



Results of the SWCCIP Tourism Group's Tourism Business Survey February 2010

Prepared for:

Emma Whittlesea, SWT

on behalf of SWCCIP Tourism Group

Prepared by:

Man Cheng (Eddy) MSc Student,

Tourism Development and Planning MSC

Supervised By: Dr Claire Dinan

University of Exeter, Business School, Tourism

Date of report: 9th April 2010

Contents

1.0	Executive Summary	3
2.0	Background	5
2.1	Background to the Research	
2.2	Research Aims and Objectives	
2.3	Survey Methodology	
3.0	Research Findings	6
3.1	Profile of Respondents	
3.2	How Extreme Weather Events Affect Tourism Businesses	
3.3	How Far Business Have Taken up the Challenge	
3.4	What Tourism Businesses Need	
4.0	Summary	17
5.0	Recommendations	18
5.1	Implication of the Findings	
5.2	Future Priorities	
6.0	Appendix 1 – Open-ended Comments	19
7.0	Appendix 2 – The Questionnaire	25

1.0 Executive Summary

This project has been informed by the findings of the 2008 Tourism Business Climate Change survey commissioned by South West Climate Change Impacts Partnership (SWCCIP) Tourism Group¹.

The 2010 Tourism Business Climate Change Survey has been conducted to identify how far tourism businesses have taken up the challenge of preparing for climate change. It will help to inform future priorities for strategy work and resource deployment for the SWCCIP Tourism Group membership. The survey was conducted from 12 Feb to 4 March 2010, as an online questionnaire sent out to the South West Tourism (SWT)'s Tourism Industry Newsletter database and re-promoted by several Destination Management Organisations (DMOs). 240 responses were obtained.

Respondents are mainly from Cornwall (33%), Somerset (19%), Devon (12%) and Poole (19%). The majority of them are from the accommodation sector (71%).

Key findings:

- 135 respondents (56%) have been affected by extreme weather in the past. Heavy rainfall followed by snow and ice are the two extreme weather events that mostly affected this group.
- 63% of the respondents think that in the future their businesses will be affected, and the main concern is heavy rainfall.
- For sources of advice and information on extreme weather and impacts of climate change on their businesses, most turn to the Environmental Agency (29%), while 13% turn to South West Tourism and 5% have referred to SWCCIP.
- In terms of informing future strategy work, the research found that 59% of respondents think that climate change could lead to extreme weather and that business need to adapt to it.
- As a business planning priority 50% see it as a medium to high priority.
- When asked about what actions they have implemented, of the given 13 measures 46% of businesses have implemented some measures, either as normal practice, or in response to extreme weather events. 29% do not intend to do anything.
- The most popular actions implemented by businesses in response to changing weather conditions include: attention to assessment of flood risk, improvement of business drainage and installation of flood defence measures.

NB. It should be noted that this survey was conducted in February 2010, following a period of extreme winter weather and several months when climate change science had been scrutinised with increased scepticism in the media. Both factors may have influenced some of the findings and perceptions of the respondents.

To help prioritise the SWCCIP Tourism Group's future resource, the research reveals that 69% of respondents are interested in finding out more about the implications of climate change for their own business. 52% want a report showing climate projections for the South West over the next 10

¹ Note that SWCCIP changed its name to Climate SouthWest on 1st April 2010.

years. 45% need help to source grants. One third would like an adaptation checklist and a free visit from a climate change advisor.

In terms of future resource priority, the research revealed that greater concentration on the effective promotion of existing materials and tools would help support businesses most efficiently at the present time, rather than investment in new initiatives. Ease of access of support materials is essential. If the SWCCIP Tourism Group link were more visible on the environment agency's website this would help.

If there is an intention to invest in more initiatives, businesses really want an evidenced based report on the likely implications for the region's weather and climate over the next ten years and greater signposting of grants to help them

The overall research finding is that respondents are either confused by, or side tracked by the 'debate' surrounding the 'cause'/'validity' of climate change arguments and data. Consequently, we recommend a shift of emphasis in communications with tourism business owners, from 'Climate Change' issues, to a focus on using a less politicised and contentious term such as 'extreme weather events'.

2.0 Background

2.1 Background to the project

The South West Climate Change Impacts Partnerships (SWCCIP) Tourism Group has identified the South West tourism sector as needing support and guidance on how to prepare for climate change. To identify the specific needs of tourism businesses in the South West in relation to preparing for climate change impacts the SWCCIP Tourism Group commissioned a survey of tourism businesses in August 2008.

The findings showed that there was a high awareness of changing climate conditions among tourism business owners in the SW. The majority of respondents wanted more information about the implications of climate change for their businesses and more support in terms of how to make changes to their business practices in order to prepare for and mitigate changes in the climate.

In response to the findings South West Tourism (SWT) and SWCCIP produced support materials including a DVD, a leaflet, case studies and an online interactive web tool:

www.climateprepared.com.

The SWCCIP Tourism Group decided two years on that a second survey was required in order to track the extent to which tourism businesses have embraced climate change as a business planning issue and to help inform future development work for the SWCCIP Tourism Group.

Emma Whittlesea of SWT and Chair of the SWCCIP Tourism Group, approached Prof. Tim Coles of the University of Exeter in order to secure an ESRC sponsored ‘Business Voucher’ to fund a postgraduate student to work on this research project. Hence this piece of research has been conducted by Man Cheng, a student on the Tourism Development and Policy Masters programme and was supervised by Dr Claire Dinan, an Associate Research Fellow, from the University of Exeter Business School. Man was given considerable help and support from the Research Team based at SWT and would like to express his gratitude to Paul Haydon and Dr Alan Poots of SWT, who helped considerably with the online design and analysis of the questionnaire survey.

2.2 Research Aims and Objectives

The aim of the 2010 survey is to:

- 1) identify how far businesses have taken up the challenge of preparing for climate change
- 2) help inform future work by the SWCCIP Tourism Group, and
- 3) help to prioritise future resource in addressing the needs of tourism businesses

2.3 Survey Methodology and Administration

The surveying period was from 12 Feb to 4 March 2010. The survey was administered in the form of an online questionnaire administered via SNAP, it was sent to potential respondents through the Tourism Industry Newsletter run by SWT as a web link with a brief introduction of the project. The link was also circulated by members of the SWCCIP Tourism Sector Group to their relevant networks. The database contains approximately 11,000 contacts of which there is thought to be a regular readership of 3,000, although this is not tracked. 240 online responses were received and all are anonymous.

3.0 Research Findings

3.1 Profile of Respondents

By Districts:

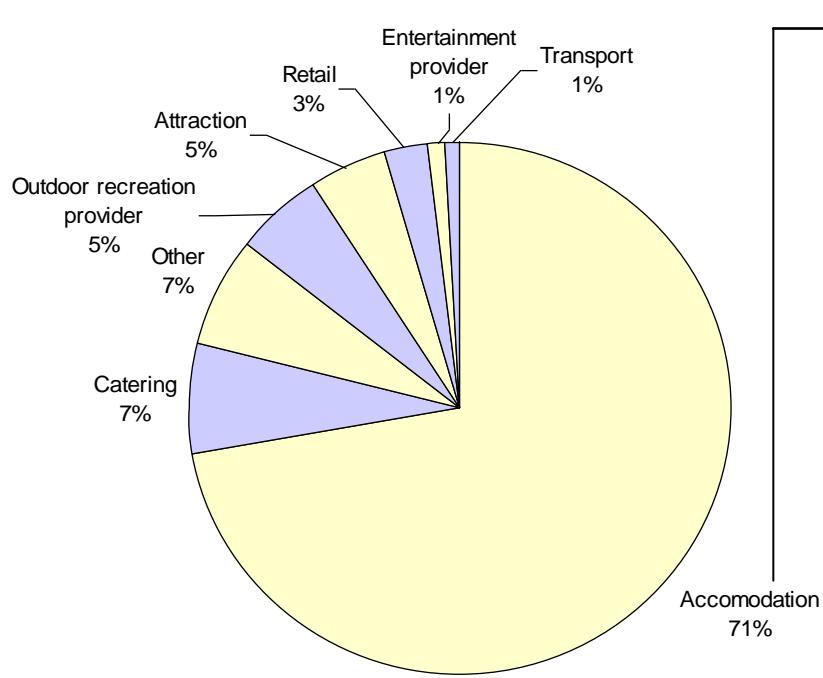
Respondents were asked to fill in their postcode. 9 regions are identified in SW. One third of the respondents are from Cornwall (33%), then in descending order from Somerset (19%), Devon (12%), Bournemouth and Poole (10%), Cotswolds and Forest of Dean (7%), Dorset (3%), Wiltshire (3%), Bath (2%) and Bristol (1%).

