific region)

Sunshine Coast residents are:

- more likely to recognise new/improved infrastructure and facilities as a benefit, along with the chance to see elite athletes (of note, residents on the Sunshine Coast are much more likely than the Queensland average to have a personal interest in sport, fitness and organised sport either as a participant, spectator or volunteer).

Cairns residents are:

- more likely to recognise the creation of more jobs being of benefit (but show some concern that there may not be any benefit for their residents/community).

More negative regional sentiment (by specific region)

Gold Coast residents are:

- less likely to think the organisers are on track with plans and less likely to think they will benefit personally;
- more likely to cite the ‘cost of the Games’ as being a concern.

Toowoomba residents are:

- less positive about the economic, environmental and legacy benefits;
- more likely to suggest that there aren’t any benefits (of Brisbane 2032) at all.

Townsville residents are:

- more sceptical about the ‘health benefits’ and whether regional Queensland’s economy will benefit;
- are more likely to worry that there won’t be any benefits for non-SEQ residents/communities.

Ipswich residents are:

- are more likely to be concerned about traffic congestion during the Games (of note, Ipswich residents were found to be less interested in general in sport and fitness compared to the average for Queensland).

AGREEMENT WITH SENTIMENT STATEMENTS – Other segment differences

Age/Gender differences

Younger Queenslanders (aged under 40 years):

- tend to feel more positive about the Games compared to older Queenslanders - particularly in relation to thinking they will personally benefit.

The oldest age group in the research (60-69 years):

- typically feels less positive about a number of aspects - the legacy left for Queensland, less pride, less inspired about activity and health, and are less supportive about the organisers doing a great job and being on track.
- While the genders feel similarly about most aspects of Brisbane 2032, males tend to be more positive in terms of the Games achieving a “climate positive games” and feeling that they will benefit personally.

People living with disability are **less likely** (than those without disability) to agree that:

- The Brisbane 2032 Games will benefit me personally.

People of *CALD background are **more likely** (than those who aren't) to agree that:

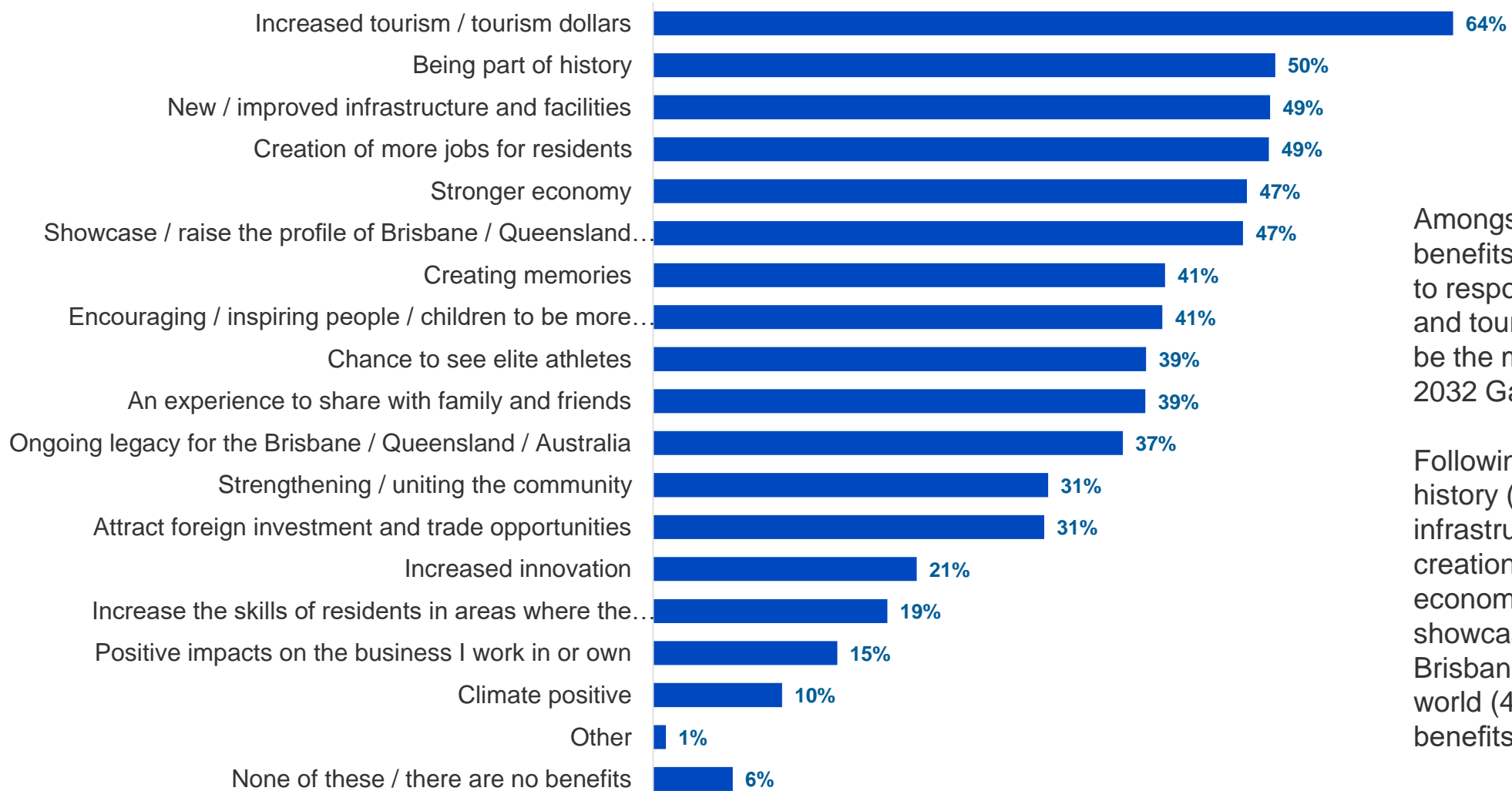
- The Brisbane 2032 Games make me feel proud.

First Nations are **more likely** (than average) to agree:

- The organisers of the Games are doing a great job so far;
- The Brisbane 2032 Games will benefit me personally.

PERCEIVED BENEFITS/POSITIVE IMPACTS OF THE GAMES

PERCEIVED BENEFITS / POSITIVE IMPACTS OF THE GAMES



Amongst a range of potential benefits and positive impacts shown to respondents, increased tourism and tourism dollars was deemed to be the most likely benefit of the 2032 Games (64%).

Following this, being being part of history (50%), new/improved infrastructure and facilities (49%), creation of more jobs (49%), strong economy (47%) and showcasing/raising the profile of Brisbane and Queensland to the world (47%) were the most salient benefits/impacts of 'Brisbane 2032'.

