

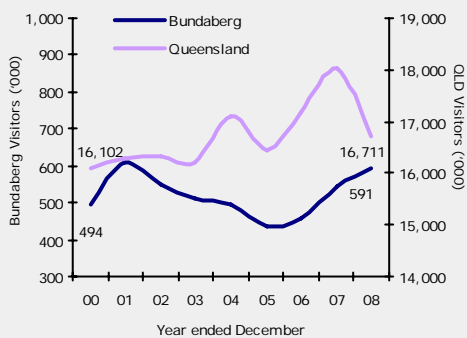
Bundaberg Regional Snapshot

Year ended December 2008



	Visitors	Holiday	VFR	Business
Domestic overnight	591,000	226,000	233,000	98,000
Annual change*	▲ 9%	▲ 3%	▲ 23%	▼ -12%
Trend change**	▲ 11%	▲ 12%	▲ 11%	▲ 16%
International overnight	41,000	33,000	n/p	n/p
Annual change	▼ -9%	▼ -11%	n/p	n/p
Trend change	▲ 1%	▲ 1%	n/p	n/p

Domestic visitation

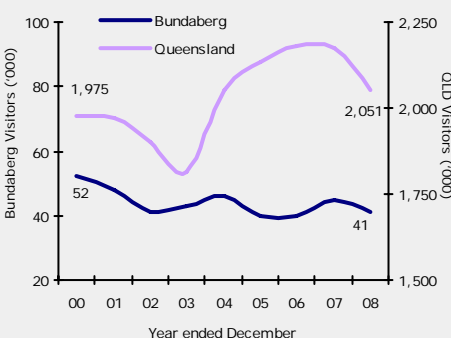


▪ Bundaberg attracted 4% of domestic visitors to Queensland (QLD), with 38% coming for a holiday, 39% to visit friends or relatives (VFR), and a further 17% for business.

▪ Bundaberg was one of a handful of QLD regions to see an increase in domestic visitors. A strong intrastate holiday market from regions such as the Gold Coast, Sunshine Coast and residents from Bundaberg drove this increase.

▪ It was the increase in intrastate VFR visitors (up 32%) that drove the increase in domestic VFR visitation to the region.

International visitation



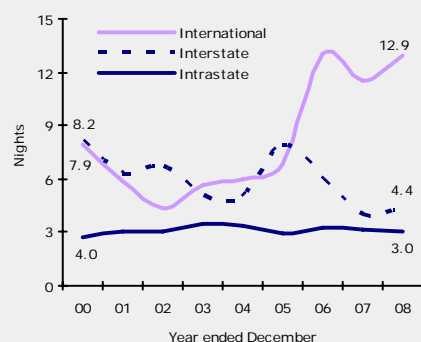
▪ Bundaberg saw a decline of 9% in international visitors over the last year. The majority (80% of total international market) of travel to the region is for a holiday.

▪ Bundaberg saw declines from many of its international source markets especially from its largest international source market, the United Kingdom (down 11%).

▪ The decline in holiday visitors to Bundaberg led to an overall decline in international visitors to the region.

▪ International backpackers also reduced their travel to Bundaberg in 2008 (down 13%).

Average length of stay (Bundaberg)

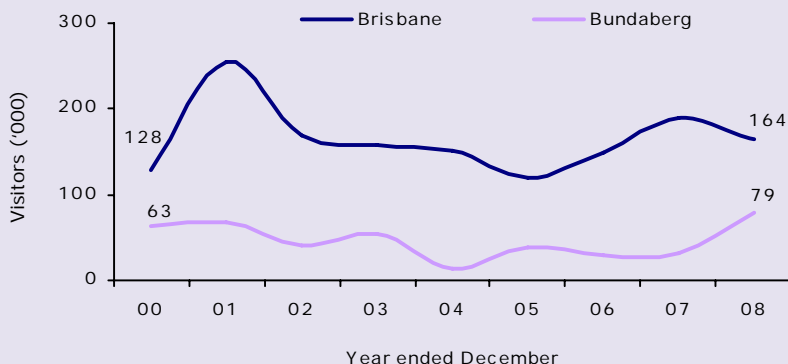


▪ Domestic visitors' average length of stay was 3.2 nights. Interstate visitors stayed an average 1.4 nights longer than their intrastate counterparts.

▪ Since 2005 there has been decrease in the interstate drive market visitors, which has contributed to the decline in domestic average length of stay.

