

Social Indicators 2017 Queensland



13
tourism
regions

29.2m
overnight visitors¹
(21.5m domestic /
7.8m international)

\$25bn
total tourism
contribution to gross
state product
(7.9% of QLD GSP)²



About this study:

Our study monitors local community views on tourism. Queensland residents are surveyed with a focus on understanding their sentiment towards tourism, their local area, and the impacts of tourism on their local area.

This is our third Social Indicators study, with previous studies run in 2010 and 2013. For our 2017 study, we surveyed 3,346 Queensland residents with fieldwork conducted between 8 June 2017 and 12 July 2017.

Here we present the results for Queensland as a state. Individual summaries for each of Queensland's 13 tourism regions are available on our website. teq.queensland.com/research-and-insights

This study examines the social impacts of tourism on the local community, as perceived by its residents. The research is intended to inform the decision making of state and local authorities, as well as tourism bodies.

Tourism is a \$25 billion industry for Queensland, accounting for 7.9 per cent of its gross state product. In the year ending June 2017, the state's residents welcomed 29.2 million overnight visitors. Our Social Indicators study aims to monitor these residents' views on tourism.

In the study, the first words that comes to Queenslanders' mind when thinking about their local area showed a positive attitude. They primarily see it as peaceful, beautiful, friendly, and quiet.



Notes:
1. Tourism Research Australia, International & Domestic Visitor Surveys for the year ending June 2017
2. Tourism Research Australia, State Tourism Satellite Accounts 2015/16

Attitudes towards living in their local area

In the study we asked respondents to select one of three statements to describe how they feel about living in their local area. Queenslanders really like living where they do. The study revealed that over a third (37 per cent) of residents 'really like' living in the area and 'can't think of anywhere else they would rather live'.

	2013	2017
Really like it, can't think of anywhere else I would rather live	39%	37%↓
Enjoy living here but can think of other places I would enjoy equally	50%	52%↑
I only live here because circumstances demand it	12%	11%↓

i.e. 37% of Queensland respondents chose this statement as best describing how they feel about living in their local area

Attitudes towards tourism in local area

Respondents answered a series of questions about their attitudes towards tourism in their local area. For each question they picked a statement that best reflects their view.

This showed a largely positive attitude towards tourism. However, attitudes have shifted towards a more neutral position over the past four years. Some residents have shifted from saying that they 'really like' tourists to saying that they 'tolerate tourists as they're good for the community'. In addition, overall fewer think their local area needs to attract 'more' tourists. There remains little negative sentiment towards tourism.

At a regional level, attitudes towards tourism were the most positive outside of the South-East Queensland regions, i.e. outside of Brisbane, Gold Coast, and Sunshine Coast. Regional residents overwhelmingly want more tourists and seek continued growth in tourism development.

The majority of Queensland residents see tourists in their day-to-day lives, and usually don't talk to them. Regionally, we found that meeting and making friends with tourists was most common in the Fraser Coast, Bundaberg, Whitsundays, and Tropical North Queensland regions.

"Tourists are, on the whole, very happy and it's lovely to see people smiling and enjoying themselves."

QLD Resident, 2017

"...tourists and locals cohabit very nicely where I live."

QLD Resident, 2017

"I enjoy seeing tourists come to our town"

QLD Resident, 2017

2013

2017

Feelings towards tourists

I really like tourists	57%	46%↓
I tolerate tourists as they're good for the community	31%	40%↑
I adjust my lifestyle to avoid tourism inconveniences	10%	11%
I stay away from places tourists go	3%	3%

Number of tourists local area should attract

More	45%	36%↓
About the same number	50%	57%↑
Fewer	6%	7%

Preferred tourism development growth

Happy with continued growth	59%	58%
Happy but no more growth	25%	29%↑
Want less tourism	3%	6%↑
More growth, different direction	13%	7%↓

Level of contact with tourists

Never come into contact with them	22%	21%
See them around but don't usually talk to them	51%	54%↑
Often interact with them as part of my job	10%	10%
Often meet them around town and talk to them	15%	13%↓
Have made friends with them, but not kept in contact	7%	6%
Have made friends with them, and have kept in contact	4%	3%↓

Attitudes towards tourism in local area cont.

2013

2017

Respondents were then asked to rate the overall impact tourism has on their community, and on them personally, by using a seven-point scale ranging from 'very negatively (-3)' to 'very positively (+3)'.