PERCEIVED BENEFITS OF THE GAMES – Segment differences

Regional differences

- **Sunshine Coast** residents are more likely to recognise new/improved infrastructure and facilities as a benefit, along with the chance to see elite athletes.
- **Toowoomba** residents are more likely to suggest that there aren't any benefits at all, whereas **Cairns** residents are more likely to recognise the creation of more jobs as a benefit.

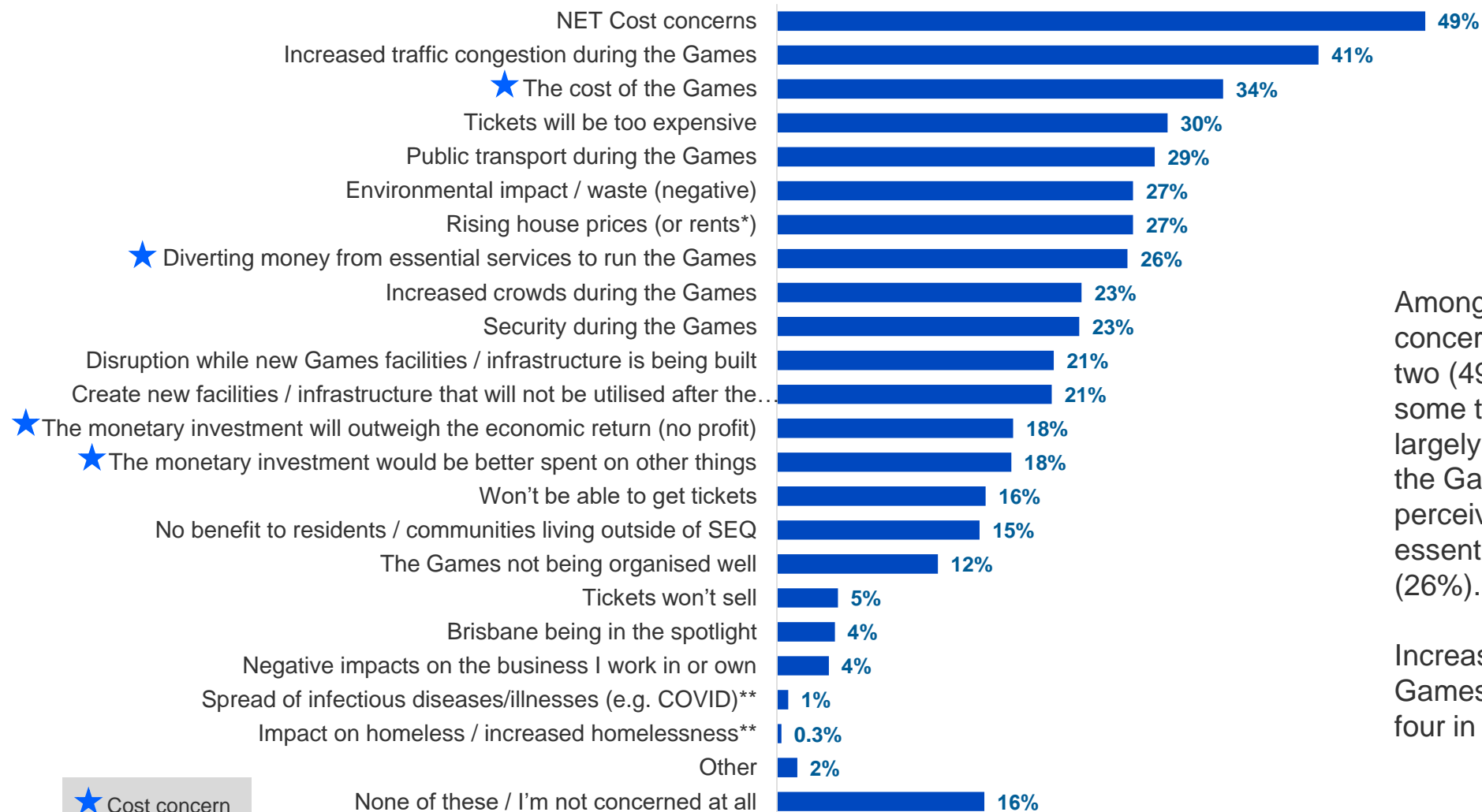
Age/Gender differences

- Queensland's youngest (13-17 years) are enthusiastic about increased tourism, infrastructure, the region's profile, creating memories and legacy, the health benefits and the chance to see elite athletes.
- The 18-29 year olds are most impressed by the idea of experiencing a moment in history.
- The oldest group in the research, aged 60-69 years, are more pleased (than average) about the (economic) benefits such as new/improved infrastructure and facilities, more jobs, raising the region's profile and attracting more foreign investment and trade.
- Females make more positive mentions around tourism, history, jobs, the area's profile, creating memories and inspiring health benefits. They are also appreciative of the Games offering an experience to share with family and friends. Compared to females, males are more likely to acknowledge the "climate positive" commitment (as being a Brisbane 2032 benefit).

People of *CALD background are more likely to identify 'attracting foreign investment/trade' as a benefit of Brisbane 2032, compared to non-CALD residents.

AREAS OF CONCERN ABOUT THE 2032 GAMES

PERCEIVED AREAS FOR CONCERN ABOUT THE GAMES



Amongst a range of potential areas for concern shown to respondents, one in two (49%) Queenslanders mentioned some type of cost concern. This is largely driven by the perceived cost of the Games in general (34%) and the perceived diversion of money from essential services to run the Games (26%).

Increased traffic congestion during the Games is the next highest concern, with four in ten (41%) mentioning this.

AREAS OF CONCERN ABOUT THE 2032 GAMES – Segment differences

Regional differences

- Residents living on the **Gold and Sunshine Coasts** are more likely to be concerned about traffic congestion but highest concern (for traffic congestion) is within **Ipswich**.
- Those **outside SEQ** are more likely to think that there won't be any benefits (at all) for their residents/communities – especially within Cairns, Townsville, Central Queensland.
- **Gold Coast** residents cite the cost of the Games more often as a concern.
- **Outside SEQ** Queenslanders are less concerned about:
 - Increased traffic congestion
 - Public transport
 - Increased crowds.

Age/Gender differences

- Older Queenslanders 50+ years are more concerned about the general cost of the Games, and about 'security during the Games' - compared to younger residents.
- The 13-29 year olds are more concerned than average about environmental impacts and the rising cost of housing.
- Females are more concerned (than males) about the various cost implications (including diversion of funds from essential services, a lack of economic return/profit, or that the funds could be better spent elsewhere); and indeed, females are more worried about a series of other aspects, most notably increased traffic congestion, environmental impacts, housing costs etc.