▪ The international average length of stay increased to 12.9 nights. Holiday average length of stay was 11.9 nights (up 0.8 nights), the highest since the year ended December 2000.

Key intrastate source markets YE Dec 00 - 08



▪ Intrastate visitors represented 86% of domestic visitors to Bundaberg in the year ending December 2008.

▪ Brisbane residents were the regions largest source market, however they reduced their visitation to the region over the year. Bundaberg was one of a number of Queensland regions that recorded a decline in visitation from Brisbane residents.

▪ Bundaberg saw increased visitation from its own residents and also Sunshine Coast residents. Sunshine Coast residents to Bundaberg also increased their length of stay (up 1.4 nights to 3.8 nights).

▪ The boost in visitation from local residents and residents from neighbouring regions is illustrative of the trend towards travelling closer to home.

Bundaberg Regional Snapshot

Domestic visitation Year ended December 2008

Domestic visitors to Bundaberg

	Visitors	% change	Nights	% change	Length of stay	Nights change
Holiday	226,000	3%	977,000	16%	4.3	0.5
VFR	233,000	23%	647,000	-2%	2.8	-0.7
Business	98,000	-12%	154,000	-31%	1.6	-0.4
Other	36,000	n/p	126,000	n/p	3.5	1.5
Total	591,000	9%	1,904,000	8%	3.2	-0.1

Intrastate						
Holiday	174,000	-2%	772,000	14%	4.4	0.6
VFR	215,000	32%	542,000	6%	2.5	-0.6
Business	91,000	-11%	140,000	-34%	1.5	-0.6
Other	29,000	n/p	89,000	n/p	3.1	1.5
Total	509,000	11%	1,543,000	8%	3.0	-0.1
Interstate						
Holiday	52,000	24%	205,000	26%	4.0	0.1
VFR	18,000	-33%	105,000	-28%	5.8	0.3
Business	6,000	n/p	14,000	n/p	2.2	1.0
Other	7,000	n/p	37,000	n/p	5.1	2.1
Total	82,000	-4%	361,000	6%	4.4	0.4

Key domestic source markets

	Visitors	% change	Nights	% change
Regional QLD	346,000	29%	1,094,000	18%
Brisbane	164,000	-14%	449,000	-10%
Bundaberg	79,000	n/p	218,000	n/p

State comparison - Domestic

Total visitors	Visitors	% change	Nights	% change
Queensland	16,711,000	-7%	72,187,000	-6%
NSW	24,078,000	0%	81,644,000	-2%
Victoria	16,724,000	-4%	52,070,000	-2%
Rest of Aus	15,429,000	-8%	65,876,000	-12%
Australia	70,491,000	-4%	271,778,000	-6%

Holiday visitors	Visitors	% change	Nights	% change
Queensland	7,609,000	-3%	36,096,000	-11%
NSW	10,580,000	2%	40,094,000	-1%
Victoria	8,018,000	0%	26,665,000	4%
Rest of Aus	6,648,000	-6%	30,890,000	-12%
Australia	31,809,000	-1%	133,745,000	-5%

QLD experienced a larger decline in domestic visitation than the national decline, due primarily to QLD recording larger declines in VFR and business visitors



Bundaberg Regional Snapshot

International visitation Year ended December 2008

International visitors to Bundaberg

	Visitors	% change	Nights	% change	Length of stay	Nights change
Holiday	33,000	-11%	398,000	-3%	11.9	0.8
Total	41,000	-9%	532,000	4%	12.9	1.4

State comparison - International

Total Visitors	Visitors	% change	Nights	% change
Queensland	2,051,000	-6%	40,564,000	12%
NSW	2,768,000	-3%	58,053,000	1%
Victoria	1,479,000	1%	33,655,000	9%
Rest of Aus	1,343,000	0%	35,063,000	5%
Australia	5,125,000	-1%	167,334,000	6%

Holiday visitors

Queensland	1,494,000	-7%	18,703,000	2%
NSW	1,555,000	-7%	17,822,000	-9%
Victoria	760,000	-3%	7,821,000	-3%
Rest of Aus	763,000	-4%	11,347,000	-2%
Australia	2,859,000	-5%	55,693,000	-3%

QLD followed the national trend and recorded a decline in international visitors. The larger decline that QLD experienced is due mainly to the states greater reliance on the holiday market. International holiday travel is more susceptible to economic downturns.