By Sectors:

71% of respondents were from the accommodation sector which dominates the sample, however we suspect that this might reflect the South West tourism business profile.. Catering accounts for 7%, those below 5% are shown in the pie chart including outdoor recreation providers and attractions, retail, entertainment providers and transport.

The breakdown of the accommodation sector is shown in the table. Among the 173 respondents in the sector, the majority of them are from guest houses (79) and self-catering (63).

Respondents categorised by sector



Accommodation breakdown	
Guest House	79
Self-catering	63
Hotel	15
Camping and Caravans	9
Holiday Village/ Park	4
Boat	1
Hostel	1
Serviced apartment	1

Base = 173

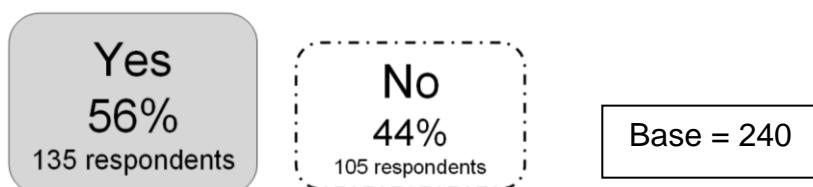
Base = 240

3.2 How Extreme Weather Events Affect Tourism Businesses

This section deals with the types of weather events that have affected respondents' businesses in the past and its likeliness in the future to affect their business. Respondents were also asked from where they obtained advice and information about these issues.

Has your business been affected by extreme weather events in the past?

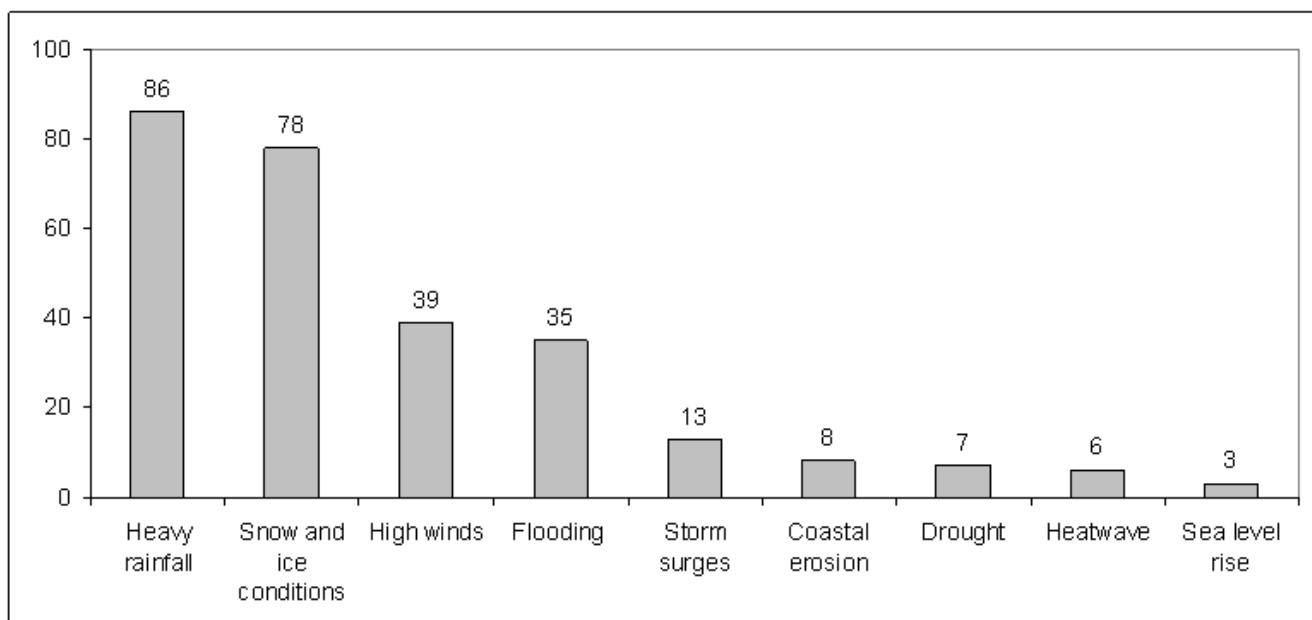
Among the 240 respondents, 56% answered that their businesses have been affected in the past by extreme weather events, while 44% said no.



Which of the following extreme weather events have led to decreased business income in the past?

Of the 135 respondents who have been affected by extreme weather events, they were given a list of weather events and asked to relate these to the way in which it had affected their business, such as: 'decrease / increase in income', 'loss of reputation' and 'increased insurance cost', etc. The 'decrease in business income' was perceived to be the most important and regular impact.

The chart below ranks the 9 extreme weather events which have lead to 'decreased business income' in descending order. 'Heavy rainfall' (86) followed by 'snow and ice' (78) outweigh other events, followed by high winds (39) and flooding (35). Others are said to be less significant as shown in the table.

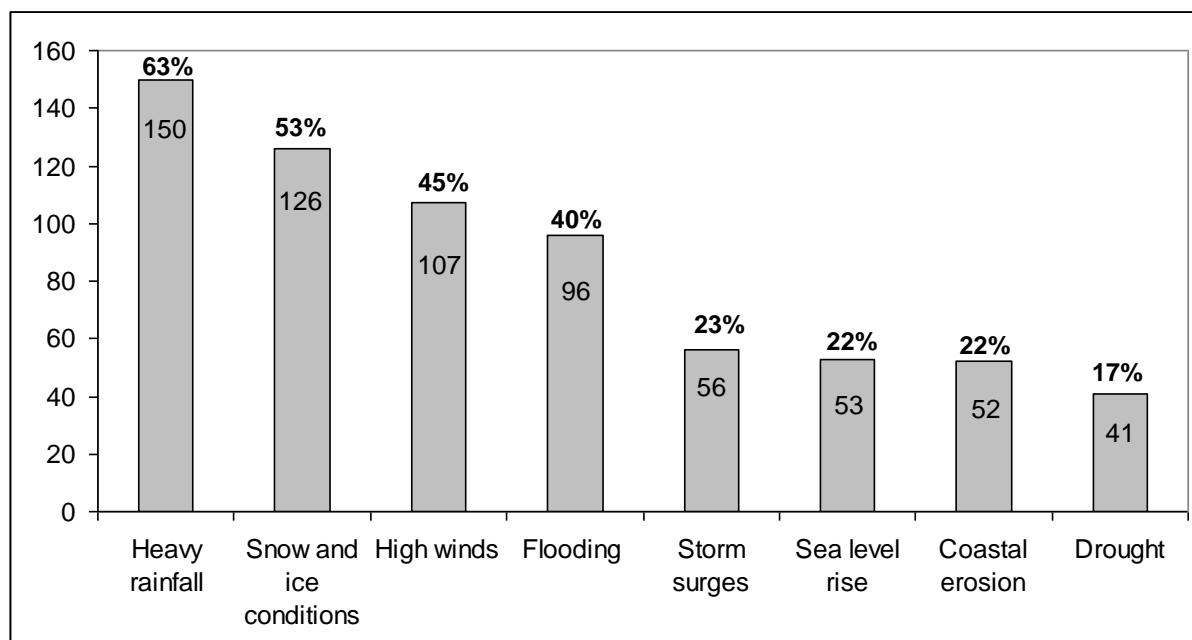


Base = 135

What extreme weather events will affect your business in the future?