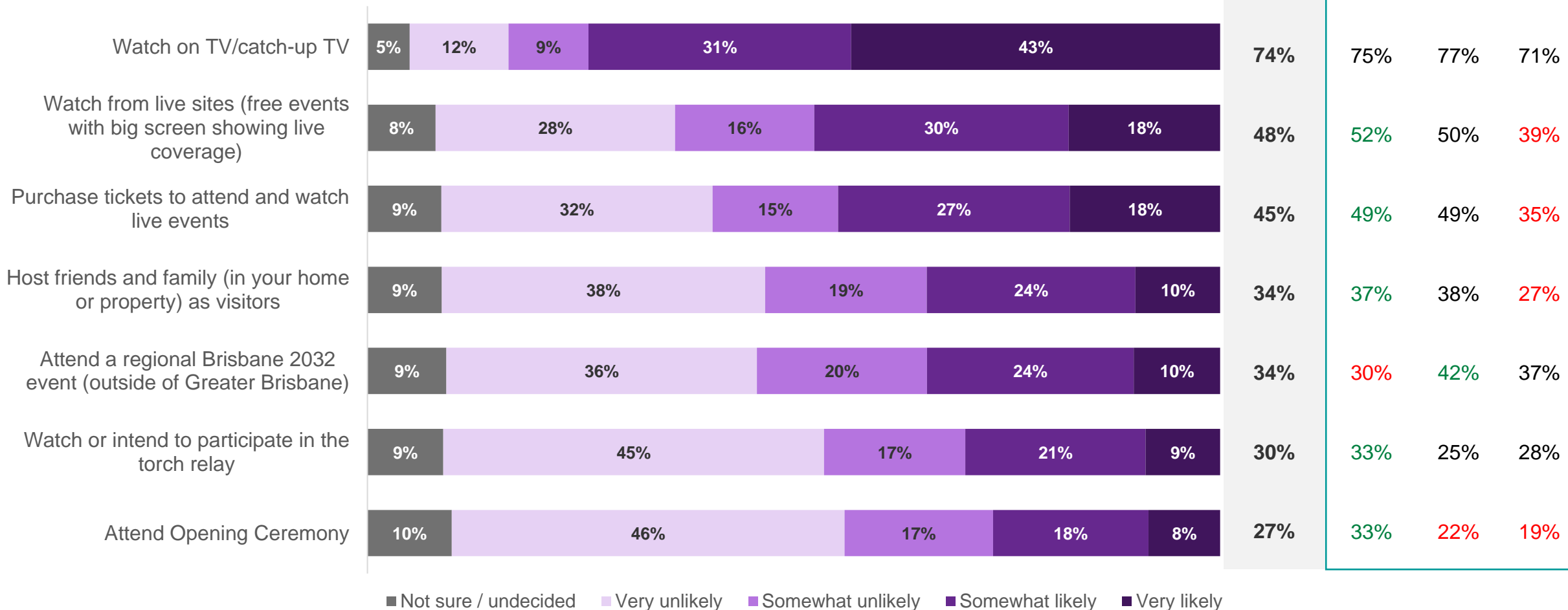
Residents who identify as living with disability are more concerned about 'security during the Games' (compared to those living without disability).

3.2

Level of involvement

LIKELY INVOLVEMENT IN VARIOUS ASPECTS OF THE 2032 GAMES

Statewide, the most likely involvement by far is watching the Games on TV or catch-up TV (74% likely). This was followed by watching from live sites (48% likely) and purchasing tickets to attend and watch live events (45%). One in three (34%) reported they were likely to host friends or family in their home as visitors or attend a regional event outside of Greater Brisbane.



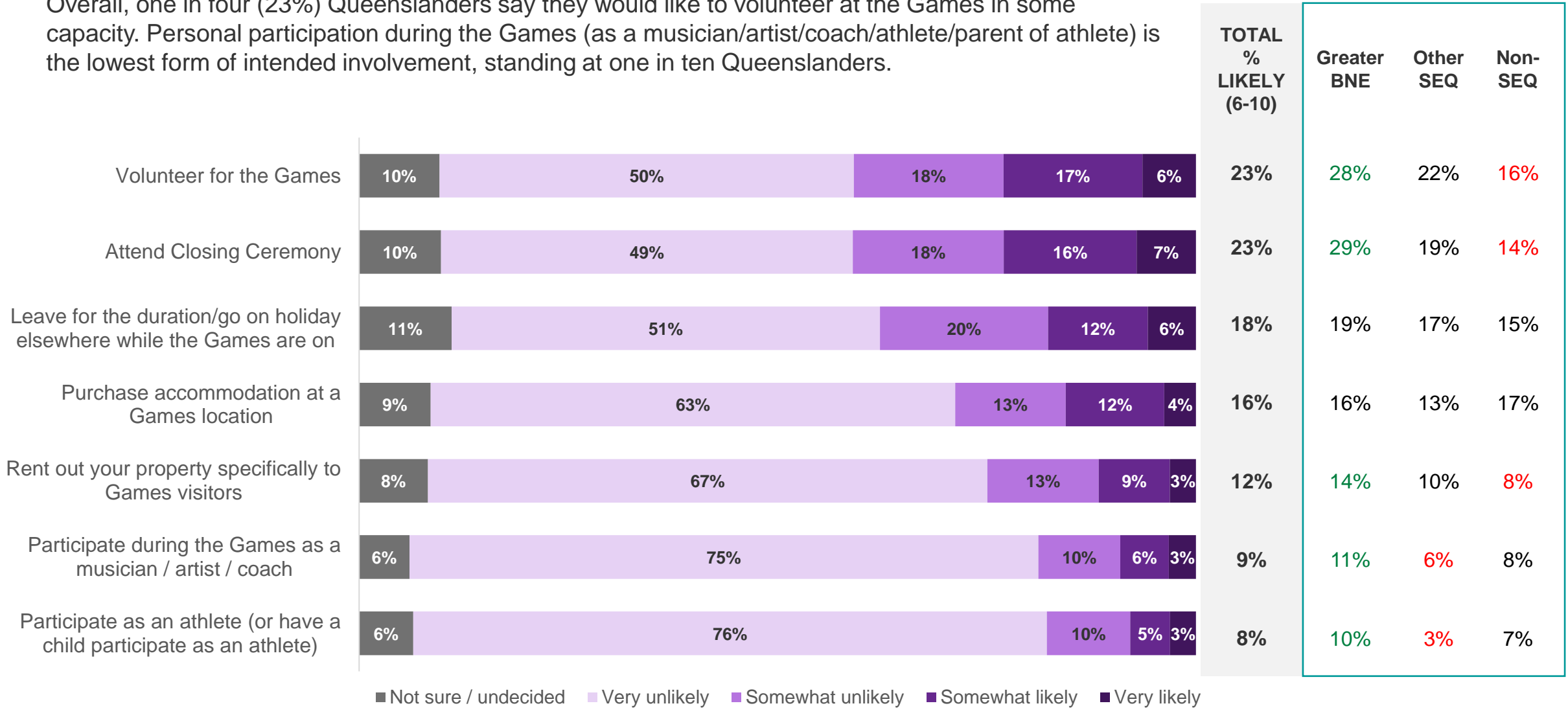
BASE: Total sample (n=2,245)

