

Year ended March 2011

IMPORTANT MESSAGE:

Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), **domestic tourism region** data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, **domestic** data for **tourism regions** will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.

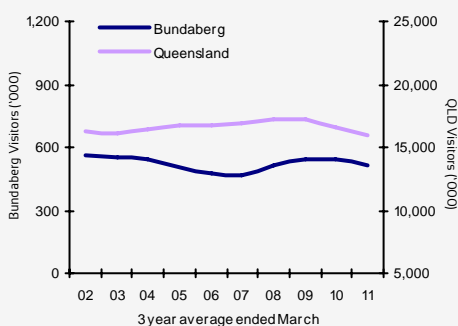
National and state level NVS data will be published as normal on a year ended basis.

Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.



	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	513,000	177,000	188,000	97,000
Trend change ¹	▼ -5%	▼ -14%	▼ -10%	▲ 13%
International overnight	40,000	31,000	6,000	n/p
Annual change ²	▼ -13%	▼ -16%	▼ -25%	n/p
Trend change	▼ -2%	▼ -5%	▲ 18%	n/p

Domestic visitation



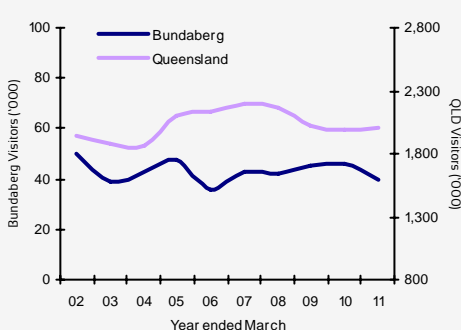
- While previously recording growth, Bundaberg saw declines in domestic visitation over the three years to March 2011, which followed the state trend.

- Intrastate holiday and VFR (visiting friends or relatives) travel primarily drove this decline with recent flood events detracting from the regions' performance.

- Brisbane was the strongest growing source market for Bundaberg driven by the business sector.

- The region's largest source market, regional Queensland, saw the biggest declines as a result of reduced accessibility and propensity to travel during the floods.

International visitation

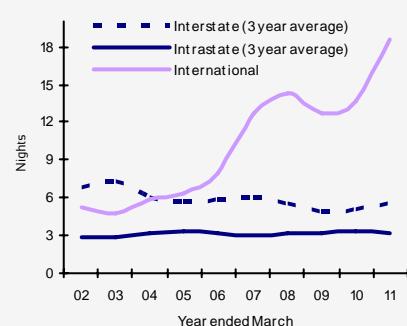


- The Bundaberg region experienced a decline in international visitation in the year ended March 2011, influenced by a continued softening from vital European markets. Many economies in Europe are yet to fully recover from the Global Financial Crisis.

- Youth (under 30 years) visitors from Europe continued to be more heavily impacted by the economic circumstances of their home countries than older travellers. Youth unemployment remains a significant issue for the UK (United Kingdom) and European markets.

- UK and European visitors account for 54% of all visitors to Bundaberg, while they only account for 26% of all visitors to Qld.

Average length of stay (Bundaberg)



- The length of stay by international visitors in the Bundaberg region continued to increase in the year ended March 2011. Key drivers for the growth remained working holiday visitors who increased their average stay in the region to almost 8 weeks.

- An increase in the number of long-stay employment travellers staying in Bundaberg further boosted total visitor nights.

- Queenslander's visiting the Bundaberg region reduced their length of stay over the three years to March 2011, particularly those visiting for a holiday.

- Interstate visitors increased their average length of stay in Bundaberg by 1.1 nights.

Tourist Accommodation³

	Hotels/Motels/Serviced apartments ⁴
Guest arrivals	155,000
Annual change	-3%
Room occupancy	55.5%
Annual change	-4.6%
Average room rate	\$113.55
Annual change	2%
Yield ⁵	\$63.03
Annual change	-5%

- Reflecting the decline in domestic visitation to Bundaberg, the commercial accommodation sector recorded a 3% decline in guest arrivals in the year ended March 2011. Room occupancy also declined 4.6%.

- Despite this, overall takings were up as a result of an increase in the average room rate (up 2%), but yield declined by 5% due to the lower room occupancy rate.

For more information on commercial accommodation for this region, please refer to the 'Tourist Accommodation Data Sheet' available on the Tourism Queensland website.

The data included in this report is sourced from the National and International Visitor surveys conducted by Tourism Research Australia. These large and comprehensive surveys 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.

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Domestic visitation

Domestic visitors to Bundaberg 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	177,000	-14%	711,000	-24%	4.0	-0.5
VFR	188,000	-10%	690,000	-4%	3.7	0.2
Business	97,000	13%	254,000	34%	2.6	0.4
Total⁶	513,000	-5%	1,819,000	-7%	3.5	-0.1
Intrastate						
Holiday	137,000	-17%	490,000	-30%	3.6	-0.7
VFR	163,000	-13%	550,000	-8%	3.4	0.2
Business	92,000	15%	244,000	37%	2.7	0.4
Total	434,000	-6%	1,386,000	-11%	3.2	-0.2
Interstate						
Holiday	40,000	0%	221,000	-3%	5.5	-0.2
Total	79,000	0%	434,000	8%	5.5	0.4

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Bundaberg ⁷	742,000	22%	n/p	n/p
Queensland	34,258,000	7%	\$3,627	7%
Australia	151,948,000	3%	\$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Key domestic source markets to Bundaberg 3 year average to March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	258,000	-14%	874,000	-22%
Brisbane	176,000	9%	512,000	15%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.



