

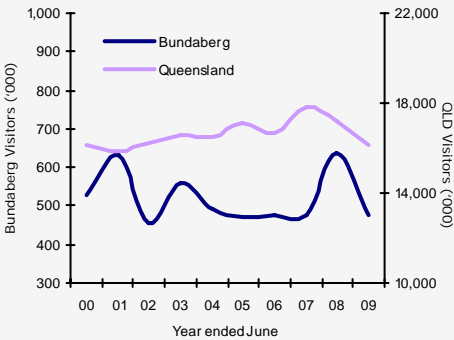
Bundaberg Regional Snapshot

Year ended June 2009

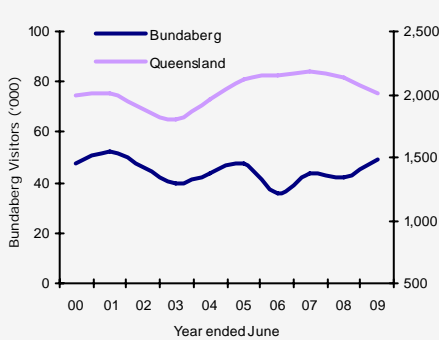


	Visitors	Holiday	VFR	Business
Domestic overnight	478,000	191,000	184,000	59,000
Annual change ¹	▼ -25%	▼ -25%	▼ -29%	▼ -42%
Trend change ²	0%	▲ 2%	▲ 2%	▼ -5%
International overnight	49,000	38,000	8,000	n/p
Annual change	▲ 17%	▲ 9%	n/p	n/p
Trend change	▲ 11%	▲ 9%	n/p	n/p

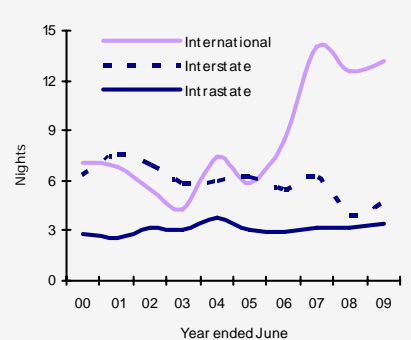
Domestic visitation



International visitation



Average length of stay (Bundaberg)



Domestic travel to Bundaberg followed the State trend and declined in the year ending June 2009.

In the previous year there was a large increase in intrastate visiting friends or relatives (VFR) visitors. This growth was not replicated in the year ending June 2009, with the region seeing a significant decline in intrastate VFR visitors. The cyclical nature of VFR travel is likely to be a contributor to the fall in visitation.

The decrease in the number of holiday visitors was driven by declines in travel from local and neighbouring regions. Positively however, Bundaberg saw growth in holiday visitors from Brisbane.

Bundaberg also saw growth in the number of day trip visitors, suggesting that some residents of local and neighbouring regions substituted a day trip for an overnight trip.

In a reverse of the State trend, Bundaberg saw an increase in international visitors.

The growth was driven by an increase in the number of visitors from the United Kingdom, with some smaller European markets also seeing growth.

The majority of European visitors to the region are under the age of 30, and it is this part of the European market that is driving the increase in visitation.

As in the case for a number of coast regions in Queensland, long distance coach or bus is the most used form of transport to Bundaberg for these younger Europeans. The majority stay in backpackers/hostels, with caravans the second most popular form of accommodation.

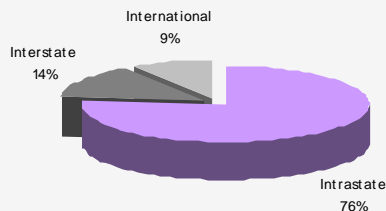
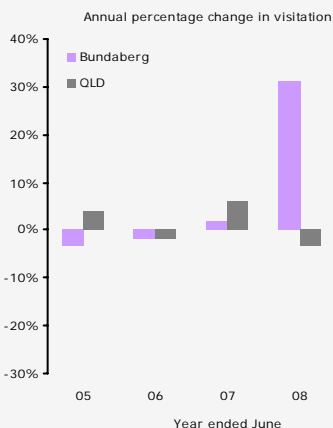
Intrastate visitors' length of stay increased marginally, with intrastate VFR visitors driving the growth. Whilst there were fewer intrastate VFR visitors, those that came to the region increased their length of stay by 1.1 nights to an average of 3.4 nights.