C1. The Brisbane 2032 Olympic and Paralympic Games events will be spread across several locations. While most of the events will be held in the Greater Brisbane area, locations such as Toowoomba, Townsville and Cairns will also host specific events. There will also be a number of 'live sites' and the torch relay which will inspire and engage local communities. At this stage, how likely or unlikely are you to do the following?

Note: Figures in green and red are significantly higher or lower than the TOTAL at 95% confidence interval.

LIKELY INVOLVEMENT IN VARIOUS ASPECTS OF THE 2032 GAMES (cont'd)

Overall, one in four (23%) Queenslanders say they would like to volunteer at the Games in some capacity. Personal participation during the Games (as a musician/artist/coach/athlete/parent of athlete) is the lowest form of intended involvement, standing at one in ten Queenslanders.



BASE: Total sample (n=2,245)

C1. The Brisbane 2032 Olympic and Paralympic Games events will be spread across several locations. While most of the events will be held in the Greater Brisbane area, locations such as Toowoomba, Townsville and Cairns will also host specific events. There will also be a number of 'live sites' and the torch relay which will inspire and engage local communities. At this stage, how likely or unlikely are you to do the following?

Note: Figures in green and red are significantly higher or lower than the TOTAL at 95% confidence interval.

LIKELY INVOLVEMENT IN THE 2032 GAMES

– verbatim comments (qualitative research)

*“I’m interested in **volunteering**
activities, helping out...
showing my
community spirit and
feeling part of it.”*
(Greater Brisbane, 36-70 years)

*“I want to be a **spectator, to**
feel the vibe.. watching people
at their **absolute peak.”***
(Non-SEQ, 18-35 years)

*“I feel like it'd be **fun** and a good
opportunity to **see the**
athletes and different
kinds of people.”*
(Greater Brisbane, 13-17 years)

LIKELY INVOLVEMENT IN THE 2032 GAMES – Segment differences

Regional Queenslanders

- Residents in **Greater Brisbane** are more likely than other Queenslanders to want to be actively involved in Brisbane 2032, with higher intentions to:
 - Watch from live sites;
 - Purchase tickets to attend live events;
 - Host friends and family;
 - Watch or participate in the torch relay;
 - Attend the Opening or Closing Ceremony;
 - Volunteer;
 - Rent out property; and/or
 - Personally participate (as an athlete/parent of athlete/musician/artist/coach).
- **Other SEQ** residents (Sunshine Coast or Gold Coast) are more likely to attend a regional event.

Age/Gender differences

- The greatest interest in getting involved lies within the **30-39 years age** group, with relatively higher intentions to watch at live sites, purchase tickets for live events (including the Opening and/or Closing Ceremonies), and host friends/family. This is also the age group where personal participation (as a musical/artist/coach/athlete/parent of athlete) is more likely than average.
- Intentions to watch at live sites and/or to purchase tickets for live events are also higher (than average) among the **40-49 year old** segment – whereas the older age groups 50+ years are less likely to want to be spectators.
- Compared to females, **males** show higher interest in purchasing accommodation at a Games location and/or participating in some other manner, such as a musician/artist/coach.

BASE: Total sample (n=2,245)

C1. The Brisbane 2032 Olympic and Paralympic Games events will be spread across several locations. While most of the events will be held in the Greater Brisbane area, locations such as Toowoomba, Townsville and Cairns will also host specific events. There will also be a number of 'live sites' and the torch relay which will inspire and engage local communities. At this stage, how likely or unlikely are you to do the following?

LIKELY INVOLVEMENT IN THE 2032 GAMES – Segment differences (cont'd)

Residents who identify as **living with disability are less likely** (than those without disability) to want to be involved in Brisbane 2032 showing less intent to:

- Attend the Opening Ceremony,
- Purchase tickets,
- Watch from live sites,
- Watch via TV,
- Host friends/family,
- Attend a regional event.

• ***CALD residents are more likely** (than non-CALD residents) to want to be involved in Brisbane 2032 showing more intent to:

- Attend the Opening Ceremony,
- Attend the Closing Ceremony,
- Purchase tickets,
- Purchase accommodation at Games locations,
- Watch from live sites,
- Host friends/family,
- Rent out their property to Games visitors,
- Participate as an athlete (or they want their child to).

First Nations residents are more likely (than non-First Nations) to want to be involved in Brisbane 2032 showing more intent to:

- Attend the Opening Ceremony,
- Attend the Closing Ceremony,
- Purchase accommodation at Games locations,
- Volunteer,
- Rent out their property to Games visitors,
- Leave for the duration/go on holiday during the Games,
- Participate as an athlete (or they want their child to),
- Participate themselves as a musician/artist/coach,
- Attend a regional event outside of Greater Brisbane,
- Watch or participate in the torch relay.

BASE: Total sample (n=2,245)