This question was addressed to all respondents. It was designed to investigate their attitudes towards what types of extreme weather will affect their business in the future, and asks about how this may affect the business in the future.

The ranking below shows that 'heavy rainfall' is the one weather event most respondents worry about (63%), then there is a gradual decrease of percentages from 'snow and ice conditions' (53%), 'high winds' (45%) and then 'flooding' (40%). Less than a quarter of respondents think that the other four weather events will affect their businesses, namely 'storm surges' (23%), 'sea level rise' (22%), 'coastal erosion' (22%) and 'drought' (17%). Clearly, the type of weather event is likely to affect businesses in different ways depending upon their geographical location we do not know the proportion of businesses located by the coast for example.

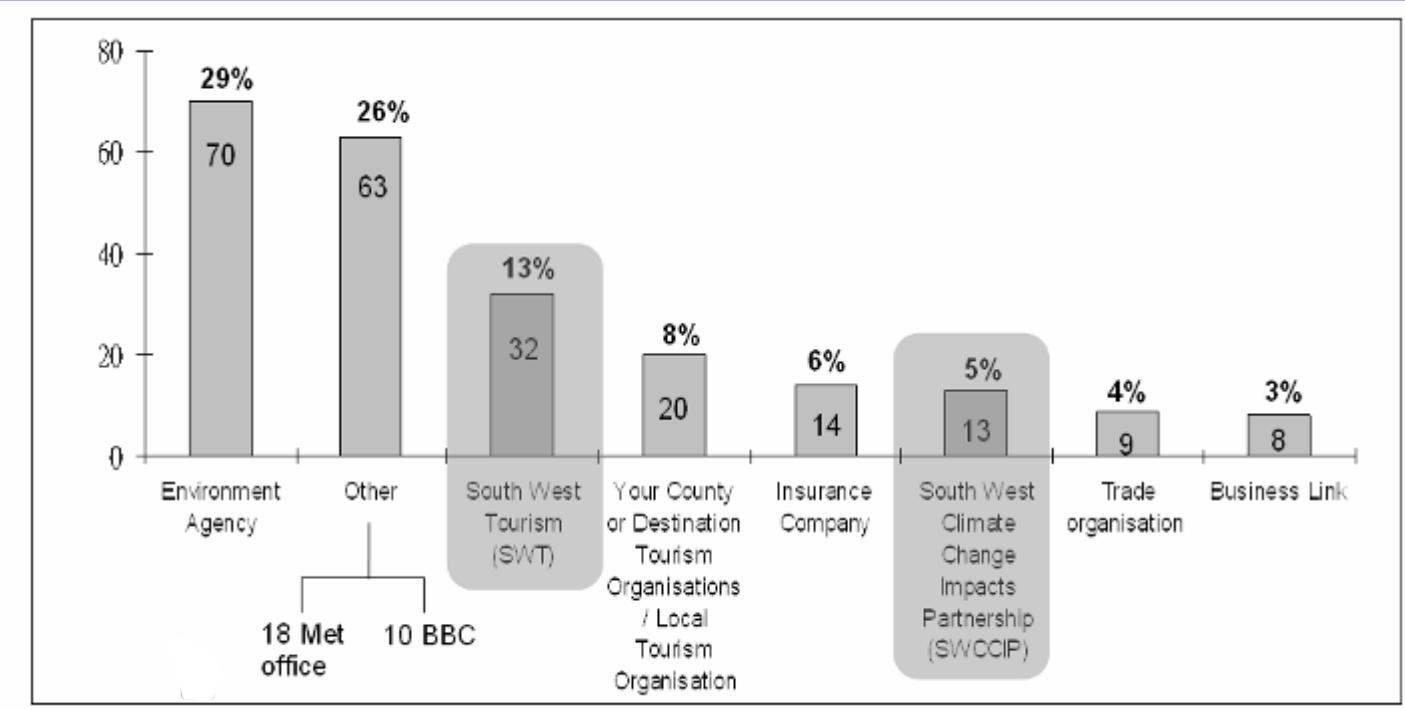


Base = 240

Warning: It should be noted that the survey was conducted in February 2010 during and just after a very heavy winter, with extreme cold snaps and long periods of heavy snow in the SW

Which organisations do you access for advice and resources regarding extreme weather events?

The Environment agency (29%) is the most popular source of advice and resources regarding extreme weather events. 'Others' (26%) equivalent to 63 respondents ranks the second, in which 18 (28%) and 10 (15%) indicated that they obtain information from the Met Office and BBC respectively. 13% and 5% of respondents use South West Tourism and SWCCIP respectively to gain information.



Base = 240

Short summary

- Slightly more than half of the respondents have been affected by extreme weather in the past (56%).
- ‘Heavy rainfall’ (86) followed by ‘snow and ice’ (78) are the two extreme weather events that have mostly affected the respondents in the past.
- Respondents think that in the future their business will be affected, mainly by - ‘Heavy rainfall’ (63%) (150) and ‘snow and ice’ (53%) (126).
- The Environment Agency (29%) is the most popular source of advice. South West Tourism (13%) and SWCCIP (5%).

3.3 How Far Businesses Have Taken Up the Challenge

Respondents’ attitude of climate change and business adaptation

This question was designed to find out if business owners in the SW thought that climate change was the cause of extreme weather events and whether they think businesses need to adapt to climate change.

65% agreed that climate change is the cause and 59% think businesses need to do something to tackle the problem.

To recap the ‘yes’ box represents those respondents who have been affected by extreme weather events in the past; while the ‘no’ box indicates those who have not been affected. The most notable point here is the bottom right hand corner which indicates those (18%) who have not been affected by extreme weather, but believe there is a need to adapt to climate change.

	Total respondents	Yes 56% 135 resp'	No 44% 105 resp'
Climate change could lead to increased extreme weather events	65%	40%	25%
Business need to adapt to climate change	59%	41%	18%
Base = 240			

How important is preparing for changes in the region’s climate to your overall business planning?

50% of the respondents consider preparing for the impacts of climate change to be a medium, or high priority as part of their overall business planning, 47% replied that it is of low, or not a priority at all for their business planning.

Again the priorities were cross-analysed by whether they have been affected by extreme weather events in the past ('yes' and 'no' boxes). It is useful to learn that 15%, who have not been affected by extreme weather events, thought they should give a medium or high priority to putting adaptation measures into their business planning. This reflects their concern that changing weather could affect them in the future.

	Total respondents	Yes 56% 135 resp'	No 44% 105 resp'
'A medium priority' to 'high priority'	50%	35%	15%
'Low priority' to 'its not a priority'	47%	21%	26%
Base = 220			

Which of the following measures have you taken in your business, and why?