% agree that tourism has a positive impact on...

...the community as a whole ¹	46%	43% ↓
...their personal quality of life ¹	17%	18%

Queenslanders continue to recognise that tourism delivers benefits to the community. However, this proportion has declined from 46 per cent in 2013 to 43 per cent in 2017. The benefits of tourism are seen to be more to the community than the individual.

i.e. 18% of Queensland respondents rated tourism as affecting their personal quality of life 'positively (2)' or 'very positively (3)'.

Positive and negative impacts of tourism

Respondents were then asked if they agree or disagree with seven positive and eight negative statements about the possible impacts of tourism. Those that agree with a statement were asked to rate its impact on their community, and on them personally, by using a seven-point scale ranging from 'very negatively (-3)' to 'very positively (+3)'.

Queensland residents overwhelmingly agree that, because of tourism, there is: greater cultural diversity (89 per cent), economic benefits (89 per cent), an increased regional profile (83 per cent), increased local pride (69 per cent), and new infrastructure (69 per cent). These positive benefits are seen to impact the community more than the individual.

The main potential negative impact that residents associate with tourism is increased prices. Over time, concerns about tourism's impact on property values has declined. The perceived impact on personal quality of life, and on the community, has also declined for several potential negative impacts.

Positive impacts of tourism

	% agree	2013	2017
Greater cultural diversity		92%	89% ↓
Important economic benefits		91%	89% ↓
Festivals and events attract tourists and raise awareness		87%	88%
Increased regional profile		86%	83% ↓
Increased local pride		72%	69% ↓
New infrastructure		68%	69%
Benefits shared evenly		38%	48% ↑

"More money comes in which ensures that the standard of life improves."

QLD Resident, 2017

"I enjoy the diversity of meeting people from all kinds of places and it's great for the region."

QLD Resident, 2017

"It feels good to see young international tourists in the area."

QLD Resident, 2017

Impact on...	...personal quality of life ¹		...community as a whole ¹	
	2013	2017	2013	2017
Greater cultural diversity	14%	17% ↑	29%	33% ↑
Important economic benefits	15%	16%	45%	43%
Festivals and events attract tourists and raise awareness	21%	19% ↓	49%	44% ↓
Increased regional profile	14%	17% ↑	40%	41%
Increased local pride	18%	21% ↑	39%	40%
New infrastructure	26%	32% ↑	49%	49%
Benefits shared evenly	17%	21% ↑	41%	40%

Notes:

1. positive impact is based on % who cited the top two ratings on a 7 point scale from very negatively (-3) to very positively (+3)

↑ Statistically significantly higher/lower than previous year at 95% confidence level
↓

Potential negative impacts of tourism

Respondents were asked if they agree or disagree with seven positive and eight negative statements about the possible impacts of tourism. Those that agree with a statement were asked to rate its impact on their community, and on them personally, by using a seven-point scale ranging from 'very negatively (-3)' to 'very positively (+3)'.

	% agree	2013	2017
Increased prices		56%	50% ↓
Increased property values		41%	38% ↓
Rise in delinquent behaviour		35%	35%
More disruption		32%	35% ↑
Negative impact on the environment		29%	29%
Negative impact on local character		29%	29%
Misdirected public spending		27%	25%
Lack of access for locals		17%	18%

"Crowds at some attractions increase. Transport in some areas under strain."
QLD Resident, 2017

"Doesn't really affect me where I live except for particular events our city hosts when for a week traffic may be extra congested etc."
QLD Resident, 2017

Impact on...	...personal quality of life ¹		...community as a whole ¹	
	2013	2017	2013	2017
Increased prices	14%	9% ↓	13%	11%
Increased property values	14%	13%	16%	15%
Rise in delinquent behaviour	9%	8%	22%	18% ↓
More disruption	12%	11%	14%	14%
Negative impact on the environment	6%	8%	18%	20%
Negative impact on local character	7%	5% ↓	8%	6%
Misdirected public spending	13%	7% ↓	15%	14%
Lack of access for locals	13%	16%	18%	16%

In summary

Queenslanders really like living where they do, primarily because it is peaceful, beautiful, friendly, and quiet.

The state's residents welcomed 29.2 million overnight visitors in the year ending June 2017. Tourism is a \$25 billion industry for the state, contributing 8 per cent of the gross state product.

