

SUMMARY OF BUSHFIRE IMPACT SURVEY OUTCOMES

Date: 28 February 2020

This summary of outcomes is based on the survey for South Australian tourism businesses intended to provide insight about the impact of recent bushfires in the Adelaide Hills and Kangaroo Island.

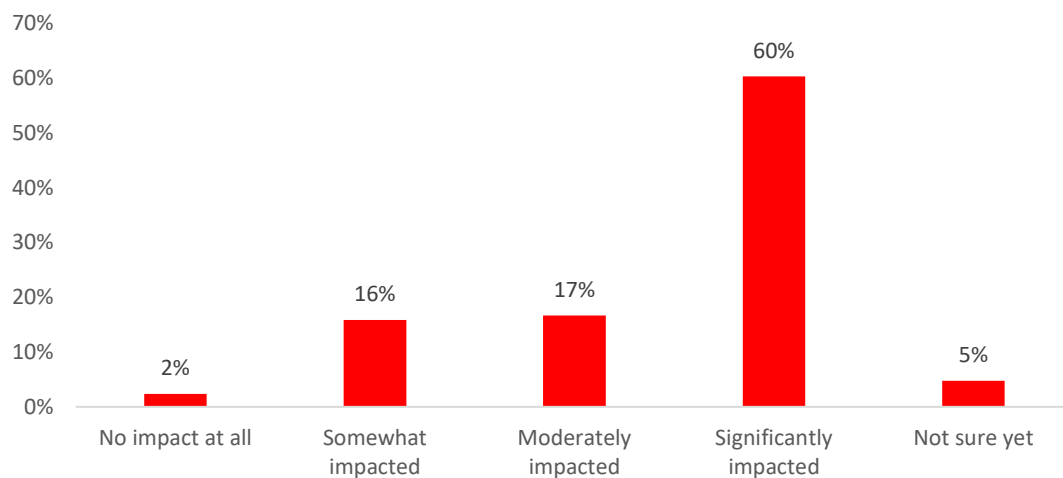
It should be noted that these results are based on the 126 surveys that had been received as at 17 February 2020.

The survey was a self-complete online survey and respondents could complete as much or as little as they wished. This means that not all questions were answered by all participants.

IMPACT OF BUSHFIRES ON BUSINESS

Most businesses responding to the survey found the fires had significantly impacted their business (60%). A further one third of participating businesses had been moderately or somewhat impacted.

To what extent have the bushfires impacted your business, either directly or indirectly?



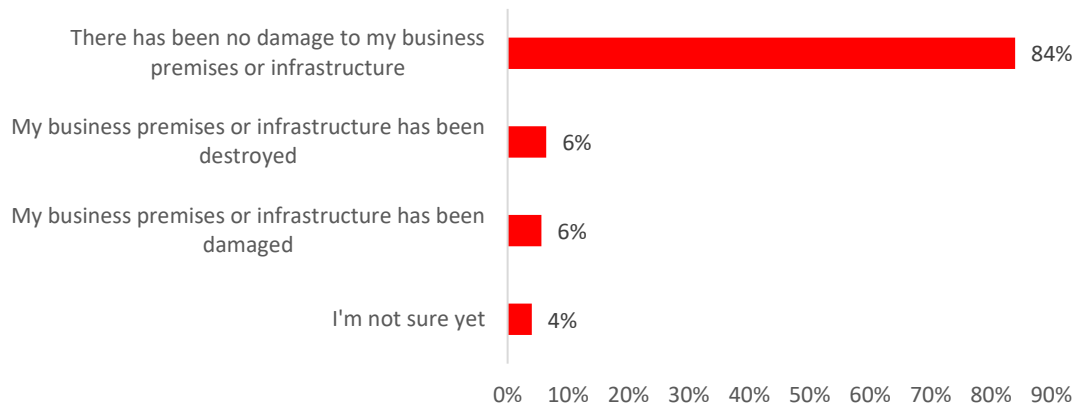
DAMAGE FROM THE FIRES

Interestingly, most businesses completing the survey and feeling the impact of the fires were those which had not suffered direct damage to the business.

This highlights the flow-on impacts of public perception and cancellations as the impact of fire spreads from those directly impacted, to adjacent businesses, to the region and indeed, to the whole state.

This observation does not detract from the 12% of participants who were dealing with destroyed or damaged premises.