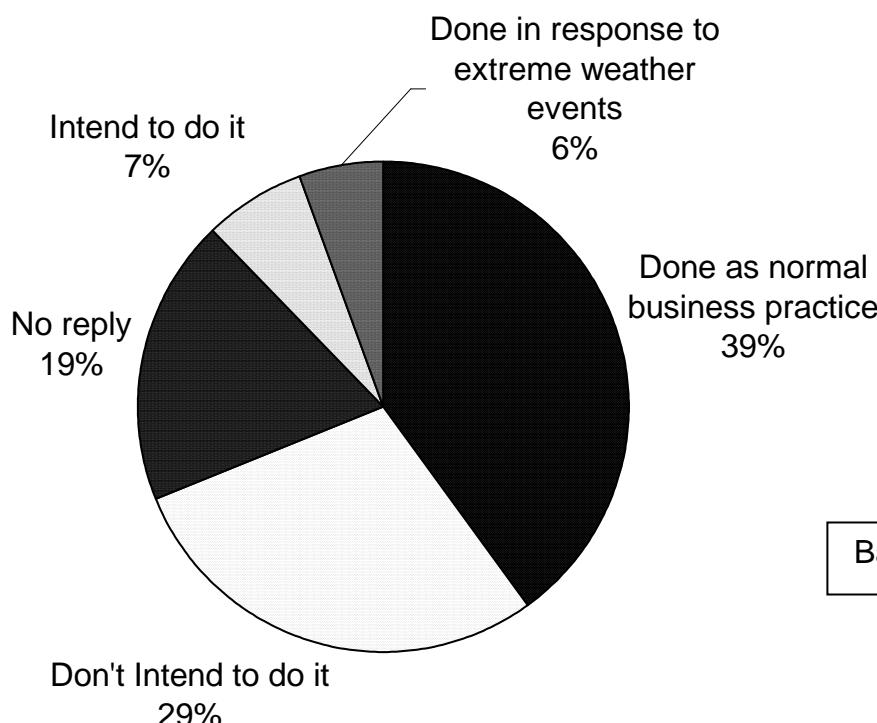
Respondents were given a list of 13 measures, which were designed to reveal what they have implemented in response to extreme weather events. If they had implemented an action this question was designed to find out whether it was “done as normal business practice” or “done in response to extreme weather events”. If they have not yet implemented any actions, they could choose whether they “intend to do it” or “don’t intend to do it”.

The list of 13 measures

13 measures	Done as normal business practice	Done in response to extreme weather events	Intend to do it	Don't intend to do it
<ul style="list-style-type: none"> - Checked your flood risk - Installed flood defence measures - Collected rain water - Developed a business continuity plan - Changed your markets / products - Checked your insurance - Reviewed Health & Safety procedures & signs - Provided shade / shelter - Improved landscaping and tree planting - Improved your business' drainage - Reviewed your cooling & ventilation - Checked & maintained buildings - Improved water efficiency 				

Rather than presenting every single measure, we took a general overview looking at the average of the measures. We found that 40% of respondents have implemented actions as part of normal business practice; only 6% have done it in response to extreme weather events. For those who still have not done anything, 29% do not intend to do any and 7% intend to do something.

Average responses of the 13 measures



Top 3 measures ‘implemented in response to extreme weather events’

One of the objectives of this research was to identify how far businesses have taken up the challenge of preparing for climate change.

The research found that the top three measures implemented by businesses related to flood prevention. 13% of respondents have checked their flood risk, 10% have improved their business drainage and 9% have installed flood defence measures.

	Done in response to extreme weather events	Intend to do it	Don't intend to do it
Checked your flood risk	13%	3%	31%
Improved your business' drainage	10%	8%	28%
Installed flood defence measures	9%	5%	55%

Base = 240

Short summary

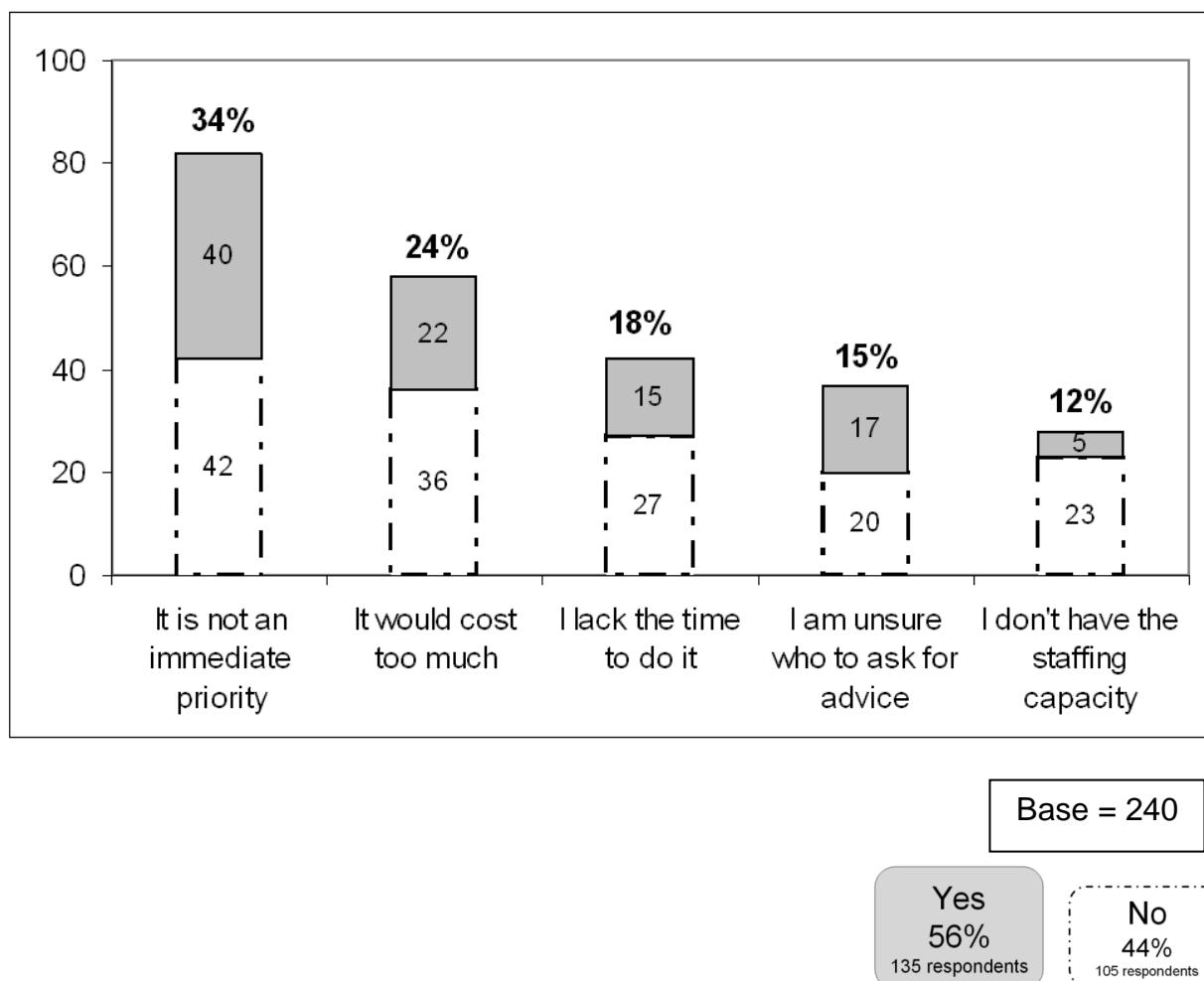
- 59% think that climate change could lead to extreme weather and that businesses need to adapt to it.
- 50% view it as a medium to high priority to prepare for changes to overall business planning.
- In response to the 13 measures they could have taken in the business to adapt to changes in the climate, on average 40% have been implemented as part of normal business practice. 29% do not intend to do anything.
- The top 3 measures that have been implemented in response to extreme weather events are ‘checked flood risk’, ‘Improved business’ drainage’ and ‘Installed flood defence measures’.

4 What Tourism Businesses Need

What is preventing you from doing more to prepare for climate change?