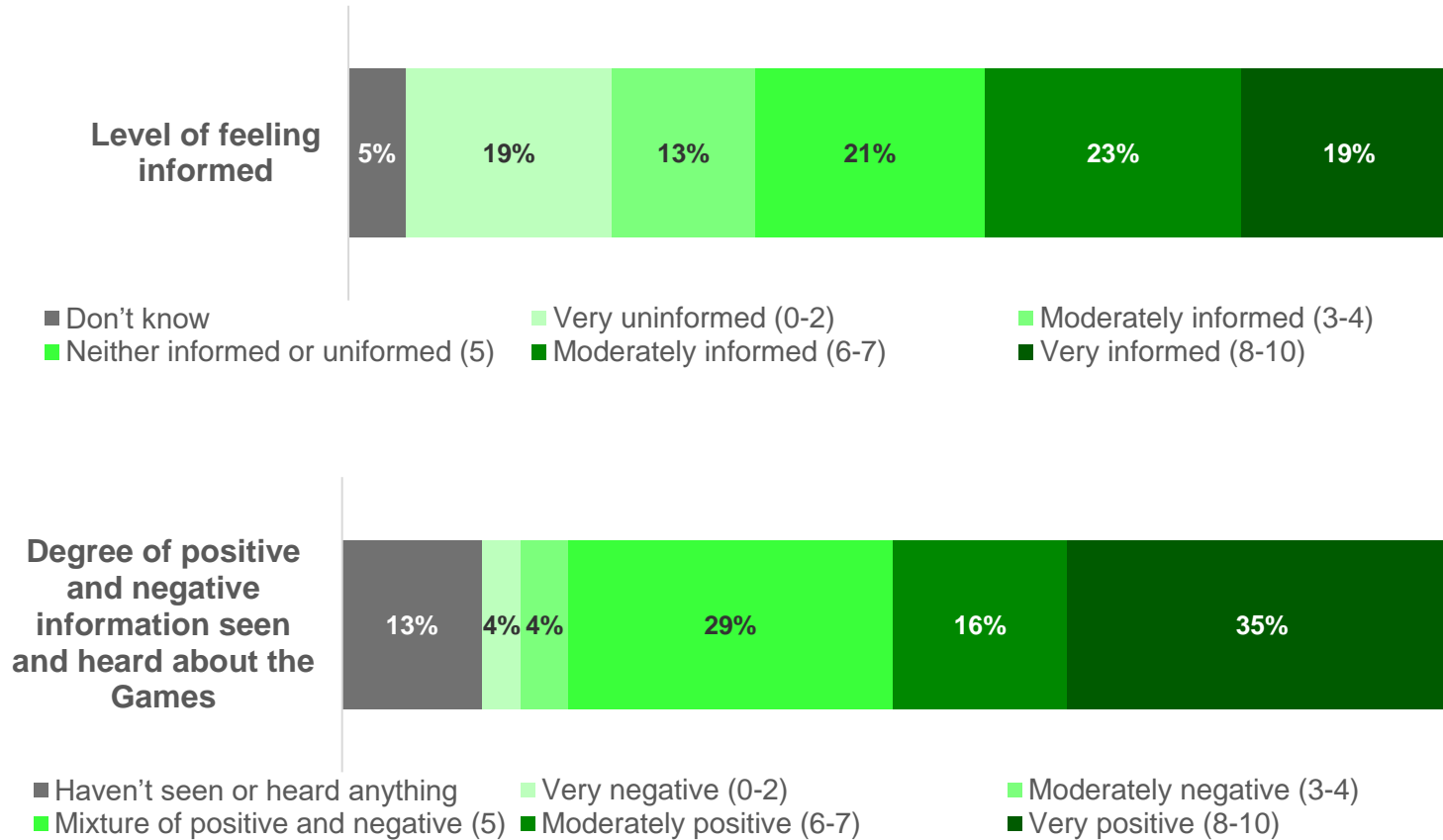
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*CALD = Culturally and Linguistically Diverse (speak a language other than English at home)

3.3

Information needs

INFORMATION NEEDS



FEEL INFORMED ABOUT 'BRISBANE 2032'

Queenslanders' views about whether they feel informed (or not) about Brisbane 2032 are varied. Two in five (43%) feel informed, while one in three (32%) feel uninformed.

WAS THE INFORMATION POSITIVE OR NEGATIVE?

One in two Queenslanders say what they have seen or heard about the 2032 Games has been positive (51%) - including 35% which has been very positive. However, a noteworthy proportion (29%) have seen or heard a mixture of positive and negative information.

More than one in ten (13%) residents reported they hadn't seen or heard anything so far about 'Brisbane 2032'.

BASE: Total sample (n=2,245)

D2. Even though the event is ten years away, to what extent do you currently feel informed about the Brisbane 2032 Olympic and Paralympic Games?

D1. In terms of what you have seen or heard so far about the Brisbane 2032 Olympic and Paralympic Games, to what extent is this positive or negative? Please think about all sources, including media, and other sources like friends, family or people you know.

*CALD = Culturally and Linguistically Diverse (speak another language than English at home)

INFORMATION NEEDS – Segment differences

Feel more informed and/or what they've heard is positive

- Greater Brisbane residents feel more informed – particularly Brisbane Inner City and Brisbane-South – these residents also say what they have heard is mainly positive
- Compared to females, males feel more informed, and are more likely to say what they have heard has been positive
- Residents of *CALD background feel more informed, and say that what they have heard has been mainly positive

Feel less informed and/or what they've heard is less positive

- Queenslanders outside of SEQ feel less informed, particularly Townsville – and say that what they have heard has been less positive (or they 'don't know')
- Brisbane–West residents and those in the neighbouring region of Ipswich have mixed positive and negative views about what they have seen and heard about 'Brisbane 2032'
- 60-69 year olds tend to think that what they have seen and heard about 'Brisbane 2032' has been negative
- Residents NOT of *CALD background feel less informed and say that what they have heard has been less positive

BASE: Total sample (n=2,245)

