

Social Indicators 2017

Brisbane



2.3m
residents¹

7.6m
overnight visitors²
(6.4m domestic /
1.2m international)

\$8.1bn
total tourism
contribution to gross
regional product
(4.9% of BNE's GRP)³

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.

For our 2017 study, we surveyed 3,346 Queensland residents with fieldwork conducted between 8 June 2017 and 12 July 2017. In the Brisbane tourism region, 403 residents were surveyed.

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

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.

Brisbane (BNE) is the most visited tourism region in Queensland (QLD), with tourism contributing 4.9 per cent of the region's gross regional product. The region's 2.3 million residents welcomed 7.6 million overnight visitors in the year ending June 2017. 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 Brisbane showed a warm, positive attitude. Commonly used words were: good, community, friendly, peaceful, and quiet.



Notes:
 1. Australian Bureau of Statistics, 2016 Census, Place of Usual Residence by SA2 aligned to tourism region
 2. Tourism Research Australia, International & Domestic Visitor Surveys for the year ending June 2017
 3. Deloitte Access Economics, Regional 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. The study revealed that around a third (34 per cent) of Brisbane residents 'really like' living in the area and 'can't think of anywhere else they would rather live'.

	BNE		QLD
	2013	2017	2017
Really like it, can't think of anywhere else I would rather live	36%	34%	37%
Enjoy living here but can think of other places I would enjoy equally	51%	55%	52%
I only live here because circumstances demand it	13%	11%	11%

i.e. 34% of Brisbane 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 the proportion of Brisbane residents who 'really like' tourists has declined from 56 per cent in 2013 to 42 per cent in 2017. Residents are now more likely to 'tolerate' tourists, with 43 per cent saying this in 2017.

"hmmmm. Some good and some negative. It does result in increased services but at times this can be excessive."

Brisbane Resident, 2017

We also saw that seven in ten (69 per cent) residents would like tourism numbers to remain 'about the same' compared with six in ten in 2013. Almost a third, 32 per cent, of residents reported having no contact with tourists, significantly more than the rest of the state.

"...I personally do not interact with tourists in my work or home life but have no negativity towards them."

Brisbane Resident, 2017

	BNE	QLD
	2013	2017

Feelings towards tourists

I really like tourists	56%	42%↓	46%
I tolerate tourists as they're good for the community	30%	43%↑	40%
I adjust my lifestyle to avoid tourism inconveniences	11%	12%	11%
I stay away from places tourists go	4%	4%	3%

Number of tourists local area should attract

More	32%	21%↓	36%
About the same number	60%	69%↑	57%
Fewer	8%	10%	7%

Preferred tourism development growth

Happy with continued growth	53%	53%	58%
Happy but no more growth	30%	34%	29%
Want less tourism	4%	7%	6%
More growth, different direction	13%	6%↓	7%

Level of contact with tourists

Never come into contact with them	33%	32%	21%
See them around but don't usually talk to them	49%	50%	54%
Often interact with them as part of my job	7%	9%	10%
Often meet them around town and talk to them	10%	10%	13%
Have made friends with them, but not kept in contact	5%	5%	6%
Have made friends with them, and have kept in contact	1%	3%↑	3%

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...

	2013	BNE 2017	QLD 2017
...the community as a whole ¹	29%	24%	43%
...their personal quality of life ¹	12%	12%	18%

Brisbane residents are less likely than the average Queenslanders to agree that tourism has a positive impact. Twenty four per cent of residents agree that tourism has a positive impact on the community, compared with 43 per cent in Queensland. Twelve per cent agree that tourism has a positive impact on their personal quality of life, compared with 18 per cent in Queensland. This difference may be related to the lower level of contact residents have with tourists compared to the rest of the state.

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)'.

Brisbane residents overwhelmingly agree that, because of tourism, there is: greater cultural diversity (86 per cent), economic benefits (85 per cent), an increased regional profile (78 per cent), increased local pride (64 per cent), and new infrastructure (66 per cent). These positive benefits are seen to impact the community more than the individual.

Agreement with statements about potential negative impacts is mostly stable. However, fewer Brisbane residents agree that tourism leads to increased prices than in 2013, down from 57 per cent to 50 per cent.

Positive impacts of tourism

% agree	BNE		QLD
	2013	2017	2017
Greater cultural diversity	91%	86%↓	89%
Important economic benefits	89%	85%	89%
Festivals and events attract tourists and raise awareness	84%	83%	88%
Increased regional profile	83%	78%	83%
Increased local pride	68%	64%	69%
New infrastructure	70%	66%	69%
Benefits shared evenly	35%	47%↑	48%

*"By interacting with tourists, I have been able to build on my knowledge of different parts of our country and the world."
Brisbane Resident, 2017*

*"More money comes in which ensures that the standard of life improves."
Brisbane Resident, 2017*

Impact on...	BNE 2017		QLD 2017	
	personal quality of life ¹	community as a whole ¹	personal quality of life ¹	community as a whole ¹
Greater cultural diversity	15%	25%	17%	33%
Important economic benefits	12%	30%	16%	43%
Festivals and events attract tourists and raise awareness	15%	31%	19%	44%
Increased regional profile	14%	29%	17%	41%
Increased local pride	19%	27%	21%	40%
New infrastructure	27%	36%	32%	49%
Benefits shared evenly	20%	28%	21%	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

□ Significantly higher when comparing the region to Queensland at the 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	BNE		QLD
	2013	2017	2017
Increased prices	57%	49%↓	50%
Increased property values	41%	38%	38%
Rise in delinquent behaviour	34%	35%	35%
More disruption	33%	35%	35%
Negative impact on the environment	32%	30%	29%
Negative impact on local character	25%	24%	29%
Misdirected public spending	29%	28%	25%
Lack of access for locals	17%	18%	18%

"Gives us more services, but also prices go up with increased tourism."

Brisbane Resident, 2017

"Crowds at some attractions increase. Transport in some areas under strain."

Brisbane Resident, 2017

Impact on...	BNE 2017		QLD 2017	
	personal quality of life ¹	community as a whole ¹	personal quality of life ¹	community as a whole ¹
Increased prices	6%	10%	9%	11%
Increased property values	12%	13%	13%	15%
Rise in delinquent behaviour	7%	13%	8%	18%
More disruption	8%	12%	11%	14%
Negative impact on the environment	8%	18%	8%	20%
Negative impact on local character	5%	7%	5%	6%
Misdirected public spending	6%	15%	7%	14%
Lack of access for locals	14%	13%	16%	16%

In summary

Brisbane residents really like living where they live. This is primarily because it has a sense of community and is friendly, peaceful and quiet.

The Brisbane region welcomes more overnight visitors than any other Queensland region.

Through the study, we see that positive sentiment towards tourism in Brisbane has softened and shifted towards a more neutral position. Fewer residents 'really like' tourists and fewer think their local area should attract 'more' tourists. There remains little negative sentiment towards tourism.

Brisbane residents continue to recognise the benefits of tourism to the community. However, broad attitudes towards tourism are softer than Queensland on average. This may be related to the lower level of contact that Brisbane residents have with tourists in their day-to-day lives.

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 2017 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