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 shires of Biggenden, Burnett, Eidsvold, Gayndah, Isis, Kolan, Mundubbera and Perry.

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Bundaberg Regional Snapshot

Year ended December 2008

Domestic Regional Comparison

	Visitors	% change	Nights	% change	Length of stay	Nights Change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,706,000	-4%	14,939,000	-2%	3.2	0.1	30%	38%	26%	28%
Gold Coast	3,316,000	-11%	14,173,000	-14%	4.3	-0.1	63%	25%	11%	20%
Sunshine Coast	2,792,000	-8%	10,870,000	-9%	3.9	0	63%	28%	8%	17%
SEQC	2,510,000	-5%	7,444,000	4%	3.0	0.3	34%	47%	15%	15%
TNQ	1,512,000	4%	7,427,000	-6%	4.9	-0.5	55%	27%	14%	9%
Toowoomba	1,060,000	-3%	2,849,000	-3%	2.7	0.0	27%	41%	24%	6%
Central QLD	969,000	-26%	3,148,000	-33%	3.2	-0.4	36%	29%	30%	6%
Townsville	837,000	-21%	3,025,000	-23%	3.6	-0.1	32%	29%	29%	5%
Fraser Coast	800,000	22%	3,069,000	17%	3.8	-0.2	39%	43%	16%	5%
Capricorn	726,000	-23%	2,302,000	-28%	3.2	-0.2	33%	31%	30%	4%
Mackay	624,000	-13%	3,196,000	29%	5.1	1.7	40%	28%	27%	4%
Bundaberg	591,000	9%	1,904,000	8%	3.2	-0.1	38%	39%	17%	4%
Whitsundays	548,000	6%	2,389,000	19%	4.4	0.5	70%	11%	15%	3%
Outback	421,000	-20%	2,176,000	12%	5.2	1.5	34%	25%	29%	3%
Western Downs	387,000	-17%	977,000	-27%	2.5	-0.4	36%	26%	30%	2%
Gladstone	284,000	-33%	846,000	-44%	3	-0.6	41%	25%	30%	2%
Southern Downs	220,000	-19%	661,000	-2%	3	0.5	50%	40%	7%	1%
Total Queensland	16,711,000	-7%	72,187,000	-6%	4.3	0.0	46%	32%	19%	-

International Regional Comparison

	Visitors	% change	Nights	% change	Length of stay	Nights Change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	897,000	-1%	16,664,000	31%	18.6	4.6	55%	28%	12%	44%
Gold Coast	795,000	-7%	8,179,000	10%	10.3	1.6	78%	16%	5%	39%
TNQ	757,000	-10%	6,402,000	-7%	8.5	0.4	91%	5%	3%	37%
Sunshine Coast	279,000	-3%	2,333,000	-7%	8.4	-0.3	81%	16%	3%	14%
Whitsundays	220,000	-2%	1,250,000	-3%	5.7	-0.1	98%	1%	0%	11%
Fraser Coast	200,000	-2%	887,000	-4%	4.4	-0.1	95%	5%	1%	10%
Townsville	145,000	-2%	1,244,000	-15%	8.6	-1.4	83%	11%	3%	7%
SEQC	118,000	3%	2,004,000	12%	17.0	1.0	42%	52%	4%	6%
Central QLD	117,000	-9%	965,000	26%	8.3	2.3	87%	8%	3%	6%
Capricorn	74,000	-12%	534,000	9%	7.2	1.4	88%	8%	3%	4%
Gladstone	55,000	-5%	431,000	n/p	7.9	3.1	87%	5%	5%	3%
Mackay	51,000	-11%	284,000	-3%	5.5	0.4	76%	18%	8%	2%
Bundaberg	41,000	-9%	532,000	4%	12.9	1.4	80%	12%	2%	2%
Toowoomba	36,000	0%	570,000	-10%	15.8	-1.5	42%	39%	8%	2%
Outback	32,000	7%	385,000	n/p	11.9	4.2	78%	16%	6%	2%
Western Downs	12,000	-8%	96,000	-45%	8.2	-5.5	58%	25%	8%	1%
Southern Downs	6,000	n/p	125,000	-35%	55.0	12.5	50%	33%	0%	0%
Total Queensland	2,051,000	-6%	40,564,000	12%	19.8	3.2	73%	23%	9%	-

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