International visitation Year ended March 2011

International visitors to Bundaberg

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	31,000	-16%	515,000	14%	16.5	4.3
VFR	6,000	-25%	115,000	15%	17.7	4.6
Total⁸	40,000	-13%	746,000	18%	18.6	5.0

The Bundaberg region consists of the Bundaberg Regional Council and North Burnett Regional Council areas. These include the former City of Bundaberg and the shires of Biggenden, Burnett, Eidsvold, Gayndah, Isis, Kolan, Monto, Mundubbera and Perry.

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

Any questions or comments, please email research@tq.com.au

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State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,002,000	1%	39,474,000	-1%
NSW	2,829,000	3%	66,266,000	7%
Victoria	1,693,000	10%	40,628,000	2%
Rest of Aus	1,394,000	3%	40,232,000	3%
Australia ⁹	5,396,000	4%	186,600,000	3%

Holiday visitors

Queensland	1,379,000	-3%	17,804,000	-8%
NSW	1,573,000	0%	20,642,000	-2%
Victoria	810,000	7%	7,910,000	-2%
Rest of Aus	755,000	1%	11,414,000	-7%
Australia ⁹	2,866,000	1%	57,770,000	-5%

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.



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Regional Visitation

Domestic Regional Comparison (3 year average to March 2011)

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,538,000	-1%	14,155,000	-1%	3.1	0.0	29%	38%	26%	28%
Gold Coast	3,243,000	-3%	13,437,000	-7%	4.1	-0.2	61%	27%	9%	20%
Sunshine Coast	2,615,000	-5%	10,560,000	-6%	4.0	-0.1	61%	29%	7%	16%
TNQ	1,384,000	-7%	7,393,000	-4%	5.3	0.2	55%	24%	17%	9%
Toowoomba	1,186,000	-5%	3,526,000	-1%	3.0	0.1	31%	41%	21%	7%
Townsville	783,000	-12%	3,011,000	-9%	3.8	0.1	33%	28%	29%	5%
Capricorn	776,000	-9%	2,847,000	-4%	3.7	0.2	33%	28%	31%	5%
Mackay	588,000	-10%	2,388,000	-9%	4.1	0.1	27%	28%	40%	4%
Fraser Coast	572,000	1%	2,326,000	-5%	4.1	-0.3	49%	33%	14%	4%
Bundaberg	513,000	-5%	1,819,000	-7%	3.5	-0.1	35%	37%	19%	3%
Whitsundays	458,000	-3%	1,973,000	1%	4.3	0.2	69%	16%	12%	3%
Outback	361,000	-10%	1,867,000	-6%	5.2	0.2	37%	19%	37%	2%
Gladstone	312,000	-4%	1,323,000	10%	4.2	0.6	46%	30%	20%	2%
Western Downs	301,000	-22%	878,000	-19%	2.9	0.1	43%	26%	24%	2%
Southern Downs	247,000	0%	586,000	-4%	2.4	-0.1	52%	31%	13%	2%
Total	15,876,000	-5%	68,430,000	-5%	4.3	0.0	44%	32%	20%	-

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

International Regional Comparison (Year ended March 2011)

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	926,000	1%	17,018,000	6%	18.4	0.9	49%	30%	13%	46%
Gold Coast	783,000	-6%	7,799,000	-5%	10.0	0.1	77%	16%	5%	39%
TNQ	661,000	0%	5,830,000	-7%	8.8	-0.7	91%	5%	3%	33%
Sunshine Coast	271,000	-3%	2,646,000	4%	9.8	0.7	78%	18%	3%	14%
Whitsundays	191,000	-14%	1,086,000	-15%	5.7	-0.1	96%	3%	1%	10%
Fraser Coast	151,000	-19%	565,000	-26%	3.7	-0.4	97%	4%	0%	8%
Townsville	124,000	-14%	1,361,000	-2%	11.0	1.4	78%	13%	5%	6%
Capricorn	72,000	-11%	499,000	-42%	7.0	-3.6	81%	11%	4%	4%
Gladstone	57,000	-11%	243,000	-47%	4.3	-2.9	88%	7%	5%	3%
Mackay	46,000	-16%	350,000	-20%	7.6	-0.4	76%	17%	7%	2%
Bundaberg	40,000	-13%	746,000	18%	18.6	5.0	78%	15%	0%	2%
Toowoomba	36,000	-8%	703,000	3%	19.6	2.1	44%	33%	14%	2%
Outback	24,000	-11%	253,000	-26%	10.5	-2.2	75%	13%	8%	1%
Western Downs	12,000	0%	167,000	8%	14.1	1.3	58%	17%	8%	1%
Southern Dns	10,000	25%	205,000	24%	20.0	0.6	70%	30%	0%	0%
Total	2,002,000	1%	39,474,000	-1%	19.7	-0.5	69%	25%	9%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia.

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.

2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.

3. Tourist accommodation figures refer to the Bundaberg tourism region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation March 2011.

4. Figures provided refer to hotels/motels/serviced apartments with fifteen or more rooms.

5. Yield refers to average takings per room night available.

6. This figure includes "Other" visitors.

7. 3 year average ended March 2011.

8. This figure includes "Business" and "Other" visitors

9. Excludes Transit visitors who did not have a stopover place.
n/p not published.