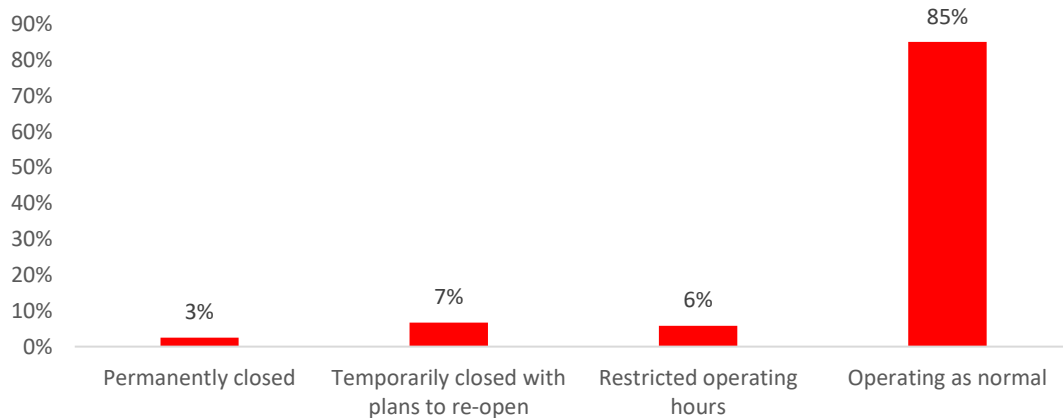
How would you describe the extent of damage to your business premises or infrastructure caused by the bushfires?



CURRENT BUSINESS STATUS

In alignment with the reported physical damage sustained, 85% of participants were maintaining normal operating hours. Three per cent had permanently closed while the rest were temporarily closed or had restricted opening hours.

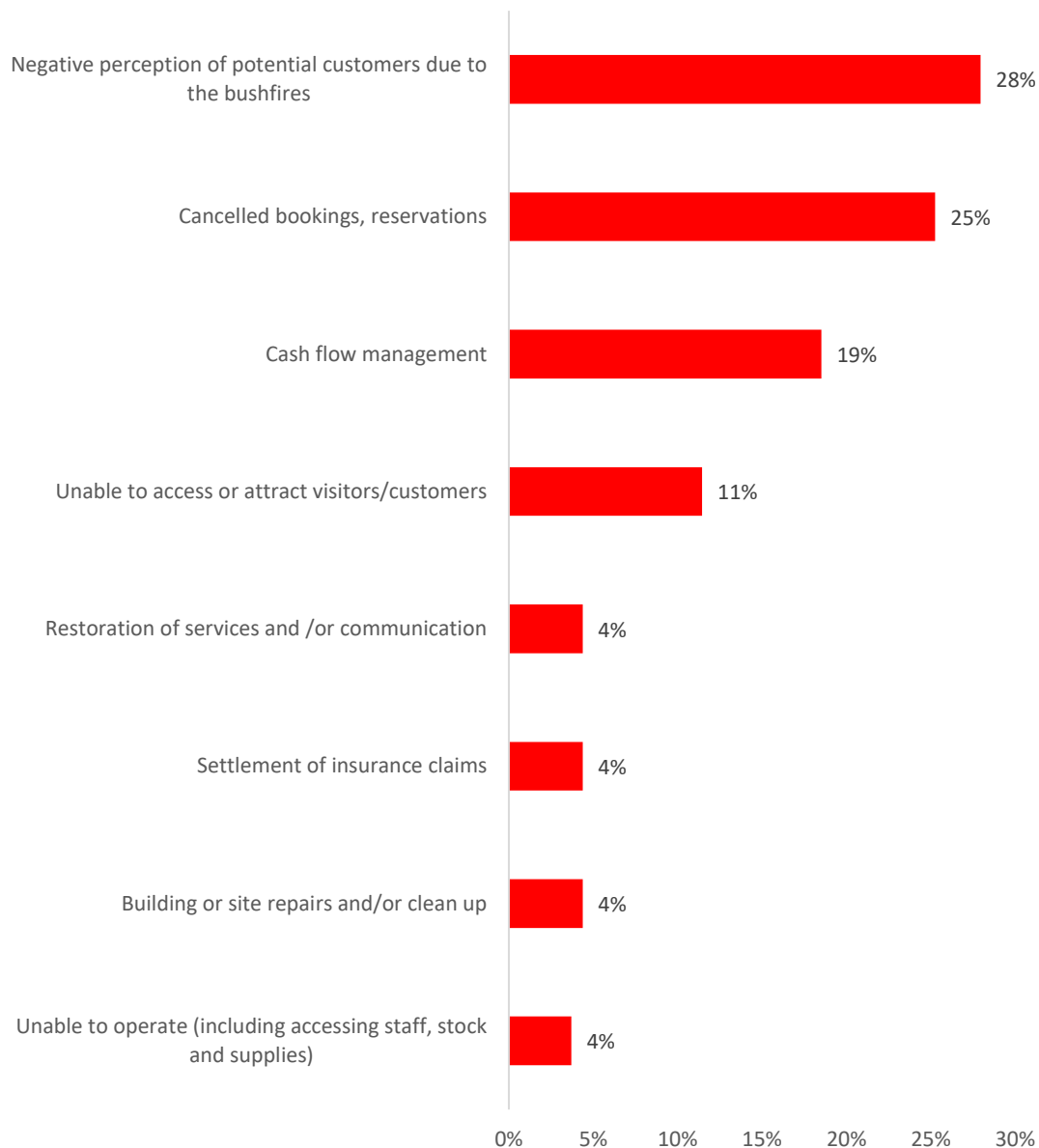
What is the current status of your business?