Intrastate holiday visitors to Bundaberg reduced their stay in the region by 0.6 nights (to an average of 4.3 nights). The trend towards shorter, more affordable trips is a likely influence on this result.

International visitors' length of stay was influenced by employment visitors who represent a small percentage of visitors, but a large percentage of visitor nights. Working holiday visitors also have an extended stay in the region. Working holiday and employment visitors were also responsible for the large increase seen in the year ending June 2007.

International holiday visitors (excluding working holiday visitors) stayed in the region an average of 4 nights.

Total visitation



There were **527,000** total overnight visitors to Bundaberg in the year ended June 2009, this was a 23% decline on the year ended June 2008.

The data included in this report is sourced from the National and International Visitor surveys conducted by Tourism Research Australia. These are large and comprehensive surveys that provide valuable data on a national, state, and regional level. The variable nature of travel, combined with sampling variability (which all surveys are subject to) means that regional results need to be viewed as indicative only. It is likely that not all segments of the region will experience the changes noted on a regional level.

Domestic visitors to Bundaberg

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	191,000	-25%	807,000	-33%	4.2	-0.5
VFR	184,000	-29%	679,000	6%	3.7	1.2
Business	59,000	-42%	106,000	-43%	1.8	0.0
Total	478,000	-25%	1,731,000	-17%	3.6	0.3
Intrastate						
Holiday	156,000	-22%	664,000	-32%	4.3	-0.6
VFR	161,000	-31%	540,000	0%	3.4	1.1
Business	50,000	n/p	84,000	n/p	1.7	-0.2
Total	402,000	-27%	1,381,000	-20%	3.4	0.2
Interstate						
Holiday	36,000	-32%	144,000	-35%	4.0	-0.2
Total	76,000	-15%	350,000	0%	4.6	0.7

Key domestic source markets to Bundaberg

	Visitors	Annual % change	Nights	Annual % change
Regional Qld	234,000	-35%	892,000	-28%
Brisbane	168,000	-11%	489,000	-1%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,121,000	-6%	67,645,000	-11%
NSW	22,550,000	-7%	77,471,000	-6%
Victoria	15,912,000	-8%	49,426,000	-6%
Rest of Aus	14,733,000	-8%	63,033,000	-10%
Australia	67,066,000	-7%	257,575,000	-8%
Holiday visitors				
Queensland	7,304,000	-4%	34,653,000	-12%
NSW	10,049,000	-4%	39,308,000	-1%
Victoria	7,424,000	-9%	24,644,000	-7%
Rest of Aus	6,368,000	-8%	29,484,000	-11%
Australia	30,087,000	-6%	128,089,000	-8%

Queensland recorded a more marginal decline in total visitors, and holiday visitors than the Nation. Queensland's improved intrastate results was a key contributor.

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Bundaberg	574,000	10%	n/p	n/p
Queensland	31,438,000	10%	\$3,175	3%
Australia	141,437,000	3%	\$14,566	3%



International visitors to Bundaberg

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	38,000	9%	459,000	6%	11.9	-0.3
Total	49,000	17%	645,000	22%	13.2	0.6

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,012,000	-5%	39,863,000	2%
NSW	2,712,000	-3%	60,541,000	6%
Victoria	1,481,000	0%	35,902,000	13%
Rest of Aus	1,341,000	0%	37,346,000	12%
Australia	5,072,000	-2%	173,652,000	8%
Holiday visitors				
Queensland	1,454,000	-8%	19,509,000	5%
NSW	1,525,000	-6%	19,334,000	6%
Victoria	747,000	-4%	7,779,000	-3%
Rest of Aus	756,000	-3%	12,052,000	10%
Australia	2,785,000	-6%	58,675,000	5%

Queensland saw an increase in the often more affordable form of travel, VFR. However, due to its' greater reliance on the holiday market it experienced a larger decline in visitation overall than the Nation.



Regional Snapshots for all Queensland regions are available on the TQ Research website, www.tq.com.au/research

Overview snapshots are also available for both Domestic and International visitors. Any questions or comments, please email research@tq.com.au

Bundaberg region includes the city of Bundaberg and the former shires of Biggenden, Burnett, Eidsvold, Gayndah, Isis, Kolan, Mundubbera and Perry.

