

Social Indicators 2021 Tropical North Queensland



Laura, Tropical North Queensland

About this study:

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.

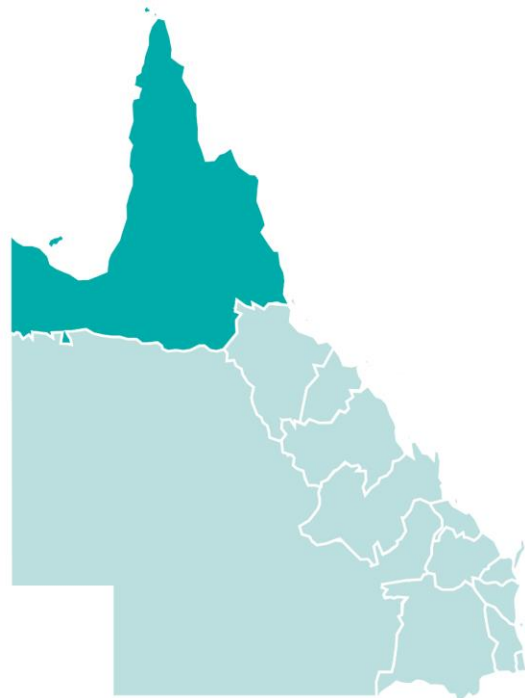
Our study monitors local community views on tourism. Queensland residents are surveyed with a focus on understanding their sentiment towards tourism and their local area.

For our 2021 study, we surveyed 3,305 Queensland residents with fieldwork conducted between 10 June 2021 and 7 July 2021. In the Tropical North Queensland tourism region, 300 residents were surveyed.

This is our fifth Social Indicators study, with previous studies run in 2010, 2013, 2017 and 2019. We have compared results for 2021 to the results from 2019.

Tourism supports 14.6% of the gross regional product (GRP) in the Tropical North Queensland region (TNQ). In the year ending June 2021, the region's 297,000 residents welcomed 1.9 million overnight visitors. Our Social Indicators study aims to monitor these residents' views on tourism.

In the study, the first words that come to residents' minds when thinking about their area showed that they see it as tropical, beautiful and describe the area as paradise. Residents also make reference to the region's rainforests and Great Barrier Reef.



297,000
residents¹

\$2.4bn
total tourism contribution
to gross regional product
(14.6% of TNQ's GRP)³

1.9m
domestic overnight
visitors²

Notes:

1. Australian Bureau of Statistics, Regional Population, Australia, 2019-20
2. Tourism Research Australia, National Visitor Surveys for the year ending June 2021
3. Tourism Research Australia, Regional Tourism Satellite Accounts 2019-20

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. The study revealed that almost half (46%) of TNQ residents 'really like' living in the area and 'can't think of anywhere else they would rather live', which is significantly above the state average.

| | TNQ | | QLD |
|---|------|------|------|
| | 2019 | 2021 | 2021 |
| Really like it, can't think of anywhere else I would rather live | 47% | 46% | 38% |
| Enjoy living here but can think of other places I would enjoy equally | 46% | 47% | 52% |
| I only live here because circumstances demand it | 7% | 8% | 10% |

i.e. 46% of Tropical North 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 that attitudes are positive towards tourism. Three in five (59%) residents 'really like' tourists and a similar share (58%) would like more tourists in the local area, both remain higher than the Queensland average.

"When tourism in the region is thriving, people are happy ..."

TNQ resident, 2021

Residents have a relatively high level of interaction with tourists in their area; more than twice as many are making friends with tourists than the average Queenslanders and only 5% never come into contact with tourists. These positive interactions, and the importance of tourism to the regional economy, may be leading residents to want continued tourism growth in their local area, with 63% holding this view.

"Getting the chance to meet tourists, by giving directions or suggestions on where they should visit makes me feel a part of the community."

TNQ resident, 2021

| | TNQ | | QLD |
|--|------|------|------|
| | 2019 | 2021 | 2021 |

Feelings towards tourists

| | | | |
|---|-----|-----|-----|
| I really like tourists | 57% | 59% | 42% |
| I tolerate tourists as they're good for the community | 37% | 31% | 42% |
| I adjust my lifestyle to avoid tourism inconveniences | 4% | 8%↑ | 12% |
| I stay away from places tourists go | 2% | 2% | 4% |

Number of tourists local area should attract

| | | | |
|-----------------------|-----|-----|-----|
| More | 58% | 58% | 31% |
| About the same number | 38% | 35% | 60% |
| Fewer | 5% | 7% | 9% |

Preferred tourism development growth

| | | | |
|----------------------------------|-----|-----|-----|
| Happy with continued growth | 66% | 63% | 55% |
| Happy but no more growth | 19% | 19% | 31% |
| Want less tourism | 3% | 6% | 6% |
| More growth, different direction | 12% | 12% | 9% |

Level of contact with tourists

| | | | |
|---|-----|-----|-----|
| Never come into contact with them | 1% | 5% | 26% |
| See them around but don't usually talk to them | 50% | 58% | 49% |
| Often interact with them as part of my job | 17% | 11% | 8% |
| Often meet them around town and talk to them | 25% | 17% | 13% |
| Have made friends with them, but not kept in contact | 13% | 9% | 5% |
| Have made friends with them, and have kept in contact | 6% | 8% | 2% |

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

Significantly higher when comparing the region to Queensland at the 95% confidence level

Attitudes towards tourism in local area cont.