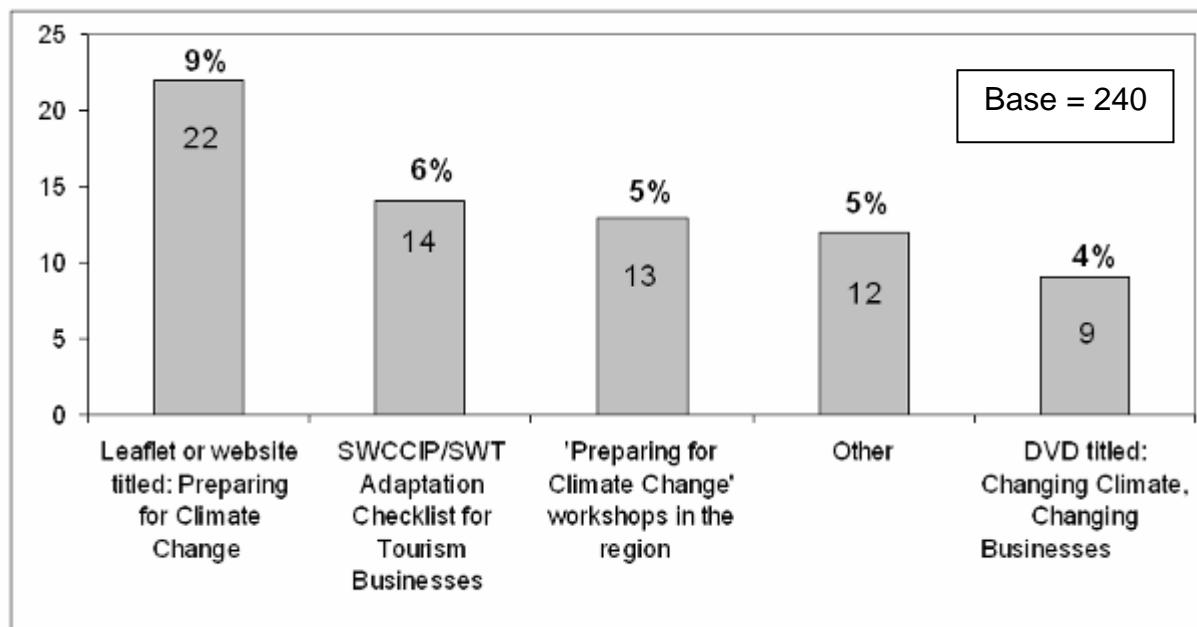
This question investigates the barriers that prevent business owners from doing more to prepare for climate change. The results distinguish between “those affected by extreme weather events in the past” and “those not affected yet by extreme weather events” for each reason and are presented in the bar chart below.

34% replied that it is not an immediate priority to do more. 24% think that it would cost too much. 18% lack the time to do it. 15% are unsure who to ask for advice and 12% do not have the staffing capacity.



Have you used any of the following information?

This question investigates the extent to which respondents have used SWCCIP materials. In general the usage is low – all less than 10%. Among the five sources of information, 9% have read the leaflet and website title “Preparing for Climate Change”. 6% used the adaptation checklist for tourism businesses. 5% attended workshops and 4% watched the DVD titled “Changing Climate, Changing Businesses”. The actual frequencies (number of respondents) are given in the column.



Would you be interested in finding out more about the potential implications of climate change for your business?

69% of respondents are interested in finding out more about the potential implications of climate change for their businesses. When charted against their view as to whether they regard planning for climate change as a high/medium to low business priority we see that of the 69% who would like to find out more, 23% see it as a low or not a priority at all for their business, while 44% see it as a medium to high business planning priority.

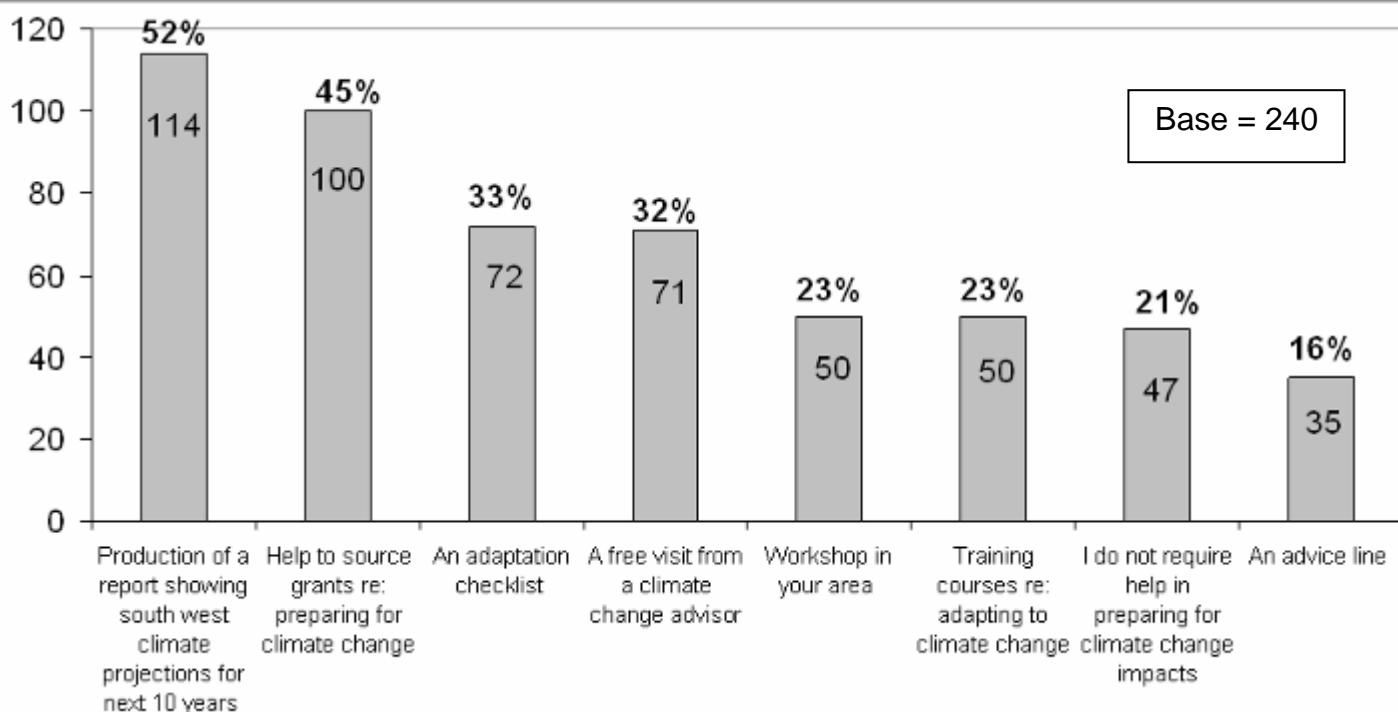
	All respondents	'Medium priority' to 'high priority'	'Low priority' to 'its not a priority'
Yes	69%	44%	23%
No	29%	21%	18%

Base = 240

Would any of the following help you in preparing for climate change impacts on your business?

This question was designed to inform future resources priority. 52% replied it would be helpful if there was a report showing South West climate projections for the next 10 years. 45% need help to

source grants for doing preparation and adaptation. 33% would like an adaptation checklist, 32% would like a free visit from a climate change advisor, 23% would like to attend a workshop, 23% would attend a training course and 16% would like an advice line. But 23% replied they do not need any help.



Do you have any other comments to make about your business and climate change?

This was a free form answer section where respondents were asked for their views on climate change and what it means to them and their business. Selected comments with respect to the objectives and others having potential implications for communications are presented as follows:

“.....although I believe it is happening and will affect all of us, too many differing opinions are put forward by governing bodies. We rely on experts to guide us.”

“Our weather records show a gradually increasing rainfall for the last 25 odd years. This could be disastrous for our farming as well as tourism if that trend continues. Most models showing future trends seem to be out of sync with what is happening.”