Through the study, we saw that residents have a positive attitude towards tourism. This was particularly evident in the regions outside of South-East Queensland, i.e. outside of Brisbane, Gold Coast, and Sunshine Coast. Regional residents overwhelmingly want more tourists, say they 'really like' tourists, and seek continued tourism development.

Over time, the positive attitude towards tourism has shifted to a more neutral position compared with 2013. There remains little negative sentiment towards tourism.

We also saw that residents continue to recognise that tourism delivers many benefits. These benefits are seen to impact the community more than the individual. In terms of the potential negative impacts of tourism, the perceived impact in several areas has declined over the past four years.

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Notes:
1. negative impact is based on % who cited the bottom two ratings on a 7 point scale ranging from very negatively (-3) to very positively (+3).

↑ Statistically significantly higher/lower than previous year at 95% confidence level
↓

Key

A number of statements used in the questionnaire have been abbreviated for ease of reporting. The full statements, as asked in the questionnaire, are listed below.

Abbreviated wording	Questionnaire wording
Residents' feeling about their local area	
Really like it, can't think of anywhere else I would rather live	I really like it, I can't think of anywhere else I would rather live
Enjoy living here but can think of other places I would enjoy equally	I enjoy living here but can think of other places I would enjoy equally
I only live here because circumstances demand it	I only live here because circumstances demand it and would prefer to live somewhere else
Feelings towards tourists	
I really like tourists	I really like tourists, they are great for the community
I tolerate tourists as they're good for the community	I tolerate tourists and the minor inconveniences they cause because they are good for the community
I adjust my lifestyle to avoid tourism inconveniences	I adjust my lifestyle to avoid the inconveniences associated with tourism
I stay away from places tourists go	I stay away from places where tourists go because I don't want anything to do with them
Preferred tourism development growth	
Happy with continued growth	I am happy with the way tourism is developing in my local area and would like to see it continue to grow
Happy but no more growth	I am happy with the way tourism has developed in my local area but would not like to see it grow any more
Want less tourism	I would like to see less tourism in my local area
More growth, different direction	I would like to see more tourism growth in my local area but in a different direction
Level of contact with tourists	
Never come into contact with them	I never come into contact with tourists as far as I am aware
See them around but don't usually talk to them	I see tourists around but don't usually speak to them unless they ask for direction etc.
Often interact with them as part of my job	I often interact with tourists as part of my job
Often meet them around town and talk to them	I often meet tourists around town and talk to them
Have made friends with them, but have not kept in contact	I have made friends with tourists during their stay in my local area, but have not kept in contact
Have made friends with them, and have kept in contact	I have made friends with tourists and kept in contact after they have left
Positive statements	
Festivals and events attract tourists and raise awareness	Festivals and Events attract tourists and raise awareness of the region
Important economic benefits	Tourism is good for the economy because the money that visitors spend when they come to the region helps to stimulate the economy, stimulates employment opportunities, and is good for local business
Increased local pride	Tourism makes local residents feel more proud of their town and makes them feel good about themselves and their community
Increased regional profile	Tourism showcases our region in a positive light. This helps to promote a better opinion of our region and encourages future tourism and/or business investment
Benefits shared evenly	The benefits of tourism are shared evenly across the local community
New infrastructure	Because of tourism there are better shopping, dining and/or recreational opportunities in the region
Greater cultural diversity	Tourism brings people from different backgrounds and cultures into the community
Negative statements	
Misdirected public spending	Too much public money is spent on developing facilities for tourists that would be better spent on other public facilities/ activities
More disruption	Tourism disrupts the lives of local residents and creates inconvenience. Problems like traffic congestion, parking difficulties and excessive noise are worse when there are lots of tourists around
Rise in delinquent behaviour	Tourism is associated with some people behaving inappropriately, perhaps in a rowdy and delinquent way, or engaging in excessive drinking or drug use or other criminal behaviour
Negative impact on the environment	Tourism has a negative impact on the environment through excessive litter and/or pollution and/or damage to natural areas
Increased prices	Tourism leads to increases in the prices of some things such as some goods and services and/or property values and/or rental costs
Lack of access for locals	Tourists deny local residents access to public facilities, that is, roads, parks, sporting facilities, public transport and/ or other facilities are less available to local residents because of overcrowding
Negative impact on local character	Because of tourism the character of the region has changed
Increased property values	The increase in property values associated with tourism, makes it more difficult for some people to live in the area