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...

| | 2019 | TNQ 2021 | QLD 2021 |
|---|------|----------|----------|
| ...the community as a whole ¹ | 77% | 76% | 41% |
| ...their personal quality of life ¹ | 36% | 36% | 14% |

TNQ residents are some of the most likely in Queensland to feel that tourism has a positive impact. Over three quarters (76%) of residents agree that tourism has a positive impact on the community compared with 41% in Queensland. More than a third (36%) agree that tourism has a positive impact on their personal quality of life, compared with 14% in Queensland. Frequent contact with tourists in the region as well as the industry's 14.6% contribution to the local economy may raise awareness of tourism's positive impacts.

i.e. 14% 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)'.

Positive impacts of tourism

TNQ residents overwhelmingly agree that, because of tourism, there is: greater cultural diversity (95%), economic benefits (94%), an increased regional profile (92%), increased local pride (78%), and new infrastructure (77%). These positive benefits are seen to impact the community more than the individual.

| % agree | TNQ | | QLD |
|---|------|------|------|
| | 2019 | 2021 | 2021 |
| Greater cultural diversity | 93% | 95% | 89% |
| Important economic benefits | 93% | 94% | 89% |
| Festivals and events attract tourists and raise awareness | 94% | 90% | 88% |
| Increased regional profile | 91% | 92% | 83% |
| Increased local pride | 74% | 78% | 71% |
| New infrastructure | 73% | 77% | 67% |
| Benefits shared evenly | 48% | 50% | 44% |

"Tourism is essential to the livelihood of people in my community"

TNQ resident, 2021

"The city I live in has grown. It is now a great city with many services and facilitiesMuch of this is due to the tourist dollars and tourist needs..."

TNQ resident, 2021

| Impact on... | TNQ 2021 | | QLD 2021 | |
|---|---------------------------------------|-----------------------------------|---------------------------------------|-----------------------------------|
| | personal quality of life ¹ | community as a whole ¹ | personal quality of life ¹ | community as a whole ¹ |
| Greater cultural diversity | 33% | 55% | 15% | 34% |
| Important economic benefits | 24% ↓ | 70% | 12% | 43% |
| Festivals and events attract tourists and raise awareness | 23% ↓ | 52% ↓ | 15% | 39% |
| Increased regional profile | 25% | 50% | 14% | 38% |
| Increased local pride | 28% | 60% | 16% | 39% |
| New infrastructure | 44% | 71% | 28% | 47% |
| Benefits shared evenly | 28% | 50% ↓ | 16% | 39% |

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

□ Significantly higher when comparing the region to Queensland at the 95% confidence level

Potential negative impacts of tourism

While residents recognise the benefits of tourism there has been a significant increase in the share who agree that tourism results in increased property values (up from 37% to 50%) and a rise in delinquent behaviour (up from 36% to 44%).

| % agree | TNQ | | QLD |
|------------------------------------|------|------|------|
| | 2019 | 2021 | 2021 |
| Increased prices | 52% | 49% | 60% |
| Increased property values | 37% | 50%↑ | 53% |
| Rise in delinquent behaviour | 36% | 44%↑ | 42% |
| More disruption | 25% | 32% | 43% |
| Negative impact on the environment | 33% | 35% | 36% |
| Negative impact on local character | 42% | 38% | 30% |
| Misdirected public spending | 28%↑ | 24% | 28% |
| Lack of access for locals | 14% | 17% | 26% |

"Prices in restaurants, bars and shops increase making them unaffordable for many local residents"

TNQ resident, 2021

"It does make it difficult sometimes to be able to go out with friends or family due to the amount of tourists, there are not many areas known only by locals only areas that we can go"

TNQ resident, 2021

| Impact on... | TNQ 2021 | | QLD 2021 | |
|------------------------------------|---------------------------------------|-----------------------------------|---------------------------------------|-----------------------------------|
| | personal quality of life ¹ | community as a whole ¹ | personal quality of life ¹ | community as a whole ¹ |
| Increased prices | 8% | 14% | 10% | 13% |
| Increased property values | 11% | 16% | 10% | 18% |
| Rise in delinquent behaviour | 4% ↓ | 10% ↓ | 8% | 15% |
| More disruption | 13% | 11% ↓ | 12% | 15% |
| Negative impact on the environment | 6% ↓ | 14% ↓ | 9% | 17% |
| Negative impact on local character | 5% | 4% ↓ | 8% | 7% |
| Misdirected public spending | 4% ↓ | 12% ↓ | 6% | 14% |
| Lack of access for locals | 28% ↑ | 18% | 12% | 17% |

In summary

The majority of TNQ residents enjoy living where they do, and they describe their area as a beautiful and tropical paradise.

Tourism contributes 14.6% of the region's gross regional product. The region's 297,000 residents welcomed 1.9 million domestic overnight visitors in the year ending June 2021.

Through the study, we see a positive attitude towards tourists. Residents are more likely than the average Queenslanders to 'really like' tourists and to want more tourism. They are also more than twice as likely to make friends with tourists.

Residents are more likely than average to recognise the benefits of tourism, but there was increased recognition that tourism leads to increased property prices and a rise in delinquent behaviour compared to 2019.

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 at the end of our Social Indicators 2021 Queensland report on our website: teq.queensland.com/research-and-insights/domestic-research/queensland-research

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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

□ Significantly higher when comparing the region to Queensland at the 95% confidence level

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