

CRITICAL SOURCE MARKET MONITOR

An ongoing monitor of the most significant domestic overnight source markets for Eurobodalla. The Monitor data has been customised and refined to focus on travellers on trips with holiday/leisure as the main purpose. It has been further refined to limited this purpose of trip to those were 'self drive' travellers. The Monitor relates to visitors from the source market to destinations Australia-wide as is intended as a 'state of health' indicator for each source.

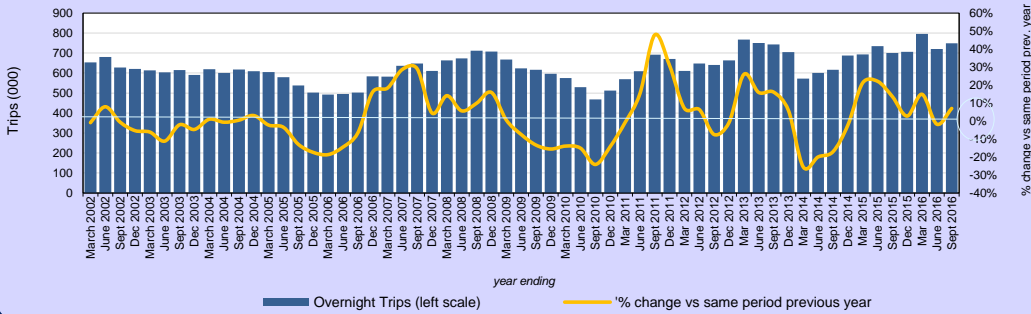
Updated to year ending September 2016



Prepared for Eurobodalla Shire Council by Peter Valerio.

EX-ACT OVERNIGHT TRIP VOLUME

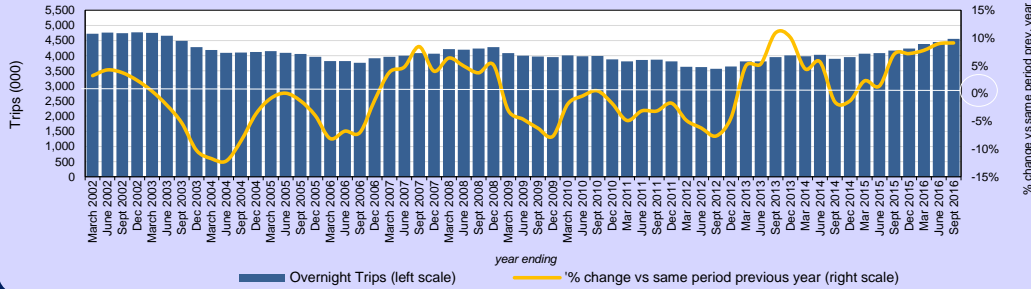
TRANSPORT TYPE = SELF DRIVE MAINPURPOSE OF TRIP: HOLIDAY/LEISURE



The year ending March 2016 increasingly appears to be a high point in the ex-ACT self drive holiday/leisure travel market cycle. Whilst trip volume remains at above average levels, declining year-on-year growth rates suggest the market is 'cooling off'. Despite this, the volume of almost 750,000 trips in the year ending September 2016 cannot be ignored - especially given the 'run' of recent year end periods around the 700,000 mark.

EX-SYDNEY OVERNIGHT VISITOR VOLUME

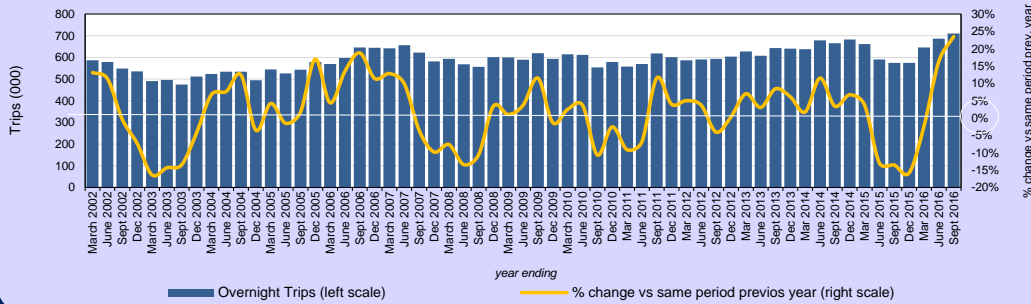
TRANSPORT TYPE = SELF DRIVE MAINPURPOSE OF TRIP: HOLIDAY/LEISURE



Sydney visitor volume of 4.6m for the YE September '16 is an increase of 9.1% compared to the same period last year and the highest self drive holiday visitor volume generated by that market since 2003. The period YE Sept '15-16 represents the most significant growth phase in this market. The sustained growth represents a significant market opportunity for all destinations within driving distance.

EX-STH COAST OVERNIGHT TRIP VOLUME

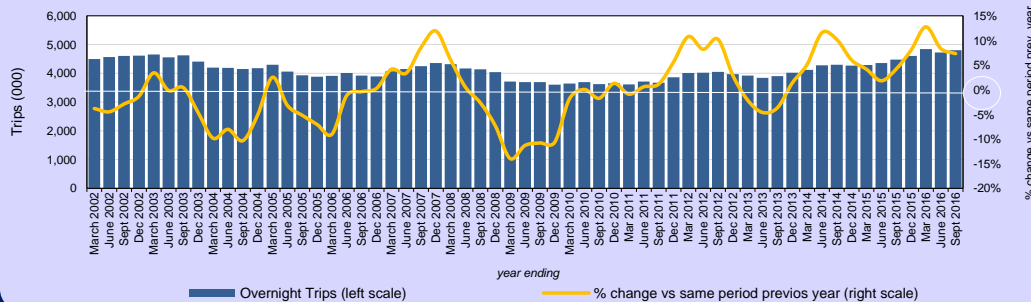
TRANSPORT TYPE: SELF DRIVE MAINPURPOSE OF TRIP: HOLIDAY/LEISURE



The South Coast Region generated a record 710,000 self-drive holiday/leisure trips over the 12 months ending September 2016. The growth compared to the same period in the previous year of 23.5% represents the third consecutive period of double-digit growth. 'Home regions' are easily overlooked by destinations and operators alike. In this case the geographic size of the South Coast and the record volume means that it represents a clear opportunity for Eurobodalla.

EX-MELBOURNE OVERNIGHT TRIP VOLUME

TRANSPORT TYPE: SELF DRIVE= CAR/PRIVATE VEHICLE; MAINPURPOSE OF TRIP: HOLIDAY/LEISURE



The Melbourne self-drive holiday/leisure continues to grow. The latest trip volume of 4.8 million represents a 7.3% increase on the year ending September 2015. Perhaps more significantly it is the 12th consecutive year ending period that is larger than the same period in the previous year. This is the most sustained period of growth experienced by the Melbourne self drive holiday/leisure market and one that Eurobodalla may benefit from.