“Our business’s location is on a hillside which has made us particularly susceptible to extreme weather events like flooding, strong winds, and snowfall. I would be interested to learn more about what climate change may possibly bring to our area.”

“We try to follow the trends but we are a very small business with little resources. If a workshop is to be designed then PLEASE consider the smaller business i.e. the one man band!!”

‘...access to grants, less red tape and additional costs eg planning.’

"There is no full proof of climate change - records are too short. This has more to do with power nations in the west not being held to ransom by the Middle East and Russia over oil - so let's blame global warming. This whole lie is going to come back and bite the governments where it hurts - in the meantime we are to pay for the propaganda."

Short summary

- Why are so few businesses preparing for climate change? 34% think that it is not an immediate priority. About a fifth of them say time and money is a major constraint
- 69% are interested in finding out more about potential implications of climate change for their business
- How to help them? 52% want a report showing south west climate projections for next 10 years. 45% need help to source grants. One third would like an adaptation checklist and a free visit from a climate change advisor.

4.0 Summary

In response to the original research objectives, the key findings of the research are as follows:

Objective 1: Identify how far businesses have taken up the challenge of preparing for climate change

- Slightly more than half of the respondents have been affected by extreme weather in the past (56%).
- 'Heavy rainfall' (86) followed by 'snow and ice' (78) are the two extreme weather events that mostly affected the respondents in the past. Please note: this survey was conducted in February 2010, following a period of extreme winter weather with high snowfall and long cold snaps.
- Respondents think that in the future their business will be affected, mainly by. - 'Heavy rainfall' (63%) (150) and 'snow and ice' (53%) (126).
- In response to the 13 measures they have taken in the business, on average 40% have been implemented as part of 'normal business practice'. 29% do not intend to do anything about adapting to changes in the climate.
- The top 3 measures that have been implemented in response to extreme weather events are 'checked flood risk', 'Improved business' drainage' and 'Installed flood defence measures'.

Objective 2: Help inform future strategy work by SWT and SWCCIP

- 59% of respondents think that climate change could lead to extreme weather and business need to adapt to it.
- 50% of respondents hold the view that adapting and preparing for changes in the climate is a medium to high priority for their business planning.
- The Environment Agency (29%) is the most popular source of advice and resources on adapting to climate change. Respondents also consult South West Tourism (13%) and SWCCIP (5%).

Objective 3: Help to prioritise future resource in addressing the needs of tourism businesses

- 69% of respondents are interested in finding out more about potential implications of climate change for their business.
- How to help them?
 - 52% want a report showing south west climate projections for next 10 years.
 - 45% need help to source grants.
 - One third would like an adaptation checklist and would find a free visit from a climate change advisor helpful.

5.0 Recommendations

5.1 Implications of the Findings

The ‘free form’ comment section of the survey revealed some very interesting findings relating to business owners views about the debate around climate change. Some of the respondents are not convinced by the climate change argument and think that it is a cliché. Some are confused by the climate change debate and issues surrounding causation theories and data, they don’t trust it and it turns them off.

The research team suggest that using the term ‘Climate Change’ could inadvertently divert people’s attention onto ‘the debate’ about causes and data validity, rather than focusing their attention on implementing practical measures designed to tackle the problems of ‘extreme weather events’, which have in the past, or could in the future, affect their businesses.

We would recommend that focus should move away from talking about ‘Climate Change’ with businesses, and start talking about ‘Extreme Weather Events’, as Business owners can more easily buy into this concept, because they have witnessed ‘Extreme Weather Events’ first hand and believe them to be happening more often.

5.2 Future Priorities

According to the findings there has been a low awareness amongst the respondents of preparation and adaptation materials and tools developed by the SWICCP Tourism Group (less than 10%). However, these materials are just what respondents are requesting, for example 33% requested an adaptation checklist.

We would recommend that additional promotional efforts should be made to raise the profile and uptake of the tools already developed by the SWCCIP Tourism Group.

The Environment Agency is the most popular source of advice, 29% of respondents claimed to have accessed it for advice on extreme weather events. We would recommend that a higher profile be given on the Environment Agency homepage to the SWCCIP Tourism Group website, initiatives and tools.

If there is an intention to invest in more initiatives, businesses are requesting an evidenced based report on the real implications for the region’s weather and climate over the next ten years. They would also like clear signposting to grants to help them implement actions and initiatives designed to help them adapt to changes in the region’s climate

6.0 Appendix 1 – Open-ended Comments

Do you have any other comments to make about your business and climate change?

89 Comments were collected and categorised into “sceptical”, “confused”, “supportive” and “want help”. For some comments of a category they overlap another. Please note that these are the exact words of the respondents.

Sceptical (24)	
1	there is unsufficient data and modelling of climate change, more work will have to be done. it is too complex for any current predictions to be accurate.
2	Climate change is a natural event, i do not believe humans have changed or worsened the climate. Should there ever be severe climate change then all of us will have to adapt at that time, until then there are more important things to worry about.
3	I have spoken to district, county and regional council officials and believe that there is a lack of awareness or conspiracy of silence amongst those who should be taking a lead. For example, why are they building in low lying areas of Poole? The lead should be firstly from national government, and it has failed, secondly from regional government and it has failed, and thirdly at a local council level, and it has not woken yet. It is too important an issue to be considered as an issue for the tourism industry.
4	A small blip in time over reacting costing loads of money and the weather will be what it will be, mankind adapts. How much money did this cost?
5	'Bournemouth' has been a tropical rainforest and it has also also been on the edge of a glacier during the most recent ice age. The climate has changed continuously for the last 100 Million years and it will continue to change continuously for the next 100 Million years - it's normal, it has always happened so get used to it and please stop wasting tax payers money.
6	yes it's a load of old rubbish exaggerated by the government to use a taxation stick to beat us with. Ask any geologist, climate change has fluctuated throughout the whole of history, it's natures way of rectifying.
7	When the Scientists are so convinced of Climate Change they fix the figures to prove it - that says it all. If it does get warmer or colder there is nothing man can do or wants to do. Nature will control everything.
8	There is no full proof of climate change - records are too short. This has more to do with power nations in the west not being held to ransom by the middle east and Russia over oil - so lets blame global warming. This whole lie is going to come back and bite the governments where it hurts - in the meantime we are to pay for the propaganda.
9	Its a joke the government ads a climate change levy on all businesses that are VAT registered-my business uses less power than most big houses yet I still have to pay a climate change levy on my power bills, its a joke
10	Promoting Climate change is just another way for the gov. to tax us, this winter has been much colder, so global warming!!!!
11	Its a load of crap
12	Is this really the most important factor facing SW businesses at this point in time? How much did this survey cost? i hope it is in no way funded by my joining fee to the SW tourist board
13	Having lived in the same location for over 40 years I observe no trend that can be blamed on "climate change"
14	There is nothing new under the sun, and the climate has always been changing. If the sea level is going to rise why are the government doing nothing about it, they should be building sea defences.

15	I don't like this type of questionnaire. Obviously, IF there is a change in the climate then it requires assimilation in business plans and practice. However, extreme weather conditions occur all the time and do not necessarily mean the climate is changing. Nor does it imply man's activities are the (main) cause. But risk assessment is important, and waste of resources and waste creation are top of my agenda. I do believe we are spending a huge amount of resources on tackling theoretical risks versus actual ones.
16	With the down turn of sales due to the recession, priority must be given to staying in business on a monthly basis rather than planning for events that have not taken effect to the extent of demanding change. Action will be taken, maybe too late, to those climatic changes as it takes effect on an annual basis. At present, it's felt that these changes are too subtle to necessitate a reaction.
17	as in question 13 - climate change is being overplayed (in my opinion) it's an in buzz thing and providing plenty of jobs for not a lot! A great deal of paper wasting frightening us, light bulbs which don't give much light etc.
18	It's more to do with the image of bad weather than the reality that affects our business inaccurate bad weather forecasts don't help
19	Stop wasting time & money. Remember the New Ice Age forecast in the 1970's
20	Money would be better spent than talking shops about "what if!!!!!"
21	I am pleased to note that you have not suggested that climate change is affected by ANY OF MAN'S ACTIVITIES. Unlike our unscientific politicians and the media.
22	Climate change is a very risky science and money could be wasted reacting to the wrong assumptions
23	Climate change is propaganda and fake scientific facts purely used so that the population can be coerced into paying more tax. We are supposed to feel guilty about this and not question this fake evidence. The world has been warming since the end of the last ice age 10,000 years ago. A whole useless industry has grown up to support the idea of climate change and this survey is just part of this.
24	There is insufficient data and modelling of climate change, more work will have to be done. It is too complex for any current predictions to be accurate.