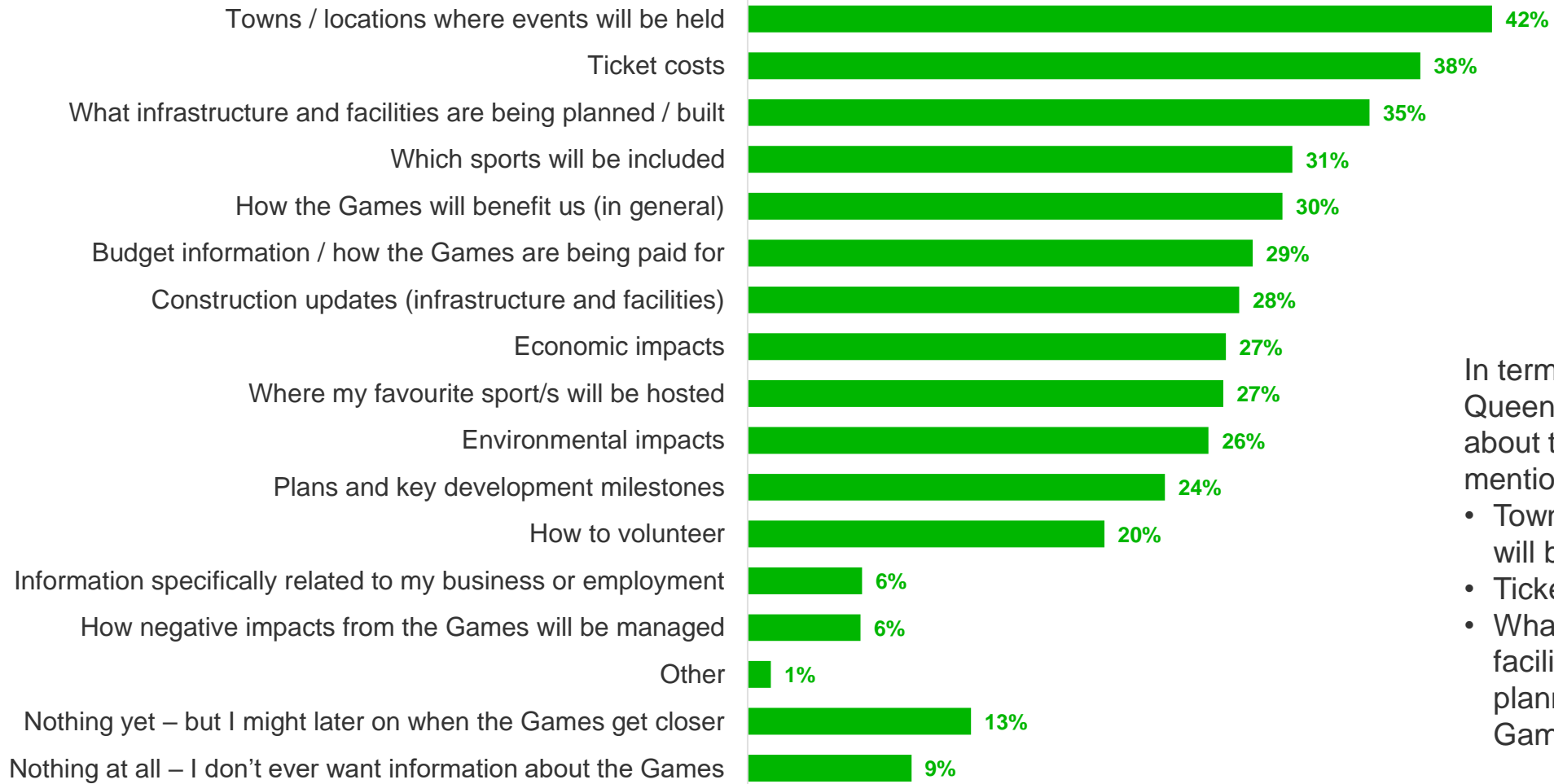
D2. Even though the event is ten years away, to what extent do you currently feel informed about the Brisbane 2032 Olympic and Paralympic Games?

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DESIRED TOPICS FOR FURTHER INFORMATION

DESIRED TOPICS FOR MORE INFORMATION



In terms of the information Queenslanders want to know about the 2032 Games, top mentions include:

- Towns/locations where events will be held (42%),
- Ticket costs (38%), and
- What infrastructure and facilities are being planned/built to cater for the Games (35%).

DESIRED TOPICS FOR FURTHER INFORMATION – Segment differences

Regional differences

- Residents on the **Sunshine Coast** show more interest (than average) in knowing more about a number of Brisbane 2032 topics: namely, which towns/locations are hosting events; where their favorite sport will be hosted; and how to volunteer.
- More **Brisbane Inner City** dwellers are interested in construction updates.
- **Brisbane-West** residents show more interest in how the negative impacts will be managed.
- People in **Darling Downs–Maranoa** are more likely to be uninterested in Brisbane 2032, with one in four saying they don't want any information about the Games.

Age/Gender differences

Residents aged **13-17 years** show higher (than average) interest in:

- Which sports will be included and/or the environmental impacts.

Residents aged **18-29 years** show higher (than average) interest in:

- How the Games will benefit them and/or environmental impacts.

Residents aged **30-39 years** show higher (than average) interest in:

- Information specifically related to their business or employment.

Females are more interested (than average) in knowing about:

- The towns/locations where events will be held, the environmental impacts, and/or how the negative impacts from the Games will be managed.

First Nations residents are **more likely** (than non-First Nations) to want information about:

- Economic impacts; but are **less likely** to be interested in:
 - Construction updates (infrastructure and facilities).

People of *CALD background show a greater appetite for information about:

- How the Games will benefit them
- Budget information/how the Games are being paid for
- Construction updates (infrastructure and facilities)
- Economic impacts.

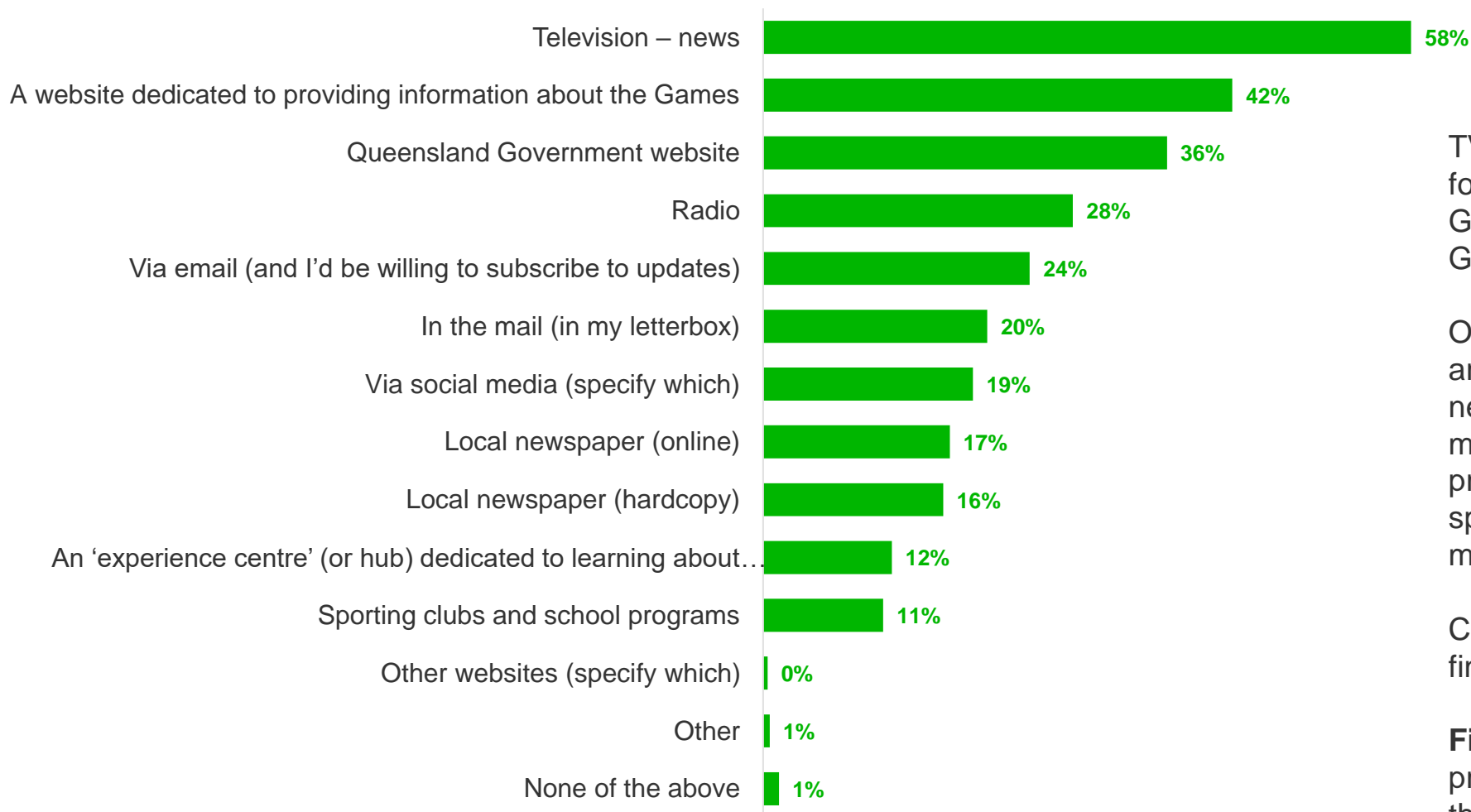
BASE: Total sample (n=2,245)