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Bundaberg Regional Snapshot

Year ended June 2009

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,627,000	1%	14,697,000	3%	3.2	0.1	28%	37%	26%	29%
Gold Coast	3,179,000	-7%	13,291,000	-13%	4.2	-0.2	62%	26%	10%	20%
Sunshine Coast	2,589,000	-12%	10,269,000	-13%	4.0	0.0	63%	29%	6%	16%
SEQC ³	2,308,000	-9%	6,630,000	-6%	2.9	0.1	38%	45%	12%	14%
Tropical North Qld	1,518,000	5%	7,222,000	-11%	4.8	-0.8	55%	22%	16%	9%
Central Qld	995,000	-15%	3,507,000	-9%	3.5	0.2	40%	25%	30%	6%
Toowoomba	974,000	-16%	2,755,000	-16%	2.8	0.0	29%	39%	26%	6%
Townsville	852,000	-11%	2,938,000	-16%	3.4	-0.3	31%	27%	34%	5%
Fraser Coast	848,000	23%	3,594,000	35%	4.2	0.3	48%	39%	12%	5%
Capricorn	584,000	-32%	1,956,000	-27%	3.3	0.2	37%	28%	29%	4%
Mackay	577,000	-19%	2,684,000	-9%	4.7	0.5	24%	35%	37%	4%
Bundaberg	478,000	-25%	1,731,000	-17%	3.6	0.3	40%	38%	12%	3%
Whitsundays	407,000	-19%	1,705,000	-20%	4.2	0.0	70%	16%	10%	3%
Outback	372,000	-27%	1,718,000	-23%	4.6	0.2	37%	20%	33%	2%
Gladstone	298,000	-11%	1,083,000	-7%	3.6	0.1	57%	22%	19%	2%
Western Downs	297,000	-34%	939,000	-21%	3.2	0.6	36%	26%	33%	2%
Southern Downs	191,000	-30%	488,000	-27%	2.6	0.2	57%	30%	8%	1%
Total Queensland	16,121,000	-6%	67,645,000	-11%	4.2	-0.2	45%	32%	20%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	922,000	3%	16,179,000	7%	17.5	0.7	55%	28%	12%	46%
Gold Coast	785,000	-8%	7,732,000	-4%	9.8	0.3	79%	16%	4%	39%
Tropical North Qld	703,000	-15%	6,583,000	2%	9.4	1.6	91%	5%	3%	35%
Sunshine Coast	276,000	-2%	2,325,000	-3%	8.4	-0.1	79%	18%	2%	14%
Whitsundays	218,000	-4%	1,352,000	11%	6.2	0.8	97%	2%	0%	11%
Fraser Coast	197,000	-4%	855,000	-8%	4.3	-0.3	95%	5%	0%	10%
Townsville	147,000	1%	1,329,000	4%	9.0	0.2	82%	12%	2%	7%
Central Qld	126,000	-1%	1,067,000	8%	8.4	0.6	87%	8%	3%	6%
SEQC ³	118,000	7%	2,313,000	33%	19.6	3.9	40%	50%	5%	6%
Capricorn	81,000	0%	614,000	13%	7.6	0.9	85%	7%	2%	4%
Gladstone	56,000	-8%	404,000	-9%	7.2	0.0	89%	5%	4%	3%
Mackay	55,000	6%	403,000	57%	7.3	2.4	73%	18%	9%	3%
Bundaberg	49,000	17%	645,000	22%	13.2	0.6	78%	16%	2%	2%
Toowoomba	37,000	3%	591,000	4%	16.1	0.5	49%	32%	11%	2%
Outback	30,000	-6%	452,000	67%	14.9	6.5	87%	7%	3%	1%
Western Downs	14,000	8%	118,000	-19%	8.5	-3.1	71%	14%	7%	1%
Southern Downs	7,000	-30%	205,000	37%	30.5	15.3	57%	29%	0%	0%
Total Queensland	2,012,000	-5%	39,863,000	2%	19.8	1.5	72%	24%	8%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia. Visitor expenditure data is courtesy of Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended June 2009 vs. year ended June 2008

2. Trend change refers to the percentage change between the 3 years to June 2008 vs. the 3 years to June 2009

3. South East Queensland Country

n/p – this information is either not available or not published due to low sample size