Confused (6)

1	If climate change means warmer summers in Cornwall then it will be an advantage. However I am very concerned about the impact of Wind Farms on the tourist industry in Cornwall
2	Our weather records show a gradually increasing rainfall for the last 25 odd years. This could be disastrous for our farming as well as tourism if that trend continues. Most models showing future trends seem to be out of sync with what is happening.
3	I think there should be better education of clients/customers by the tourism industry acting cooperatively so that clients are prepared to compromise on comfort and luxury - for example clients should not expect to be able to use gallons of hot water without paying a premium. In the hospitality industry there is an unavoidable conflict between providers wanting to provide a high quality of comfort and also wanting to respond to climate change.
4	The recent failure of the Copenhagen talks and the furore over leaked emails and glacial melting inaccuracies makes it increasingly difficult to interpret accurately the numerous claims made about climate change. That aside, the recent and continuing bad weather is impacting on our business, making customers unwilling or even unable to travel, severely restricting bookings. The short term prognosis for bookings this year is looking decidedly pessimistic!
5	Weather cycles may well affect visitor numbers and this might well impact on all of our companies. It is however possible that longer drier summers will have the reverse effect. What we do not have is certainty and most right minded people spend money on things that are going

	to happen and not things that might happen. If I was told that in 20 years time my office would be underwater I would act on this through planning. In 50 years it is quite possible that the wrong side of peak oil might mean that there are no cars on the road in which case no requirement for a chain ferry.
6	As we are a seaside holiday resort bad weather obviously has an effect on last minute bookings but I do not understand how planning can change this.

Supportive (17)

1	We try to do our bit to minimise our impact on the environment, which is the route cause of climate change.
2	Whilst we are not a business in the context of the survey and are over the SW border we'd be interested in working more closely with SWCCIP/SWT in this regard.
3	WE will adapt to variations in weather in the ways we always have.
4	We have won 3 C+ Carbon positive awards for the South West, We are a case study for DEFRA & Business in the Community. We do a great deal to reduce carbon emissions and run a socially responsible business
5	Our particular business is small and whatever will affect it, as far as climate change is concerned, will affect us too, so we are gradually making changes, as we need them ourselves.
6	I have read leaflets etc and aware of consequences but think at the moment there is little for me to do eg unless there's a landslide flooding no problem as I live on a hill
7	I only have one room for B&B. I have made everything as eco friendly as I can. I am not in a flood area and can't afford to put solar panels in at present. I recycle everything I am able so don't know what else I can do. Just wait and see.
8	My property is an apartment within a large building so anything that is done has to be a joint decision with all the owners of the other apartments. We do, as a group have it in mind
9	I think people need to use their common sense and join CAM the Friends of the Earth and Greenpeace organizations who are experts within this field. I already hold bi yearly workshops on solar panels and use my property as an example of how much money can be saved but installing such systems.
10	We get advice from GTBS which has helped our business
11	important as my business is about mitigating climate change
12	have suffered ground water flooding and taken steps to be less vulnerable. Fitted flood guards. That will do for us so far.
13	As a carbon neutral destination I feel we have accessed a potentially beneficial market that will attract guests as eco tourism becomes more attractive
14	I think that it is imperative that tourism businesses look at energy and waste audits so that climate change is avoided rather than sit back and accept it as a 'fait accompli'. I would rather lobby for legislation on this issue that have money spent on advising people on how to deal with increasing temperatures and flooding.
15	Climate Change is one of many areas where businesses today need to show flexibility and adaptability to change. Consideration of external factors (incl. weather events) should form part of emergency/business continuity planning.
16	We are on a hill in Glastonbury, so the risk of flooding is low at present. we wish to purchase solar panels, and rainwater harvesting as soon as is possible and to look at other sustainable practices that may suit our business
17	The worst that could happen to me is a flood. Eventually I will put up flood boards, but it is not top priority for a business in first year of trading

Want help (20)

1	I don't understand enough to make comment so a training course would be high on my list of priorities.
2	As a tourist resort I am not sure what we can do to avoid the impact of bad weather at the peak time of the year. People will not book a British break in high season if they are going to be rained off. The snow this winter preventing the bookings we had arriving therefore we lost that income and had disgruntled customers wanting deposits back. The winter in general is an appalling time of year for us and has never changed in 11 years so I cannot think anything will help. The summer we need help in trying to persuade people the UK has a lot to offer despite the weather good or bad. Not sure that will happen when you have a two week holiday from work many people want the sun and we cannot ever magic that up in the UK so for my business whilst I am always interested in workshops it is marketing against the weather and for the weather that would be good!!
3	Yes, I think we have little help regarding business charges from government.
4	Financial incentives, tax cuts, grants etc would help
5	One day it will get more attention from me...lack the time at the moment, though I'm sure a catastrophe would focus the mind!
6	Cost
7	There does need to be clarification about the affects of climate change, although I believe it is happening and will affect all of us, too many differing opinions are put forward by governing bodies. We rely on experts to guide us.
8	There is very little easily accessible help available. I needed to change my boiler and rang Business link for advice on the options. They refereed me to various agencies who could only tell me about their preferred option. No one could give me comparatives or tell me how much noise their system would make. I have gone with old technology as I have a full price, I know the running costs and can factor in increases, it can be done quickly and noise levels are known and can be kept to a minimum.
9	We are a green business and have taken many green measures to improve our carbon footprint, not sure what else we can do but would be interested to find out
10	I run a one man consultancy business from my home, and I am close to retirement, so most of the questions above are irrelevant to me. However, I do believe climate change is here already, the effects are being felt already and businesses need to plan for the medium to long term. Much more education is needed, and I believe that easily accessible workshops is probably the best route to follow.
11	Extreme climatic variations are nothing new - real information and fact on the subject of climate change would be far preferable to un-substantiated hype whenever there is an extreme heat wave, amount of rainfall or other climatic factor.
12	Yes. I would like to see far more flexibility in respect of grants to assist us in making changes to save water, grow more of our own food, reduce carbon footprint, put in place alternative energy sources. At the moment the big grants are going to schools and cannot help small business.
13	A travelling roadshow/banners etc would be useful as we could help people to understand the reality of a changing climate. A questionnaire that would help us understand what are visitors would like/ expect us to do.
14	Most info is acquired from the internet!
15	we try to follow the trends but we are a very small business with little resources. If a workshop is to be designed then PLEASE consider the smaller business ie the one man band!!