D3. At this stage, what information would you like about the Brisbane 2032 Olympic and Paralympic Games? Please note you will not be contacted by anyone as a result of your answers to this question. (Multiple response)

*CALD = Culturally and Linguistically Diverse (speak another language than English at home)

DESIRED CHANNELS FOR FURTHER INFORMATION

DESIRED CHANNELS FOR MORE INFORMATION



TV News is the most desirable channel for receiving information about the 2032 Games (58%), followed by a dedicated Games website (42%).

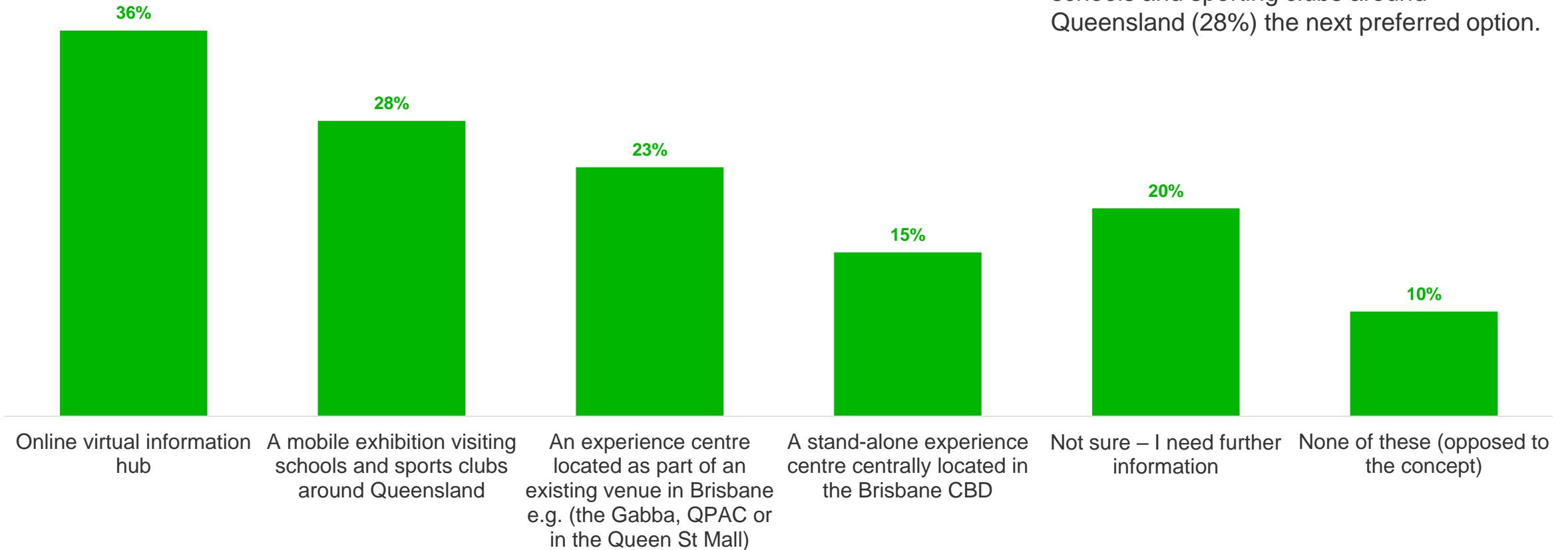
Older Queenslanders **aged 50+ years** are more likely to prefer the television news and are less interested in social media and/or sporting clubs/school programs. Information delivered via sporting clubs/school programs is of more interest to **18-29 year olds**.

Compared to **males**, **females** prefer to find out things via social media.

First Nations show a greater preference for news to be delivered via their local newspaper in hardcopy.

COMMUNITY ENGAGEMENT CONCEPT PREFERENCES

COMMUNITY ENGAGEMENT CONCEPT PREFERENCES



The community engagement concept received most support for being delivered online (36%), with a mobile exhibition visiting schools and sporting clubs around Queensland (28%) the next preferred option.

BASE: Total sample (n=2,245)

D5. A themed 'experience centre' (or hub) focusing on the Olympic and Paralympic Games may be developed. This could be an interactive centre, or a community and engagement hub covering topics such as the history of the games, project information, learning opportunities and interactive experiences. The centre (or hub) would be available to the community to visit/engage in prior to the Brisbane 2032 Games and would provide for learning opportunities for visiting members of the public as well as school groups. Which of the following would you prefer?

COMMUNITY ENGAGEMENT CONCEPT PREFERENCES – Segment differences

Prefer online virtual information hub

- **Most preferred overall**
- Segments **more likely** (than average) to prefer an online information hub:
 - Females
 - Townsville residents.

Prefer a mobile exhibition

- **Second most preferred overall**
- Segments **more likely** (than average) to prefer a mobile exhibition:
 - Residents outside of SEQ
 - Darling Downs residents
 - Wide Bay residents.

Prefer stand-alone centre or experience

- **Least preferred overall**
- Segments **more likely** to prefer a stand-alone centre/experience:
 - Greater Brisbane residents – especially those located in Brisbane Inner City
 - 18-29 year olds
 - *CALD residents.

BASE: Total sample (n=2,245)

D5. A themed 'experience centre' (or hub) focusing on the Olympic and Paralympic Games may be developed. This could be an interactive centre, or a community and engagement hub covering topics such as the history of the games, project information, learning opportunities and interactive experiences. The centre (or hub) would be available to the community to visit/engage in prior to the Brisbane 2032 Games and would provide for learning opportunities for visiting members of the public as well as school groups. Which of the following would you prefer?