FACTORS MOST IMPACTING THE BUSINESS AT THE TIME OF RESPONSE

The main issues impacting businesses at the time of completing the survey were negative perceptions of potential customers (28%) and cancelled bookings (25%). Shorter term issues were also evident with 19% being challenged by cash-flow management and 11% being unable to access or attract customers.

What factors are most impacting your business right now?



IMMEDIATE, MEDIUM- AND LONG-TERM PRIORITIES

Businesses were asked to specify their immediate, medium and long term needs to assist recovery from the bushfires.

The two leading factors regardless of the term of the issue were the need for promotion of areas impacted by bushfires and the need for more bookings or fewer cancellations.

Medium term concerns are focussed on keeping business flowing with strong responses on the need for promotion, more customers and for financial assistance to offset the losses experienced in the wake of the fires.

In the longer term, in addition to these issues, the rebuilding of infrastructure (8%) and assistance with marketing (4%) start to become more prevalent.

Note that these results have been thematically summarised from the verbatim comments provided by participants.

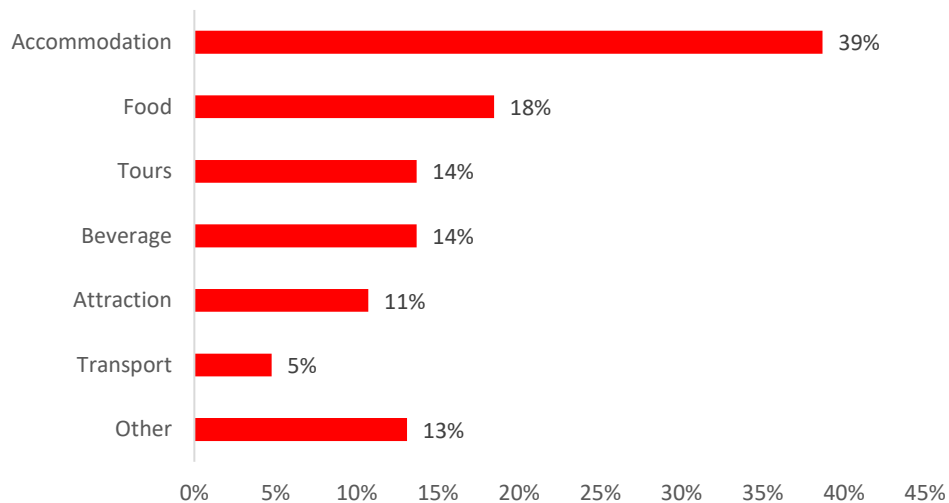
| | Immediate Priority | Medium Term Priority | Long Term Priority |
|--|--------------------|----------------------|--------------------|
| Promotion for areas impacted by bushfires | 33% | 40% | 33% |
| More bookings/ customers or fewer cancellations | 17% | 11% | 13% |
| Financial help – to offset losses | 9% | 11% | 5% |
| Promotion for areas not impacted by bushfires | 8% | 6% | 1% |
| Clarity around funding and assistance available | 2% | 1% | 1% |
| Help finding alternative markets/ itinerary inclusions | 2% | 1% | 0% |
| Clean up required/ manage active fires and risk | 2% | 0% | 1% |
| Assistance with marketing | 2% | 5% | 2% |
| Access subsidies -i.e. ferry and airlines | 2% | 1% | 0% |
| Reactivation of high-end offerings | 1% | 1% | 1% |
| Assistance retaining skilled workers | 1% | 1% | 1% |
| Rebuilding of infrastructure | 0% | 2% | 5% |
| Reductions in business costs/taxes to assist recovery | 0% | 2% | 1% |
| Other | 12% | 10% | 11% |
| No needs in this timeframe | 5% | 2% | 3% |
| No response | 12% | 12% | 23% |

RESPONDING BUSINESS PROFILE

Type of business

The profile of participants is dominated by those in accommodation (34%) followed by those in food (16%).

What is your type of business?



Region

Most participating businesses were from Kangaroo Island with a strong secondary representation from the Fleurieu Peninsula.

Region