16	Our businesses location on a hillside has made us particularly susceptible to extreme weather events like flooding, strong winds, and snowfall. I would be interested to learn more about what climate change may possibly bring to our area.
17	I am an environmental consultant, so are aware of the issues but would appreciate info on trends, grants etc as stated in previous question.
18	Willow Tree Barn is fairly sustainable with a solar panel and a water to water heat source pump. We are interested in doing all we can to lessen our impact on the environment.
19	access to grants, less red tape and additional costs eg planning.
20	It is part of my day to day business so regular information is always helpful

Others (22)

1	A more interesting climate would be good for UK business.
2	I have never heard about SWCCIP or seen any of their publications before.
3	We are not at risk of flooding because our office is on a hill. If it is hotter and there is more sunshine, we should get more visitors. For OUR business an increase in global temperature will probable be a good thing, though I agree that for the wider global community the net effect will be negative.
4	Bring on global warming and let's have some hot summers! Rev those engines and lets get cooking!
5	If I live another 10 years I will be happy, whatever the weather !
6	As a boat hire company, our main influence would be sea level etc which alone we have no control over!
7	no
8	Good sunny weather makes an enormous difference to my bookings
9	no
10	We are on the edge of the Somerset Levels and flooding is a big issue with the Village sometimes being cut off and several properties under water (not ours)
11	as q13
12	No
13	No
14	no
15	None
16	Not really, thank you.
17	No
18	No

19	As our guest book sometimes a year in advance they and ourselves have no idea how the climate will affect their holiday.
20	I suppose as a photographer and creator of digital presentations using digital imagery and audio we have the opportunity to capitalise from all weather events.
21	Unlikely to impact our accommodation but could affect the local wildlife reserves that attract many of our visitors.
22	Guests seem totally unaware/unmoved by efforts to encourage them to be more energy-efficient. They have their 'holiday' head on, and use as much water, electricity and heat as they want, while leaving windows open!

7.0 Appendix 2 – The Questionnaire

Thanks for logging on to this survey.

South West Climate Change Impacts Partnership (SWCCIP) are conducting a survey to find out how tourism businesses in the SW are responding to changes in the region's climate.

This survey will take approximately 5 minutes to complete. All completed surveys will be entered into a draw to win a FREE place on one of South West Tourism's 'Welcome Management Course', or for 2 FREE Places on a 'Welcome Host Course'.

If you experience any technical difficulties please contact apoots@swtourism.org.uk.

Q1. Do you think any of the following extreme weather events will affect your business in the future? (Please tick ANY that apply)

- High winds
- Heavy rainfall
- Flooding (sea, river, or surface water)
- Drought
- Heatwave
- Sea level rise
- Coastal erosion
- Storm surges
- Snow and ice conditions
- None of the above

Q2. Has your business been affected by extreme weather events in the past?

- Yes
- No

Q3. Please select how any of the following have impacted your business... (Please tick ANY that apply)

	Decrease business costs	Increased business costs	Decrease business income	Increased business income	Loss of reputation	Increased insurance cost
High winds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heavy rainfall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flooding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drought	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heatwave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sea level rise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coastal erosion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storm surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snow and ice conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4. Which of the following organisations do you access for advice and resources regarding extreme weather events? (Please tick ANY that apply)

- South West Climate Change Impacts Partnership (SWCCIP)
- South West Tourism (SWT)
- Insurance Company
- Business Link
- Your County or Destination Tourism Organisations / Local Tourism Organisation
- Trade organisation
- Environment Agency
- Other
- Don't know
- None

Q5. Which 'trade' or 'other' organisations do you access for advice and resources regarding extreme weather events?

Q6. Which, if any, of the following measures have you taken in your business, and why?
(You can pick only ONE response in each row)

	Done as normal business practice	Done in response to extreme weather events	Intend to do it	Don't intend to do it
Checked your flood risk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Installed flood defence measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collected rain water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developed a business continuity plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changed your markets / products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checked your insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed Health & Safety procedures and signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provided shade / shelter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved landscaping and tree planting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved your business' drainage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed your cooling & ventilation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checked & maintained buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved water efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

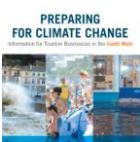
Q7. Please select ANY of the statements with which you agree...

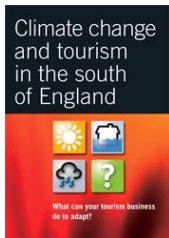
- Climate change could lead to increased extreme weather events
- Businesses need to adapt to climate change
- I don't believe that climate change will make much difference to my business
- None of the above

Q8. Have you used any of the following information? (Please tick ANY that apply)

<input type="checkbox"/> DVD titled: <i>Changing Climate, Changing Businesses</i>	<input type="checkbox"/> Leaflet or website titled: <i>Preparing for Climate Change</i>	<input type="checkbox"/> SWCCIP/SWT <i>Adaptation Checklist for Tourism Businesses</i>	<input type="checkbox"/> 'Preparing for Climate Change' workshops in the region	<input type="checkbox"/> Other	<input type="checkbox"/> None
--	--	---	---	--------------------------------	-------------------------------









Q9. Which other information have you accessed for advice and resources?

Q10. How important is preparing for changes in the region's climate to your overall business planning? (Please tick ONE response)

- A high priority A medium priority A low priority It is not a priority

Q11. Would any of the following help you in preparing for climate change impacts on your business? (Please tick ANY that apply)

- Workshop in your area
- Production of a report showing south west climate projections for next 10 years
- An advice line
- An adaptation checklist
- Training courses re: adapting to climate change
- Help to source grants re: preparing for climate change
- A free visit from a climate change advisor
- Other
- I do not require help in preparing for climate change impacts

Q12. What else would be of help to you in preparing for climate change impacts on your business?

Q13. What is preventing you from doing more to prepare for climate change? (Please tick ANY that apply)

- | | |
|---|---|
| <input type="checkbox"/> I am unsure who to ask for advice | <input type="checkbox"/> It is not an immediate priority |
| <input type="checkbox"/> There is not clear scientific evidence about the causes | <input type="checkbox"/> It is not relevant for my business |
| <input type="checkbox"/> There is not clear scientific evidence about the impacts | <input type="checkbox"/> I think the whole issue of climate change is being over-played |
| <input type="checkbox"/> I lack the time to do it | <input type="checkbox"/> I am going to wait and see what happens |
| <input type="checkbox"/> It would cost too much | <input type="checkbox"/> I'm not being prevented from preparing for climate change |
| <input type="checkbox"/> I don't have the staffing capacity | <input type="checkbox"/> Other |

Q14. What other things are preventing you from doing more to prepare for climate change?

Q15. Would you be interested in finding out more about the potential implications of climate change for your tourism business?

- Yes
 No

Q16. Do you have any other comments to make about your business and climate change?

And finally a few details about your business please:

Q17. Your type of business (if more than one, please select your main business type)

- | | | |
|--|---|--|
| <input type="checkbox"/> Accommodation - Boat | <input type="checkbox"/> Accommodation - Self-catering | <input type="checkbox"/> Entertainment provider |
| <input type="checkbox"/> Accommodation - Campus | <input type="checkbox"/> Accommodation - Serviced apartment | <input type="checkbox"/> Outdoor recreation provider |
| <input type="checkbox"/> Accommodation - Guest Accommodation | <input type="checkbox"/> Attraction | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Accommodation - Camping and Caravans | <input type="checkbox"/> Catering - Restaurant / Cafe | <input type="checkbox"/> Transport |
| <input type="checkbox"/> Accommodation - Holiday Village/ Park | <input type="checkbox"/> Catering - Pub / Bar | <input type="checkbox"/> Other |
| <input type="checkbox"/> Accommodation - Hostel | <input type="checkbox"/> Catering - Kiosk | |
| <input type="checkbox"/> Accommodation - Hotel | <input type="checkbox"/> Catering - Other | |

Q18. Your postcode

Please also register your e-mail for entry into the prize draw and to be kept informed of developments in this area.

Please press the "Submit" Button below - Thank you very much for your time!

All completed surveys will be entered into a draw to win a FREE place on one of South West Tourism's 'Welcome Management Course', or for 2 FREE Places on a 'Welcome Host Course'

Further information on the courses can be found through South West Tourism's website
<http://www.swtourism.org.uk/>