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4.

Summary findings –
Queensland stakeholders

RESEARCH SUMMARY – STAKEHOLDERS - Who we spoke to

The regions

- The qualitative research (Phase 1) included in-depth interviews with regional representatives from Cairns, Townsville, Capricorn and Outback Queensland – economic development stakeholders whose common aim is to secure the future economic development of their regions, and to ensure their voices are heard and that their regions don't miss out on any opportunities for prosperity.
- In relation to 'Brisbane 2032', each organisation:
 - Highlighted the natural and manmade assets or unique selling proposition (USP) of their region (e.g. attracting visitors) and the existing sports facilities that they would like to see host events and pre-Games training (re sports tourism).
- Also included in the research (Phase 1), holding a Queensland-wide lens, was a representative from the Queensland Chamber of Commerce, Queensland Council of Social Service and the Aboriginal and Torres Strait Islander Committee.
 - In relation to 'Brisbane 2032' their viewpoints encompassed empowering the position (for opportunity and involvement) of their members/associates across the whole state of Queensland.

The universities

- The qualitative research also included in-depth interviews with Brisbane universities; QUT (Queensland University of Technology), UQ (The University of Queensland) and USQ (University of Southern Queensland). The representatives were stewards and coordinators for external engagement, philanthropy, scholarships and the collaboration and partnering with industry.
- On the topic of 'Brisbane 2032', they were quick to point out the particular strengths and distinct specialisms of their university. Relevant expertise areas raised in the possibility of commercialising research innovations (re 'Brisbane 2032') included:
 - Transport and logistics
 - Green (sustainable) energy and within the F&B industry
 - Recycling, bioplastics
 - Health
 - Sports and data science
 - AI (Artificial Intelligence)/robotics/smart technology
 - Land surveying.
- In addition, university stakeholders listed their on campus sports facilities, such as Olympic pools, hockey fields etc.

RESEARCH SUMMARY – STAKEHOLDERS – Stakeholder sentiment

- Stakeholders recognise that hosting the ‘Brisbane 2032 Olympic and Paralympic Games; is a significant milestone for Queensland.
- Within their regions and organisations, discussions have started (at high levels), and all have set up working groups/taskforces to start talking through what this means for their region/organisation/university, to identify the implications and opportunities, and to strategise on how they might leverage these to their advantage.
- Greatest support for the event is coming from the tourism sector who see their challenge as ensuring visitors to ‘Brisbane 2032’ also put regional Queensland assets and experiences on their ‘things to do and see while in Australia’ repertoire.
 - Visitors to Brisbane will have to be persuaded to move north or outback (as opposed to southern destinations).
- Among the economic development organisations located regionally, there are negative perceptions that skilled workers will move to the South East corner, and that general government funding will be redirected away from regions.
- The main concern among the universities is missing out on the opportunities for involvement, which are considered numerous and varied.

*“The **Olympics is the reason they will come** to Queensland, we (regional Qld) need to give them **a reason to stay (or come back).**”*
(Economic development organisation)

*“This is another thing that my Board and my operators are very scared about is that we're already, and even pre-COVID, we were struggling for staff. It's going to be **worse during the Olympics** because **all the jobs will be in the southeast corner.**”*
(Economic development organisation)

RESEARCH SUMMARY – STAKEHOLDERS – The legacy that stakeholders want

- Broadly among stakeholders, the hope for ‘Brisbane 2032’ legacy includes:
 - Heightening the Brisbane/Queensland brands and reputations (and the individual brand profiles of universities, towns, regions, Queensland businesses);
 - New and improved infrastructure that benefits residents and attracts tourists and sports tourism;
 - Procurement opportunities for all Queensland SME businesses and the support to scale up operations and transition to sustainable business practices;
 - Universities, each with their unique research and development specialisms are also excited about the opportunity to work with organisers to see where mutually beneficial goals can be explored and reached. This is particularly pertinent in regards to work within the renewables sector (re supporting the climate positive games commitment).

*“The legacy will be that **Brisbane is a world-class destination for study and research.**”*
(University stakeholder)

*“I hope that **Queensland business will be at the forefront...** that the organisers ensure that the **procurement opportunities are broad** and that all parts of the state benefit.”*
(Economic development organisation)

RESEARCH SUMMARY – STAKEHOLDERS – Focus for stakeholders outside of SEQ

- Stakeholders outside of South East Queensland (SEQ) genuinely hope that ‘Brisbane 2032’ is delivered as a games for every Queenslanders, and that all Queenslanders feel included.
 - They suggest however, that achieving this sentiment will be an ongoing challenge.
- Where at all possible, regions are extremely enthusiastic to host preliminary games, pre-games training camps, torch relay etc, and are very open to all possibilities to optimise their regions’ profile and involvement in the lead up, during and aftermath of ‘Brisbane 2032’.
 - They request that the assessment of these opportunities are approached openly and equitably, and that the most populated regions (or those who have hosted before) are not given an assumed advantage without careful consideration of each regions’ ‘unique sales pitch’.
- Further consideration should be given to the ‘perceived gap’ re funding but also the ‘liveability gap’ re services (between Non-SEQ and the South East) and attempts made to ensure these gaps don’t widen further due to ‘Brisbane 2032’.
 - To dilute the negativity, one stakeholder suggested that the government could commit equal funds to economic development projects in the regions over the next decade. In addition, two stakeholders specifically highlighted that it will be very important to ensure that current grant commitments to the regions are honoured. A further stakeholder requested more supportive government policy to boost Queensland businesses in relation to: transitioning to sustainable business practices, scaling up operations and procurement targets.

*“Whether the **‘building better regions’ will still be funded**, whether they’ll still have the same or similar grant programs that they’ve currently got or **will the funds be diverted into the Olympics?** And that’s **a very big concern** from all of the councils at the moment.”*

(Economic development organisation)

RESEARCH SUMMARY – STAKEHOLDERS – The next steps

- In terms of next steps, all stakeholders show a strong desire to start open and constructive dialogue with the organisers about their opportunities and have requested a point of contact to commence collaborations.
- All stakeholders were delighted to be involved in the research, but some did point out, their involvement does set up an expectation about the future.
 - Many expect some type of follow-up but importantly, they welcome the opportunity to be personally approached to provide Games organisers a lens into their organisations.

*“I don’t know **how to engage with the organising committee...** there is no mechanism/framework... The universities **don’t understand the opportunities.**”*
(University representative)

*“I want to know the **frameworks** and be **involved in conversations** to start collaborating early. **I want a seat at the table.**”*
(Economic development organisation)

KANTAR PUBLIC

